

# COMMERCIAL EXCELLENCE FUNDAMENTALS

The Definitive Guide for Practitioners



## Introduction to the Series

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ACCES Certification Textbook First Edition,  
October 2024



**Introduction to the  
Commercial Excellence Series**

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# Acknowledgements

*We extend our deepest gratitude to the hundreds of customers with whom we have had the privilege to work. Their trust, collaboration, and willingness to innovate have been invaluable in shaping our understanding and approach to commercial excellence. Through these partnerships, we have not only shared our expertise but also learned best practices that continue to inform our work.*

*We also thank the consulting firms with whom we have collaborated, whose insights and shared dedication to commercial improvement have enriched our methodologies and broadened our perspective. To the hundreds of experts who have contributed to Indigo's projects, we are deeply appreciative of your knowledge, dedication, and pursuit of excellence. Your work is reflected in every page of this manual.*

*Our gratitude extends to the private equity managers who have generously shared their playbooks and strategies, providing crucial insights into the financial and operational levers that drive sustainable growth. And to the multinational organizations we have worked with globally, thank you for your partnership, which has underscored the importance of a unified yet adaptable approach to commercial excellence.*

*This manual is a collective achievement, made possible by the contributions of all those we have had the honour of working with.*

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*Accreditation Council for  
Commercial Excellence  
Standards*

# **ACCES - Setting the Global Benchmark for Commercial Excellence**

*ACCES, the Accreditation Council for Commercial Excellence Standards, is a pioneering initiative dedicated to setting the benchmark for commercial excellence worldwide. As an accreditation council, its primary mission is to establish and uphold rigorous standards that guide organizations toward superior performance across all commercial disciplines. Through a structured framework and certification process, ACCES empowers businesses with the tools and insights needed to thrive in today's competitive landscape.*

## **Best Practices for Enhanced Performance**

*ACCES establishes a consistent set of best practices that organizations can leverage to boost their commercial performance. These guidelines enable companies to evaluate current capabilities, pinpoint areas for improvement, and align their strategies with those of globally recognized high performers. By following these recommendations, companies can achieve measurable improvements in sales, marketing, finance, and overall strategic management. Moreover, ACCES is committed to remaining ahead of market trends by continually updating its standards, ensuring that the framework stays relevant and that organizations can adapt swiftly to evolving business environments.*

## **Certification and Recognition**

*Through its robust certification process, ACCES validates an organization's adherence to high commercial excellence standards. This certification not only reinforces a company's commitment to excellence but also enhances credibility with customers, investors, and partners. In addition, practitioners can earn individual certification that recognizes their expertise and capability to drive change in complex environments.*

## **The GOLD Standards Creation**

*At the heart of ACCES are the GOLD standards—a set of best practices and performance metrics developed collaboratively by a diverse group of*

industry leaders. These standards have been crafted with valuable contributions from professionals in the private equity industry, leading academics, experienced advisors, and subject-matter experts. This collaborative approach ensures that the GOLD standards are both theoretically robust and practically applicable across various industries.

- **Industry Expertise.** Professionals from the private equity sector have contributed critical insights into market dynamics and operational challenges, ensuring that the standards address the real-world needs of businesses striving for commercial excellence.
- **Academic Contributions.** Renowned academics have infused the framework with proven theories and methodologies, enhancing its credibility and ensuring it withstands both academic scrutiny and practical application.
- **Advisory and Expert Insights.** Seasoned advisors and thought leaders have provided strategic perspectives that make the GOLD standards forward-thinking and adaptable. Their collective expertise has shaped a framework that drives innovation and sustainable growth.

### **The Vision for Commercial Excellence**

With the Commercial Excellence series, ACCES aims to disseminate key concepts, best practices, and frameworks that benefit anyone committed to excelling in the commercial space. By integrating rigorous standards, continuous improvement, and collaborative expertise, ACCES provides a comprehensive pathway for achieving and sustaining excellence in the global marketplace.

