PORTFOLIO TIMELINE & DELIVERABLES

WEEK 0: ONBOARDING

Stage	Total Time	CEO	Champion
Week 0: Onboarding	**17.50**	**4.75**	**12.75**
Call - Review Onboarding Documents:	**1.00**	**0.50**	**0.50**
Introductions	0.10	0.05	0.05
Review Onboarding Materials	0.50	0.25	0.25
Overview of Phase 1 Kickoff Meeting	0.40	0.20	0.20
Onboarding Docs (due by Friday before Kickoff Meeting):	**16.50**	**4.25**	**12.25**
Review Program Materials:	**2.00**	**1.00**	**1.00**
Onboarding Overview	0.50	0.25	0.25
Review Program Timeline	0.50	0.25	0.25
Review of Program Calendar of Meetings	0.50	0.25	0.25
Review of Customer Acquisition Funnel	0.50	0.25	0.25
Documents to Complete:	**14.00**	**3.00**	**11.00**
Engagement Contact List	0.25	0.00	0.25
Intake Questionnaire	3.00	1.00	2.00
Win/Loss Analysis	7.00	1.00	6.00
Ideal Customer Profile (ICP)	2.00	0.50	1.50
First Draft of Sales Positioning Canvas (SPC)	1.50	0.50	1.00
Branding Asset Request	0.25	0.00	0.25
Tech Stack Procurement (intros via Upshift)	**0.50**	**0.25**	**0.25**

WEEK 1: STRATEGY

Stage	Total Time	CEO	Champion
Phase 1, Week 1: Strategy	**18.45**	**4.60**	**13.85**
Tuesday:	**7.20**	**3.60**	**3.60**
Meeting – Phase 1 Kickoff:	**7.20**	**3.60**	**3.60**
Kickoff Briefing	1.00	0.50	0.50
Discovery Interview	2.00	1.00	1.00
Systems & Business Process Review	2.00	1.00	1.00
Sales Positioning Canvas (SPC)	2.00	1.00	1.00
Program Scheduling & Misc.	0.20	0.10	0.10
Week 1 Assignments (due by Retrospective Call Time):	**10.25**	**0.50**	**9.75**
Sales Positioning Canvas v0.1	**1.25**	**0.25**	**1.00**
ICP Buying Process	**1.25**	**0.25**	**1.00**
Systems Procurement:	**3.25**	**0.00**	**3.25**
Salesforce (Enterprise Edition)	1.00	0.00	1.00
Yesware (Enterprise Edition)	0.75	0.00	0.75
Twilio Configuration (via FastCall)	0.50	0.00	0.50
FastCall Installation & Configuration (after Salesforce is secured)	1.00	0.00	1.00
Systems Access Credentials	**0.25**	**0.00**	**0.25**
Other (support, calls, revisions, etc.)	**1.00**	**0.00**	**1.00**
Weekly Retrospective	**1.00**	**0.50**	**0.50**

WEEK 2: STRATEGY

Stage	Total Time	CEO	Champion
Phase 1, Week 2: Strategy	**30.25**	**7.00**	**23.25**
Design Documents (due by Tuesday evening):	**2.50**	**0.50**	**2.00**
Metric Questionnaire	**2.50**	**0.50**	**2.00**
Week 2 Assignments (due by Friday 12:00PM):	**27.75**	**6.50**	**21.25**
Recruitment Plan Delivered	**6.00**	**1.00**	**5.00**
Management Documentation:	**8.25**	**2.25**	**6.00**
Salesperson Calendar & Agendas	3.25	1.25	2.00
Build-out of 6-week Onboarding Plan	5.00	1.00	4.00
Lead Generation Plan Secured	**4.00**	**1.00**	**3.00**
Email Prospecting Documents:	**2.50**	**0.75**	**1.75**
Email Prospecting Messaging	2.25	0.75	1.50
A/B Email Testing Analytics	0.25	0.00	0.25
CRM Field Audit	**2.50**	**0.00**	**2.50**
Design Review @ 2PM on Friday:	**2.00**	**1.00**	**1.00**
Insights & Recommendations	1.00	0.50	0.50
BPMN & Sales Funnel Matrices	1.00	0.50	0.50
Other (support, calls, revisions, etc.)	**2.50**	**0.50**	**2.00**

