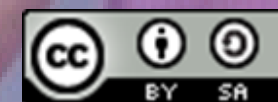




Green Transition Training Modules

MODULE 13: Roadmap for the Green Transition in Family SMEs

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Content of this module

1

Takeaways

2

Introduction

3

Key Concepts - Content of the specific module

4

References and Recommended Literature



Takeaways

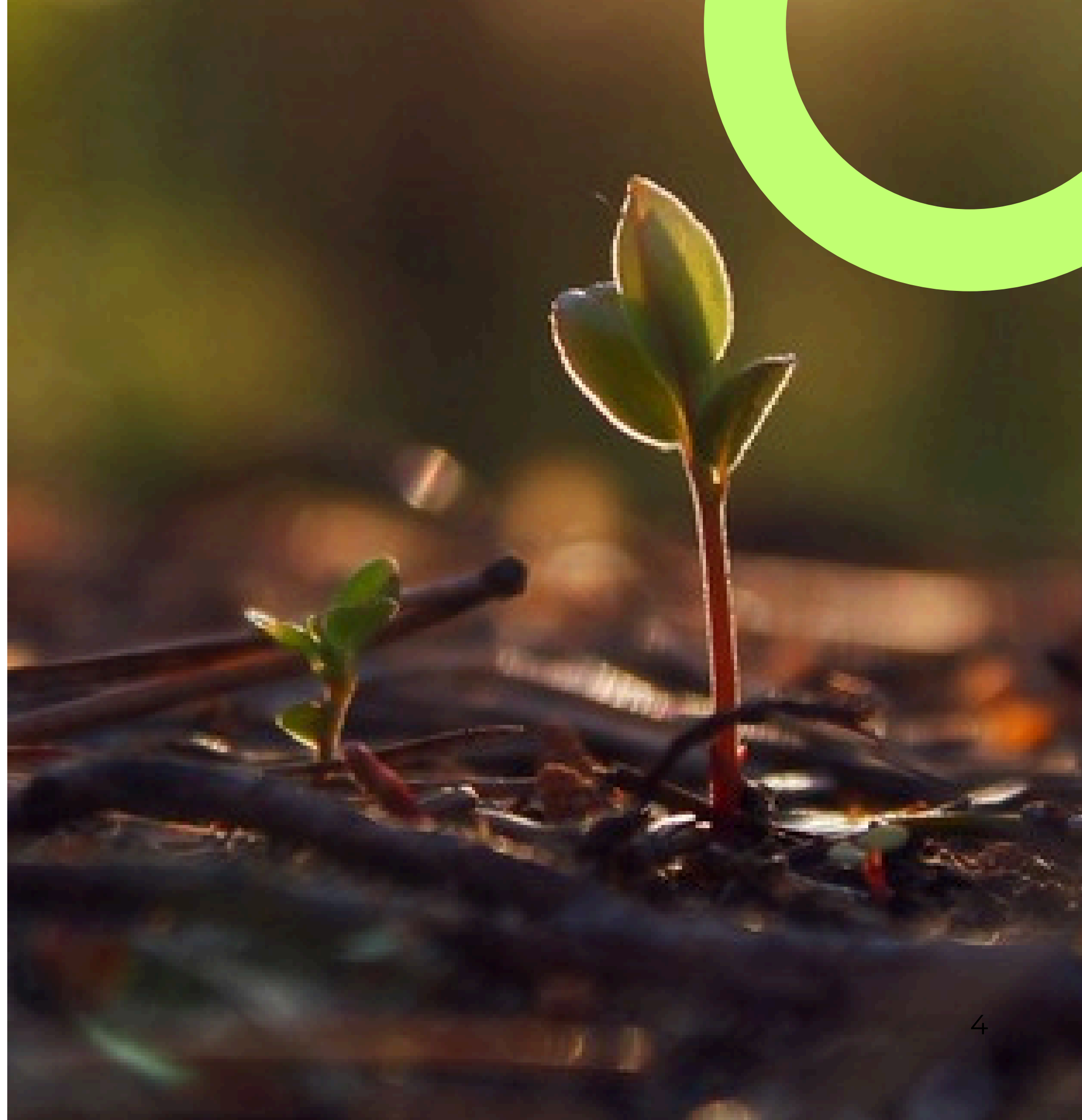
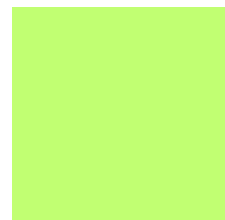
After completing this module, participants will:

- gain a clear understanding of what it means to create a realistic roadmap for the green transition in a family SME,
- learn to apply the key planning steps (baseline analysis, goal definition, milestones, responsibilities, strategies, resources, feedback),
- learn how to involve the family, employees, and partners in the planning process,
- understand how to set measurable indicators (KPI, ROI, CO₂e, energy self-sufficiency),
- become familiar with tools (grant programs, community energy, PPA, circular solutions),
- be able to translate a vision into an action plan for 12–36 months for their own business.

