



(Client Name)
ONE-UP Sales Coaching Path
Year One

Activity	Client Role	EcSell Institute Role	Date
STAGE: Client Onboarding			
ONE-UP Sales Coaching Process Kick-off Call	Senior sales leader attends call to discuss their needs, goals and customized client path	Lead call to learn client's needs and goals, and introduce customized client path	Month 1
ONE-UP Sales Coaching Program Introduction	Sales managers attend call to learn about EcSell Institute resources, tools, client path and next steps	Lead the call to introduce EcSell Institute resources, tools, client path and next steps to client sales managers	Month 1
ONE-UP Customization Call	Senior sales leader attends call to identify key areas within ONE-UP to be customized. Complete company and individual user profile form	Lead call to define client customization needs. Customize ONE-UP per client needs. Set up a company profile and individual user profiles	Month 1
STAGE: Measurement			
Execute Through the Eyes of the Rep Survey	Senior sales leader reviews dashboards for survey set-up and announces survey to managers and reps	Send survey announcement language. Set up and administer survey. Generate survey reports	Month 1
Execute Through the Eyes of the Rep Pulse Survey	Senior sales leader reviews dashboards for Pulse survey set-up and announces survey to managers and reps	Send survey announcement language. Set up and administer Pulse survey. Generate survey reports	Month 7
STAGE: Education			
ONE-UP Sales Coaching Academy	Sales managers attend on-site education on ONE-UP sales coaching principles, best practices and coaching cloud	Lead on-site education on ONE-UP sales coaching principles, best practices and coaching cloud	Month 2
STAGE: Implementation			
Through the Eyes of the Rep Survey Results Review Call	Attend team and individual calls to review rep survey results	Lead team and individual calls to review rep survey results	Month 2
Roundtable Call: One-to-One Meetings	Attend roundtable to discuss successes, questions and ideas for one-to-one meetings	Lead roundtable to discuss successes, questions and ideas for one-to-one meetings	Month 3
Implementation Call: Joint Call Events	Attend best practice implementation and ONE-UP training on joint call events	Lead best practice implementation and ONE-UP training on joint call events	Month 4

Implementation Call: Sales Call Evaluations	Attend best practice implementation and ONE-UP training on sales call evaluations	Lead best practice implementation and ONE-UP training on sales call evaluations	Month 5
Roundtable Call: Joint Call Events and Sales Call Evals	Attend roundtable to discuss successes, questions and ideas for joint call events and sales call evaluations	Lead roundtable to discuss successes, questions and ideas for joint call events and sales call evaluations	Month 6
Through the Eyes of the Rep Pulse Results Review Call	Attend team and individual calls to review rep survey results	Lead team and individual calls to review rep survey results	Month 7
Implementation Call: Team Meetings	Attend best practice implementation and ONE-UP training on team meetings	Lead best practice implementation and ONE-UP training on team meetings	Month 8
Roundtable Call: Team Meetings	Attend roundtable to discuss successes, questions and ideas for team meetings	Lead roundtable to discuss successes, questions and ideas for team meetings	Month 9
Implementation Call: Career Development Plans	Attend best practice implementation and ONE-UP training on career development plans	Lead best practice implementation and ONE-UP training on career development plans	Month 10
Roundtable Call: Career Development Plans	Attend roundtable to discuss successes, questions and ideas for career development plans	Lead roundtable to discuss successes, questions and ideas for career development plans	Month 11
Roundtable Call: Best Practices	Attend roundtable to discuss successes, questions and ideas on coaching best practices	Lead roundtable to discuss successes, questions and ideas on coaching best practices	Month 12
STAGE: Track and Analyze			
ONE-UP Sales Coaching Report	Senior sales leader identifies interest areas for analysis of ONE-UP data	Generates monthly ONE-UP Sales Coaching Reports based on areas of interest	Monthly, starting Month 7
Monthly Senior Leadership Call	Senior sales leader attends call to review ONE-UP Sales Coaching Report and identify follow-up steps	Lead call to review ONE-UP Sales Coaching Report and identify follow-up steps	Monthly, starting Month 7
STAGE: Change			
Year Two Strategy Call	Senior sales leader attends call to review ONE-UP Sales Coaching Report on best practice implementation and rep survey results in relation to sales results. Identify strategies for Year Two	Lead call to review ONE-UP Sales Coaching Report on best practice implementation and rep survey results in relation to sales results. Identify strategies for Year Two	Month 12