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English translation: Víctor Arranz and Ana Cendagorta-Galarza

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Jorge Salinas is Partner Director of Atesora and Lider-Haz-GO!
Executive Summary
Coaching is a newly emerging profession in Spain. It was born practically in this century.

The EMCE project was originally created in April of 2006 with the intention of getting to know and spreading information about the current situation of the coaching profession in Spain, as well as to evaluate its development and to detect its possible needs.

EMCE´06* was first published in November of 2006, and it incorporates the results obtained in 2005 and its projection to 2006.

We decided that this survey should be bi-annual and should be developed and managed in an independent manner by the undersigned team.

EMCE´08** was published in May of 2008, incorporating the results obtained in 2007 and its projection to 2008.
HISTORY (and II)

- EMCE’08 is the first and only national survey of executive coaching which has received the approval of ICF World to include it into their web-portal, with the next suggestion “EMCE ’08 is a good example of how a research on coaching business can be designed and performed inside a country”

- Many other prestigious organizations has published that results, such as:
  - ICF World, Professional Coaching Publications, AECOP, Instituto de Empresa, RRHH Magazine, etc.

- EMCE’10 *** is published in september’10, incorporating the results of 2009 and its projection to 2010
OBJECTIVE

To get know the market for executive coaching in Spain from the coaches’ point of view that are working in this market segment, to help them make decisions that could influence their performance and professional outcome.

We consider this market to be composed of:

- The players,
- Their practices,
- Their size in numbers and value,
- Their projections for one year and
- Their unsatisfied needs that might help in their development.
WORK PLAN AND METHODOLOGY (I)

1. Definition of the employment sources of coaches
2. Definition of the areas to survey
3. Establishment of a work team, goals, strategies, distribution of chores, schedules, resources, potential obstacles and process
WORK PLAN AND METHODOLOGY (and II)

- decision of the external server platform (confidentiality / investment)
- free access on-line survey
- build up the questionnaire
- pilot testing
- revision of the questionnaire
- release of the survey
- questionnaire validation (174 validated in EMCE´10, 133 in EMCE´08 y 102 in EMCE´06)
- data processing
- completion reports
- design and implementation of the results communication plan
INTERPRETATION OF THE RESULTS

- **Results.** In the results are included the participants answers to 80 questions that covered the following areas: demography and training; coaching as a profession; features of coaching procedures; hiring coaching services; hiring of coaches; evaluation of the market and the supervision of coaching procedures.

- **Validation.** Some of the answers have been eliminated during the validation phase due to errors and answers that were out of an acceptable range.

- **Reliability.** The reliability of the results is limited, as they are in other publications in this field, because they don’t cover a representative sample of the profession. Then the reliability is a function of the volume of completed questionnaires. The reliability of this survey can be considered “very acceptable” in the case of most of the results given, except in the specific case of the chapter covering of “supervision” which we consider as “fairly representative”.

E.M.C.E.´10
COACH PROFILE´09

- woman, between 31-49 years
- lives and works in Madrid
- 1 to 5 years experience
- offers other services as well, in particular those related to training
- has 17 new coachees this year
- performs 125 coaching sessions a year
- performs them in person and on an individual basis
- works with coaching processes that last between 4-10 sessions, 90 minutes/session
- 230 € fee/session and 26.700 € annual turnover
SOME RELEVANT COMPARISONS ´09/´07

All data are averages

- Real turnover (€): 26.700 vs. 29.700
- Coaching sessions performed: 125 vs. 123
- Number of new coachees /coach: 17 vs. 21
- Fees coaching session (€): 230 vs. 305
- Number of hiring companies: 6,0 vs. 7,4
Based on the following data (‘10/’09 projection increases):

- Δ new coachees: 34 %
- Δ coaching sessions: 30 %
- Δ FB360°: 7 %
- Δ turnover: 32 %
- Δ number of hiring business: 32 %

We formulate the following assumptions:

- Δ volume of coaching sessions ‘10/’09: 30 %
- Fees erosion: - 10 %
- Number of “active” coaches in ‘10: 260
- Life cycle maturity: growth phase
DEVELOPMENT PREDICTIONS (and II)

We deduced that:

- Market value in ‘09: 5,9 M €
- Market value in ‘10: 7,1 M €
- Trend: 3 to 5 years of growth with a two digit figure and 5 to 7 years of growth with a one digit figure
OPORTUNITIES (I)

If we take into consideration the previous predictions which point towards a large increment in the demand for executive coaching services, we consider that the following opportunities will be available for the period going from 2010 to 2020 (growth phase):

- Increased number of coaches (an increased demand for Training Centers for Coaches: TCC´s)
- The need for educating and informing the market/clients and coachees (Professional Associations and TCC´s)
- Increased need/demand in the training of coaches (due to increased knowledge of the field on behalf of the clients, more competition between the TCC´s, Continuing (Post-grad) Training and Specialization)
- Higher demand in the quality of coaching services (Professional and Supervising Associations)
OPORTUNITIES (II)

- An increase in the standardization of coaching practices (Associations and TCC’s)
- Further development of telephone/video-conference coaching (accessibility and flexibility)
- Further development of group and team coaching
- Increased demand of the tools used in coaching (of the suppliers of these services)
- Increase in the services and tools used in the business promotion of coaching services (increase in competitiveness)
- Increase in the number of large businesses providing coaching services which will detract business from independent coaches (hiring to be concentrated in large consulting firms and Business Schools)
OPORTUNITIES (and III)

- Emergence of niche coaching practice (specialization based on competences)
- Development of internal coaching (transversal coaching and manager-coach practice within the corporations)
- Narrowing the range of fees and progressive erosion of average fees (increased competitiveness)
- Progressive acceptance and development of personal coaching (market that will move an elevated turnover)

*EMCE´06. Original Project and procedures done by: Jaime Bacás (Project Director), Luis Picazo, Jorge Salinas, Emilio Arsuaga y Marta Capellán) with the sponsorship of ICF España.

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E.M.C.E.´10
Report Results
1. Gender (174)

- Male: 46% (2009) vs. 52% (2007)
- Female: 54% (2009) vs. 48% (2007)
2. Age (174)
3. Nationality (170)

- **Spanish**: 92% (2009) vs. 88% (2007)
- **European**: 4% (2009) vs. 6% (2007)
- **Others**: 6% (2009) vs. 4% (2007)
4. Province of residence (167)

- Madrid: 53% (2009), 56% (2007)
- Barcelona: 23% (2009), 21% (2007)
- Other provinces: 24% (2009), 23% (2007)
5. Geographic area where you usually practice coaching (173)
6. Academic Degrees (173)

- Science/Engineering/Medicine and Similar: 2007 (22%), 2009 (24%)
- Psychology/Sociology/Teaching/Philosophy: 2007 (32%), 2009 (39%)
- Others: 2007 (44%), 2009 (39%)

E.M.C.E. ´10
7. Do you think it’s necessary to receive training in order to be a coach? (162)

2007:
- Necessary: 86%
- Convenient: 13%
- Not necessary: 1%

2009:
- Necessary: 93%
- Convenient: 7%
- Not necessary: 0%

E.M.C.E.´10
8. Do you consider accreditation necessary for working in the coaching field? (133)

2007

- Necessary: 12%
- Convenient: 47%
- Not necessary: 41%

2009

- Necessary: 51%
- Convenient: 40%
- Not necessary: 9%
9. I obtained my degree/accreditation in coaching through (174)
10. In your training as a coach, how many hours of each modality? (149)
11. Resources preferred to use to further my development as a coach (152)

- Workshops/seminars
- Webinars/e-learning
- Conferences
- Couching supervision
- Specialization programs
- Others

2007
2009
12. Preferred areas for development (146)

- NLP
- Personality Test
- Gestalt
- Constellations
- Transactional Analysis
- C. Rogers, Maslow
- Sales/Service coaching promotion
- Others
- Bioenergetics/Focusing
- Psycodrama
- Others

[Bar chart showing preferences for 2007 and 2009]
13. Years practicing coaching professionally (157)
14. Ethical dilemmas faced practicing coaching (153)
15. Country where you practice mostly (152)

