

Example Commercial Systems Review Summary

Sanitised example of the written summary provided after a Commercial Systems Workshop

CLIENT TYPE

Mid-market
contract
manufacturer

RESPONDENTS

6 senior
stakeholders

PARTICIPANTS

CEO, Commercial
Director, Sales
Lead, Marketing
Lead

FORMAT

Pre-work
diagnostics +
90-minute
workshop +
written summary

Purpose

This summary captures the main patterns surfaced through the pre-work diagnostic and leadership workshop. Its purpose is to provide a clearer shared picture of how the commercial side of the business is currently working, where confidence is weak or inconsistent, and what appears most worth investigating next.

Executive Summary

The business appears commercially active, but not fully joined up. Leadership, sales, and marketing do not appear to share the same level of confidence in how opportunities are created, defined, progressed, and made visible.

The issue does not appear to be lack of effort. It appears to be inconsistency in how the commercial side of the business is understood and managed. In several areas, activity seems to be compensating for weak clarity rather than supported by a coherent commercial system.

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The clearest near-term opportunity is not simply more activity. It is stronger clarity around where the business most wants to win, what a good-fit opportunity looks like, and where visibility currently weakens between first interest and sales progression.

This example is designed to reflect the kind of clarity and output quality the workshop is intended to produce: practical, diagnostic, and useful in its own right.

Diagnostic snapshot

Pre-work diagnostic completed by 6 respondents across leadership, sales, and marketing. Scores are shown for leadership and front-line groups separately, because the gap between them is often more revealing than the average.

■ Leadership ■ Sales & Marketing Scale: 0-5

Commercial insight & decision-making (avg 3.6)



Sales process and pipeline visibility (avg 3.1) LARGEST GAP



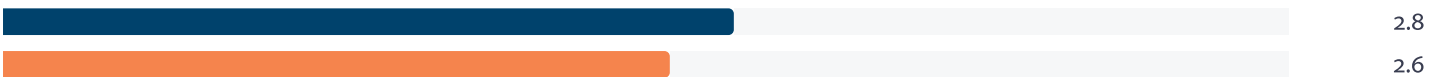
How new opportunities are created (avg 2.9)



Market focus and differentiation (avg 2.8)



Website and digital presence (avg 2.7)



Areas of strongest confidence

- Underlying operational capability and delivery credibility
- Belief that the business has genuine strength in a number of target sectors
- Shared recognition that commercial improvement matters strategically

Areas of weakest confidence

- Clear definition of a good opportunity
- Visibility into pipeline movement and stalls
- Confidence in where new opportunities should come from
- Confidence that the website supports progression, not just presentation

Key alignment gaps

- 1 Leadership vs front-line confidence**
Leadership appears more confident than sales and marketing about the visibility and consistency of the current commercial system. The pipeline-visibility gap above is the clearest example.
- 2 Credibility vs progression**
The business appears reasonably confident in capability and credibility, but less confident in how that translates into deliberate commercial movement.
- 3 Activity vs systems clarity**
Commercial activity appears to be happening, but with weaker shared confidence that it is being driven by a coherent system rather than accumulated habits and individual effort.

Overall pattern: Different functions do not appear to be looking at exactly the same commercial reality. That matters because alignment gaps often reveal where the system is least clear.

Current-state observations

The workshop discussion suggests that the commercial side of the business is active, but not yet behaving like a fully joined-up system.

- Good opportunities currently appear to enter the business through a mix of referrals, relationships, repeat business, and uneven digital routes.
- Different teams do not appear to describe the commercial journey in the same way.
- The website may be supporting credibility more than progression.
- Visibility appears to weaken between early interest, qualification, and momentum tracking.
- Important commercial knowledge seems to sit partly with individuals rather than being translated into clearer shared systems logic.

Issues most worth addressing

- Weak shared definition of what a worthwhile opportunity looks like.
- Inconsistent visibility into progression, stalls, and momentum.
- Over-reliance on inherited patterns or individual judgment.
- Market-facing clarity may not yet do enough justice to where the business genuinely creates value.
- Commercial decisions may be made with partial rather than sufficiently consistent evidence.

VISIBLE SYMPTOM

Pipeline feels active but hard to interpret

LIKELY UPSTREAM ISSUE

Opportunity definition and progression logic are not yet clear enough across the business

High-level opportunities

- 1 Clarify where the business most wants to win**
Sharper market focus would make the rest of the system easier to align.
- 2 Tighten the shared definition of a good-fit opportunity**
Greater consistency here would improve both progression quality and decision-making confidence.
- 3 Improve visibility between first interest, qualification, and commercial progression**
This appears to be one of the clearest points where confidence currently weakens.
- 4 Strengthen the role of the website and digital presence**
The website should help buyers understand fit and move forward, not simply present capability.
- 5 Build a more reliable basis for commercial insight**
The business would benefit from stronger shared visibility into where opportunities come from, where they stall, and what appears to be driving better movement.

Questions worth investigating next

- Where do the most valuable opportunities really come from today?
- Where does visibility weaken most between first contact and sales progression?
- Where do leadership, sales, and marketing define fit and value differently?
- Which issue is most upstream: market clarity, opportunity definition, progression visibility, or decision support?

Most sensible next step

A focused follow-on investigation into the upstream commercial foundations of the business: where it most wants to win, what it genuinely does best, how a good-fit opportunity should be defined, and how that should shape website, sales, marketing, and visibility design across the commercial front end.

In our methodology, this is the ground covered by Value Architecture, the second step of the Commercial Intelligence Engine.

This summary is designed to leave the leadership team with a clearer shared picture of the current commercial system and a more credible basis for deciding what needs deeper work first.