Introduction

A roadmap (sometimes translated as a “journey map” or “step plan”) is a **visual and strategic tool** that shows where the company is heading, what steps it will take to get there, and within what time frame. Unlike a classic strategy, which often stays at the level of visions and long-term goals, a roadmap provides concrete milestones, responsibilities, and resources. It is thus a **bridge between an idea and everyday practice**.

In the context of the green transition, a roadmap is especially important. It helps align family values with real investments and decisions. It gives employees a clear plan of what will be implemented and when. It facilitates communication with partners, customers, and the community, and increases credibility with banks, investors, and grant institutions.



Key Concepts



Who Contributes to Creating a Roadmap?

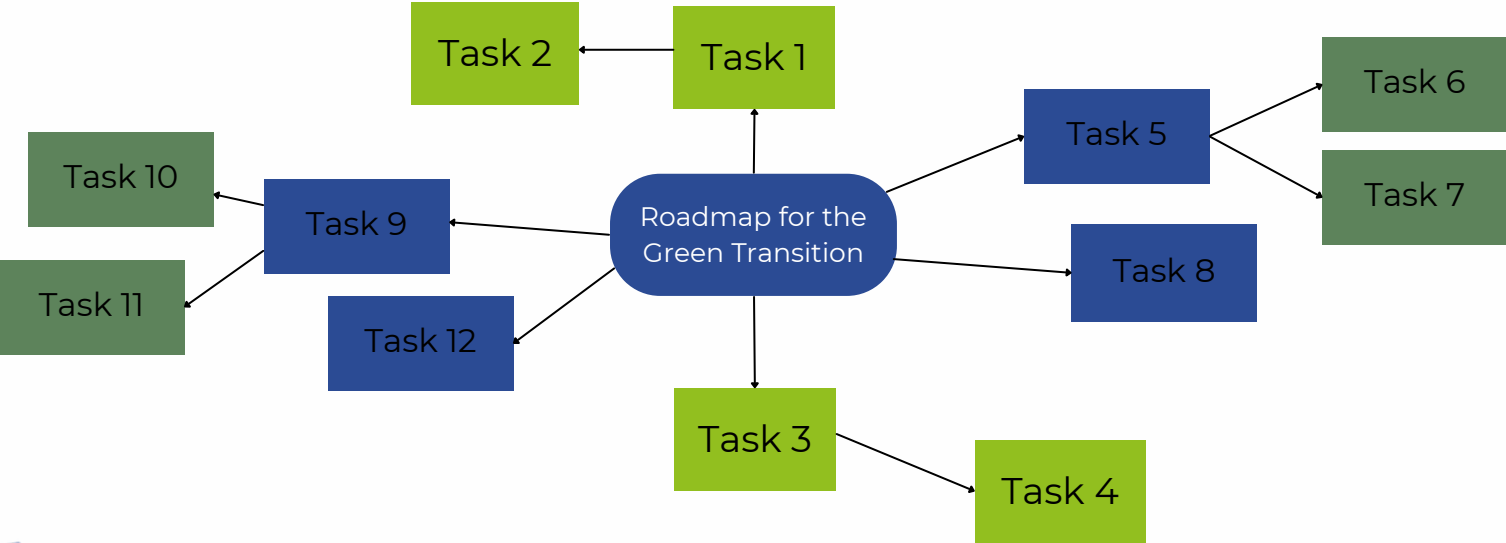
- **Family and owners** – set the long-term vision: “where we want to go and what we want to pass on to the next generation.”
- **Management and employees** – translate the vision into specific projects and measures.
- **External partners** – consultants, banks, funding agencies, technology providers who deliver know-how and solutions.
- **Community and customers** – indirectly influence the roadmap, as their expectations and needs determine what is important for the company to communicate and implement.

