

FD - P10. Commercial Roadmap

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NEW / Next release

R-2314 / Change about massa risus, vestibulum in nunc vitae, sagittis dignissim est.

1. Functional Process

Glossary

Abbreviation :	Definition:
PY	Previous Year
CY	Current Year
T	Ton
KP	Kilo Pound
ASP	Average Sales Price
ASP ex-works	Average Sales Price not including logistics costs
% probability	The % of probability to win an opportunity
Initial fields	Fields pre-filled with data or extrapolated or empty (for A customers) at the time of initialization
Updated fields	Fields completed or reviewed/updated by Sales Rep
Adjusted Fields	Fields adjusted by Managers
UOM	Unit Of Measure

Process Overview

The workstream commercial roadmap is part of 'Sales Strategy', one of the levers of the Commercial Excellence toolbox. The aim of the commercial roadmap is to align objectives across the sales organization: strategic aspirations are translated at a granular level (e.g., geography, end-use, product, customer) to make them actionable for the salesforce. The commercial roadmap process allows to verify the coherence between "bottom-up targets" (set by the sales reps) and high-level targets (set by top management), for the time horizon of the Strategic Roadmap.

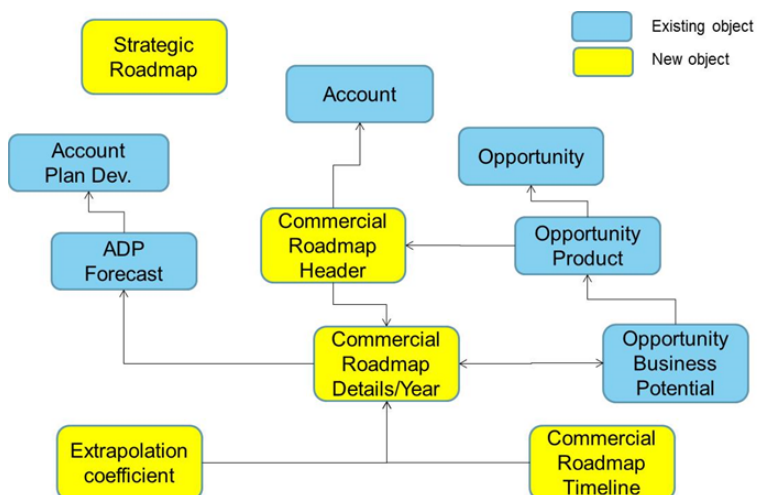
The purpose of the workstream commercial roadmap inside the CRM is to improve the process by allowing all stakeholders to enter and review data inside a single tool. This avoids multiple Excel files shared across teams.

Flow



2. Data Model & security

Main objects



We have several different objects for Commercial Roadmap: one Header which stores all common data across years (for example product and ship to information), one Detail which stores all detailed data per year

Commercial Roadmap header. this object will store these main data:

- Commercial Roadmap Year
- Ship to account
- Sold to account
- Product
- End use
- Segmentation
- Previous year data
- ...

Commercial Roadmap detail. we'll create in this object one line for each year, current year, Y+1, Y+2, Y+3, Y+4, Y+5 and we will store these main data:

- Year
- Volume by quarter
- Price by quarter
- Contribution margin by quarter
- Unit of measure
- Currency
- Volume by year
- Price by year

- Contribution margin by year
- ...

Extrapolation coefficient, this object will store parameters that allow to extrapolate volume and price.

Commercial Roadmap timeline, this object will store the different dates corresponding to the process main steps by GBU:

- Initializing the Commercial Roadmap
- Ending the updates by Sales rep
- Ending the adjustments asked by managers
- Freezing the synchronization between opportunities and Commercial Roadmap
- Freezing the Roadmap

3. Detailed process

3.1 Pre-fill Data for bottom-up exercise

The commercial roadmap bottom-up exercise aims at having a view on Price, Volume (and Margin) at a customer-product level over five years. Two main sources will be used to initialize Commercial Roadmap Data :

- The sales to initialize recurrent business
- The growth opportunities to initialize growth business.

3.1.1 Initialize data for the recurrent business

For the recurrent business in order to facilitate sales representative work, we will pre-fill data for previous year, current year, and in some cases, Y+1, Y+2, Y+3, Y+4, Y+5. All data pre-filled could be updated except data corresponding to previous year sales or current year sales.

The rules to pre-fill data will be different depending on years and depending on GBUs.

3.1.1.1 Pre-fill data for previous year

For all GBUs the previous year will be pre-filled with sales data uploaded from Analytics (Qlikview application). For prices we upload ASP & ASP-ex works because some GBUs want to work with ASP-ex works or just want to visualize ASP ex-works.

Each sales line will allow to initialize one line in the Commercial Roadmap header object and 6 lines in the object Commercial Roadmap details corresponding to these different years:

- Current year
- Y+1
- Y+2
- Y+3
- Y+4
- Y+5

As a first step, all data in the details object will be pre-filled with zero in volume, ASP and contribution margin.

In the sales data extraction:

- Volumes are in ton
- Prices are in invoice currency/ton
- Margins are in %
- Margins are in euro (not available in Analytics in currency but can be recalculated)

The volumes in tons will be converted in Kilo pound automatically. The prices currency/t will be converted in currency/kilo pound automatically. The sales extraction corresponding to previous year sales will pre-fill Commercial Roadmap header only.

NB : before uploading sales in SFDC we have 3 pre-requisites :

- Sales have to be mapped with end use
- Sales have to be mapped with sales rep corresponding to active users in SFDC
- ABC customer classification has to be uploaded at ship to level in SFDC.

3.1.1.2 Pre-fill current year

The Commercial Roadmap bottom-up will be done in June. Therefore, realized sales data will exist till May of current year. To pre-fill current year different rules exist depending on GBUs:

- Spe Chem : 5 first months with sales data + 7 months with APO forecast
- Peroxides : 5 first months with sales data + 7 months extrapolated
- Soda Ash : 5 first months with sales data + 7 months with DynaSys forecast

- EP : 5 first months with sales data + 7 months with APO
- Novocare : 5 first months with sales data + 7 months with BFR03

3.1.1.2.1 Sales data to pre-fill current year (5 months) GBU : Spe Chem, Soda Ash, EP, Novocare, Peroxides

For current year, first we will pre-fill the 5 first months with sales and after we will add the 7 others months with forecast or BFR or extrapolation data.

Sales will be uploaded from Analytics using a different object than the previous year data because for current year the data will be extracted with a month granularity.

If a new combination (ship to/product/end-use) exists in the sales extraction corresponding to an existing product & and existing account in SFDC we will create a new Commercial Roadmap Header (PY pre-filled with zero, current year pre-filled with sales) and 6 lines of details (current year updated with sales data, all others lines pre-filled with zero).

If the combination already exists in the Commercial Roadmap Header we'll update the Commercial Roadmap data (current year in the detail object)

5 first month of Current sales will pre-fill the Commercial Roadmap Header in the first step:

- Sales volume CY (T) = sum (volume 01+volume 02+volume 03+ volume 04 + volume 05)
- Sales volume CY (KP) = sum (volume 01+volume 02+volume 03+ volume 04 + volume 05) * conversion rate
- Sales Average price CY currency/t = sum ((volume 01* ASP currency/t 01) + ((volume 02* ASP currency/t 02)+ ((volume 03* ASP currency/t 03) + ((volume 04* ASP currency/t 04) + ((volume 05* ASP currency/t 05)) / (volume 01 + volume 02+volume 03+ volume 04 + volume 05)
- Sales Average price CY currency/kp = Sales Average price CY currency/t/ conversion rate
- Sales Contribution margin CY % = sum ((volume 01* ASP currency/t 01) + ((volume 02* ASP currency/t 02)+ ((volume 03* ASP currency/t 03) + ((volume 04* ASP currency/t 04) + ((volume 05* ASP currency/t 05)) / (Margin currency 01 + Margin currency 02+ Margin currency 03+ Margin currency 04 + Margin currency 05).

Current sales will pre-fill the Commercial Roadmap detail corresponding to the current year:

Current year data are aggregated by quarter in the Commercial Roadmap detail:

- Initial volume Q1 in t = sum (volume 01+volume 02+volume 03)
- Initial volume Q1 in KP = sum (volume 01+volume 02+volume 03)* conversion rate
- Initial ASP Q1 currency/t = sum ((volume 01* ASP currency/t 01) + ((volume 02* ASP currency/t 02)+ ((volume 03* ASP currency/t 03)) / (volume 01+volume 02+ volume 03)
- Initial ASP Q1 currency/kp = Initial ASP Q1 currency/t / conversion rate
- Initial ASP ex works Q1 currency/t = sum ((volume 01* ASP ex works currency/t 01) + ((volume 02* ASP ex works currency/t 02)+ ((volume 03* ASP ex works currency/t 03)) / (volume 01+volume 02+ volume 03)
- Initial ASP ex works Q1 currency/kp = Initial ASP ex works Q1 currency/t / conversion rate
- Initial CM Q1 % = sum ((volume 01* ASP currency/t 01) + ((volume 02* ASP currency/t 02)+ ((volume 03* ASP currency/t 03)) / (Margin currency 01 + Margin currency 02+ Margin currency 03)
- Initial volume Q2 in t = sum (volume 04+volume 05)
- Initial volume Q2 in KP = sum (volume 04+volume 05)* conversion rate
- Initial ASP Q2 currency/t = sum ((volume 04* ASP currency/t 04) + ((volume 05* ASP currency/t 05)) / (volume 04+volume 05)
- Initial ASP Q2 currency/kp = Initial ASP Q2 currency/t / conversion rate
- Initial ASP ex works Q2 currency/t = sum ((volume 04* ASP ex works currency/t 04) + ((volume 05* ASP ex works currency/t 05)) / (volume 04+volume 05+)
- Initial ASP ex works Q2 currency/kp = Initial ASP ex works Q2 currency/t / conversion rate
- Initial CM Q2 % = sum ((volume 04* ASP currency/t 04) + ((volume 05* ASP currency/t 05)) / (Margin currency 04 + Margin currency 05)

All the fields "updated" will be pre-filled with the same rules. If the sales rep want to change June he will modify the complete quarter value.

3.1.1.2.2 APO data to pre-fill current year (7 last months of the current year) : GBU Spe Chem, EP

The forecast are done at material level. APO will send material code and before uploading data we have to search the product level 4 corresponding to the material. All lines will be aggregated at product level 4 before their upload in [Salesforce.com](https://www.salesforce.com).

If a new combination exists in the APO extraction (not already existing in sales data) corresponding to an existing product & and existing account we will create a new Commercial Roadmap Header (As APO doesn't have the end use, the end-use will be blank in the Commercial Roadmap Data and sales rep will have to complete it, PY year pre-filled with 0), we'll also create 6 lines in the Commercial Roadmap details objects (current year with APO data, all others years pre-filled with zero).

If the combination customer/product already exists in the Commercial Roadmap Header, we'll update the Commercial Roadmap data to complete them with APO data (current year detail).

APO extraction will contain dummy account & dummy product corresponding to growth business. We will not upload these data in the Commercial Roadmap.

APO data will allow to pre-fill 7 months of the current year in volume in the Commercial roadmap detail object. The APO forecast will not pre-fill the Commercial Roadmap Header object.