WEEK 3: DEVELOPMENT

Stage	Total Time	CEO	Champion
Phase 2, Week 3: Development	**12.50**	**3.75**	**8.75**
Week 3 Assignments (due by Retrospective Call Time):	**10.50**	**2.25**	**8.25**
Sales Playbook Development	**8.00**	**2.00**	**6.00**
Establish Email Copy/Campaign Schedule	**1.00**	**0.25**	**0.75**
Other (support, calls, revisions, etc.)	**1.50**	**0.00**	**1.50**
Program Drinks	**1.00**	**1.00**	**0.00**
Weekly Retrospective	**1.00**	**0.50**	**0.50**

WEEK 4: DEVELOPMENT

Stage	Total Time	CEO	Champion
Phase 2, Week 4: Development	**11.00**	**2.00**	**9.00**
Thursday:	**2.00**	**1.00**	**1.00**
Meeting – Sales Handbook Review Session:	**2.00**	**1.00**	**1.00**
Sales Handbook Review	1.00	0.50	0.50
Handbook Development/Review	0.80	0.40	0.40
Expectations for Adoption Roll-out	0.20	0.10	0.10
Week 4 Assignments (due by Retrospective Call Time):	**9.00**	**1.00**	**8.00**
Sales Handbook v0.1	**3.50**	**0.50**	**3.00**
Review Salesperson Calendars	**1.50**	**0.50**	**1.00**
Watch Salesforce Training Videos	**2.00**	**0.00**	**2.00**
Other (support, calls, revisions, etc.)	**2.00**	**0.00**	**2.00**

WEEK 5: ADOPTION

Stage	Total Time	CEO	Champion
Phase 3, Week 5: Adoption	**23.00**	**5.75**	**17.25**
Monday:	**4.00**	**2.00**	**2.00**
Meeting – Sales Program Training:	**4.00**	**2.00**	**2.00**
Sales Program Overview	1.00	0.50	0.50
Salesforce Rollout	2.00	1.00	1.00
Sales Handbook Rollout	1.00	0.50	0.50
Week 5 Assignments (due by Retrospective Call Time)	**2.00**	**0.75**	**1.25**
Provide Upshift with Recommendations on Playbook Revisions	**1.50**	**0.50**	**1.00**
Send Top 3 Priorities for Next Week	**0.50**	**0.25**	**0.25**
Everyday Assignments:	**16.00**	**2.50**	**13.50**
Reviewing All Salespersons Activities for Accurate System Procedures:	**12.00**	**2.00**	**10.00**
Ensure Consistency in Work Schedule	6.00	1.00	5.00
Ensure Consistency in the Operations of Salesforce	6.00	1.00	5.00
Other (support, calls, revisions, etc.)	**3.00**	**0.00**	**3.00**
Weekly Retrospective	**1.00**	**0.50**	**0.50**

WEEK 6: ADOPTION

Stage	Total Time	CEO	Champion
Phase 3, Week 6: Adoption	**17.50**	**3.25**	**14.25**
Monday:	**0.50**	**0.25**	**0.25**
Deliver Sales Meeting Notes (Plan for Top 3 Priorities)	**0.50**	**0.25**	**0.25**
Thursday:	**2.00**	**1.00**	**1.00**
Meeting – Executive Training:	**2.00**	**1.00**	**1.00**
Executive Training on Dashboards	1.00	0.50	0.50
Review Adoption Progress/Metrics	0.20	0.10	0.10
Development of the Progress Report	0.20	0.10	0.10
Review Top 3 Priorities	0.20	0.10	0.10
Provide Upshift with Recommendations on Handbook Revisions	0.20	0.10	0.10
Open/Response Rates for Week 6 Email Testing	0.20	0.10	0.10
Everyday Assignments:	**15.00**	**2.00**	**13.00**
Reviewing All Salespersons Activities for Accurate System Procedures:	**12.00**	**2.00**	**10.00**
Ensure Consistency in Work Schedule	6.00	1.00	5.00
Ensure Consistency in the Operations of Salesforce	6.00	1.00	5.00
Other (support, calls, revisions, etc.)	**3.00**	**0.00**	**3.00**