# Introduction to the Commercial Excellence Fundamentals Collection

This four-volume series is designed as a structured and comprehensive roadmap for organizations seeking to achieve peak commercial performance. Each volume builds upon the previous one, offering an interconnected approach that takes you from defining a solid strategy to executing successful marketing and sales initiatives, optimizing pricing, structuring an efficient organization, and designing effective incentive plans. The series concludes with a deep dive into diagnostics, best practices, and key analytics, ensuring a continuous improvement cycle. By following this step-by-step framework, businesses can optimize every aspect of their commercial operations and drive sustained success.

In the following pages we lay the foundation for the entire series by defining what commercial excellence means and why it is a crucial driver of growth and profitability. We will provide an overview of the key principles, methodologies, and frameworks that will be explored in the following volumes. This introduction ensures that readers understand the interconnected nature of strategy, marketing, sales, pricing, organization, and incentives, helping them navigate the series with a clear vision of how each component contributes to overall commercial success.

## **Volume 1: Commercial Strategy and Marketing**

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Strategy is at the core of commercial excellence, and this volume focuses on how organizations can define and implement winning strategies. It begins by exploring the importance of setting clear commercial objectives that align with broader corporate goals. Businesses must position themselves effectively in the market, differentiate from competitors, and ensure long-term sustainability.

This volume goes beyond traditional strategy formulation by discussing how organizations can develop adaptive strategies that respond to

evolving market conditions. It covers everything from competitive analysis and market segmentation to long-term planning and execution frameworks. The goal is to provide companies with a clear, actionable strategic foundation that drives sustainable growth.

A strong marketing function is essential for demand generation, brand positioning, and customer engagement. This volume takes a deep dive into what makes marketing effective, from building a compelling brand to leveraging data-driven strategies. It explores how to design and execute go-to-market plans that resonate with target audiences, drive lead generation, and increase conversion rates.

Marketing is no longer just about awareness; it is about measurable impact. This volume discusses the role of digital transformation in modern marketing, emphasizing performance marketing, content strategies, and customer engagement initiatives. It also highlights how companies can align their marketing efforts with sales to create a seamless and effective commercial engine.

## **Volume 2: Sales Excellence**

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Sales is the lifeblood of any business, and this volume focuses on building high-performance sales organizations. It examines how to structure sales teams, optimize sales processes, and leverage modern sales enablement tools to maximize efficiency. The ability to manage pipelines, build strong customer relationships, and execute effective account management strategies is critical to revenue growth.

Beyond tactics, this volume also explores sales methodologies, providing insights into different approaches that companies can adopt based on their business models. From consultative selling to solution selling, businesses must tailor their sales strategies to meet customer needs and market demands. This volume ensures that sales teams are equipped with the skills, tools, and structures needed to consistently hit and exceed targets.

## **Volume 3: Organization, Talent and Incentives**

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Having the right strategy, marketing, sales, and pricing approach is not enough without the proper organizational structure to support execution. This volume explores how to design organizations that drive commercial

excellence, ensuring role clarity, cross-functional collaboration, and efficiency.

Successful companies establish operating models that align with their commercial strategy, allowing for scalability and adaptability. This volume discusses how businesses can create structures that foster accountability, streamline decision-making, and enhance agility. It also explores how organizations can build high-performing teams and leverage internal communication structures to support commercial goals.

Incentives play a crucial role in motivating teams and driving performance. This volume takes a detailed look at how companies can design compensation models that align with business objectives. Sales teams, marketing professionals, and commercial leaders all perform better when incentives are structured effectively.

This volume covers different types of incentive structures, from commission-based models to performance-based rewards, ensuring that businesses create compensation plans that encourage the right behaviors. It also explores best practices for setting quotas, designing incentive tiers, and maintaining fairness in performance-based compensation. A well-designed incentive structure not only boosts motivation but also ensures that company goals and employee objectives are aligned.

#### **Volume 4: Strategic Pricing and Commercial Terms**

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Pricing is one of the most powerful levers for profitability, yet it is often underutilized or misunderstood. This volume delves into how companies can develop strategic pricing models that balance competitiveness with profitability. It explores value-based pricing, price segmentation, discount management, and psychological pricing techniques.