To pre-fill the current year detail will we use the formulas below:

To complete the second quarter with month 06 in a second step:

- Initial volume Q2 in t = initial volume Q2 in t +volume 06 CY
- Initial volume Q2 in KP = Initial volume Q2 in t * conversion rate
- Initial ASP Q2 currency/t = initial ASP Q2 currency/t
- Initial ASP Q2 currency/kp = initial ASP Q2 currency/t/ conversion rate

- Initial ASP ex works Q2 currency/t = Initial ASP ex works Q2 currency/t
- Initial ASP ex works Q2 currency/kp = Initial ASP ex works Q2 currency/kp
- Initial CM Q2 % = Initial CM Q2 %

To fill the third and fourth quarter:

- Initial volume Q3 in t = volume 07 CY + volume 08 CY + volume 09 CY
- Initial volume Q3 in KP = (volume 07 CY + volume 08 CY + volume 09 CY) * conversion rate
- Initial ASP Q3 currency/t = (Initial volume Q1 in t* Initial ASP Q1 currency/t + Initial volume Q2 in t* Initial ASP Q2 currency/t) / (Initial volume Q1 in t + Initial volume Q2 in t)
- Initial ASP Q3 currency/kp = initial ASP Q3 currency/t* conversion rate
- Initial ASP ex works Q3 currency/t = (Initial volume Q1 in t* Initial ASP ex works Q1 currency/t + Initial volume Q2 in t* Initial ASP ex works Q2 currency/t) / (Initial volume Q1 in t + Initial volume Q2 in t)
- Initial ASP ex works Q3 currency/kp = Initial ASP ex works Q3 currency/t * conversion rate
- Initial CM Q3% = initial CM Q2%
- Initial volume Q4 in t = volume 10 CY + volume 11 CY + volume 12 CY
- Initial volume Q4 in KP = (volume 10 CY + volume 11 CY + volume 12 CY) * conversion rate
- Initial ASP Q4 currency/t = (Initial volume Q1 in t* Initial ASP Q1 currency/t + Initial volume Q2 in t* Initial ASP Q2 currency/t) / (Initial volume Q1 in t + Initial volume Q2 in t)
- Initial ASP Q4 currency/kp = initial ASP Q2 currency/t* conversion rate
- Initial ASP ex works Q4 currency/t = (Initial volume Q1 in t* Initial ASP ex works Q1 currency/t + Initial volume Q2 in t* Initial ASP ex works Q2 currency/t) / (Initial volume Q1 in t + Initial volume Q2 in t)
- Initial ASP ex works Q4 currency/kp = Initial ASP ex works Q4 currency/t * conversion rate
- Initial CM Q4% = initial CM Q2%

All the fields updated will be pre-filled with the same rules.

New rules to manage exceptions:

If Initial volume Q1 in t = 0 and Initial Volume Q2 = 0 and all APO data = 0

Do not extrapolate Y+1, Y+2, Y+3, Y+4, Y+5 with previous year all lines will be empty.

If Initial volume Q1 in t = 0 and Initial Volume Q2 = 0 and no lines exists in APO file

Do not extrapolate Y+1, Y+2, Y+3, Y+4, Y+5 with previous year all lines will be empty.

If Initial volume Q1 in t <> 0 or Initial Volume Q2 <> 0 and no lines exists in APO file

Extrapolate Y+1, Q3 with the following rules:

- Initial volume Q3 in t = (Initial volume Q1 in t + Initial volume Q2 in t)/5*3
- Initial volume Q3 in KP = Initial volume Q3 in t * conversion rate
- Initial ASP Q3 currency/t = (Initial volume Q1 in t* Initial ASP Q1 currency/t + Initial volume Q2 in t* Initial ASP Q2 currency/t) / (Initial volume Q1 in t + Initial volume Q2 in t)
- Initial ASP Q3 currency/kp = initial ASP Q3 currency/t/ conversion rate
- Initial ASP ex works Q3 currency/t = (Initial volume Q1 in t* Initial ASP ex works Q1 currency/t + Initial volume Q2 in t* Initial ASP ex works Q2 currency/t) / (Initial volume Q1 in t + Initial volume Q2 in t)
- Initial ASP ex works Q3 currency/kp = Initial ASP ex works Q3 currency/t / conversion rate

Extrapolate Y+1, Q4 with the following rule:

- Initial volume Q4 in t = (Initial volume Q1 in t + Initial volume Q2 in t)/5*3
- Initial volume Q4 in KP = Initial volume Q3 in t * conversion rate
- Initial ASP Q4 currency/t = (Initial volume Q1 in t* Initial ASP Q1 currency/t + Initial volume Q2 in t* Initial ASP Q2 currency/t) / (Initial volume Q1 in t + Initial volume Q2 in t)
- Initial ASP Q4 currency/kp = initial ASP Q4 currency/t/ conversion rate
- Initial ASP ex works Q4 currency/t = (Initial volume Q1 in t* Initial ASP ex works Q1 currency/t + Initial volume Q2 in t* Initial ASP ex works Q2 currency/t) / (Initial volume Q1 in t + Initial volume Q2 in t)
- Initial ASP ex works Q4 currency/kp = Initial ASP ex works Q4 currency/t / conversion rate

If Initial volume Q1 in t <> 0 and Initial Volume Q2 <> 0 and all APO data = 0. Do not extrapolate Y+1, Y+2, Y+3, Y+4, Y+5 with previous year all lines will be empty.

3.1.1.2.3 Extrapolation to pre-fill Current year data, GBU : Peroxides

As the BFR03 file contains aggregated data we cannot use this file to fill current year data. Peroxides has decided to extrapolate sales data to complete Current year data .

The extrapolation will not update the Commercial Roadmap Header:

The extrapolation will pre-fill the Commercial Roadmap detail corresponding to the current year:

To complete the second quarter:

- Initial volume Q2 in t = initial volume Q2 in t + 1/2 initial volume Q2 in t

- Initial volume Q2 in KP = Initial volume Q2 in t * conversion rate
- Initial ASP Q2 currency/t = initial ASP Q2 currency/t
- Initial ASP Q2 currency/kp = initial ASP Q2 currency/t* conversion rate
- Initial ASP ex works Q2 currency/t = Initial ASP ex works Q2 currency/t
- Initial ASP ex works Q2 currency/kp = Initial ASP ex works Q2 currency/kp
- Initial CM Q2 % = Initial CM Q2 %

To fill the third and fourth quarter:

- Initial volume Q3 in t = Volume (Previous Year) / 4 * growth coefficient Current year^[1]
- Initial volume Q3 in KP = Initial volume Q3 in t * conversion rate
- Initial ASP Q3 currency/t = initial ASP Q2 currency/t
- Initial ASP Q3 currency/kp = initial ASP Q3 currency/t* conversion rate
- Initial volume Q4 in t = Volume (Previous Year) / 4 * growth coefficient Current year¹
- Initial volume Q4 in KP = Initial volume Q4 in t * conversion rate
- Initial ASP Q4 currency/t = initial ASP Q2 currency/t
- Initial ASP Q4 currency/kp = initial ASP Q4 currency/t* conversion rate

3.1.1.2.4 BFR03 data to pre-fill Current year data, GBU : Novocare

BFR03 file contains the following granularity and the following metrics:

- Customer : ship to level
- Product : material level
- Volume in kg by month
- Price in currency/kg by month
- Margins in currency

Before uploading data in the Commercial Roadmap will have to aggregated data by product level 4. We'll have to transform all volumes in KG in ton by dividing by 1000. We'll have also to transform lines in columns.

BFR03 extraction will contain dummy account & dummy product corresponding to growth business. We will not include data corresponding to dummy product or dummy customer.

For BFR03, if the dummy product doesn't exist in SAP it will be not included in the Commercial Roadmap and a list will be sent to CRM Champion. For opportunities all lines will be included even if dummy product.

If the combination customer/product already exists in the commercial roadmap header we'll update the data (in the commercial roadmap details current year).

If a new combination exists in the BFR03 extraction not corresponding to a combination already existing in the sales, we will create a new Commercial Roadmap Header and 6 new lines in the Commercial Roadmap details. If the account doesn't exist in SFDC we will not create an header in the Commercial Roadmap header.

If the material doesn't exist or doesn't correspond to a standard product we will not create a header in the Commercial Roadmap header. When lines are rejected during the upload process, the data manager will send all lines with errors to CRM Champion for information.

To complete the second quarter:

- Initial volume Q2 in t = initial volume Q2 in t + June Volume BFR03
- Initial volume Q2 in KP = Initial volume Q2 in t * conversion rate
- Initial ASP Q2 currency/t = initial ASP Q2 currency/t
- Initial ASP Q2 currency/kp = initial ASP Q2 currency/t* conversion rate
- Initial ASP ex works Q2 currency/t = Initial ASP ex works Q2 currency/t
- Initial ASP ex works Q2 currency/kp = Initial ASP ex works Q2 currency/kp
- Initial CM Q2 % = Initial CM Q2 %

To fill the third and fourth quarter:

- Initial volume Q3 in t = July Volume BFR03 + August Volume BFR03 + September Volume BFR 03
- Initial volume Q3 in KP = Initial volume Q3 in t * conversion rate
- Initial ASP Q3 currency/t = (July sales BFR03 + August sales BFR03 + September sales BFR 03)/(July Volume BFR03 + August Volume BFR03 + September Volume BFR 03)
- Initial ASP Q3 currency/kp = initial ASP Q3 currency/t* conversion rate
- Initial volume Q4 in t = October Volume BFR03 + November Volume BFR03 + December Volume BFR 03
- Initial volume Q4 in KP = Initial volume Q4 in t * conversion rate
- Initial ASP Q4 currency/t = (October sales BFR03 + November sales BFR03 + December sales BFR 03)/(October Volume BFR03 + November Volume BFR03 + December Volume BFR 03)
- Initial ASP Q4 currency/kp = initial ASP Q4 currency/t* conversion rate

3.1.1.2.5 DynaSys data to pre-fill current year GBU : Soda Ash

The forecast are done at material level. DynaSys will aggregate data at product level 4 before sending the file.

The volumes are in kg. The ASP are in currency/kg. All volumes will be converted in tons before their upload. All prices will be converted in currency/t before their upload.

DynaSys extraction will contain prospect account & dummy product corresponding to growth business. We will not include these data in the Commercial Roadmap.

If a new combination exists in the DynaSys extraction (not already existing in the sales data extraction) corresponding to an existing product & and existing account we will create a new Commercial Roadmap Header and 6 lines in the Commercial Roadmap detail (current year with DynaSys data, all others years pre-filled with zero). If the account doesn't exist in SFDC we will not create a header in the Commercial Roadmap header.

If the product level 4 doesn't exist we will not create a header in the Commercial Roadmap header. If the combination customer/product already exists in the Commercial roadmap we'll update data (commercial Roadmap details current year).

DynaSys data will allow to pre-fill 7 months of the current year in volume and price in the Commercial roadmap detail object. The DynaSys forecast will not pre-fill the Commercial Roadmap Header object.

To pre-fill the current year detail will we use the formulas below:

To complete the second quarter:

- Initial volume Q2 in t = initial volume Q2 in t + volume 06 CY in t
- Initial volume Q2 in KP = Initial volume Q2 in t * conversion rate
- Initial ASP Q2 currency/t = initial ASP Q2 currency/t
- Initial ASP Q2 currency/kp = initial ASP Q2 currency/t * conversion rate
- Initial ASP ex works Q2 currency/t = Initial ASP ex works Q2 currency/t
- Initial ASP ex works Q2 currency/kp = Initial ASP ex works Q2 currency/kp
- Initial CM Q2 % = Initial CM Q2 %

To fill the third and fourth quarter:

- Initial volume Q3 in t = volume 07 CY + volume 08 CY + volume 09 CY
- Initial volume Q3 in KP = (volume 07 CY + volume 08 CY + volume 09 CY) * conversion rate
- Initial ASP Q3 currency/t = (volume 07 CY in t* ASP 07 CY currency/t + volume 08 CY in t* ASP 08 CY currency/t + volume 09 CY in t* ASP 09 CY currency/t) / (volume 07 CY + volume 08 CY + volume 09 CY)
- Initial ASP Q3 currency/kp = initial ASP Q3 currency/t * conversion rate
- Initial ASP ex works Q3 currency/t = (volume 07 CY in t* ASP ex-works 07 CY currency/t + volume 08 CY in t* ASP ex works 08 CY currency/t + volume 09 CY in t* ASP ex-works 09 CY currency/t) / (volume 07 CY + volume 08 CY + volume 09 CY)
- Initial ASP ex works Q3 currency/kp = Initial ASP ex works Q3 currency/t * conversion rate
- Initial CM Q3% = initial CM Q2%
- Initial volume Q4 in t = volume 10 CY + volume 11 CY + volume 12 CY
- Initial volume Q4 in KP = (volume 10 CY + volume 11 CY + volume 12 CY) * conversion rate
- Initial ASP Q4 currency/t = (volume 10 CY in t* ASP 10 CY currency/t + volume 11 CY in t* ASP 11 CY currency/t + volume 12 CY in t* ASP 12 CY currency/t) / (volume 10 CY + volume 11 CY + volume 12 CY)
- Initial ASP Q4 currency/kp = Initial ASP Q4 currency/t * conversion rate
- Initial ASP ex works Q4 currency/t = (volume 10 CY in t* ASP ex-works 10 CY currency/t + volume 11 CY in t* ASP ex works 11 CY currency/t + volume 12 CY in t* ASP ex-works 12 CY currency/t) / (volume 10 CY + volume 11 CY + volume 12 CY)
- Initial ASP ex works Q4 currency/kp = Initial ASP ex works Q4 currency/t * conversion rate
- Initial CM Q4% = initial CM Q2%

All the fields updated will be pre-filled with the same rules. The different fields corresponding to upload DynaSys forecast, are described in the Excel sheet: Solvay –Salesforce objects Commercial Roadmap.