- **Spain**: 95% (2009) 93% (2007)
- **Europe**: 3% (2009) 3% (2007)
- **EEUU**: 1% (2009) 0% (2007)
- **Others**: 2% (2009) 4% (2007)
16. Languages you can use in your practice (153)

- Spanish: 99% (2009), 100% (2007)
- English: 41% (2009), 35% (2007)
- Catalan: 31% (2009), 26% (2007)
- French: 13% (2009), 17% (2007)
- Others: 18% (2009), 15% (2007)
17. Do you offer other services besides coaching? (157)

- **YES**: 90% (2009) / 86% (2007)
- **NO**: 10% (2009) / 14% (2007)
18. Other services that coaches offer (138)
19. Types of performed coaching (156)

2007

- Individual: 55%
- Group/Team: 40%
- Both: 5%

2009

- Individual: 97%
- Group: 37%
- Team: 49%

Both: 40% (divided between 70% individual and 30% group)

On 183 total of answers (multiple answers)
20. Fields in which coaching is performed (154)
21. Professional coaching associations known (150)
22. Associations to which you are affiliated (150)

- ICF: 45% (2009), 42% (2007)
- AECOP: 25% (2009), 26% (2007)
- ASESCO: 17% (2009), 14% (2007)
- Other: 7% (2009), 11% (2007)
22 Bis. Other Associations to which you are affiliated too

<table>
<thead>
<tr>
<th>FIACE (Iberoamerican Federation of Executive Coaching)</th>
<th>ICC (International Coaching Community)</th>
</tr>
</thead>
<tbody>
<tr>
<td>AC3 (Coaching Association for <em>SMEs</em>, Professionals and People)</td>
<td>EMCC (European Mentoring and Coaching Council)</td>
</tr>
<tr>
<td>COACHVILLE</td>
<td>AUGERE (Foundation)</td>
</tr>
<tr>
<td>AECODE (Spanish Sport Coaching Association)</td>
<td>RHIACA (Hispanic-American Network on Active Coaches)</td>
</tr>
<tr>
<td>ACECAT (Catalán Sport Coaching Association)</td>
<td>IAC (International Association of Coaches)</td>
</tr>
<tr>
<td>FLAPCO (Latin American Professionals Federation of Ontological Coaching)</td>
<td>G-COACHING (Association for the Coaching Diffusion)</td>
</tr>
<tr>
<td>AEPNL (Spanish PNL Association)</td>
<td>AIC (International Coaching Association with NLP)</td>
</tr>
</tbody>
</table>
23. Formalize a “contract” with the coachee, besides the official one with the organization (132)
24. Average length (in minutes) of your coaching sessions (132)

- Less than 45:
  - 2% in 2007
  - 2% in 2009

- 60:
  - 30% in 2007
  - 30% in 2009

- 90:
  - 52% in 2007
  - 48% in 2009

- 120:
  - 14% in 2007
  - 18% in 2009

- More than 120:
  - 2% in 2007
  - 2% in 2009
25. Average length (hours) of your coaching processes (129)

- More than 16 hours: 30% in 2007, 25% in 2009
- 13-16 hours: 20% in 2007, 15% in 2009
- 10-12 hours: 25% in 2007, 20% in 2009
- 7-9 hours: 10% in 2007, 10% in 2009
- 4-6 hours: 5% in 2007, 0% in 2009
- 0-3 hours: 5% in 2007, 5% in 2009
25.Bis. Average length (sessions) of your coaching processes (131)

- 0-3: 3% (2009), 4% (2007)
- 4-6: 27% (2009), 27% (2007)
- 7-9: 39% (2009)
- 10-12: 28% (2009), 22% (2007)
- 13-16: 3% (2009), 10% (2007)
- More than 16: 6% (2009), 5% (2007)
25.Bis 2. Average length (months) of your coaching processes (131)

- 0-3 months: 31% (2009), 22% (2007)
- 4-6 months: 50% (2009), 50% (2007)
- 7-9 months: 13% (2009), 16% (2007)
- 10-12 months: 5% (2009), 10% (2007)
- 13-16 months: 1% (2009), 2% (2007)
- More than 16 months: 0% (2009), 0% (2007)
26. Coachees Profile (115)

- Self-Employed Professional
- Other Levels
- Other Directors
- Senior Management
27. Average number of sessions according to coachee profile (121)

