COMMERCIAL EXCELLENCE PLAYBOOK

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Note on confidentiality and anonymization

This document summarizes illustrative, anonymized examples of commercial excellence work drawn from the author's professional experience. It is prepared for external professional and recruitment discussion purposes only.

Company names have been replaced with generic labels (Company A, B, C…); named third parties, business partners, and specific product/brand identifiers have been removed or generalized. Financial figures are approximate and intended to illustrate the scale and nature of past work, not to disclose precise, non-public company data.

No content sourced from third-party consulting deliverables, proprietary client methodology, or material marked confidential by a former or current employer or client is included. This summary reflects the author's own individual contribution and professional judgment.

Purpose

This document illustrates the potential financial impact of each lever of a Commercial Excellence Framework, using standard value-driver logic, drawn from anonymized examples of past work.

Sequencing Logic

The levers are sequenced and numbered exactly as in the Commercial Excellence Framework below: I. Go-to-Market Foundations (A–D) → II. Sales Methodology (1–4) → III. Org & Operating Model (5–8) → IV. Strategic Pricing (9–10). Each dimension depends on the one before it — offering and route-to-market decisions follow from market mapping and segmentation, the sales methodology runs inside the route-to-market model that's been set, the org & operating model exists to deliver that methodology, and pricing sets and captures the value everything upstream has created.

Framework Overview

The graphic below is the framework used, covering Go-to-Market, Route-to-Market, Sales Methodology, Org & Operating Model, and Strategic Pricing. The lever sections that follow use the same letters and numbers (A–D, 1–10).

COMMERCIAL EXCELLENCE FRAMEWORK

I. GO-TO-MARKET

A MARKET MAPPING
- Addressable market by sub-segment & life stage
- Competitive analysis
- Customer survey

B SEGMENTATION
- Segments defined by potential & buying behavior
- Criteria & thresholds to prioritize growth
- Integrating organic growth drivers

C OFFERING
- Targeting segments with right value proposition
- Product portfolio & pipeline
- Front- & back-end service levels
- SKU & brand portfolio

D ROUTE-TO-MARKET
- Improving Sales ROI by redirecting sales through direct channels (reps, KAM, inside sales, eCommerce) and indirect channels (dealers, distributors, retail, agents, franchises)

II. SALES METHODOLOGY

1 Sales routines
- Codified routines orchestrating team interaction & resource leverage

2 Sales funnel
- Clear funnel structure for execution & decision-making, powered by CRM

3 Account mgt
- Running the business for key accounts, including sales plays & playbook discipline

4 Reporting
- Leveraging CRM & ERP data for transparent performance & better sales piloting

III. ORG & OPERATING MODEL

5 Org structure
- Clear accountabilities, decision-making & governance design

6 Roles & responsibilities
- Delineated across sales & supporting roles

7 Capacity & sizing
- Right sizing across sales & supporting roles

8 Performance mgt
- Winning behaviors, right incentives, training & Sales ROI tracking

IV. STRATEGIC PRICING

9 Price setting
- Value pricing
- Dynamic pricing
- Commodity pricing
- Contract management

10 Price getting
- Execution discipline
- Rebates & promotions
- Profitability analytics
- Value selling

Commercial Excellence Diagnostic Scorecard

A structured assessment tool used in the first weeks of an engagement to establish where a portfolio company stands across all 14 levers before committing to a roadmap.

Each lever is scored 1 (Absent) to 5 (Optimized), based on document review, CRM/ERP data pulls, and a structured round of 8-12 stakeholder interviews spanning sales, marketing, finance, and operations leadership.

Score	Definition
1 — Absent	No defined process; entirely reactive or ad hoc.
2 — Emerging	Pockets of good practice exist but are not systematized.
3 — Defined	A documented process exists; adoption is inconsistent across teams.
4 — Managed	Consistently applied and tracked against KPIs.
5 — Optimized	Embedded practice, benchmarked, and continuously improved.

Diagnostic Signals by Lever

Lever	Key Diagnostic Signal	Maturity (1-5)
A. Market Mapping	Is the addressable market sized by sub-segment? Has a competitor-intensity analysis run in the last 24 months?	
B. Segmentation	Do accounts carry a tier/segment tag in the CRM? Is service model differentiated by tier?	