3.1.1.2.6 Price exception for BU Catalyst GBU SpecChem

For the current year (month 06 to 12), prices will be extrapolated but an upload will override the prices. Catalyst Finance will complete an Excel sheet based on an extraction of [Salesforce.com](https://www.salesforce.com) Commercial Roadmap detail lines.

This extraction will contain the following data:

- Id
- Ship to code
- Product level 4
- Product level 3
- Year
- Sold to code
- Sold to country
- Corporate account
- Currency
- ASP extrapolated in currency/T

3.1.1.3 Pre-fill Y+1

To pre-fill year Y+1 different rules exist depending on GBUs:

- Spe Chem : 12 months extrapolated (for B & C customers, A remains empty)
- Peroxides : 12 months extrapolated (for B & C customers, A remains empty)
- Soda Ash : 12 months with DynaSys forecast (all customers)
- EP : 12 months with APO forecast (all customers)
- Novocare : 12 months extrapolated (for B & C customers, A remains empty)

3.1.1.3.1 Extrapolation rules (12 months) GBUs: Spe Chem, Peroxides & Novocare

We will pre-fill Y+1 data in the Commercial Roadmap Detail Objet with the following rules:

If the customer has a customer classification = A : the lines will not be pre-filled.

If the customer has a customer classification = B,C or blank the lines will be pre-filled.

- Initial volume Q1 in t = Current year Initial volume Q1 in t * Y+1 market growth coefficient [2]
- Initial volume Q1 in KP = Initial volume Q1 in t * conversion rate
- Initial ASP Q1 currency/t = Current year Initial ASP Q1 currency/t * Y+1 cost inflation[3] * Y+1 raw material cost evolution[4]
- Initial ASP Q1 currency/kp = Initial ASP Q1 currency/t * conversion rate
- Initial ASP ex works Q1 currency/t = Current year Initial ASP ex works Q1 currency/t * Y+1 cost inflation³ * Y+1 raw material cost evolution⁴
- Initial ASP ex works Q1 currency/kp = Initial ASP ex works Q1 currency/t * conversion rate
- Initial CM Q1 = current year Initial CM Q1

The same rules will be applied to all quarters:

- we extrapolate Y+1 Q2 with data coming from Current Year Q2 data
- we extrapolate Y+1 Q3 with data coming from Current Year Q3 data
- we extrapolate Y+1 Q4 with data coming from Current Year Q4 data

An help text, will define the :

- Market Growth coefficient
- Cost inflation
- Raw material inflation

3.1.1.3.2 APO data to pre-fill Y+1 : GBU EP

The forecast are done at material level. APO will send material code and before uploading data we have to search the product level 4 corresponding to the material. All lines will be aggregated at product level 4 before their upload in [Salesforce.com](https://www.salesforce.com).

For EP the Y+1 year is not by quarter but directly by year.

All volumes will be converted in tons before their upload.

If a new combination exists in the APO extraction (not already existing in sales data) corresponding to an existing product & and existing account we will create a new Commercial Roadmap Header (As APO doesn't have the end use, the end-use will be blank in the Commercial Roadmap Data and sales rep will have to complete it, PY year pre-filled with 0), we'll also create 6 lines in the Commercial Roadmap details objects (Y+1 with APO data, all others years pre-filled with zero).

If the combination customer/product already exists in the Commercial Roadmap Header, we'll update the Commercial Roadmap data to complete them with APO data (current year detail).

APO extraction will contain dummy account & dummy product corresponding to growth business. We will not upload these data in the Commercial Roadmap.

We will have the end-use corresponding to current Year sales. It is problematic only for new combinations not existing in sales but existing in APO (we will not have the corresponding end-use).

In this case Sales rep could complete the end use directly in the Commercial Roadmap

APO data will allow to pre-fill 12 months of the Y+1 year in volume in the Commercial roadmap detail object. The APO forecast will not pre-fill the Commercial Roadmap Header object.

To pre-fill the Y+1

detail will we use the formulas below:

To complete the year:

- Initial volume Y+1 in t = volume 01 Y+1 + volume 02 Y+1 + volume 03 Y+1 + volume 04 Y+1 + volume 05 Y+1 + volume 06 Y+1 + volume 07 Y+1 + volume 08 Y+1 + volume 09 Y+1 + volume 10 Y+1 + volume 11 Y+1 + volume 12 Y+1
- Initial volume Y+1 in KP = Initial volume Y+1 in t * conversion rate
- Initial ASP Y+1 currency/t = Sales average CY currency/t * cost inflation⁽²⁾ * raw material cost evolution⁽³⁾

- Initial ASP Y+1 currency/kp = initial ASP Y+1 currency/t* conversion rate
- Initial CM Y+1 % = Sales Contribution Margin CY %

All the fields updated will be pre-filled with the same rules. The different fields corresponding to upload APO forecast, are described in the Excel sheet: Solvay –Salesforce objects Commercial Roadmap.

3.1.1.3.3 DynaSys data to pre-fill year Y+1 GBU : Soda Ash

The forecast are done at material level. DynaSys will aggregate data at product level 4 before sending the file.

The volumes are in kg. The ASP are in currency/kg.

All volumes will be converted in tons before their upload. All prices will be converted in currency/t before their upload.

DynaSys extraction will contain prospect account & dummy product corresponding to growth business. We will not include these data in the Commercial Roadmap.

If a new combination exists in the DynaSys extraction (not already existing in the sales data extraction) corresponding to an existing product & and existing account we will create a new Commercial Roadmap Header and 6 lines in the Commercial Roadmap detail (Y+1 year with DynaSys data, all others years pre-filled with zero). If the account doesn't exist in SFDC we will not create a header in the Commercial Roadmap header.

If the product level 4 doesn't exist we will not create a header in the Commercial Roadmap header.

If the combination customer/product already exists in the Commercial roadmap we'll update data (commercial Roadmap details current year)

DynaSys data will allow to pre-fill 12 months of the Y+1 year in volume and price in the Commercial roadmap detail object.

To pre-fill the Y+1 year detail we will use the formulas below:

To complete the first quarter:

- Initial volume Q1 in t = volume 01 Y+1 + volume 02 Y+1 + volume 03 Y+1
- Initial volume Q1 in KP = Initial volume Q1 in t * conversion rate
- Initial ASP Q1 currency/t = (volume 01 Y+1 in t* ASP 01 Y+1 currency/t + volume 02 Y+1 in t* ASP 02 Y+1 currency/t + volume 03 Y+1 in t* ASP 03 Y+1 currency/t) / (volume 01 Y+1 + volume 02 Y+1 + volume 03 Y+1)
- Initial ASP Q1 currency/kp = initial ASP Q1 currency/t* conversion rate
- Initial ASP ex works Q1 currency/t = (volume 01 Y+1 in t* ASP ex-works 01 Y+1 currency/t + volume 02 Y+1 in t* ASP ex-works 02 Y+1 currency/t + volume 03 Y+1 in t* ASP ex-works 03 Y+1 currency/t) / (volume 01 Y+1 + volume 02 Y+1 + volume 03 Y+1)
- Initial ASP ex works Q1 currency/kp = Initial ASP ex works Q1 currency/t * conversion rate
- Initial CM Q1 % = Initial CM CY Q1 %

To complete the second quarter:

- Initial volume Q2 in t = volume 04 Y+1 + volume 05 Y+1 + volume 06 Y+1
- Initial volume Q2 in KP = Initial volume Q2 in t * conversion rate
- Initial ASP Q2 currency/t = (volume 04 Y+1 in t* ASP 04 Y+1 currency/t + volume 05 Y+1 in t* ASP 05 Y+1 currency/t + volume 06 Y+1 in t* ASP 06 Y+1 currency/t) / (volume 04 Y+1 + volume 05 Y+1 + volume 06 Y+1)
- Initial ASP Q2 currency/kp = initial ASP Q2 currency/t* conversion rate
- Initial ASP ex works Q2 currency/t = (volume 04 Y+1 in t* ASP ex-works 04 Y+1 currency/t + volume 05 Y+1 in t* ASP ex-works 05 Y+1 currency/t + volume 06 Y+1 in t* ASP ex-works 06 Y+1 currency/t) / (volume 04 Y+1 + volume 05 Y+1 + volume 06 Y+1)
- Initial ASP ex works Q2 currency/kp = Initial ASP ex works Q2 currency/t * conversion rate
- Initial CM Q2 % = Initial CM CY Q2 %

To fill the third quarter:

- Initial volume Q3 in t = volume 07 Y+1 + volume 08 Y+1 + volume 09 Y+1
- Initial volume Q3 in KP = Initial volume Q3 in t * conversion rate
- Initial ASP Q3 currency/t = (volume 07 Y+1 in t* ASP 07 Y+1 currency/t + volume 08 Y+1 in t* ASP 08 Y+1 currency/t + volume 09 Y+1 in t* ASP 09 Y+1 currency/t) / (volume 07 Y+1 + volume 08 Y+1 + volume 09 Y+1)
- Initial ASP Q3 currency/kp = initial ASP Q3 currency/t* conversion rate
- Initial ASP ex works Q3 currency/t = (volume 07 Y+1 in t* ASP ex-works 07 Y+1 currency/t + volume 08 Y+1 in t* ASP ex-works 08 Y+1 currency/t + volume 09 Y+1 in t* ASP ex-works 09 Y+1 currency/t) / (volume 07 Y+1 + volume 08 Y+1 + volume 09 Y+1)
- Initial ASP ex works Q3 currency/kp = Initial ASP ex works Q3 currency/t * conversion rate
- Initial CM Q3 % = Initial CM CY Q3 %

To fill the fourth quarter:

- Initial volume Q4 in t = volume 10 Y+1 + volume 11 Y+1 + volume 12 Y+1
- Initial volume Q4 in KP = Initial volume Q4 in t * conversion rate
- Initial ASP Q4 currency/t = (volume 10 Y+1 in t* ASP 10 Y+1 currency/t + volume 11 Y+1 in t* ASP 11 Y+1 currency/t + volume 12 Y+1 in t* ASP 12 Y+1 currency/t) / (volume 10 Y+1 + volume 11 Y+1 + volume 12 Y+1)
- Initial ASP Q4 currency/kp = initial ASP Q4 currency/t* conversion rate
- Initial ASP ex works Q4 currency/t = (volume 10 Y+1 in t* ASP ex-works 10 Y+1 currency/t + volume 11 Y+1 in t* ASP ex-works 11 Y+1 currency /t + volume 12 Y+1 in t* ASP ex-works 12 Y+1 currency/t) / (volume 10 Y+1 + volume 11 Y+1 + volume 12 Y+1)
- Initial ASP ex works Q4 currency/kp = Initial ASP ex works Q4 currency/t * conversion rate
- Initial CM Q4 % = Initial CM CY Q4 %

3.1.1.4 Pre-fill Y+2, Y+3, Y+4, Y+5

To pre-fill the following years different rules exist depending on GBUs:

- Spe Chem, Peroxides, Novecare, Soda Ash : 12 months extrapolated (for B & C customers, A remains empty)
- EP : 12 months extrapolated (all customers)

We will pre-fill Y+2, Y+3, Y+4, Y+5 data in the Commercial Roadmap Detail Objet with the following rules for Spe Chem, Peroxides, Novecare, Soda Ash:

If the customer has a customer classification = A : the lines will not be pre-filled.