- Self-Employed Professional
- Employed
- Other Directors
- Senior Management

2007

2009
28. Used Tools (117)

2009

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feedback 360°</td>
<td>39%</td>
</tr>
<tr>
<td>MBTI</td>
<td>14%</td>
</tr>
<tr>
<td>Thomas</td>
<td>3%</td>
</tr>
<tr>
<td>FIRO-B</td>
<td>3%</td>
</tr>
<tr>
<td>None</td>
<td>16%</td>
</tr>
<tr>
<td>Other</td>
<td>25%</td>
</tr>
</tbody>
</table>
28. Bis. Other used tools (117)

<table>
<thead>
<tr>
<th>DISC</th>
<th>CO-ACTIVO MODEL</th>
<th>METODOLOGY SUCES DE UNLIMITED NETWORK</th>
</tr>
</thead>
<tbody>
<tr>
<td>SWOT (DAFO)</td>
<td>PUBLIC IMAGE, MANDALA</td>
<td>ACTION PLAN, VISION</td>
</tr>
<tr>
<td>DBM</td>
<td>HBDI</td>
<td>TEAM DIAGNOSTIC ASSESSMENT</td>
</tr>
<tr>
<td>OWN QUESTIONNARIES</td>
<td>ENNEAGRAM</td>
<td>KOSTIK</td>
</tr>
<tr>
<td>PAPI</td>
<td>MPA</td>
<td>GRAPHOPSYCHOLOGY</td>
</tr>
<tr>
<td>CREATIVITY TOOLS, MANAGEMENT...</td>
<td>NARRATION OF “VITAL MOMENTS”</td>
<td>COMPETEA, PERFORMANCE, CTI</td>
</tr>
<tr>
<td>DRAMATIC AL THECNICS</td>
<td>BELBIB TEST</td>
<td>BIRKMAN</td>
</tr>
<tr>
<td>WHEEL OF LIFE</td>
<td>NON VIOLENCE COMUNICACION</td>
<td>COECO MODEL</td>
</tr>
</tbody>
</table>
29. Average time (minutes) spent in session preparation (123)
30. Coachee withdrawals from processes (115)

2009: 2% withdrawals
31. Coachees objectives (128)

- Change Management
- Corporate Restructuring/Mergering
- Redesign Professional Career
- Interpersonal Relation
- Team Management
- Better Sales Skills
- Personal-Professional Balance
- Time Management

2007

2009

- Professional Promotion
- Team/Project Integration
- Redesign Professional Career
- Interpersonal Relations
- Team Management
- Better Sales Skills
- Time Management/Personal-Professional Balance

Legend:
- Less Frequently
- Medium Frequently
- Very Frequently
32. Delivers report at the end of the coaching process (121)
33. % of the clients require that the coach has... (98)
34. “Added” benefits for the coachees (127)

- **Self Consciousness**
  - 2007:
    - Always: 0%
    - Frequently: 50%
    - Sometimes: 100%
  - 2009:
    - Always: 100%
    - Frequently: 50%
    - Sometimes: 0%

- **Self Confidence**
  - 2007:
    - Always: 0%
    - Frequently: 50%
    - Sometimes: 100%
  - 2009:
    - Always: 50%
    - Frequently: 50%
    - Sometimes: 0%

- **More Pro-Active**
  - 2007:
    - Always: 0%
    - Frequently: 50%
    - Sometimes: 100%
  - 2009:
    - Always: 50%
    - Frequently: 50%
    - Sometimes: 0%

- **Stronger Commitment**
  - 2007:
    - Always: 0%
    - Frequently: 50%
    - Sometimes: 100%
  - 2009:
    - Always: 50%
    - Frequently: 50%
    - Sometimes: 0%
35. Where sessions take place (124)

- **2007**
  - Others
  - Public Places
  - Office Space Rented to Another
  - Coach Office
  - Coachee Office

- **2009**
  - Others
  - Public Places
  - Office Space Rented to Another
  - Coach Office
  - Coachee Office
36. What is the number of companies that hired your coaching services in 2009? (115)