WEEK 7: OPTIMIZATION

Stage	Total Time	CEO	Champion
Phase 4, Week 7: Optimization	**21.50**	**4.50**	**17.00**
Monday:	**0.50**	**0.25**	**0.25**
Deliver Sales Meeting Notes (Plan for Top 3 Priorities)	**0.50**	**0.25**	**0.25**
Wednesday:	**5.00**	**1.25**	**3.75**
Deliver Sales Team Metrics (Progress Report Card)	**0.50**	**0.25**	**0.25**
Score a Minimum of 10 Calls (focus on one call type)	**4.00**	**1.00**	**3.00**
Deliver FastCall Recording Notes to Upshift	**0.50**	**0.00**	**0.50**
Thursday:	**2.00**	**1.00**	**1.00**
Meeting – Program Optimization:	**2.00**	**1.00**	**1.00**
Review Dashboards	0.50	0.25	0.25
Critique Adoption of Systems & Messaging	0.50	0.25	0.25
Review Sales Management Capacity	0.30	0.15	0.15
Identify Top 3 Outcomes to Achieve	0.50	0.25	0.25
Open/Response Rates for Week 7 Email Testing	0.20	0.10	0.10
Everyday Assignments:	**14.00**	**2.00**	**12.00**
Reviewing All Salespersons Activities for Accurate System Procedures:	**12.00**	**2.00**	**10.00**
Ensure Consistency in Work Schedule	6.00	1.00	5.00
Ensure Consistency in the Operations of Salesforce	6.00	1.00	5.00
Other (support, calls, revisions, etc.)	**2.00**	**0.00**	**2.00**

WEEK 8: OPTIMIZATION

Stage	Total Time	CEO	Champion
Phase 4, Week 8: Optimization	**21.50**	**4.50**	**17.00**
Monday:	**0.50**	**0.25**	**0.25**
Deliver Sales Meeting Notes (Plan for Top 3 Priorities)	**0.50**	**0.25**	**0.25**
Wednesday:	**5.00**	**1.25**	**3.75**
Deliver Sales Team Metrics (Progress Report Card)	**0.50**	**0.25**	**0.25**
Score a Minimum of 10 Calls (focus on one call type)	**4.00**	**1.00**	**3.00**
Deliver FastCall Recording Notes to Upshift	**0.50**	**0.00**	**0.50**
Thursday:	**2.00**	**1.00**	**1.00**
Meeting – Program Optimization:	**2.00**	**1.00**	**1.00**
Review Dashboards	0.50	0.25	0.25
Critique Adoption of Systems & Messaging	0.50	0.25	0.25
Review Sales Management Capacity	0.30	0.15	0.15
Identify Top 3 Outcomes to Achieve	0.50	0.25	0.25
Open/Response Rates for Week 8 Email Testing	0.20	0.10	0.10
Everyday Assignments:	**14.00**	**2.00**	**12.00**
Reviewing All Salespersons Activities for Accurate System Procedures:	**12.00**	**2.00**	**10.00**
Ensure Consistency in Work Schedule	6.00	1.00	5.00
Ensure Consistency in the Operations of Salesforce	6.00	1.00	5.00
Other (support, calls, revisions, etc.)	**2.00**	**0.00**	**2.00**

WEEK 9: OPTIMIZATION

Stage	Total Time	CEO	Champion
Phase 4, Week 9: Optimization	**22.50**	**5.50**	**17.00**
Monday:	**0.50**	**0.25**	**0.25**
Deliver Sales Meeting Notes (Plan for Top 3 Priorities)	**0.50**	**0.25**	**0.25**
Wednesday:	**5.00**	**1.25**	**3.75**
Deliver Sales Team Metrics (Progress Report Card)	**0.50**	**0.25**	**0.25**
Score a Minimum of 10 Calls (focus on one call type)	**4.00**	**1.00**	**3.00**
Deliver FastCall Recording Notes to Upshift	**0.50**	**0.00**	**0.50**
Thursday:			
Meeting – Program Optimization:	**2.00**	**1.00**	**1.00**
Review Dashboards	0.50	0.25	0.25
Critique Adoption of Systems & Messaging	0.50	0.25	0.25
Review Sales Management Capacity	0.30	0.15	0.15
Identify Top 3 Outcomes to Achieve	0.50	0.25	0.25
Open/Response Rates for Week 9 Email Testing	0.20	0.10	0.10
Program Drinks	**1.00**	**1.00**	**0.00**
Everyday Assignments:	**14.00**	**2.00**	**12.00**
Reviewing All Salespersons Activities for Accurate System Procedures:	**12.00**	**2.00**	**10.00**
Ensure Consistency in Work Schedule	6.00	1.00	5.00
Ensure Consistency in the Operations of Salesforce	6.00	1.00	5.00
Other (support, calls, revisions, etc.)	**2.00**	**0.00**	**2.00**