A well-structured pricing strategy ensures that businesses capture the full value of their offerings while remaining attractive to customers. This volume also covers pricing governance and analytics, helping organizations track the effectiveness of their pricing models and make data-driven adjustments. The ability to set and maintain optimal price points is a key driver of sustainable revenue growth.

## **Annex – Diagnostics, Best practices, and Key analytics**

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The final volume serves as a practical reference guide, providing a toolkit for evaluating and continuously improving commercial effectiveness. It includes diagnostics for assessing commercial health, industry best practices, and a comprehensive look at key performance analytics.

Organizations that want to sustain commercial excellence must measure their progress, refine their approaches, and adapt to changing conditions. This volume offers benchmarking frameworks, data-driven methodologies, and real-world case studies to help businesses track performance, identify gaps, and implement improvements. It ensures that companies remain agile and can make informed decisions based on measurable insights.

## **A complete guide to achieving Commercial Excellence**

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Together, these 5 volumes form a comprehensive and actionable guide to commercial excellence. By covering everything from strategy to execution, optimization, and continuous improvement, this series provides leaders with the knowledge, tools, and best practices to drive sustainable growth and superior commercial performance.

Whether you are building a commercial function from the ground up or refining an existing strategy, this collection serves as the definitive resource for achieving and maintaining a competitive edge.

# Introduction to Commercial Excellence

In today's competitive and rapidly changing business environment, achieving commercial excellence has become a strategic imperative for organizations aiming for sustainable growth, customer loyalty, and operational efficiency. Commercial excellence extends beyond just sales or marketing; it encompasses a comprehensive approach to optimizing every facet of a company's operations, aligning all functions with customer needs, and driving consistent, measurable results. This manual serves as a guide for organizations and professionals seeking to elevate their commercial capabilities, providing the frameworks, strategies, and best practices needed to excel in all aspects of commercial operations.

## Defining Commercial Excellence

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Commercial excellence is a holistic approach that combines sales effectiveness, customer-centric strategies, operational efficiency, and cross-functional alignment to create value at every customer touchpoint. Unlike traditional methods that may focus on isolated metrics, commercial excellence strives for a synchronized system where all business functions—from sales and marketing to pricing, customer service, and operations—work collaboratively to meet both customer expectations and business objectives.

Achieving commercial excellence requires an organization to deeply understand its customers, market dynamics, and competitive landscape. It involves creating adaptable strategies, efficient processes, and customer-focused approaches that are agile and responsive to evolving needs. By fostering a culture of excellence, companies can ensure that each interaction contributes positively to the customer experience and supports sustainable growth.

## Importance of Commercial Excellence in Management

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The role of commercial excellence in management is pivotal, as it serves as a bridge between strategic vision and operational execution. For

executives and managers, commercial excellence provides a roadmap to achieve alignment across departments, ensuring that all functions contribute cohesively toward the company's goals. Effective management of commercial excellence allows leaders to make informed decisions based on data-driven insights, customer feedback, and market analysis, fostering a proactive rather than reactive approach to business challenges.

By embedding commercial excellence into management practices, organizations can achieve:

1. **Increased Revenue and Profitability:** Efficiently aligning pricing strategies, customer acquisition and retention initiatives directly impacts revenue growth and profitability.
2. **Enhanced Customer Satisfaction and Loyalty:** A customer-centered approach builds stronger, long-lasting relationships, leading to increased customer loyalty and reduced churn.
3. **Agility and Responsiveness:** Commercial excellence prepares companies to swiftly adapt to market shifts, changing customer preferences, and competitive pressures.
4. **Operational Efficiency:** Streamlining processes and aligning resources toward high-impact activities reduces waste, improves productivity, and enables teams to focus on customer value creation.
5. **Data-Driven Decision Making:** Leveraging analytics and CRM tools enables managers to make accurate, timely decisions that enhance business performance and customer satisfaction.