What Does a Roadmap Look Like?

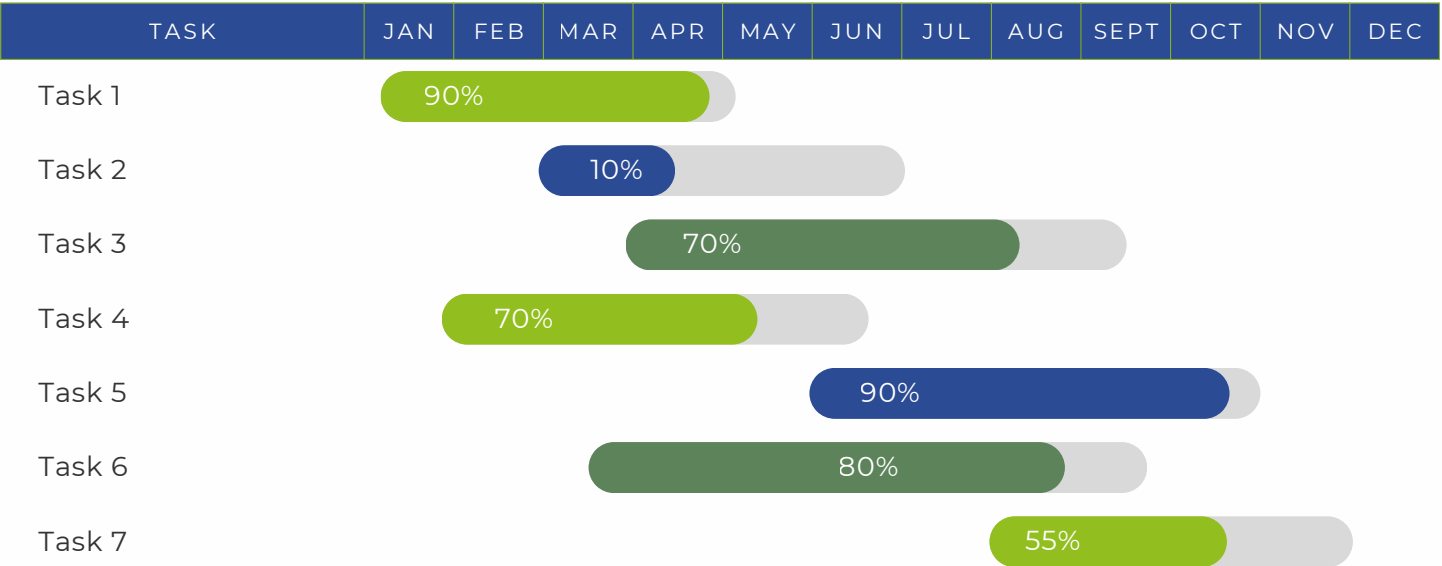


It can take the form of a **timeline** (e.g., 12–36 months), a **Gantt chart**, or a **mind map**. It lists specific projects (from quick wins to long-term investments), assigned roles and responsibilities, and sets measurable metrics and KPIs for success (e.g., CO₂e, % of recycling, MWh saved).