Lever	Key Diagnostic Signal	Maturity (1-5)
C. Offering	Is brand/SKU complexity cost quantified per product? Has the portfolio been rationalized in the last 3 years?	
D. Route-to-Market	Is channel mix (direct vs. indirect, field vs. digital) matched to account value and cost-to-serve?	
1. Sales Routines	Is there a documented sales cadence (pipeline review, forecast call)? Is it followed consistently?	
2. Sales Funnel	Are stage-conversion rates and cycle length tracked by CRM stage? Is there a defined win/loss process?	
3. Account Management	Do key accounts have documented account plans? Is there a playbook for expansion selling?	
4. Reporting	Is there a single source of truth for pipeline/performance data? Do leaders use a shared dashboard weekly?	
5. Org Structure	Are commercial roles and decision rights documented (RACI)? Any known silos or duplicated functions?	
6. Roles & Responsibilities	Are reps segmented into hunter/farmer/hybrid roles matched to account type?	
7. Capacity & Sizing	Is headcount sized against a market-potential model? Is departure/retirement risk forecast?	
8. Performance Management	Is there a formal sales training program? Are incentive plans tied to strategic KPIs?	
9. Price Setting	Is pricing governed centrally (floor/ceiling bands), or fully discretionary? Is pricing segmentation-based?	
10. Price Getting	Is there visibility into the gap between list and realized price? Are rebates/promotions tracked for ROI?	

How to use this: *Score every lever during the diagnostic window, then prioritize levers scoring ≤2 that also carry high relevance to the deal thesis. Those become the natural inputs to the first-100-days roadmap that follows the case studies and financial impact analysis below.*

I. Go-to-Market Foundations

Defines where to compete and which customers to prioritize — the input every downstream lever depends on.

A. Market Mapping

Addressable market by sub-segment & life stage, competitive analysis, and customer surveys.

Company A — PE-owned industrial materials business (~€1.5bn revenue) — Market Mapping & Share-of-Wallet

- **Context:** Company A needed better visibility into where growth potential sat across ~5,000 potential and existing customers, and how competitive one of its regional businesses (~€400M of ~€1.5bn total revenue) really was.
- **Action:** Built a share-of-wallet view per account to map white space and define hunter profiles; ran a competitor-intensity analysis in the region at product-group level to build cost curves.

- **Impact:** Identified a concrete ~€20M export opportunity in an underserved market and a need to partner to remain competitive in a specific region.

B. Segmentation

Customer segmentation that creates full transparency on account value, potential, and growth priority, combining quantitative and qualitative (behavioural) criteria.

Company B — Global food & ingredients business (~$50bn revenue) — Segmentation & Service Levels

- **Context:** Company B had no systematic way to tell which of its customers warranted white-glove service versus self-service.
- **Action:** Segmented 4,500 customers across three regions; identified the top 10% (~450 accounts) as the priority tier for differentiated key account service and growth focus, as well as the lowest tier to be transitioned to a self-service solution.
- **Impact:** Reallocated time spent of 20 sales FTE from long tail customers to prospecting higher value opportunities, while customer service transitioned the 500 customers to a 24/7 self-service platform.

C. Offering

Targeting segments with the right value proposition, product portfolio, service levels, and SKU/brand portfolio.

Company C — Global animal nutrition business — Portfolio Simplification (regional swine business unit)

- **Context:** A regional business unit (~€200M revenue) carried 8 brands with unclear underlying economics.
- **Action:** Reviewed the true cost of complexity per brand — formulation, manufacturing changeovers, inventory, marketing overhead — rather than judging brands on revenue or gross margin alone; rationalized the portfolio to 5 brands.
- **Impact:** EBITDA improved by 15%.

D. Route-to-Market

Reaching customers through direct channels (field sales, KAM, inside sales, eCommerce) and indirect channels (dealers, distributors, retail, agents, franchises).