## Overview of Key Strategies

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Achieving commercial excellence involves the deployment of several key strategies that optimize different aspects of the business. Each strategy serves to align internal capabilities with market demands, ensuring that the company operates efficiently and can meet customer needs effectively.

1. **Customer-Centric Strategy:** At the heart of commercial excellence is a customer-focused approach. This strategy involves deep customer segmentation, understanding customer pain points, and tailoring solutions that resonate with distinct customer groups. By ensuring that customer needs are prioritized across all functions, companies can drive loyalty and engagement.

2. **Sales Effectiveness and Enablement:** Enabling the salesforce with the right tools, data, and training enhances productivity and empowers sales teams to close deals efficiently. This strategy covers territory management, account allocation, CRM integration, and performance metrics, all designed to equip sales teams to meet their targets and build lasting customer relationships.
3. **Strategic Pricing:** Pricing strategies are essential for competitive positioning and profitability. Effective pricing considers market demand, customer value perception, competitor pricing, and cost structures to maximize profitability. By implementing dynamic pricing models and regularly analyzing market trends, companies can stay competitive while optimizing margins.
4. **Operational Excellence:** Streamlined operations enable the company to deliver high-quality products and services while minimizing costs. Operational excellence includes process optimization, resource allocation, and effective supply chain management, ensuring that customer needs are met promptly and efficiently.
5. **Data-Driven Decision Making:** Leveraging data analytics is crucial for real-time insights into customer behavior, market trends, and internal performance. Through CRM systems, predictive analytics, and customer feedback mechanisms, companies can make well-informed decisions that support growth and customer satisfaction.
6. **Marketing and Brand Positioning:** Effective marketing and brand positioning strategies ensure that the company resonates with its target audience. This includes multi-channel campaigns, digital marketing, and brand loyalty programs, all aimed at building a recognizable, credible brand that attracts and retains customers.
7. **Customer Retention and Loyalty Programs:** Retaining customers is often more cost-effective than acquiring new ones. Customer retention strategies—such as loyalty programs, personalized offers, and proactive support—build long-term relationships that drive repeat business and referrals, contributing to a steady revenue stream.
8. **Cross-Functional Collaboration:** Achieving commercial excellence requires seamless collaboration across departments, including sales, marketing, customer service, and operations. A cross-functional approach ensures that each department's efforts are aligned, supporting a unified strategy that enhances customer experience and operational efficiency.

9. **Continuous Improvement and Diagnostics:** Regular diagnostics help identify gaps in commercial performance and provide a basis for continuous improvement. This strategy involves setting performance metrics, conducting regular assessments, and implementing adjustments to stay aligned with market needs and operational goals.
10. **Competitive Intelligence and Market Awareness:** Staying aware of industry trends, competitor activities, and customer expectations enables organizations to adapt strategies proactively. Competitive intelligence tools and market analysis provide insights that help refine strategies and improve decision-making.

# Structure of the Manual

The manual is organized into distinct chapters, each focusing on a critical area of commercial excellence. Here's an overview of the topics covered:

## **1. Foundations of Commercial Strategy**

Establishes the foundation for achieving business growth by aligning sales, marketing, and pricing strategies with corporate objectives.

## **2. Competitive Market and Customer Intelligence**

Involves gathering and analyzing data on competitors, market trends, and customer preferences to drive informed business decisions.

## **3. Go-to-Market Strategy (GTM)**

Defines how a company delivers its products or services to customers, including channel selection, sales models, and engagement tactics.

## **4. Product Portfolio**

Focuses on managing a company's range of products and services, ensuring they meet market demands and contribute to business goals.

## **5. Strategic Planning**

The process of setting long-term commercial goals and defining actions to achieve them through structured decision-making.

## **6. Distribution Strategy**

Determines how products and services reach customers efficiently through direct, indirect, or hybrid distribution channels.

## **7. Foundations of Marketing and Customer Alignment**

Ensures marketing strategies resonate with customer needs, aligning messaging, branding, and engagement efforts.