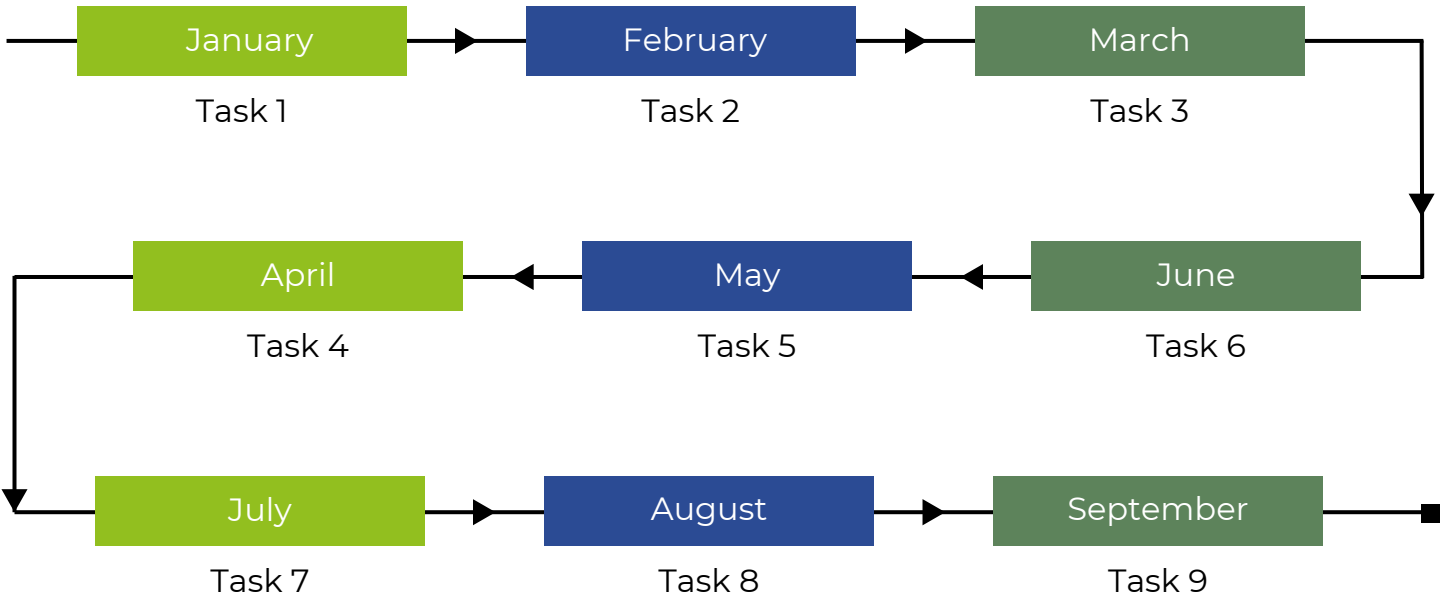
Mind Map



Gantt Chart



Timeline



Tools for Creating a Roadmap

Traditionally, roadmaps were drawn on boards or in presentations. Today, there is a wide range of digital and modern tools that make visualization and collaboration easier, such as:



Excel / Google Sheets

simple starting point, clear table of steps, milestones, and budgets



AI assistants

simulate scenarios (e.g., ROI of solar investments, CO₂ savings)



Mobile apps

allow employees to see the impact of their work (consumption, savings, recycling)



PowerPoint / Canva

visual format, easy to share within the family and company



Interactive dashboards (Power BI, Tableau)

show in real time how the company is meeting ecological targets



Specialized ESG/renewables tools

e.g., Sphera, Plan A, Sweep, which track carbon footprint, emissions, and the impact of individual steps



Trello, Asana, ClickUp

project management apps that allow task assignment, deadline tracking, and live roadmap updates



Miro, MURAL

digital whiteboards where the family and team can co-create the roadmap and visualize scenarios



Collaborative platforms

family businesses can share roadmaps and experiences within associations and business networks



SUFABU

Example of a roadmap created in Microsoft Excel:

Month	Activity	Responsibility	Measurable Goal	Expected Costs
0-3	Baseline analysis (consumption, emissions, processes)	ESG coordinator / external consultant	Report with baseline data prepared	€2,000 – €4,000
2-6	Definition of vision and goals	Family council + management	Ecological mission in one sentence, 3–5 main goals	Internal (workshops)
3-12	Quick wins (LED, heat recovery, digitalization)	Technical director + maintenance team	10% reduction in energy consumption	€20,000 – €40,000
12-24	Strategic projects (PV installation, e-mobility, FSC packaging)	Project manager + CFO	Installation of 250 kWp PV, 20% of fleet electric	€200,000 – €600,000 (with subsidies)
24-36	Expansion and partnerships (community energy, circularity)	CEO + partnership with municipality/suppliers	Join an energy community, 50% of packaging circular	€80,000 – €200,000
0-36	Measurement and reporting (KPI, CO ₂ e, ESG reports)	ESG coordinator + controlling	Annual ESG report, KPI dashboard	€8,000 – €20,000 / year

7 Key Steps in Creating a Roadmap

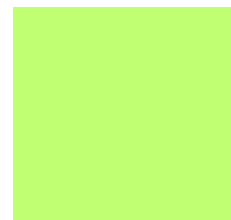
Creating a roadmap is not a one-time task but a gradual process that guides a family business from the initial analysis to the long-term engagement of all key actors. Each step has its own logic and builds on the previous one - from mapping the baseline situation, defining visions and goals, setting milestones and financing, to clear roles, measuring success, and communicating with stakeholders. Only when these steps are interconnected does a functional and realistic roadmap emerge.