Company C — Regional dairy-focused business unit — Route-to-Market: Mono- to Omni-channel

- **Context:** 150 sales reps served 15,000 customers in person; the customer base was shrinking and cost-to-serve was too high, while market conditions accelerated a shift toward virtual selling.
- **Action:** Introduced inside sales call centre and eCommerce as additional channels; reallocated reps to growth zones and covered remaining white zones virtually.
- **Impact:** Sales ROI improvement by 30% within 2 years.

II. Sales Methodology

The day-to-day execution engine: how sales teams operate, sell, manage accounts, and report once coverage is set.

1. Sales Routines

Codified routines orchestrating team interaction & resource leverage.

Company D — European flooring/textiles manufacturer (~$1.1bn revenue) — Commercial Transformation

- **Context:** A focused 80-FTE, ~€170M-revenue slice of Company D's sales force (within a broader ~$1.1bn / 800-FTE transformation) lacked a disciplined operating cadence.
- **Action:** Stood up a commercial war room with a structured review cadence across the team.
- **Impact:** ~10% of selling time freed (~8 FTE-equivalents of capacity) redirected to new-business prospecting.

2. Sales Funnel

Clear funnel structure for execution & decision-making, powered by CRM.

Company E — Global chemicals & specialty products business (~$3bn revenue, European operations) — Pipeline & Opportunity-to-Order

- **Context:** Company E's opportunity-to-order process lacked visibility into where deals were being won, lost, or stalled.
- **Action:** Analyzed and optimized the funnel; used CRM to track win/loss ratio, stage-conversion rates, and cycle length.
- **Impact:** 20% improvement in conversion rates, freeing up 10% time for more prospecting.

3. Account Management

Running the business for key accounts, including sales plays & playbook discipline.

Company C — Global animal nutrition business — Consultative Selling (Middle East / Africa region)

- **Context:** Company C's regional sales approach was transactional rather than consultative, limiting growth in strategic accounts, including a large distributor in Saudi Arabia.
- **Action:** Introduced a consultative selling approach with that distributor, then expanded to 5 more countries.
- **Impact:** Doubled the distributor's business and generated >$1M in incremental consulting fees.

4. Reporting

Leveraging CRM & ERP data for transparent performance & better sales piloting.

Company A — PE-owned industrial materials business — Sales Reporting & Performance Piloting

- **Context:** Company A's ~400-person sales force and leadership lacked a shared, transparent view of pipeline health and in-period performance.
- **Action:** Stood up leading and lagging indicators in CRM and a BI dashboard tool.
- **Impact:** Enabler — gives leadership and the sales force a common performance view for better sales piloting; a precondition for realizing every other lever's impact.

III. Org & Operating Model

The people and structure that deliver the sales methodology: how the organization is built, staffed, equipped, and rewarded.

5. Org Structure

Clear accountabilities, decision-making & governance design.

Company C — Global animal nutrition business — Post-Acquisition Integration

- **Context:** After acquiring two specialty-ingredient businesses, Company C ran three siloed commercial organizations that didn't leverage each other's strengths in the market.

- **Action:** Built an aggregated share-of-wallet view per account, set a 15% SOW cut-off rule for account ownership, and separately mapped Sales ROI across two related product lines.
- **Impact:** 15% FTE savings and 10% revenue growth from the integration.

6. Roles & Responsibilities

Delineated across sales & supporting roles.

Company A — PE-owned industrial materials business — Sales Role Redesign

- **Context:** Company A's ~400-person sales force used a generic rep role regardless of account growth stage.
- **Action:** Defined hunter, farmer, and hybrid role profiles matched to account growth stage as part of the coverage redesign.
- **Impact:** ~400 reps re-profiled as ~100 hunters, ~200 hybrids, and ~100 farmers, each with tailored incentive plans.

7. Capacity & Sizing

Right-sizing across sales & supporting roles.

Company A — PE-owned industrial materials business — Sales Capacity Planning

- **Context:** Company A risked under- or over-staffing a key region relative to true market potential and upcoming rep retirements.
- **Action:** Built a potential-based staffing model calibrated to market-mapping output with adjusted span of control.
- **Impact:** 15% of the sales organisation was either let go, relocated or demoted.