## **8. Building Brand Equity through Advertising and Promotion**

Enhances brand perception and loyalty through targeted advertising, promotions, and public relations campaigns.

## **9. Customer Acquisition**

Strategies and tactics used to attract, engage, and convert prospects into loyal customers.

#### **10. Customer Journey and Differentiation**

Maps the end-to-end customer experience and identifies unique value propositions to create competitive advantages.

#### **11. Foundations of Sales Excellence**

Focuses on improving sales team efficiency, effectiveness, and customer engagement to drive revenue growth.

#### **12. Cross-sell and up-sell strategies**

Techniques to maximize customer lifetime value by selling complementary products or upgrading existing purchases.

#### **13. Customer visits, time allocation and sales territory optimization**

Helps sales teams prioritize high-value customers and efficiently allocate resources across territories.

#### **14. Sales operations: people, training and collaboration**

Supports sales teams with processes, tools, and training to enhance performance and productivity.

#### **15. Sales team bottom-up sizing**

Determines the optimal number of sales representatives based on market potential, workload, and growth objectives.

#### **16. Lead generation and Hunting**

Tactics used to identify and engage potential customers, ensuring a strong sales pipeline.

#### **17. Account Planning**

A structured approach to managing key accounts by setting objectives, mapping opportunities, and strengthening relationships.

#### **18. S&OP and Forecasting**

Sales and Operations Planning (S&OP) aligns demand forecasting with supply chain capabilities to optimize inventory and sales performance.

#### **19. Coaching and Proactive Account Management**

Focuses on developing sales teams and maintaining long-term relationships with key customers through strategic account management.

## **20. Foundations of Organizational Design**

Defines the structure of a commercial organization to optimize efficiency, communication, and performance.

## **21. Key roles in the Commercial organization**

Outlines critical positions such as sales, marketing, pricing, and operations, and their impact on business success.

## **22. Governance**

Establishes policies, decision-making processes, and accountability structures within the commercial organization.

## **23. Operating model**

Defines how a company functions, including processes, structures, and resources to execute its commercial strategy.

## **24. Building an effective team: people and training**

Focuses on recruiting, developing, and retaining top commercial talent through targeted training programs.

## **25. Talent assessment: required competencies, 9 boxes and performance**

Evaluates employee capabilities using structured frameworks to identify strengths, gaps, and development needs.

## **26. Change management**

The process of guiding teams through organizational transitions to ensure smooth adoption of new strategies and initiatives.

## **27. Incentive Plans**

Compensation structures designed to motivate sales teams and drive desired performance outcomes.

## **28. Quota setting and MBO Plans**

Defines sales targets and Management by Objectives (MBO) frameworks to align performance with business goals.

### **29. Foundations of Pricing Strategy**

Overview of pricing as a strategic lever to optimize profitability, competitiveness, and market positioning.

### **30. Pricing Methodologies**

Various approaches to setting prices, including cost-based, value-based, and competitive pricing models.

### **31. Managing competition: how competitive dynamics impact Pricing**

Examines market forces and competitor pricing strategies to maintain a competitive edge.

### **32. Price setting prerequisites**

The foundational elements required for effective pricing, including cost analysis, value perception, and market research.

### **33. Developing an effective Pricing Strategy**

Creating a structured approach to pricing that balances profitability, demand, and competitive positioning.

### **34. Pricing Execution**

The implementation of pricing strategies through sales, discounting policies, and enforcement mechanisms.

### **35. Channel management**

Optimizing relationships with distributors, resellers, and direct channels to maximize market reach and efficiency.

### **36. Common pitfalls**

Identifying and mitigating common mistakes in sales, marketing, and pricing strategies that impact performance.

### **37. Pricing Infrastructure**

The tools, systems, and governance required to support pricing decisions and execution.

## **Deep Dives and Additional Resources**

Includes specialized diagnostic approaches in organizational design, talent management, product management, and pricing maturity for targeted insights.

## **KPIs and Analytics**

Key performance indicators and analytical tools used to measure and improve commercial performance.