If the customer has a customer classification = B, C or blank the lines will be pre-filled.

We will pre-fill Y+2, Y+3, Y+4, Y+5 data in the Commercial Roadmap Detail Objet with the following rules for EP: all lines are pre-filled

Common rules for all GBUs

- Initial volume Y+2 in t Y+2 = Initial volume Y+1 in t * Y+2 market growth coefficient ⁽²⁾
- Initial volume Y+2 in KP = Initial volume Y+2 in t Y+2 * conversion rate
- Initial ASP Y+2 currency/t = Initial ASP Y+1 currency/* Y+2 cost inflation⁽³⁾ * Y+2 raw material cost evolution⁽³⁾
- Initial ASP Y+2 currency/kp = Initial ASP Y+2 currency/t * conversion rate
- Initial ASP ex works Y+2 currency/t = Initial ASP ex works Y+1 currency/t * Y+2 cost inflation⁽³⁾ * Y+2 raw material cost evolution⁽⁴⁾
- Initial ASP ex works Y+2 currency/kp = Initial ASP ex works Y+2 currency/t * conversion rate
- Initial CM Y+2 = Initial CM Y+1

The same rules will be applied to all years:

- we extrapolate Y+3 with data coming from Y+2 data
- we extrapolate Y+4 with data coming from Y+3 data
- we extrapolate Y+5 with data coming from Y+4 data

3.1.1.5 Common rules to pre-fill all lines

Sales are calculated by the tool : Volume in t*ASP in currency/t

The currency will correspond to the invoicing currency

The exchange rate for will follow the rules below :

- For previous year : one exchange rate for all the year (average one)
- For current year :
 - For Rhodia legacy the exchange rate is different month by month
 - For Solvay Legacy the exchange rate is the average of the last monthly exchange rate of the current year, for instance for March the exchange rate is the average of the exchange rates of January, February and March).
 - For year Y+1, Y+2... one budget rate by year.

The commercial roadmap will be at the ship to granularity. It will be possible to report on the sold to account. The commercial roadmap will be at the product level 4 granularity.

3.1.1.6 Industrial origin updated : exception for Spe Chem

Spe Chem would like to update in mass Y+1 industrial origin in the Commercial Roadmap data. Industrial origin is pre-filled with the extract of sales data. We propose to extract in an Excel sheet data with a report. The report will contain Commercial Roadmap ID. The finance & supply chain will update the industrial origin of each lines. Data team will proceed to upload the data updated in the Commercial Roadmap.

3.1.1.7 Extrapolation table

A new custom object will store in the system all extrapolation parameters. It's possible to create a record directly in the object and it will be possible to upload all the parameters from a GBU directly in the system. For the 3 extrapolation parameters, each GBU will update an Excel sheet template, and SBS data team will upload this template in the tool once a year. Each year, all these parameters can be modified.

The mandatory fields are listed below:

- Year
- GBU
- Region

Others fields are optional:

- Segment
- GBU segment
- GBU region
- BU
- Product level 3
- RT 15 : product level 2

These coefficients will be managed by the GBU commercial excellence team (CRM Champion).

3.1.2 Initialize data for the growth business during the Commercial Roadmap initializing period

For the growth business, we'll create Commercial Roadmap Headers corresponding to all growth opportunities opened or closed with a first delivery date >= May the first (current year).

The growth opportunities correspond to two different record types:

- Product qualified
- Product requiring qualification

The opportunities are created at sold to level and not ship to level. The ship to will be not be filled in the commercial roadmap header for growth business. We'll create one line in the Commercial Roadmap header for sold to/ product level 4 combinations during the initializing phase.

3.1.2.1 Initializing growth business data for Commercial Roadmap header

The data will be updated with the following mapping rules:

- Origin = "Opportunity"
- Account Name sold to = opportunity sold to
- Account name ship to = blank
- ship to city = blank
- ship to country = blank
- GBU = opportunity GBU
- Product level 4 name = opportunity product
- Product level 3 name = product Level 3 corresponding in the hierarchy to opportunity product
- Market corporate = corporate market corresponding to opportunity end use
- Region = sold to region
- Segment corporate = corporate segment corresponding to opportunity end use
- Customer classification = customer classification in the customer segmentation for the GBU for the sold to
- Sales volume PY (T) = 0
- Sales volume PY (KP) = 0
- Sales volume CY (T) = 0
- Sales volume CY (KP) = 0
- Sales Average price CY currency/t = 0
- Sales Average price CY currency/kp = 0
- Sales Average price ex-works CY currency/t = 0
- Sales Average price ex works CY currency/kp = 0
- Sales Contribution margin CY = 0
- Owner = opportunity owner
- end use = opportunity end use
- Group of activity = blank
- Sub activity = blank
- GBU region = GBU region in the customer segmentation for the GBU for the sold to
- Corporate account = sold to corporate account
- Customer sub-type = Customer sub-type in the customer segmentation for the GBU for the sold to
- Plant = blank
- Company = blank
- To include in the CR = "Yes"
- RT17 : Target first delivery date

3.1.2.2 Initializing growth business data for Commercial Roadmap detail

In the Commercial Roadmap we manage only ton and kilo-pound as unit of measure.

If the opportunities are created with another unit of measure we'll need a conversion table between the different units of measure. Currently this conversion table doesn't exist in SFDC. We strongly recommend creating growth opportunity in ton or kilo pound to simplify the process. We will create a message box in the Opportunity saying "For reporting purpose, please provide volumes in Tons or Kilo Pounds".

If the opportunity is created in Ton we fill the fields corresponding to ton (Volume & ASP by UOM) in the Commercial Roadmap and we calculate the fields in Kilo pounds. If the opportunity is created in kilo pound we fill the fields corresponding to Kilo Pound in the Commercial Roadmap and we calculate the fields in ton.

We have to map the Commercial Roadmap year detail with the opportunity business potential year. The business potential first year is based on the targeted first delivered date.

For the current year and the Y+1 year the commercial roadmap are displayed by quarters (except for EP : the data are displayed by year, we update the fields year). We'll have to divide the business potential volume depending on the quarter of the targeted first delivery date.

If the targeted first delivery date is included in the current year, the first year of the opportunity business potential will correspond to the Commercial roadmap current year detail.

For Current year, if the targeted first delivery date is included in first quarter of the year we will not include the potential as it should be already included in the sales extract.

For Current year, if the targeted first delivery date is included in second quarter of the year

- Initial volume Q1 in $t = 0$
- Initial ASP Q1 currency/ $t = 0$
- Initial CM Q1 = 0
- Initial volume Q2 in $t = \text{Opportunity business potential} / 3 * \% \text{probability}$
- Initial ASP Q1 currency/ $t = \text{Opportunity target unit price}$
- Initial CM Q1 = Opportunity Contribution margin in %

The same formula will be applied to quarters Q2, Q3 & Q4.

For Current year, if the targeted first delivery date is included in third quarter of the year

- Initial volume Q1 in $t = 0$
- Initial ASP Q1 currency/ $t = 0$
- Initial CM Q1 = 0
- Initial volume Q2 in $t = 0$
- Initial ASP Q2 currency/ $t = 0$
- Initial CM Q2 = 0
- Initial volume Q3 in $t = \text{Opportunity business potential} / 2 * \% \text{probability}$
- Initial ASP Q3 currency/ $t = \text{Opportunity target unit price}$
- Initial CM Q3 = Opportunity Contribution margin in %

The same formula will be applied to quarters Q3 & Q4.

For Current year, if the targeted first delivery date is included in fourth quarter of the year (except for EP, we update the fields year)

- Initial volume Q1 in $t = 0$
- Initial ASP Q1 currency/ $t = 0$
- Initial CM Q1 = 0
- Initial volume Q2 in $t = 0$
- Initial ASP Q2 currency/ $t = 0$
- Initial CM Q2 = 0
- Initial volume Q3 in $t = 0$
- Initial ASP Q3 currency/ $t = 0$
- Initial CM Q3 = 0
- Initial volume Q4 in $t = \text{Opportunity business potential} * \% \text{probability}$
- Initial ASP Q4 currency/ $t = \text{Opportunity target unit price}$
- Initial CM Q4 = Opportunity Contribution margin in %

For Y+1

- Initial volume Q1 in $t = \text{Opportunity business potential} / 4 * \% \text{probability}$
- Initial ASP Q1 currency/ $t = \text{Opportunity target unit price}$
- Initial CM Q1 = Opportunity Contribution margin in %

The same formula will be applied to all quarters

For Y+2, Y+3, Y+4, Y+5

- Initial volume year in t = Opportunity business potential %probability
- Initial ASP year currency/t = Opportunity target unit price
- Initial CM year = Opportunity Contribution margin in %

All the fields "updated" will be pre-filled with the same rules.

- If the targeted first delivery date is included in the Y+1 year, the first year of the opportunity business potential corresponds to the Commercial roadmap Y+1 detail (current year will be filled with zero in volume and price). We'll apply the same rules than explained above. The current year will be filled with zero and the Y+1 quarter will be filled depending on the quarter of the targeted first delivery date.
- If the targeted first delivery date is included in the Y+2 year, the first year of the opportunity business potential corresponds to the Commercial roadmap Y+2 detail (current year and Y+1 year will be filled with zero in volume and price for all quarters).
- If the targeted first delivery date is included in the Y+3 year, the first year of the opportunity business potential corresponds to the Commercial roadmap Y+3 detail (current year and Y+1 and Y+2 years will be filled with zero in volume and price).
- If the targeted first delivery date is included in the Y+4 year, the first year of the opportunity business potential corresponds to the Commercial roadmap Y+4 detail (current year and Y+1 and Y+2 years and Y+3 will be filled with zero in volume and price).
- If the targeted first delivery date is included in the Y+5 year, the first year of the opportunity business potential corresponds to the Commercial roadmap Y+5 detail (current year and Y+1 and Y+2 years and Y+3 and Y+4 will be filled with zero in volume and price).

3.1.3 Synchronize Growth Opportunities and the Commercial Roadmap

During the initializing period we'll create Commercial Roadmap Header for existing growth opportunities, but sales rep will continue to create new opportunities during all the Commercial Roadmap process (June to September). They also close opportunities (won or lost) or update opportunities (product, probability, business potential...).

All these change have to be synchronized with the Commercial Roadmap from the initialization date until a date defined independently by all GBUs in the timeline object (End of opportunity Synchronization).

In the Commercial Roadmap sales rep or managers can change the business potential corresponding to an opportunity, these changes have to be replicated in the opportunity. The synchronization will be in two ways mode.

This synchronization will not be done in real time but a program will run every night to synchronize the data. If the sales rep wants to have an immediate synchronization a button will exist in the Commercial Roadmap to launch the synchronization in real time.

We will analyze all the different possibilities and their impact on the synchronization:

- Create a new opportunity
- Update an existing opportunity
- Change the business potential in the Commercial Roadmap Data

3.1.3.1 Create a new growth opportunity

If a new growth opportunity is created after the initializing period, we will create a commercial Roadmap header and new Commercial roadmap Details following the same rules than during the initializing period.

By default, all the new growth opportunities are included in the Commercial Roadmap (checkbox "to include in the Commercial Roadmap" is activated).