Average: 6.0 companies/coach (2009)
Average: 7.4 companies/coach (2007)
37. What is your estimated number of companies that will hire your coaching services in 2010? (115)
38. Who hires your coaching services and how many of each? (115)
39. Types of hiring companies, by size (115)
40. Types of hiring companies, by area (115)

- Agriculture and Transf.: 1 (2009)
- Services: 13 (2009), 7 (2007)
42. Have you participated in personnel hiring procedures where you have been interviewed among other coach-candidates? (115)
43. Who hire you as a coach? (102)

2009

- The end user organization: 58%
- An intermediary organization (consulting company, etc.): 42%
44. Who makes the final decision to hire you (commercially) as a coach in the final hiring organization/company? (112)
45. How do you charge your fees? (115)

- **By Hours**
  - 2009: 16%
  - 2007: 9%

- **By Sessions**
  - 2009: 48%
  - 2007: 52%

- **Whole Process**
  - 2009: 36%
  - 2007: 39%
46. New coachees in 2009 (105)

2007: 1,882 coachees; 89 coaches; average: 21,1 coachees/coach
2009: 1,860 coachees; 105 coaches; average: 17 coachees/coach
47. How many coaching sessions have you done in 2009? (105)

2007: 10.575 sessions; average 123 sessions/coach
2009: 13.123 sessions; average 125 sessions/coach
48. From the previous question, how many of each type? (105)

- **More than 251**: 
  - E-mail: 0
  - Videoconference: 0
  - By phone: 0
  - Face to Face: 6

- **151 to 200**: 
  - E-mail: 0
  - Videoconference: 0
  - By phone: 0
  - Face to Face: 9

- **81 to 150**: 
  - E-mail: 0
  - Videoconference: 0
  - By phone: 0
  - Face to Face: 8

- **41 to 80**: 
  - E-mail: 0
  - Videoconference: 0
  - By phone: 0
  - Face to Face: 9

- **21 to 40**: 
  - E-mail: 0
  - Videoconference: 0
  - By phone: 0
  - Face to Face: 13

- **1 to 20**: 
  - E-mail: 0
  - Videoconference: 16
  - By phone: 24
  - Face to Face: 11

- **0**: 
  - E-mail: 0
  - Videoconference: 0
  - By phone: 0
  - Face to Face: 0
49. Estimated number of new coachees for 2010 (coachees/coach)? (105)
50. Estimated number of coaching sessions for 2010 (104)

17,068 sessions; 99 coaches; 172 sessions/coach
Deleted 5 answers < 15 sessions
51. Estimates of types of coaching sessions to be realized (104)
52. Coaching sessions with 360° return feedback in 2007 and 2009 (92)

1.121 sessions; 42 answers; Average: 27 sessions/coach
Deleted 50 answers with 0 sessions
53. Coaching sessions with 360° return feedback in 2009 and estimates for 2010 (92)

1,590 sessions, 54 answers; Average: 29 sessions/coach
54. Average fee per coaching session (direct hiring, from end customer) (94)

Deleted 7 answers of < 50 €
Average in 2005: 241 €

Average in 2007: 305 €
Average in 2009: 230 €
54. BIS Fee per coaching session (direct hiring) (94)
55. Fee per coaching session (indirect hiring) (77)

Deleted 7 answers of < 50 €
55.BIS Average fee per coaching session. Comparison between direct and indirect hiring (77)

2009

- Direct: 230 €
- Indirect: 168 €

Deleted 6 answers.
Average fee per coaching session Comparison between direct and indirect hiring (77-77)

71 answers in indirect about 2009
56. Average fee paid to the intermediary companies (consulting firms, etc..) by the hiring organizations (41)

Deleted 10 answers lower than 50 €
Total turnover in ’09: 2,269,280 € (85 answers)
15 answers lower than 500 €/year have been eliminated
58. Estimated turnover for 2010 (100)

8 answers lower than 1000 € have been eliminated
Total estimated turnover for 2010: 2,998,510 € (92 answers)
59. Reasons that hinder a more effective sale of my coaching services (89)
60. In case that you sell service of executive coaching
Reasons why your proposals have been approved? (93)
61. Did you have coaching supervision in 2009? (103)

2007

- Yes: 53%
- No: 47%

2009

- Yes: 58%
- No: 42%
63. Nº of individual sessions of supervision received (35)