## **Business Intelligence, Tools and Systems**

The role of data-driven insights and technology in enhancing sales, marketing, and pricing decisions.

## **Diagnostics on Commercial Excellence**

Methods for assessing commercial strategy effectiveness and identifying areas for improvement.

## **PMO and Initiatives implementation**

The role of the Project Management Office in executing and tracking commercial initiatives.

## **Regular Activity and Performance Management**

Intensive, strategy-driven sessions focused on solving sales challenges and accelerating revenue growth.

## **B2B surveys and use cases**

Leveraging customer insights from surveys and case studies to refine commercial strategies.

## **Key ComEx Acronyms and Definitions**

A glossary of essential acronyms used across sales, marketing, pricing, and commercial operations.

Each chapter includes best practices, key takeaways, and case studies, providing real-world examples of how companies have successfully implemented the principles discussed. This combination of practical advice and actionable insights enables readers to apply the concepts to their unique organizational contexts.

# Who Should Use This Manual?

The purpose of this manual is to serve as a comprehensive reference for professionals, managers, and executives seeking to advance their organization's commercial maturity. Whether you're aiming to refine your company's strategic pricing approach, improve cross-sell and upsell strategies, or establish an operating model that enhances efficiency and agility, this manual provides the guidance you need to achieve these goals. Each chapter is designed to offer both foundational concepts and advanced techniques, making it a valuable resource for both beginners and experienced professionals.

This manual is designed as both a step-by-step guide and a reference resource. You can read it cover-to-cover to build a complete understanding of commercial excellence, or focus on specific chapters that are most relevant to your current objectives. Each chapter stands alone, allowing you to dive into the topics that address your immediate needs while keeping the entire framework at your disposal for broader strategic planning.

This manual is intended for:

- **Business Leaders and Executives:** To develop a holistic view of commercial excellence and lead their teams in achieving higher performance and growth.
- **Sales, Marketing, and Operations Managers:** To gain practical strategies for improving team alignment, optimizing processes, and achieving departmental goals that contribute to overall commercial success.
- **Consultants and Business Advisors:** To use as a framework when diagnosing commercial challenges and implementing best practices within client organizations.
- **Professionals Seeking Certification in Commercial Excellence:** To study as part of their certification process, gaining the skills and knowledge needed to contribute effectively to commercial strategy and operations.

# Commercial Excellence Certification

Achieving commercial excellence is not a one-time effort but a continuous journey of improvement, innovation, and adaptation. It requires a clear vision, a commitment to customer-centricity, and a willingness to align all functions toward a common goal. This manual is a companion on that journey, guiding you through each step and equipping you with the tools to navigate the complexities of modern business.

By mastering the principles and practices outlined here, your organization can enhance customer satisfaction, strengthen operational resilience, and achieve sustainable growth in an ever-evolving market landscape. Let this manual be your guide as you work toward achieving excellence in all aspects of your commercial operations.

For certification candidates, the manual serves as core study material, with each chapter designed to provide the foundational knowledge and practical insights needed to demonstrate commercial excellence competence. Completing the accompanying exercises and case studies within each chapter will deepen your understanding and prepare you for application in real-world settings.

Certifications will be awarded upon successful completion of both a multiple-choice test and a case study analysis. The multiple-choice test assesses foundational knowledge across key topics covered in the manual, ensuring a solid understanding of commercial excellence principles. The case study, meanwhile, evaluates practical application, requiring candidates to analyze a realistic business scenario and provide solutions that demonstrate strategic insight and problem-solving skills. Both components are designed to validate a comprehensive grasp of theoretical concepts and real-world application, and candidates must meet the required passing scores in each to qualify for certification.

Here's the classification that will be certified based on the results of the assessment. Each belt level reflects increasing responsibility, skill proficiency, and impact within a commercial excellence framework:

### **White Belt (Fundamental Contributor)**

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- Definition: Introductory level focused on understanding the fundamentals of commercial excellence, including basic customer insights, sales operations, and pricing principles.
- Test Results: Achieve a passing score on foundational multiple-choice assessments focused on core terminology and concepts.
- Experience: No prior experience required, making this ideal for new team members or those transitioning into commercial excellence roles.
- Role: Provides foundational support in commercial activities, assists in data gathering, and contributes to small tasks under the guidance of more experienced team members.