8. Performance Management

Winning behaviours, right incentives, training, and Sales ROI tracking.

Company B — Global food & ingredients business — Key Account Manager Academy

- **Context:** Company B's 250 Key Account Managers lacked a consistent value-selling and customer-development skill set.
- **Action:** Built and delivered a 12-week KAM training program (10 cohorts of 25), leveraging management structure to lock in ambitious growth plans.
- **Impact:** Increase of ~$80M in annual contribution margin (4% of $2B under management).

IV. Strategic Pricing

Sets and captures the value created upstream: translates segmentation, offering, and route-to-market decisions into price levels and the discipline to hold them.

9. Price Setting

Value pricing, dynamic pricing through micro-segmentation, commodity pricing, and contract management.

Company A — PE-owned industrial materials business — Micro-Segmentation & Dynamic Pricing

- **Context:** Company A priced largely off a flat list price regardless of region, segment, or product type.

– **Action:** Applied three price-setting approaches by region and product type: commodity pricing in one region, dynamic pricing built on micro-segmentation in another, and value pricing for a set of selected products globally.
– **Impact:** ~1-2% bottom-line impact (commodity pricing region); ~3-5% (micro-segmentation pricing region); ~5-15% (global value products, on that product set).

10. Price Getting

Execution discipline, rebates and promotions effectiveness, profitability analytics, and value selling.

Company C — Global animal nutrition business — Price Leakage Analysis (regional market, ~$1bn revenue)

– **Context:** A regional market unit had no visibility into how much value was leaking between list price and realized price.
– **Action:** Ran a leakage analysis on discounts and rebates, quantifying the gap between list and realized price.
– **Impact:** ~10% (~$100M) leakage identified and $10M immediately addressed.

Potential Financial Impact & Deployment Sequence by Lever

Every lever ultimately creates value through one of four channels in the standard DCF/LBO architecture:

- Revenue Growth (compounds through the forecast and is capitalized at the terminal multiple);
- EBITDA Margin (flows straight to the P&L and is capitalized immediately at the exit multiple);
- Capital Efficiency (working-capital/FCF conversion, independent of EBITDA);
- or the Multiple itself (earnings predictability and reduced key-person/silo risk lower the discount rate a buyer applies, or raise the multiple a seller can command).

Each lever below is tagged with its primary value creation mechanism — the specific channel through which it drives Enterprise Value — alongside where it typically sits in the ownership lifecycle and what it depends on, with the impact range drawn from the illustrative examples in this document.

Lever	Value Creation Mechanism	Impact Range (evidence-based)	Timing & Sequence
A. Market Mapping	Revenue expansion (new markets)	~€20M export opportunity identified (~5% of the ~€400M regional revenue base) in an underserved market, plus an identified need to partner to remain competitive in that region	100-Day · feeds C, D, 7
B. Segmentation	Resource reallocation	20 sales FTE reallocated from long-tail accounts to prospecting higher-value opportunities; 500 lowest-tier customers transitioned to a 24/7 self-service platform (from a 4,500-account, ~$50bn-revenue base)	100-Day · feeds D, 6, 9
C. Offering	Portfolio simplification	3 of 8 brands discontinued on a ~€200M-revenue business; EBITDA improved by 15%	Year 1 · needs A
D. Route-to-Market	Cost-to-serve reduction	Sales ROI improvement of 30% within 2 years from reallocating reps to growth zones and covering white zones via inside sales/eCommerce	Year 1 · needs A, B
1. Sales Routines	Capacity utilization	~10% of selling time freed (~8 FTE-equivalents) across an 80-FTE, ~€170M-revenue team, redirected to new-business prospecting	Year 1 · needs D
2. Sales Funnel	Conversion efficiency	20% improvement in conversion rates, freeing up 10% time for more prospecting	Year 1 · needs D
3. Account Management	Share-of-wallet expansion	Doubled the distributor's business and generated >$1M in incremental consulting fees, via a consultative selling approach expanded to 5 more countries	Year 2-3 · needs D
4. Reporting	Risk/predictability	Enabler — gives leadership and the ~400-person sales force a common performance view for better sales piloting; a precondition for realizing every other lever's impact	100-Day · unlocks all
5. Org Structure	Cost & risk reduction	15% FTE savings + 10% revenue growth from post-acquisition integration, informed by a Sales ROI map across two related product lines	Year 1 · needs B
6. Roles & Responsibilities	Role-to-account fit	~400 reps re-profiled as ~100 hunters, ~200 hybrids, and ~100 farmers, each with tailored incentive plans	Year 1 · needs B
7. Capacity & Sizing	Right-sizing	15% of the sales organisation right-sized (let go, relocated, or demoted), from a potential-based staffing model calibrated to market mapping and demographic (age-related departure) forecasting	Year 1 · needs A