3.1.3.2 Update a growth opportunity

All the changes below will impact the synchronization:

- Add a new product
- Change a product
- Delete a product
- Change the status
- Change the Probability
- Change the business potential (volume or price or CM %)
- Change the Targeted delivery date
- Change the End Use

3.1.3.2.1 Add a new product in an existing opportunity

If a new product is added, we will create a commercial Roadmap header with the new combination: sold to/product and new Commercial roadmap Details following the same rules than during the initializing period.

3.1.3.2.2 Change a product in an existing opportunity

If a product is changed we have to change the Commercial Roadmap Header with the new product. If the new product corresponds to another product level 3 in the hierarchy we have to change the product level 3.

3.1.3.2.3 Delete a product in an existing opportunity

If a product line is deleted in an opportunity, the corresponding commercial roadmap header has to be deleted and all the Commercial Roadmap details have to be deleted. Delete a product is only possible in the opportunity process not in the Commercial Roadmap one. In Commercial roadmap you can uncheck a product. This will not delete the opportunity only exclude it from the Commercial Roadmap.

3.1.3.2.4 Change the status in the opportunity

If the status is changed to closed won : there is no impact on the Commercial Roadmap data.

If the status is changed to closed lost : the checkbox "to include in the Commercial Roadmap" is checked out and users cannot update the checkbox to check in this opportunity. The closed lost opportunities will appear greyed in the Commercial Roadmap Page layout.

Others change in the status have no impact in the Commercial Roadmap data.

3.1.3.2.5 Change the probability

If the probability is changed, the volumes in the Commercial Roadmap have to be updated with the following rule:

The fields initial will not be changed. We'll change the fields "updated" corresponding to volume.

For Current year and Y+1 we'll change the lines in kp or in tons corresponding to the unit of measure of the opportunity.

If the opportunity is in Ton :

- If updated volume Q1 in t > 0, updated volume Q1 in t = updated volume Q1 in t * new probability/old probability
- If updated volume Q1 in t = 0 no change to do

The same rules applies to all quarters.

If the opportunity is in kp :

- If updated volume Q1 in kpt > 0, updated volume Q1 in kp = updated volume Q1 in kp * new probability/old probability
- If updated volume Q1 in kp = 0 no change to do

The same rules applies to all quarters

For Y+2, Y+3, Y+4, Y+5

If the opportunity is in Ton :

- If updated volume year in t > 0, updated volume year1 in t = updated volume year1 in t * new probability/old probability
- If updated volume year in t = 0 no change to do

The same rules applies to all years

If the opportunity is in kp :

- If updated volume year in kpt > 0, updated volume year in kp = updated volume year in kp * new probability/old probability
- If updated volume year in kp = 0 no change to do

The same rules applies to all years.

3.1.3.2.6 Change the business potential in the opportunity

If the business potential is changed all the volumes, prices and contribution margins for all the years have to be reinitialized with zero in the Commercial Roadmap details data. The opportunity business potential data will update the Commercial Roadmap details data following the same rules than the creation of a product.

3.1.3.2.7 Change the targeted delivery date in the opportunity

If the targeted delivery date is changed all the volumes, prices and contribution margins for all the years have to be reinitialized with zero in the Commercial Roadmap details data. The opportunity business potential data will update the Commercial Roadmap details data following the same rules than the creation of a product.

3.1.3.2.8 Change the end use in the opportunity

If the end use is changed, the Commercial Roadmap Header has to be updated with the new end-use, the corporate market, corporate segment, GBU market and GBU segment have to be updated also.

3.1.3.3 Synchronization detailed process

During the initialization phase (creation of commercial roadmap corresponding to growth business), we will create a header and 6 lines of detail for each product in an opportunity.

In the detail lines, we will fill the initial & updated fields with the opportunity business potential.

If the opportunity changes as described below, we will synchronize:

- the updated fields during the period between 2 following dates: start of sales rep updates , end of sales rep updates
- the adjusted fields during the period between 2 following dates: start of managers adjustments , end of managers adjustments.

3.1.3.4 Change the business potential in the Commercial Roadmap Data

If the business potential is changed in the Commercial Roadmap, this change has to be replicated in the opportunity. A change in the volume, the price or the contribution margin will be replicated in the year corresponding to the business forecast.

To synchronized data we'll use year data and not quarter data because business potential is in year. A message will explain the synchronization process to Sales Rep.

3.2 Complete and update data

The process to complete and update data by sales representatives follows 3 steps:

- Sales representative completes A customer and reviews and/or updates B and C customers (for EP, they review and/or update all lines). RT 22: They see initial fields pre-filled for B/C customers and empty "initial" fields for A Customers, they update the fields named "updated volume", "updated ASP"...if needed
- Sales managers N+1, N+2 review the fields updated and ask adjustments where needed. RT 22: They see "updated" fields, they adjust the fields named "adjusted volume", "adjusted ASP"...if needed
- Others directors (Finance, Supply Chain, Marketing, etc.) review and can ask adjustments where needed

3.2.1 Sales rep Completes A customers and validates B and C customers

We will build a specific page layout allowing sales reps to complete and review/update their commercial roadmap data.

3.2.1.1 Introduction

The page layout will be divided in 5 parts:

- One part to filter data - (Yellow part in the example)
- A second part to display Commercial Roadmap header data recurrent business – (Green part in the example)
- A third part to display Commercial Roadmap details data Initial data/Updated data – (Blue Part in the example)
- A fourth part to display growth business header (purple Part in the example)
- A fifth part to display growth business details (purple Part in the example)

A button allows manually to synchronize the opportunities corresponding to the user connected

Example :

Filters possible

- Customer Classification
- Ship to
- Corporate Group
- Country
- Region
- Product
- Corporate Market
- Corporate Segment
- GBU Market
- GBU Segment
- Users

Opportunity	Ship To Name	Corporate Name	Corporate Group	Country	Region	Product	Corporate Market	Corporate Segment	GBU Market	GBU Segment	Users
1000	USA	ABC	XYZ	USA	North	Electronics	Consumer	Home	1000	1000	1000
1001	USA	ABC	XYZ	USA	North	Electronics	Consumer	Home	1001	1001	1001
1002	USA	ABC	XYZ	USA	North	Electronics	Consumer	Home	1002	1002	1002
1003	USA	ABC	XYZ	USA	North	Electronics	Consumer	Home	1003	1003	1003
1004	USA	ABC	XYZ	USA	North	Electronics	Consumer	Home	1004	1004	1004
1005	USA	ABC	XYZ	USA	North	Electronics	Consumer	Home	1005	1005	1005

Product Code	Product Name	Region	Corporate Group	Customer	Product Code	Product Name	Region	Corporate Group	Customer
1000	1000	1000	1000	1000	1000	1000	1000	1000	1000

Year	ASP Price	Volume	Unit of Measure	Contribution Margin	Year	ASP Price	Volume	Unit of Measure	Contribution Margin
2010	1000	1000	1000	1000	2011	1000	1000	1000	1000
2012	1000	1000	1000	1000	2013	1000	1000	1000	1000
2014	1000	1000	1000	1000	2015	1000	1000	1000	1000
2016	1000	1000	1000	1000	2017	1000	1000	1000	1000

This program will be available depending on dates defined in a custom object: Commercial Roadmap Timeline. Each GBUs will choose a date to start the process for sales rep to complete and review/update the data and a date to end the sales rep updates. This program will be available between these two dates.

If the sales rep tries to launch the program before the starting date or after the ending date a message will appear "The Commercial Roadmap process hasn't started" or "The Commercial Roadmap update process is finished, from now on it's only possible to make some adjustments".

3.2.1.2 The filters

Different filters allow to filter data in order to facilitate sales rep works.

The filters will be on the fields below:

- Customer classification (A or B or C)
- Ship to (a magnifying glass filters ship to account) : possibility to choose one ship to
- Corporate group : (a magnifying glass filters corporate account) : possibility to choose one corporate account
- Country : possibility to choose one country (ship to country)
- Region : possibility to choose one region in a picklist (ship to region)
- Product : possibility to choose one product level 4 (a magnifying glass filters product level 4)
- Corporate Market : possibility to choose one market (a magnifying glass filters market)
- Corporate Segment : possibility to choose one segment (a magnifying glass filters segment)
- GBU Market : possibility to choose one GBU market (a magnifying glass filters GBU market)
- GBU Segment : possibility to choose one GBU segment (a magnifying glass filters GBU segment)
- Owner : a magnifying glass on users (for managers only)
- Recurrent business / growth business

The filters will be the same for all GBUs. It is possible to use multiple filters simultaneously. If none records are selected a message will display "Check your filters, no data corresponding to yours filters".

For a sales rep we will display the lines for which he is the owner (based on the extraction of sales data). For managers we will display the lines corresponding to its GBU, he can select one user or multiple users from its GBUs.

NB : the teams's feature is not available for custom objects (to confirm). If not available, managers can review but not adjust via reports.

3.2.1.3 The commercial roadmap header for recurrent business

Some columns are the same for all GBUs:

- ASP price for Previous Year (PY)
- Volume PY
- Unit of volume (T or KP)

The unit of measure will be chosen depending on the user preference. A new field will be created in the user object. If the user preference is equal to "Ton" we will display the volume in ton, if the user preference is equal to "Kilo-pound" we will display volume in KP.

In the Commercial data Header, all the fields are in "read only" mode.

Others columns are displayed depending on GBUs choice.

EP :

- Ship to name
- GBU market : GBU segmentation 3
- GBU segment : GBU segmentation 2
- Product name
- Region
- Corporate Group
- Customer sub type
- Contribution margin PY (%)

RT25 : add GBU application : GBU segmentation 1

Ship To Name	OSU Market	OSU Segment	Product Name	Region	Corporate Group	Customer sub-type	PY Volume	PY UOM	PY ASP	PY Contribution Margin %	Currency
OSDFUCH							35.5	T	875	40	€ur

	Initial Price	Initial Volume	Initial Contribution margin %	Updated Price	Updated Volume	Updated Contribution margin %
2006	875	346	40	875	346	40
2007	875	350	40	875	350	40
2008	875	350	40	875	350	40
2009	875	350	40	875	350	40
2010	875	370	40	875	370	40
2011	875	350	40	875	350	40

For include in CR	Ship To Name	OSU Market	OSU Segment	Product Name	Region	Corporate Group	Customer sub-type	Currency	UOM
1	OSDFUCH						€ur		T

	Initial Opportunity Price	Initial opportunity Volume	Updated Price	Updated Volume
2006	1.25	11	1.2	2.0
2007	1.25	15	1.2	2.0
2008	1.25	15	1.25	1.5
2009	1.25	15	1.25	1.5
2010	1.25	14	1.25	1.4

Novacare :

- Customer classification
- Ship to name
- Product name
- Region
- Corporate Group
- Country
- Group of activity
- Sub activity
- Contribution margin PY (%)

U.S. Customer	Ship To Name	Product Name	Region	Corporate Group	Country	OSU Market	OSU Segment	Product Name	Region	Corporate Group	Customer sub-type	PY Volume	PY UOM	PY ASP	PY Contribution Margin %	Currency
OSDFUCH												35.5	T	875	40	€ur

Year	Initial Price	Initial Volume	Initial Contribution margin %	Updated Price	Updated Volume	Updated Contribution margin %	OSU ASP	OSU Volume	OSU Contribution Margin %	OSU ASP	OSU Volume	OSU Contribution Margin %	OSU ASP	OSU Volume	OSU Contribution Margin %	OSU ASP	OSU Volume	OSU Contribution Margin %
2006	875	346	40	875	346	40	875	346	40	875	346	40	875	346	40	875	346	40
2007	875	350	40	875	350	40	875	350	40	875	350	40	875	350	40	875	350	40
2008	875	350	40	875	350	40	875	350	40	875	350	40	875	350	40	875	350	40
2009	875	350	40	875	350	40	875	350	40	875	350	40	875	350	40	875	350	40
2010	875	370	40	875	370	40	875	370	40	875	370	40	875	370	40	875	370	40
2011	875	350	40	875	350	40	875	350	40	875	350	40	875	350	40	875	350	40