### **Yellow Belt (Support Specialist)**

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- Definition: Foundational level with a working knowledge of key commercial excellence practices, focusing on support roles within the organization.
- Test Results: Achieve a minimum score in assessments covering customer segmentation, data analysis basics, and CRM functionality.
- Experience: 1-2 years of relevant experience in sales, marketing, or customer support, with exposure to data analysis or CRM tools.
- Role: Assists in data collection, supports reporting and communication, participates in projects, and applies foundational knowledge to improve customer engagement and operational processes.

### **Green Belt (Commercial Excellence Practitioner)**

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- Definition: Intermediate level with the ability to lead smaller commercial projects and apply practical commercial excellence tools and methodologies.
- Test Results: Pass an assessment on topics like sales optimization, customer journey mapping, and basic pricing strategies.
- Case Study: Demonstrate proficiency by completing a case study that involves diagnosing a commercial issue, such as sales conversion rates, and proposing improvement recommendations.

- Experience: 3-5 years of experience in roles related to sales operations, marketing analytics, or customer engagement, with a track record of supporting commercial projects.
- Role: Leads department-specific projects, such as process improvement in customer engagement or account planning, under the guidance of a Black Belt.

### **Black Belt (Commercial Excellence Leader)**

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- Definition: Advanced level, with in-depth expertise in commercial excellence strategies and management of cross-functional initiatives.
- Test Results: Achieve high scores on advanced topics, including complex data analysis, strategic pricing, and sales forecasting.
- Case Study: Complete a complex case study involving multi-department collaboration, data analysis, and solution design, such as implementing a new pricing strategy or improving customer retention rates.
- Experience: 5-8 years of experience, with a minimum of 3 years in a management or strategic role in commercial functions (e.g., sales, pricing, marketing).
- Role: Manages high-impact projects, mentors Green Belts, drives operational improvements across teams, and implements best practices for long-term customer and revenue growth.

### **Master Black Belt (Strategic Excellence Architect)**

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- Definition: Expert level focused on designing and executing commercial excellence strategies at an organizational level.
- Case Study: Solve a case study requiring strategic foresight and cross-functional expertise, such as designing a comprehensive sales and marketing alignment plan or leading a company-wide transformation project.
- Experience: Over 8 years of experience in commercial excellence, with at least 3 years in senior leadership roles driving strategic initiatives.
- Role: Leads transformational projects, coaches Black Belts and Green Belts, oversees commercial excellence across business units, and aligns commercial strategies with overall corporate objectives.

## **Champion (Executive Sponsor for Commercial Excellence)**

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- Definition: Executive level focused on the strategic oversight and support of commercial excellence initiatives throughout the organization.
- Test Results: Demonstrate understanding of advanced commercial excellence principles, focusing on alignment with corporate strategy and ROI.
- Case Study: Review of previous case studies or projects demonstrating success in championing high-impact initiatives, such as large-scale CRM or pricing transformations.
- Experience: Minimum of 10 years in executive or senior roles with a proven record of strategic impact in commercial functions.
- Role: Sponsors and champions commercial excellence initiatives, providing resources and executive-level support to project teams and ensuring alignment with organizational growth objectives.

