

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

Benefit of doing Commercial Roadmap in Salesforce.com

From...	... To
<p>Alignment</p> <ul style="list-style-type: none"> Gaps between GBU roadmap and individual targets Limited visibility on roadblocks to success 	<ul style="list-style-type: none"> Aligned objectives across the sales organization Transparent discussion on challenges & opportunities
<p>Efficiency</p> <ul style="list-style-type: none"> Efforts prioritized based on common sense Multiple files (baseline, budget, strategic roadmap) with limited flexibility 	<ul style="list-style-type: none"> Efforts prioritized based on detailed analyses of sources of growth Unique and collaborative file shared via Salesforce.com
<p>Mindset</p> <ul style="list-style-type: none"> Think about "products" Focus on "farming" 	<ul style="list-style-type: none"> Think about "customers" and "products" Go after both "hunting" and "farming"

Commercial Roadmap is a key enabler to Commercial success

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

Shutdown of a customer



What sales potential did you lose after the shutdown of a customer?

Delayed investment



What was the new yearly growth forecast for each region after the delay of a strategic project?

Loss of customer business



What sales potential did we lose after the loss of Kimberly Clark's business for HPC NA?

Delayed investment



Natural catastrophe



What customers and products were impacted by the earthquake in Japan?

Regulatory change



How would regulatory changes (e.g., gas emission control, safety) modify your customer mix?

Raw Material issues



What customers and products were impacted by the changing Guar scenario?

Capacity constraints



The Commercial Roadmap will allow a quick access to yearly targets to

- Size the problem
- Find mitigations



The Commercial Roadmap will allow a quick access to our yearly targets to

- Size the problem
- Find mitigations

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 Finan
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 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]

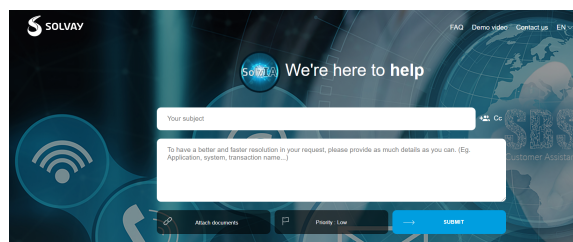
Timeline Name	Time-00000003
Year	2016
GBU	Special Chem
Start of sales rep Updates	31/12/2015
End of sales rep Updates	13/05/2016
Start of manager adjustments	8/05/2016
End of manager adjustments	31/07/2016
Start Health Matrix generation	20/04/2016
End Health Matrix generation	26/11/2016

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