WEEK 10: OPTIMIZATION

Stage	Total Time	CEO	Champion
Phase 4, Week 10: Optimization	**21.50**	**4.50**	**17.00**
Monday:	**0.50**	**0.25**	**0.25**
Deliver Sales Meeting Notes (Plan for Top 3 Priorities)	**0.50**	**0.25**	**0.25**
Wednesday:	**5.00**	**1.25**	**3.75**
Deliver Sales Team Metrics (Progress Report Card)	**0.50**	**0.25**	**0.25**
Score a Minimum of 10 Calls (focus on one call type)	**4.00**	**1.00**	**3.00**
Deliver FastCall Recording Notes to Upshift	**0.50**	**0.00**	**0.50**
Thursday:	**2.00**	**1.00**	**1.00**
Meeting – Program Optimization:	**2.00**	**1.00**	**1.00**
Review Dashboards	0.50	0.25	0.25
Critique Adoption of Systems & Messaging	0.50	0.25	0.25
Review Sales Management Capacity	0.30	0.15	0.15
Identify Top 3 Outcomes to Achieve	0.50	0.25	0.25
Open/Response Rates for Week 10 Email Testing	0.20	0.10	0.10
Everyday Assignments:	**14.00**	**2.00**	**12.00**
Reviewing All Salespersons Activities for Accurate System Procedures:	**12.00**	**2.00**	**10.00**
Ensure Consistency in Work Schedule	6.00	1.00	5.00
Ensure Consistency in the Operations of Salesforce	6.00	1.00	5.00
Other (support, calls, revisions, etc.)	**2.00**	**0.00**	**2.00**

WEEK 11: OPTIMIZATION

Stage	Total Time	CEO	Champion
Phase 4, Week 11: Optimization	**21.50**	**4.50**	**17.00**
Monday:	**0.50**	**0.25**	**0.25**
Deliver Sales Meeting Notes (Plan for Top 3 Priorities)	**0.50**	**0.25**	**0.25**
Wednesday:	**5.00**	**1.25**	**3.75**
Deliver Sales Team Metrics (Progress Report Card)	**0.50**	**0.25**	**0.25**
Score a Minimum of 10 Calls (focus on one call type)	**4.00**	**1.00**	**3.00**
Deliver FastCall Recording Notes to Upshift	**0.50**	**0.00**	**0.50**
Thursday:	**2.00**	**1.00**	**1.00**
Meeting – Program Optimization:	**2.00**	**1.00**	**1.00**
Review Dashboards	0.50	0.25	0.25
Critique Adoption of Systems & Messaging	0.50	0.25	0.25
Review Sales Management Capacity	0.30	0.15	0.15
Identify Top 3 Outcomes to Achieve	0.50	0.25	0.25
Open/Response Rates for Week 11 Email Testing	0.20	0.10	0.10
Everyday Assignments:	**14.00**	**2.00**	**12.00**
Reviewing All Salespersons Activities for Accurate System Procedures:	**12.00**	**2.00**	**10.00**
Ensure Consistency in Work Schedule	6.00	1.00	5.00
Ensure Consistency in the Operations of Salesforce	6.00	1.00	5.00
Other (support, calls, revisions, etc.)	**2.00**	**0.00**	**2.00**

WEEK 12: OPTIMIZATION

Stage	Total Time	CEO	Champion
Phase 4, Week 12: Optimization	**14.00**	**3.00**	**11.00**
Thursday:	**2.00**	**1.00**	**1.00**
Meeting – Program Wrap Up:	**2.00**	**1.00**	**1.00**
Program Overview & Key Insights	0.80	0.40	0.40
Growth Recommendations	1.00	0.50	0.50
Open/Response Rates for Week 12 Email Testing	0.20	0.10	0.10
Case Study Questionnaire	0.00	0.00	0.00
Everyday Assignments:	**12.00**	**2.00**	**10.00**
Reviewing All Salespersons Activities for Accurate System Procedures	**12.00**	**2.00**	**10.00**
Ensure Consistency in Work Schedule	6.00	1.00	5.00
Ensure Consistency in the Operations of Salesforce	6.00	1.00	5.00