

Introduction to Commercial Roadmap

Overview

In this section, you will find information about what is Commercial Roadmap, what are its benefits and what are the process steps in Salesforce.

Concerned profiles:

Sales

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Step By Step

What's in it for YOU

Commercial Roadmap consists in translating Strategic aspirations at granular level to make them actionable for the Sales teams

Commercial targets will be set at granular level ...

... by product



... by customer



... by geography



... by end-use



The Commercial Roadmap **translates strategic objectives to concrete sales targets** such as volume, revenue or contribution margin

Each target is **defined at a granular level** relevant for your business (e.g., product, geography, customer, end-use) to make it **actionable for the Sales teams**

Commercial targets

... by product



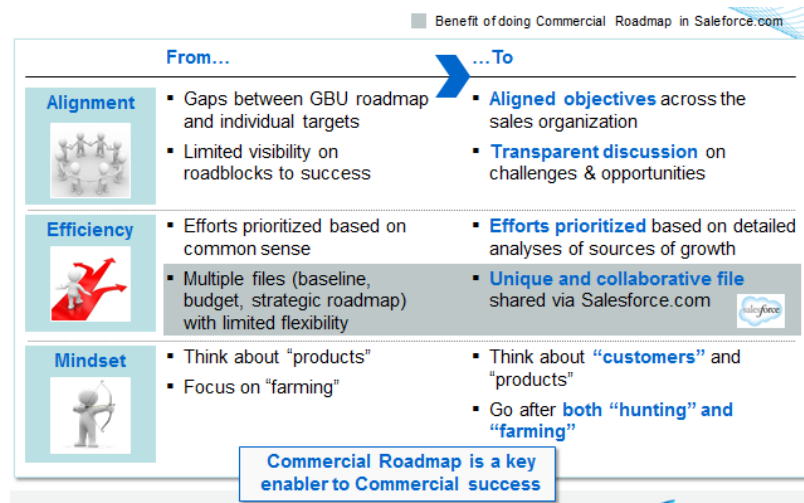
... by geography



The Commercial Roadmap **translates strategic objectives to concrete sales targets** such as volume, revenue or contribution margin

Each target is **defined at a granular level** relevant for your business (e.g., product, geography, customer, end-use) to make it **actionable for the Sales teams**

The **Commercial Roadmap** exercise aims at providing concrete benefits to improve the way you work



Some concrete **examples** for which a Commercial Roadmap could **help**



Conclusion on Commercial Roadmap

Commercial Roadmap is about...

- A detailed translation of the **Strategic Roadmap** at a commercial level by product, geography, customer or end-use
- An **overview of challenges/opportunities and action plans** needed to capture growth
- An **enabler to steer and align the sales teams** within the organization
- A **tool to track progress** versus budget (Y+1) and **highlight gaps** versus **strategic roadmap** (Y+2 to Y+5)

Commercial Roadmap is not about...

- A one-time exercise, as Commercial Roadmap exercise has to be **reviewed and challenged every year**

As a **Sales Rep**, at the end of this module, you will be able to:

- Understand Commercial Roadmap Process as it is designed in [Salesforce.com](#)
- Update pre-filled lines or complete empty lines
- Adjust lines if your manager asks you an adjustment
- Synchronize opportunities in the Commercial Roadmap
- Launch useful reports to follow your progress and achievements

As a **Manager**, at the end of this module, you will be able to:

- Understand Commercial Roadmap Process as it is designed in [Salesforce.com](#)
- Update pre-filled lines or complete empty lines
- Adjust lines
- Synchronize opportunities in the Commercial Roadmap
- Launch useful reports to follow your progress and achievements
- Generate the Health Matrix to compare the bottom-up results with strategic roadmap targets (gap analysis)

The Commercial Roadmap process will have **5 main steps** in the new SFDC tool:



Commercial Roadmap **security settings**

	All Sales users	Commercial Roadmap owner	GBU steward Financial
View and update Commercial Roadmap	×	✓	✓
Adjust Commercial Roadmap	×	✓	✓
View Health Matrix	×	×	✓
Create & edit top adjustment	×	×	✓
Delete a Commercial Roadmap	×	×	✓

The permissions here are technical permissions and are not related to the Commercial Roadmap even if in the system it is technically possible

Commercial roadmap **timeline**

All GBUs define their own timeline for the global process:

- Sales rep updates**: start and end date ("CR Updated")
- Manager adjustments**: start and end date ("CR Adjusted")
- Health matrix generation**: start and end date ("Report Health Matrix")
- Opportunity synchronization**: start and end date

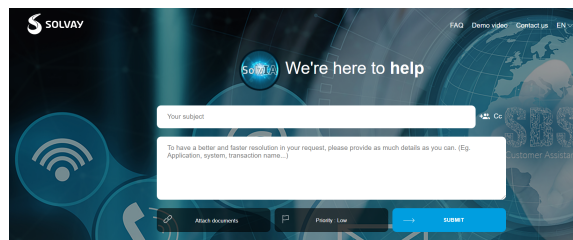
Commercial Roadmap Timeline	
Time-00000003	
Back to List: Users	
Commercial Roadmap Timeline Detail	
Edit Delete Clone	
Timeline Name	Time-00000003
Year	2016
GBU	Special Chem
Start of sales rep Updates	31/12/2015
End of sales rep Updates	13/05/2016
Start of manager adjustments	8/05/2016
End of manager adjustments	31/07/2016
Start Health Matrix generation	20/04/2016
End Health Matrix generation	26/11/2016

Related articles

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Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example