For include in CR	Ship To Name	Product Name	Region	Corporate Group	Country	OSU Market	OSU Segment	Product Name	Region	Corporate Group	Customer sub-type	Currency	UOM
1	OSDFUCH										€ur		T

Year	Initial Opportunity Price	Initial opportunity Volume	Updated Price	Updated Volume	Updated Contribution margin %	OSU ASP	OSU Volume	OSU Contribution Margin %	OSU ASP	OSU Volume	OSU Contribution Margin %	OSU ASP	OSU Volume	OSU Contribution Margin %
2006	1.25	11	1.2	2.0	40	875	346	40	875	346	40	875	346	40
2007	1.25	15	1.2	2.0	40	875	350	40	875	350	40	875	350	40
2008	1.25	15	1.25	1.5	40	875	350	40	875	350	40	875	350	40
2009	1.25	15	1.25	1.5	40	875	350	40	875	350	40	875	350	40
2010	1.25	14	1.25	1.4	40	875	350	40	875	350	40	875	350	40
2011	1.25	14	1.25	1.4	40	875	350	40	875	350	40	875	350	40

Spe Chem :

- Customer classification
- Ship to name
- Ship to city
- Corporate Market
- Product name
- Product code
- Region
- Corporate Group
- Country
- Group of activity
- Sub activity
- Production plant
- ASP ex-works PY

RT 26 : graph updated

ABC Customer	Ship To Name	Ship To City	Corporate Market	Product Name	Product Code	Region	Corporate Group	Country	Group of activity	Sub-activity	Production plant	PY ASP	PY Volume	PY QM	PY ASP ex-works	Currency
8	DEWOL	Worms										270	208	T	200	EUR
	Initial Price ASP	Initial Volume	Updated Price ASP	Updated Volume	Q1 Upd. Price ASP	Q1 Upd. Price ASP ex-works	Q1 Upd. Volume	Q2 Upd. Price ASP	Q2 Upd. Price ASP ex-works	Q2 Upd. Volume	Q3 Upd. Price ASP	Q3 Upd. Price ASP ex-works	Q3 Upd. Volume	Q4 Upd. Price ASP	Q4 Upd. Price ASP ex-works	Q4 Upd. Volume
2016	270	208	270	208	270	200	200	270	200	200	270	200	200	270	200	200
2017	270	208	270	208	270	200	200	270	200	200	270	200	200	270	200	200
2018	270	208	270	208	270	200	200	270	200	200	270	200	200	270	200	200
2019	270	208	270	208	270	200	200	270	200	200	270	200	200	270	200	200
2020	270	208	270	208	270	200	200	270	200	200	270	200	200	270	200	200
2021	270	208	270	208	270	200	200	270	200	200	270	200	200	270	200	200

To Include in CR	Ship To Name	Ship To City	Corporate Market	Product Name	Region	Corporate Group	Country	Group of activity	Sub-activity	Currency	QM
	DEWOL	Worms		DEWOL	France					EUR	T

	Initial Opportunity PY ex	Initial opportunity volume	Updated Price	Updated Volume	Q1 Upd. Price ASP	Q1 Upd. Volume	Q2 Upd. Price ASP	Q2 Upd. Volume	Q3 Upd. Price ASP	Q3 Upd. Volume	Q4 Upd. Price ASP	Q4 Upd. Volume
2016	10	10	10	10	10	10	10	10	10	10	10	10
2017	10	10	10	10	10	10	10	10	10	10	10	10
2018	10	10	10	10	10	10	10	10	10	10	10	10
2019	10	10	10	10	10	10	10	10	10	10	10	10
2020	10	10	10	10	10	10	10	10	10	10	10	10
2021	10	10	10	10	10	10	10	10	10	10	10	10

Peroxides :

- Customer classification
- Ship to name
- Ship to city
- Product name
- Region
- Corporate Group
- Country
- Group of activity
- Sub activity
- End-use
- Segment
- ASP ex works

RT 27 + RT 28: graph updated

ABC Customer	Ship To Name	Ship To City	Product Name	End-use	Segment	Region	Corporate Group	Country	Group of activity	Sub-activity	PY ASP	PY ASP ex-works	PY Volume	PY QM	Currency
8	DEWOL	Worms									270	200	208	T	EUR
	Initial Price	Initial Volume	Updated Price	Updated Volume	Q1 Upd. Price ASP	Q1 Upd. Volume	Q2 Upd. Price ASP	Q2 Upd. Volume	Q3 Upd. Price ASP	Q3 Upd. Volume	Q4 Upd. Price ASP	Q4 Upd. Volume			
2016	270	208	270	208	270	200	270	200	270	200	270	200			
2017	270	208	270	208	270	200	270	200	270	200	270	200			
2018	270	208	270	208	270	200	270	200	270	200	270	200			
2019	270	208	270	208	270	200	270	200	270	200	270	200			
2020	270	208	270	208	270	200	270	200	270	200	270	200			
2021	270	208	270	208	270	200	270	200	270	200	270	200			

To Include in CR	Ship To Name	Ship To City	Product Name	Region	Corporate Group	Country	Group of activity	Sub-activity	Currency	QM
	DEWOL	Worms	DEWOL	France					EUR	T

	Initial Opportunity PY ex	Initial opportunity volume	Updated Price	Updated Volume	Q1 Upd. Price ASP	Q1 Upd. Volume	Q2 Upd. Price ASP	Q2 Upd. Volume	Q3 Upd. Price ASP	Q3 Upd. Volume	Q4 Upd. Price ASP	Q4 Upd. Volume
2016	10	10	10	10	10	10	10	10	10	10	10	10
2017	10	10	10	10	10	10	10	10	10	10	10	10
2018	10	10	10	10	10	10	10	10	10	10	10	10
2019	10	10	10	10	10	10	10	10	10	10	10	10
2020	10	10	10	10	10	10	10	10	10	10	10	10
2021	10	10	10	10	10	10	10	10	10	10	10	10

Soda Ash :

- Customer classification
- Ship to name
- Ship to city
- Corporate Market
- Product name
- Region
- Corporate Group
- Country
- Group of activity
- Sub activity
- ASP ex-works PY

Company Name	Product Name	Category	Region	Market	Volume	Price	Revenue	Profit	Margin	YTD	QTD	YTD	QTD	YTD	QTD	YTD	QTD	YTD	QTD
2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039

Company Name	Product Name	Category	Region	Market	Volume	Price	Revenue	Profit	Margin	YTD	QTD	YTD	QTD	YTD	QTD	YTD	QTD	YTD	QTD
2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039

Company Name	Product Name	Category	Region	Market	Volume	Price	Revenue	Profit	Margin	YTD	QTD	YTD	QTD	YTD	QTD	YTD	QTD	YTD	QTD
2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039

3.2.1.4 The commercial roadmap detail for recurrent business

In the commercial roadmap Detail, we will display 6 lines:

- Current year in quarter, except for EP (in year)
- Y+1 in quarter, except for EP (in year)
- Y+2 in year
- Y+3 in year
- Y+4 in year
- Y+5 in year

The columns depends on GBUs. In the Commercial data Detail, some fields are in "read only" mode, others are in "edit" mode.

For Current year and Y+1 years common fields :

- Initial price (year) read only
- Initial volume (year) read only
- Updated price (year) formula = average of quarters (read only)
- Updated volume (year) formula = sum of quarters (read only)
- Q1 Updated ASP
- Q1 Updated volume
- Q2 Updated ASP
- Q2 Updated Volume
- Q3 Updated ASP
- Q3 Updated volume
- Q4 Updated ASP
- Q4 Updated Volume
- For Soda Ash : we will add ASP-ex works (read and edit fields) for all quarters.
- For Spe Chem & Novocare: we will add ASP-ex works (read only fields) for all quarters.
- For Novocare & EP : we'll add Contribution Margin in % for all quarters for Novocare for the year for EP (read and edit fields).

For Y+2, Y+3, Y+4, Y+5 years common fields :

- Initial price (year) read only
- Initial volume (year) read only
- Updated ASP (edit)
- Updated Volume (edit)
- For Soda Ash : we ll add ASP-ex works (read and edit fields)
- For Spe Chem & Novocare: we will add ASP-ex works (read only fields)
- For Novocare & EP : we will add Contribution Margin in % (read & edit fields).

3.2.1.5 The commercial data header for growth business

The unit of measure will be chosen depending on the user preference. A new field will be created in the user object. If the user preference is equal to "Ton" we will display the volume in ton, if the user preference is equal to "Kilo-pound" we will display volume in KP.

All the fields are in "read only" mode. The columns are displayed depending on GBUs choice.

Common columns:

- To include in the CR (checkbox)
- Sold to name

- Product name
- Region
- Corporate Group
- % probability
- Status

EP :

- GBU market: GBU segmentation 3
- GBU segment : GBU segmentation 2
- Customer sub type
- Application : GBU segmentation 1

Novecare :

- Country
- Group of activity
- Sub activity

Spe Chem :

- Sold to city
- Corporate Market
- Country
- Group of activity
- Sub activity

Peroxides :

- Sold to city
- Country
- Group of activity
- Sub activity
- Product level 2
- Product level 4

Soda Ash :

- Sold to city
- Corporate Market
- Country
- Group of activity
- Sub activity

If the checkbox is check-in all the details line are displayed and can be updated, if the checkbox is check-out the details line are not displayed in the page layout. Except for closed lost opportunities, the checkbox can be check-in or check-out at any time.

3.2.1.6 The commercial detail for growth business

We'll display 6 lines :

- Current year and Y+1 in quarter except for EP (in year)
- Y+2, Y+3, Y+4, Y+5 in year

The columns depends on GBUs

For Current year and Y+1 years common fields :

- Initial price (year) read only
- Initial volume (year) read only
- Updated price (year) formula = average of quarters (read only)
- Updated volume (year) formula = sum of quarters (read only)
- Q1 Updated ASP
- Q1 Updated volume
- Q2 Updated ASP
- Q2 Updated Volume
- Q3 Updated ASP
- Q3 Updated volume
- Q4 Updated ASP
- Q4 Updated Volume

For Novecare & EP : we'll add Contribution Margin in % for all quarters for Novecare for the year for EP (read & edit).

For Y+2, Y+3, Y+4, Y+5 years common fields :

- Initial price (year) read only
- Initial volume (year) read only
- Updated ASP (edit)
- Updated Volume (edit)

For Novocare & EP: we'll add Contribution Margin in % .

3.2.1.7 Possibility to create a new line in the Commercial Roadmap header

Only for Novocare, it will be possible to create a new line directly in the Commercial Roadmap.

Some fields will be mandatory :

- Origine = "CR" by default
- Year CR = Current year by default
- Account Name sold to or Account name ship to (one account mandatory)
- GBU
- Product level 4 name
- Owner = user connected by default
- end use

If a header is created all details lines will be created initialized with zero in volume, ASP and contribution margin. A creation in the Commercial Roadmap will not create an opportunity. For other GBUs, there will be no possibility to create a new line in the Commercial Roadmap. If the sales rep wants to create a new line, he will have to create a new Opportunity.

3.3 Managers approve & /or adjust

3.3.1 Managers review/ adjust the Commercial Roadmap

We will build a specific page layout allowing managers to update the commercial roadmap data. The managers can directly update the data or can ask to sales rep to update the data. All adjustments concerning growth business will be synchronized with opportunities.

Reports allow managers to analyze and validate the commercial roadmap corresponding to their team (list of sales rep). There is no formalized approval process in the system.