Lever	Value Creation Mechanism	Impact Range (evidence-based)	Timing & Sequence
8. Performance Management	Productivity uplift	~$80M annual contribution margin (4% of ~$2B assets under management) from a 12-week Key Account Manager training program (250 KAMs, 10 cohorts of 25)	Year 2-3 · needs 6
9. Price Setting	Price realization	~1-2% bottom-line impact from commodity pricing; ~3-5% from dynamic/micro-segmentation pricing; ~5-15% from value pricing on selected products globally	Year 1 · needs B, C
10. Price Getting	Leakage recovery	~10% (~$100M) leakage identified on ~$1bn regional revenue between list and realized price; ~$10M immediately addressed	Pre-Exit · needs 9

Legend — Timing & Sequence: *100-Day = initial diagnostic window; Year 1 = design & stand-up; Year 2-3 = scale & compound; Pre-Exit = lock in and defend the multiple. "needs X" means the lever requires that lever's output first; "feeds/unlocks X" means this lever's output enables that lever downstream. Every Value Creation Mechanism tag above maps to one of the four EV channels — Revenue Growth, EBITDA Margin, Capital Efficiency, or the Multiple itself — set out at the start of this section.*

First 100 Days: Deployment Plan

How the Diagnostic Scorecard and lever framework translate into a live engagement, phased to match how PE deal teams expect value creation work to mobilize.

Days 1-30: Diagnose

- **Run the Diagnostic Scorecard:** document review, CRM/ERP data pull, and 8-12 stakeholder interviews across sales, marketing, finance, and operations.
- **Stand up baseline reporting (Lever 4) first where it doesn't already exist:** a shared pipeline/performance view is a precondition for evidencing every other lever's impact.
- **Complete Market Mapping (A) and Segmentation (B):** both are 100-Day levers in the framework and the direct upstream input to route-to-market, pricing, and coverage decisions.
- **Deliverable:** completed scorecard and a prioritized lever roadmap, reviewed with management and the sponsor.

Days 31-60: Design

- **Socialize scorecard findings** with the management team and sponsor; align on the priority list of levers scoring ≤2 with high deal-thesis relevance.
- **Design the Year 1 roadmap:** detailed plans for the levers tagged "Year 1" in the framework (Offering, Route-to-Market, Sales Routines, Sales Funnel, Org Structure, Roles & Responsibilities, Capacity & Sizing, Price Setting), sequenced per their dependencies.
- **Agree one or two quick-win pilots** in the highest-readiness levers, to build credibility with the sales organization before full rollout.
- **Deliverable:** a 12-18 month value creation roadmap with named owners, KPIs, and target dates.

Days 61-100: Mobilize

- **Launch the quick-win pilot(s)** agreed in the design phase, with weekly tracking against baseline.

- **Stand up the governance cadence:** monthly KPI review with the sponsor/board, feeding off the reporting layer stood up in days 1-30.
- **Confirm resourcing and ownership** for each prioritized lever, including any capability gaps flagged by the scorecard.
- **Deliverable:** first monthly value-creation dashboard and a signed-off Year 1 execution plan.

Beyond Day 100: *Levers tagged "Year 2-3" (Account Management, Performance Management) build on the Year 1 foundation as account-level and people-capability plays; the lever tagged "Pre-Exit" (Price Getting) is timed deliberately late, to defend realized pricing and the multiple in the run-up to a sale process.*