2009

- 0-4: 63%
- 5-8: 20%
- 9-12: 9%
- More than 12: 9%
64. Length in minutes. Individual supervision sessions (33)

**2007**
- 30 min.: 8%
- 60 min.: 41%
- 90 min.: 8%
- 120 min.: 38%

**2009**
- 30 min.: 18%
- 60 min.: 27%
- 90 min.: 48%
- More than 120 min.: 3%
- 120 min.: 3%
66. How the supervision sessions are paid (30)
67. Total average amount invested in individual supervision (25)

Deleted 7 answers lower than 100 €/year
18.130 €/year in 18 answers
68. Group supervision. Nº of persons in the group. (29)

**2007**

- 2-4: 7%
- 5-8: 14%
- 9-12: 55%

**2009**

- 2-4: 3%
- 5-8: 7%
- 9-12: 21%
- 13-15: 28%
- More than 15: 41%
69. Number of supervision sessions received in group. (29)

2007

- 0-4: 31%
- 5-8: 37%
- 9-12: 12%
- More than 12: 10%

2009

- 0-4: 48%
- 5-8: 21%
- 9-12: 17%
- More than 12: 14%
70. Length (in minutes) of the group supervision sessions (28)

**2007**
- 90 min.: 44%
- 120 min.: 8%
- 180 min.: 8%
- 240 min.: 4%
- More than 240 min.: 7%

**2009**
- 90 min.: 36%
- 120 min.: 7%
- 180 min.: 7%
- 240 min.: 18%
- More than 240 min.: 11%
72. How group sessions are paid (19)

- Per hour: 7%
- Per session: 43%
- Per program: 50%
- Per group: 63%
73. Total investment made in group supervision (25)

Deleted 6 answers < 100 €
20.998 €/year in 19 answers
74. Matters that were supervised (individually and in groups) (36)

- Insufficient technical know-how to accompany the coachee in special or singular situations: 27%
- Understanding the coachee: 16%
- Emotional blocking of the coach: 14%
- Separation between coaching and therapy/psychiatry: 13%
- Respecting the coachees’ freedom/choices: 9%
- Empathy with the coachee: 6%
- Ethical conflicts: 5%
- Incompatibility between coach and coachee (religious beliefs, politics, etc.): 0%

2009
75. Criteria used to choose a supervisor (36)

- Experience as a coach: 29%
- References: 27%
- Experience as a supervisor: 18%
- Technical orientation (ontological, humanist, NLP, etc.): 11%
- Fee: 6%
76. If you don’t receive supervision, would you like to? (79)
77. Have you acted and formally charged as a supervisor? (100)

The question in 2007 was “Have you supervised other coaches?”
If you have supervised, please tell us what training you have received. (30)

- Practice/learned from own supervision sessions: 38%
- Reading: 18%
- Workshops: 18%
- Specific Training Program: 16%
- None: 7%
79. Will you invest in specific training to become a supervisor? (96)

- Yes: 59%
- No: 41%
80. Some comments and suggestions

- It is necessary to include personal coaching data, because it is already a reality in Spain.
- I work as volunteer coach, I have never charge my coaching sessions.
- Some questions are not clear.
- Very interesting, congratulations!
- The 80% of my work is as internal coach in a multinational company.
- I think is very important to value experience and training of coaches, because a lot of professionals have the accreditation, but they have never exercised it, and many do not have accreditation but they exercise.
- It would be possible to make the same survey to the Personal Coaching market. It would be very useful.
- I liked that survey. It have made me think. It project me. I would make it next time.
- I have founded it a very interesting survey for my profession.
- Thank you for the initiative. I am grateful that the survey was made by a coach. Suggestions: make note the difference between the study of executive coaching and the group/team coaching. The number of the people coached, sessions per process and the price of the coaching process are different. I usually make the 80% group/team coaching and 20% executive coaching, the data can be misleading to put in the same criteria. Greetings.
- Haven't been so long!
Thank you for your participation!

Your contribution makes possible that we have this information that allows us to learn more about our profession and make the appropriate decisions to manage it to where we want.

See you again in E.M.C.E.’12!
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