3.3.1.1 Introduction

The page layout will be divided in 4 parts:

- One part to filter data - (Yellow part in the example)
- A second part to display Commercial Roadmap recurrent business header data – (Green part in the example)
- A third part to display Commercial Roadmap details data Updated data/Adjusted data– (Red Part in the example)
- A fourth part to display growth business header (orange Part in the example)
- A fifth part to display growth business details Updated data/Adjusted data (orange Part in the example)

Example :

Filter	Customer Classification	Ship to	Corporate Group	Country	Region	Product	Corporate market	Corporate segment	GBU Market	GBU segment	User
ABC Customer	Ship To	Product	Region	Corporate Group	Country	GBU Region	PY Volume	PY UOM	PY ASP	PY ASP-x works	Currency
5	DE/CH/UM	8040X	EMEA		France	EMEA	333	T	875	820	Eur

	Updated Price	Updated Volume	Adjusted Price	Adjusted Volume	Q1 Adj. Price ASP	Q1 Adj. Volume	Q2 Adj. Price ASP	Q2 Adj. Volume	Q3 Adj. Price ASP	Q3 Adj. Volume	Q4 Adj. Price ASP	Q4 Adj. Volume
2016	875	333	875	333	875	333	875	333	875	333	875	333
2017	875	333	875	333	875	30	875	30	875	100	875	100
2018	875	360	875	360								
2019	875	360	875	360								
2020	875	370	875	370								
2021	875	360	875	360								

To include in CR	Sold to	Product	Region	Corporate Group	Country	GBU Region	Currency
5	Bayer	8040X	EMEA	Bayer	France	EMEA	Eur

	Updated Opportunity Price	Updated Opportunity Volume	Adjusted Price	Adjusted Volume	Q1 Adj. Price ASP	Q1 Adj. Volume	Q2 Adj. Price ASP	Q2 Adj. Volume	Q3 Adj. Price ASP	Q3 Adj. Volume	Q4 Adj. Price ASP	Q4 Adj. Volume
2016	1.23	1.2	1.23	1.2			1					
2017	1.23	1.2	1.23	1.2								
2018	1.23	1.2										
2019	1.23	1.2										
2020	1.23	1.4										

This menu will be available depending on dates defined in a custom object: Commercial Roadmap Timeline. Each GBUs will choose a date to end the sales rep update (which corresponds to the start of the managers adjustments) and a date to end the managers adjustments. This menu will be available between these two dates.

One message will appear after the ending of opportunity synchronization process : "The opportunities are no more synchronized with the Commercial Roadmap". This message will be in the page layout header

3.3.1.2 The filters

The filters are the same than the filters used to complete and update data for sales rep. For managers we will display the lines corresponding to its GBU, he can select one user or multiple users from its GBUs.

NB : the teams's feature is not available for custom objects (to confirm). If not available, managers can review but not adjust via reports.

3.3.1.3 The commercial data header for recurrent business

The columns are the same than the columns used to complete and update data for sales rep.

3.3.1.4 The commercial data detail for recurrent business

We'll display 6 lines :

- Current year and Y+1 in quarter except for EP (in year)
- Y+2, Y+3, Y+4, Y+5 in year

The columns depends on GBUs.

For Current year and Y+1 years common fields :

- Updated price (year) read only
- Updated volume (year) read only
- Adjusted price (year) formula = average of quarters (read only)
- Adjusted volume (year) formula = sum of quarters (read only)
- Q1 Adj. ASP
- Q1 Adj. volume
- Q2 Adj. ASP
- Q2 Adj. Volume
- Q3 Adj. ASP
- Q3 Adj. volume
- Q4 Adj. ASP
- Q4 Adj. Volume
- Comments

For Soda Ash : we ll add ASP-ex works (read and edit fields) for all quarters

For Spe Chem & Novecare : we'll add ASP-ex works (read only fields) for all quarters

For Novecare & EP : we'll add Contribution Margin in % for all quarters for Novecare for the year for EP.

For Y+2, Y+3, Y+4, Y+5 years common fields :

- Updated price (year) read only
- Updated volume (year) read only
- Adjusted ASP (edit)
- Adjusted Volume (edit)
- Comments (edit)

For Soda Ash : we ll add ASP-ex works (read and edit fields) for all quarters

For Spe Chem & Novecare: we'll add ASP-ex works (read only fields) for all quarters

For Novecare & EP : we'll add Contribution Margin in %.

1.3.1.5 The commercial data header for growth business

The columns are the same than the columns used to complete and update data for sales rep.

3.3.1.6 The commercial data detail for growth business

We'll display 6 lines :

- Current year and Y+1 in quarter except for EP (in year)
- Y+2, Y+3, Y+4, Y+5 in year

The columns depends on GBUs

For Current year and Y+1 years common fields :

- Updated price (year) read only
- Updated volume (year) read only
- Adjusted price (year) formula = average of quarters (read only)
- Adjusted volume (year) formula = sum of quarters (read only)
- Q1 Adj. ASP
- Q1 Adj. volume
- Q2 Adj. ASP
- Q2 Adj. Volume
- Q3 Adj. ASP
- Q3 Adj. volume
- Q4 Adj. ASP
- Q4 Adj. Volume
- Comments

For Novacare & EP : we'll add Contribution Margin in % for all quarters for Novacare for the year for EP.

For Y+2, Y+3, Y+4, Y+5 years common fields :

- Updated price (year) read only
- Updated volume (year) read only
- Adjusted ASP (edit)
- Adjusted Volume (edit)
- Comments (edit)

For Novacare & EP : we'll add Contribution Margin in % .

3.3.1.7 Possibility to create a new line in the Commercial Roadmap header

Only for Novacare, it will be possible to create a new line directly in the Commercial Roadmap.

Some fields will be mandatory :

- Origine = "CR" by default
- Year CR = Current year by default
- Account Name sold to or Account name ship to (one account mandatory)
- GBU
- Product level 4 name
- Owner = user connected by default
- end use

If an header is created all details lines will be created initialized with zero in volume, ASP and contribution margin. A creation in the Commercial Roadmap will not create an opportunity.

For other GBUs, there will be no possibility to create a new line in the Commercial Roadmap. If the sales rep wants to create a new line, he will have to create a new Opportunity.

3.3.2 Others directors review/adjust the Commercial Roadmap

Other directors (Supply Chain, Finance, Marketing, etc.) will be able to use the same reports than the sales managers to review the data .

There is no formalized approval process in the system.

3.4 Compare with Strategic Roadmap & Adjust

The GBU Strategic Roadmap will be uploaded in the tool. The granularity is not harmonized; each GBU has its own strategic roadmap. We will create a custom object to store the strategic roadmap in SFDC. This custom object will be highly secured and only a few people by GBUs will be able to access these data (CRM champion should provide the list).

In a health matrix report, we will compare Strategic Roadmap with Commercial Roadmap bottom-up exercise (updates and adjustments).

RT34: **Strategic Roadmap**: "defined by" must **still be checked and confirmed with GBU Special Chem Strategic Marketing**

3.4.1 Upload Strategic Roadmap

Each GBU has a different granularity for their Roadmap. We'll store all Strategic Roadmaps in the same object described in the Excel Solvay Salesforce Objects Commercial Roadmap V01.xls

Granularity :

- All volumes have to be in ton before uploading the data in SFDC.
- The revenue will be in currency.
- The average price in currency by ton

- Contribution margin in currency

For EP the Strategic Roadmap is defined by:

- Commercial region (divided by 4 in Asia: China, Korea, India, South East Asia)
- GBU Market (Auto or C&E or Others or Unmapped)
- GBU Segment (Differentiation / Essentials) and if possible GBU detailed segmentation (Essentials, Metal replacement, thermal management, fluid barrier, fire protection)

For Novecare the Strategic Roadmap is defined by

- BU
- Region
- GBU segment
- Product level 2

For Spe Chem the Strategic Roadmap is defined by:

- BU
- Region
- Corporate Market
- Corporate segment
- Product level 4

For Peroxides the Strategic Roadmap is defined by:

- BU
- Region
- Corporate Market
- Product level 4

For Soda Ash the Strategic Roadmap is defined by:

- BU
- Region
- Corporate Segment
- Product level 4

3.4.2 Health matrix

The health matrix will be based on a standard report. The health matrix is available as from the date of initialization. The health matrix allows to compare the Strategic Roadmap with the bottom-up exercise (updates and adjustments).

In the health matrix we will have :

- One line for the bottom-up recurrent business, managers adjustments included
- One line for the bottom-up growth business, managers adjustments included
- One line for the Strategic Roadmap data
- One line for top adjustments data
- The difference between Strategic and Bottom-up exercise

The difference will be highlighted in green if the bottom-up > Strategic data.

The difference will be highlighted in red if the bottom-up < Strategic data

Different health matrix will show:

- Revenue
- Volume
- Contribution margin (Novecare, EP)

Project team will construct an example and each GBUs will adapt their own health matrix:

- by BU & Region
- By region & market
- By BU, region & segment

3.4.3 Top adjustments

Top adjustments can only be done after the end of management adjustments. Top adjustments can be created directly in the Strategic roadmap object to store adjustments done at high level. These top adjustments will not be split by customer/product combination.

The mandatory fields will be :

- GBU
- BU
- Region
- Volume in t
- Revenue in currency

To separate adjustments from Strategic Roadmap data these records will have a category "Top adjustments". Only top managers can create top adjustments.

For Spe Chem & Peroxides, for Y+1 it will not be possible to create top adjustments because for the budget construction they need to have all data split by customer/product combination.

3.5 Follow-up

3.5.1 Commercial Process timeline

Each GBUs will have to define the start and end dates of the different steps:

- Date 1: Initialize the Commercial Roadmap (and start the updates by sales reps)
- Date 2 : Start of sales rep updates
- Date 3: End the updates by Sales rep
- Date 4 : Start of managers adjustments
- Date 5: End the adjustments by managers
- Date 6: Freeze the synchronization between Opportunities and Commercial Roadmap
- Date 7: Freeze the Commercial Roadmap

A custom table in Salesforce will allow to store all these dates by GBU.

RT 23 + RT 24: CRM Champion & GBU data steward or Finance team (depending on GBU) have the authorization to change dates in this object.

Dates can be updated during the ongoing process (e.g end date later than the originally scheduled).

3.5.2 Alerts

Depending on these dates, we can post chatter feeds on send automatic e-mail to all sales rep and managers to inform them that:

- They have to update or validate their commercial roadmap between the XX/XX/2016 and the YY/YY/2016.
- They can make only adjustments between the XX/XX/2016 and the YY/YY/2016.
- The commercial roadmap is now frozen

3.5.3 Commercial Roadmap in ADP

In Account development plan a section display currently the business potential of all the accounts linked with this ADP.

We'll replace this section by a new section which displays for the 5 next years the commercial roadmap related to all accounts linked to this ADP. All combinations ship to/product (recurrent business) and sold to/product (growth business) will be aggregated by years.

We'll only include the growth business checked "to be included in the CR" and growth business with a status different to "close lost". As the commercial roadmap is in different currencies, we'll display in ADP amounts converted in euro for price and revenues. For the volume we'll display tons. For contribution margins we'll display euros.

In the timeline we will add two new dates: start of ADP synchronization, end of ADP synchronization. When we reach the date corresponding to the start of synchronization, we will in a first step initialize ADP business potential with the commercial roadmap data. In a second step, every night we will update the ADP business potential if the ADP has changed.

3.5.3.1 Initialization phase

For each account listed in the Account plan associations, we will search all Commercial roadmap headers corresponding to the sold to field or ship to field in the header.

If in the account plan association both the ship to and the corresponding sold to are listed the commercial roadmap header has to be taken into account only one time.

All products will be aggregated by years. In the account plan, the first year of the business potential corresponds to the creation year of the ADP. We will fill only 2 fields (sales and contribution margin). Sales correspond to revenue in the commercial roadmap headers.

3.5.3.2 Synchronization phase

Each night until the end of the synchronization, we will synchronize if:

- A new ADP is created (we will fill the business potential object for this new ADP, as described in the initialization paragraph)
- A new account is added in the account plan association (recalculation of the business potential to add the revenue of this new account)
- An account is deleted from the account plan association (recalculation of the business potential to remove the business potential corresponding to the account deleted)

3.5.4 Security settings

A sales representative can see and edit only his own combinations (customer/product) and his own opportunities (he is the owner). The Commercial Roadmap data are GBU restricted. The Strategic Roadmap and health matrix are restricted to some users to list by the CRM Champions.