ComEx Certification Level	Certified Competencies	Certification Criteria
<b>White Belt (Fundamental Contributor)</b>	<ul style="list-style-type: none"> <li>- Understands basic principles of commercial excellence, including customer insights, sales operations, and introductory pricing concepts</li> <li>- Supports foundational tasks and assists in data gathering for commercial initiatives</li> <li>- Contributes to small projects under supervision</li> </ul>	<ul style="list-style-type: none"> <li>- <b>Assessment:</b> Passing exam with entry level score on a foundational multiple-choice test covering core terminology and basic concepts</li> <li>- <b>Experience:</b> No prior experience required; suitable for entry-level team members or those new to commercial excellence roles</li> </ul>
<b>Yellow Belt (Support Specialist)</b>	<ul style="list-style-type: none"> <li>- Understands foundational concepts of commercial excellence</li> <li>- Can support basic implementation tasks in a team setting</li> <li>- Assists with data collection &amp; entry-level analysis, supports communication, responsible end-to-end for ad-hoc tasks</li> </ul>	<ul style="list-style-type: none"> <li>- <b>Assessment:</b> Passing exam with a medium rated score on a multiple-choice test covering core terminology and key concepts</li> <li>- <b>Experience:</b> 1-2 years of relevant experience</li> </ul>
<b>Green Belt (Commercial Excellence Practitioner)</b>	<ul style="list-style-type: none"> <li>- Able to apply commercial excellence principles independently</li> <li>- Conducts basic diagnostics and identifies improvement opportunities</li> <li>- Manages small projects and supports team initiatives in commercial functions</li> </ul>	<ul style="list-style-type: none"> <li>- <b>Assessment:</b> Passing exam with a high rated score on a multiple-choice test covering all key concepts. Score needs to be in the top 20% percentile in all but one Comex areas (Strategy, Sales, Marketing, Pricing, Organization, Incentives, KPIs and Frameworks).</li> <li>- <b>Case study:</b> Successfully passing a case study, which consists of diagnosing a commercial issue</li> <li>- <b>Experience:</b> 3-5 years of relevant experience</li> <li>- <b>Yellow belt for at least 1 year</b> and demonstrated application of key concepts in a corporate environment since, unless overall tenure is &gt;5 years</li> </ul>
<b>Black Belt (Commercial Excellence Leader)</b>	<ul style="list-style-type: none"> <li>- Leads projects on commercial excellence independently</li> <li>- Proficient in conducting diagnostics, implementing solutions, and measuring impact</li> <li>- Coaches teams and drives adoption of best practices across departments</li> </ul>	<ul style="list-style-type: none"> <li>- <b>Assessment:</b> Passing exam with a high rated score on a multiple-choice test covering all key concepts. Score needs to be in the top 10% percentile in each of the Comex area.</li> <li>- <b>Case Study:</b> Complete a complex case study in multidisciplinary areas</li> <li>- <b>Interview:</b> Situational role play</li> <li>- <b>Experience:</b> 5-8 years of relevant experience</li> <li>- <b>Green belt for at least 1 year</b></li> </ul>
<b>Master Black Belt (Strategic Excellence Architect)</b>	<ul style="list-style-type: none"> <li>- Strategically leads commercial excellence initiatives across multiple teams</li> <li>- Designs and optimizes commercial processes and frameworks</li> <li>- Advises senior leaders on commercial strategy and process improvement</li> <li>- Mentors Green and Black Belts on project execution and diagnostics</li> </ul>	<ul style="list-style-type: none"> <li>- <b>Case study:</b> Successfully passing a case study focused on strategic foresight and cross-functional expertise</li> <li>- <b>Interview:</b> Project portfolio review</li> <li>- <b>Experience:</b> 8-10+ years of relevant experience</li> <li>- <b>Black belt for at least 1 year</b></li> </ul>
<b>Champion (Executive Sponsor for Commercial Excellence)</b>	<ul style="list-style-type: none"> <li>- Provides executive sponsorship and strategic oversight for commercial excellence</li> <li>- Ensures alignment of commercial excellence with organizational goals</li> <li>- Builds and fosters a culture of continuous improvement across the organization</li> </ul>	<ul style="list-style-type: none"> <li>- <b>Assessment:</b> Executive review and demonstration of strategic impact</li> <li>- <b>Case study:</b> Successful review of previous case studies or projects</li> <li>- <b>Interview:</b> Situational role play</li> <li>- <b>Experience:</b> Senior leadership role and 10-15+ years in relevant domains</li> <li>- <b>Master Black belt for at least 1 year</b></li> </ul>

Figure 1: Certification criteria

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