3.6 Data recovery

GBUs would like to upload in the new tool their previous Commercial Roadmap:

- Peroxides 2015
- Spe Chem 2015
- EP 2015

No data recovery for Novacare & Soda Ash.

3.7 Reports and dashboards

3.7.1 Reports to analyze B&C customers pre-filled data

Sum of Initial Total		Year						
Account name Ship to	Product level 4	2015	2016	2017	2018	2019	2020	
<input type="checkbox"/> AJAY EUROPE SARL	H2O2 ST-500	EUR 39,583.60	EUR 42,797.79	EUR 41,586.53	EUR 44,056.55	EUR 41,994.24	EUR 43,217.37	
	Subtotal	EUR 39,583.60	EUR 42,797.79	EUR 41,586.53	EUR 44,056.55	EUR 41,994.24	EUR 43,217.37	
<input type="checkbox"/> ALLCHITAL SPA	H2O2 ST-500	EUR 7,842.23	EUR 8,479.02	EUR 8,239.05	EUR 8,728.40	EUR 8,319.82	EUR 8,562.15	
	Subtotal	EUR 7,842.23	EUR 8,479.02	EUR 8,239.05	EUR 8,728.40	EUR 8,319.82	EUR 8,562.15	
<input type="checkbox"/> AGUALON FRANCE BV	H2O2 FCC-35	EUR 45,345.00	EUR 48,573.56	EUR 49,489.53	EUR 48,573.56	EUR 49,489.53	EUR 50,949.64	
	Subtotal	EUR 45,345.00	EUR 48,573.56	EUR 49,489.53	EUR 48,573.56	EUR 49,489.53	EUR 50,949.64	
<input type="checkbox"/> BIOQUELL SAS	H2O2 AG-SPRAY-350S	EUR 17,605.50	EUR 18,859.01	EUR 19,214.64	EUR 18,859.01	EUR 19,214.64	EUR 19,781.54	
	Subtotal	EUR 17,605.50	EUR 18,859.01	EUR 19,214.64	EUR 18,859.01	EUR 19,214.64	EUR 19,781.54	
<input type="checkbox"/> BLEDNA SA	H2O2 AG-SPRAY-350S	EUR 38,610.00	EUR 41,359.03	EUR 42,138.95	EUR 41,359.03	EUR 42,138.95	EUR 43,382.20	
	Subtotal	EUR 38,610.00	EUR 41,359.03	EUR 42,138.95	EUR 41,359.03	EUR 42,138.95	EUR 43,382.20	
<input type="checkbox"/> BRENTAG ARDENNES	H2O2 AG-BATH-350	EUR 25,308.18	EUR 27,110.12	EUR 27,621.35	EUR 27,110.12	EUR 27,621.35	EUR 28,436.27	
	H2O2 AG-SPRAY-350S	EUR 4,383.75	EUR 4,695.87	EUR 4,784.42	EUR 4,695.87	EUR 4,784.42	EUR 4,925.58	
	Subtotal	EUR 29,691.93	EUR 31,805.99	EUR 32,405.77	EUR 31,805.99	EUR 32,405.77	EUR 33,361.85	
<input type="checkbox"/> BRENTAG VAL DE LOIRE P.A ORLEANS SOLOGNE	H2O2 AG-SPRAY-350S	EUR 17,535.00	EUR 18,783.49	EUR 19,137.70	EUR 18,783.49	EUR 19,137.70	EUR 19,702.33	

Report lists all accounts corresponding to B&C customers in the sales rep portfolio. The sales rep analyses the data pre-filled and if he wants to make changes he clicks on the tab commercial roadmap in SFDC.

3.7.2 Reports to follow data completion for Sales rep & Managers



Reports allows sales rep & managers to follow their progress in completing data for A customers and updating data for B&C customers. Managers can follow the progress of his team globally or sales rep by sales rep.

3.7.3 Reports for sales managers

		EUR 4,929,164.49	EUR 24,995,882.10	EUR 5,349,235.34	EUR 5,450,164.30	EUR 5,447,224.63	EUR 5,401,659.61	EUR 51,573,338.47
Celine Vanlaenderen								
	QUSA	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
	KYOHU JOCHUOKU CO. LTD.	EUR 890.36	EUR 981.53	EUR 944.23	EUR 935.23	EUR 917.25	EUR 953.22	EUR 5,821.82
	ORAPH LOGISTIQUE	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
	BOCSA COLOMBIA S.A.	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
	SAKOSBE CO. LTD.	EUR 6,455.11	EUR 7,116.11	EUR 6,845.64	EUR 6,780.45	EUR 6,650.05	EUR 6,910.84	EUR 40,758.20
	TALLEY ENVIRONMENTAL CARE LTD	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
	WATERX LLC.	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
	Subtotal	EUR 4,936,509.96	EUR 25,003,979.74	EUR 5,357,025.21	EUR 5,457,879.98	EUR 5,454,791.93	EUR 5,409,523.67	EUR 51,619,716.49
David Henry								
	AQUA PHARMA LTD	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
	CAMPBELL RIVER MARINE TERMINAL	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
	CN CARGO FLO TERMINAL	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
	MARINE HARVEST CANADA OMEGA DOCK	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
	Subtotal	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
Debbie Pyke								
	ACCOPRO DISTRIBUTION CENTRE	EUR 34,006.13	EUR 38,209.29	EUR 36,767.43	EUR 36,178.68	EUR 37,127.89	EUR 36,427.37	EUR 226,716.79
	AKCROS CHEMICALS LTD	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
	ANOUS FIRE LIMITED	EUR 5,738.46	EUR 6,204.42	EUR 6,026.83	EUR 6,386.91	EUR 6,087.93	EUR 6,265.25	EUR 36,711.86
	BESTFOODS FRANCE SITE INDUSTRIELLE	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
	BIOCHEMICA UK LTD	EUR 20,581.88	EUR 22,253.13	EUR 21,623.32	EUR 22,907.63	EUR 21,835.32	EUR 22,471.30	EUR 131,872.58
	BIOCELL UK LTD.	EUR 16,555.00	EUR 17,733.72	EUR 18,068.13	EUR 17,733.72	EUR 18,068.13	EUR 18,601.20	EUR 106,759.90
	BP CHEMICALS	EUR 8,961.93	EUR 9,689.64	EUR 9,415.40	EUR 9,974.63	EUR 9,507.71	EUR 9,784.04	EUR 57,333.95
	BIAR CHEMICALS LTD	EUR 172,586.88	EUR 186,600.93	EUR 181,319.78	EUR 192,089.20	EUR 183,097.42	EUR 188,430.36	EUR 1,184,124.57

To facilitate the approval process, reports will be created in the tool (by volume, by price, by revenue). These 3 reports will be built centrally by the project team as example and each GBU will customize them using their own columns or filters. In this report will include the growth business in order to have a global portfolio vision.

3.7.4 Health Matrix

Region	Segment		Year				
			2016	2017	2018	2019	2020
EMEA	Air Treatment	Sum of Commercial roadmap Revenue	EUR 687,032.00	EUR 687,032.00	EUR 687,032.00	EUR 687,032.00	EUR 687,032.00
		Sum of Close Dev Revenue	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
		Sum of Current Dev Revenue	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
		Sum of TOP Management adjustment Revenue	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
		Sum of Bottom Up	EUR 687,032.00	EUR 687,032.00	EUR 687,032.00	EUR 687,032.00	EUR 687,032.00
		Sum of Strategic roadmap Revenue	EUR 715,010.00	EUR 721,995.00	EUR 742,950.00	EUR 749,935.00	EUR 749,935.00
		Sum of Growth Gap Objective	EUR -27,978.00	EUR -34,963.00	EUR -55,918.00	EUR -62,903.00	EUR -62,903.00
	Chemical Industry	Sum of Commercial roadmap Revenue	EUR 47,503,260.00	EUR 47,503,260.00	EUR 47,503,260.00	EUR 47,503,260.00	EUR 47,503,260.00
		Sum of Close Dev Revenue	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
		Sum of Current Dev Revenue	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
		Sum of TOP Management adjustment Revenue	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
		Sum of Bottom Up	EUR 47,503,260.00	EUR 47,503,260.00	EUR 47,503,260.00	EUR 47,503,260.00	EUR 47,503,260.00
		Sum of Strategic roadmap Revenue	EUR 49,371,291.00	EUR 49,849,939.00	EUR 51,288,562.00	EUR 51,767,210.00	EUR 51,767,210.00
		Sum of Growth Gap Objective	EUR -1,868,031.00	EUR -2,346,679.00	EUR -3,785,302.00	EUR -4,263,950.00	EUR -4,263,950.00
	Fisheries - Aquaculture	Sum of Commercial roadmap Revenue	EUR 35,268,624.00	EUR 35,268,624.00	EUR 35,268,624.00	EUR 35,268,624.00	EUR 35,268,624.00
		Sum of Close Dev Revenue	EUR 456,000.00	EUR 456,000.00	EUR 456,000.00	EUR 456,000.00	EUR 456,000.00
		Sum of Current Dev Revenue	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
		Sum of TOP Management adjustment Revenue	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00	EUR 0.00
		Sum of Bottom Up	EUR 35,724,624.00	EUR 35,724,624.00	EUR 35,724,624.00	EUR 35,724,624.00	EUR 35,724,624.00
		Sum of Strategic roadmap Revenue	EUR 38,104,980.00	EUR 37,036,878.00	EUR 38,104,980.00	EUR 38,461,014.00	EUR 38,461,014.00
		Sum of Growth Gap Objective	EUR -2,856,356.00	EUR -1,917,254.00	EUR -2,836,356.00	EUR -3,192,390.00	EUR -3,192,390.00

This report will be built centrally by the project team as example and each GBU will customize it using their own columns or filters.

3.7.5 Commercial Roadmap in Analytics

We have to analyze with the Analytics' team which KPIs we want to follow (most probably for a future release).

[1] To find the market growth coefficient we will follow the rules below :

- with the segment in the commercial roadmap header, the current year, the region, the GBU region if not blank, the BU; we search if a line exists in the extrapolation table
- o if a line exists we take into account the market growth coefficient found
- o if a line doesn't exist

with the product level 3 in the commercial roadmap header, the current year, the region, the GBU region if not blank, the BU; we search if a line exists in the extrapolation table

- if a line exists we take into account the market growth coefficient found
- if a line doesn't exist we extrapolate with 0% of market growth coefficient

[2] To find the market growth coefficient we will follow the rules below :

- with the segment in the commercial roadmap header, the y+1 year, the region, the GBU region if not blank, the BU; we search if a line exists in the extrapolation table
 - o if a line exists we take into account the market growth coefficient found
 - o if a line doesn't exist
 - with the product level 3 in the commercial roadmap header, the y+1 year, the region, the GBU region if not blank, the BU; we search if a line exists in the extrapolation table

- if a line exists we take into account the market growth coefficient found
- if a line doesn't exist we extrapolate with 0% of market growth coefficient

[3] to find the cost inflation coefficient we will follow the rules below :

- with the segment in the commercial roadmap header, the y+1 year, the region, the GBU region if not blank, the BU; we search if a line exists in the extrapolation table
 - if a line exists we take into account the cost inflation coefficient found
 - if a line doesn't exist
 - with the product level 3 in the commercial roadmap header, the y+1 year, the region, the GBU region if not blank, the BU; we search if a line exists in the extrapolation table
 - if a line exists we take into account the cost inflation coefficient found
 - if a line doesn't exist we extrapolate with 0% of cost inflation coefficient

[4] to find the raw material cost evolution we will follow the rules below :

- with the level 3 in the commercial roadmap header, the y+1 year, the BU; we search if a line exists in the extrapolation table
 - if a line exists we take into account the raw material cost evolution found
 - if a line doesn't exist we extrapolate with 0% of raw material cost evolution

Last modifications :

User	Last Update
Julien Andreoli-ext	3309 days ago
BRAHIM, Walid	
KANJA-ext, Zakaria	
NWANGWU, Daniel	