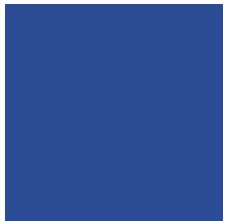


Step 1 – Baseline Analysis

Baseline analysis is the first step toward creating a realistic roadmap. Without understanding the current state of company's performance across the transition areas (like energy, production, packaging, relationship to the landscape, company culture, and community communication), it is impossible to set goals or track progress. Only when we know where we stand today can we responsibly determine where we want to go tomorrow. Baseline data serve as a benchmark - they allow us to compare future savings and improvements. They also help identify "quick wins" as well as strategic investments.



Step 1 – Baseline Analysis



Areas to Analyse (Internally vs Externally)

What we can handle internally (DIY approach)	Where it is advisable to involve external experts
Energy – basic overview of consumption from invoices and meters, record of fuel costs.	Detailed energy audit – certified auditors can identify specific savings and calculate payback periods.
Transport – inventory of the vehicle fleet, evaluation of average fuel consumption and emissions based on vehicle registration documents.	Carbon footprint calculation (CO₂e) – especially Scope 3 (emissions in the supply chain) requires specialized know-how and software.
Production and operations – mapping of waste streams, recording water and material consumption.	Technological production audits – e.g., measuring machine efficiency, optimizing logistics or irrigation systems.
Products and packaging – list of materials used, checking certifications (FSC, PEFC, recycled content).	Eco-design of products and packaging – consultants can design circular solutions and assess the life cycle (LCA).
People and culture – surveys among employees and family, internal interviews.	Governance and ESG reporting – an external facilitator or consultant helps set KPIs, reporting frameworks (GRI, CSRD), and “no-go” boundaries.
Community and the public – simple overview of activities (sponsorships, cooperation with the municipality).	Environmental projects in the landscape – cooperation with NGOs or biodiversity experts.



Step 1 – Baseline Analysis

Methods and Tools to Use

- Energy and environmental audits
- Calculation of the carbon footprint (CO₂e) – Scope 1, 2, 3
- Mapping of processes and material flows
- Surveys among employees, family members, and the community
- Benchmarking (comparison with the industry)



Step 1 – Baseline Analysis

Concrete Examples of Real Companies across Europe

Company	Green Transition Activity (RES)	Steps to Analyse the Baseline Situation
Delfy (CZ)	Installation of photovoltaic power plants (3×30 kW), heat pumps	Evaluation of electricity consumption, identification of peak loads, payback calculation, monitoring of production/consumption
Mårdskog & Lindkvist (SE)	More efficient warehouses (heat recovery) + biogas trucks	Monitoring of temperature and consumption, logistics analysis, tracking of transport emissions
Elektrofink (DE)	New production plant with 160 kW PV	Energy audit, consumption scenarios, capacity calculations, renewable energy development plan
Salvadori Arte (IT)	Implementation of LED lighting + preparation for PV	Analysis of gas and electricity consumption, cost comparison of options, evaluation of savings

Step 1 – Baseline Analysis

Reflection Questions

- Do we currently have reliable data on our energy and gas consumption, emissions, waste, and packaging, or are we relying only on estimates?
- In which areas can we perform the analysis ourselves, and where do we need external support?
- What are our biggest “information gaps” (e.g., Scope 3 emissions, waste management, community impacts)?
- Are our data comparable with industry benchmarks? If not, how will we supplement them?
- Who in the family or company will be responsible for collecting and updating this data?



Task for the Company

Select 3 key areas (e.g., energy, transport, packaging) and conduct a basic analysis:

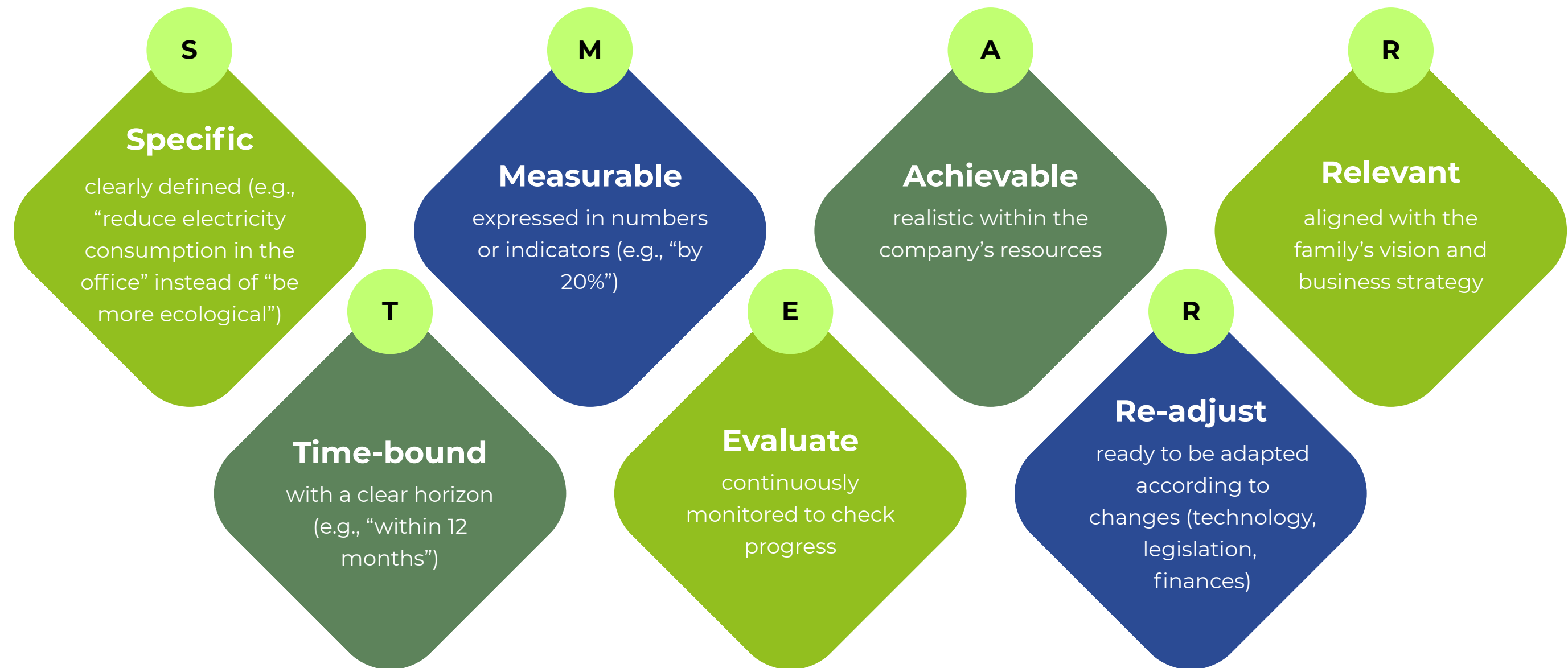
- Gather available internal data (invoices, records, inventory).
- Indicate whether the data are accurate (hard) or estimated.
- Evaluate whether you can monitor this area internally or if external experts will be needed.

The outcome is a simple table “What we know – How reliable – Internal / External”, which becomes the foundation of the roadmap.

Step 2 – Defining Vision and Goals

After the initial analysis, the next step is to set a vision and measurable goals. The vision answers the question “*Where do we, as a family business, want to get to?*” and the goals define “*How will we measure it specifically and by when?*”

For the vision and goals to make sense, they must be formulated according to the **SMARTER methodology**. Every goal should be:



Step 2 – Defining Vision and Goals

Practical Examples

Delfy (CZ) – Photovoltaics and Heat Pumps

- **Vision:** “To be an energy self-sufficient company with minimal dependence on external sources.”
- **Short-term SMARTER Goal:** “Within 12 months, increase in-house electricity production from PV by 10% through the installation of an additional 10 kW capacity.”
- **Long-term SMARTER Goal:** “By 2030, achieve 80% energy self-sufficiency through a combination of PV, storage, and heat pumps.”

Mårdskog & Lindkvist (SE) – Biogas and Transport

- **Vision:** “To reduce the carbon footprint of logistics services and maintain the reputation of a responsible family-owned wholesaler.”
- **Short-term SMARTER Goal:** “Within 2 years, replace 20% of the fleet with biogas-powered vehicles and reduce CO₂ emissions from transport by 15% compared to 2022.”
- **Long-term SMARTER Goal:** “By 2035, operate 100% of the fleet on electric or other zero-emission propulsion.”

Step 2 – Defining Vision and Goals

Task for the Family Business

Use the results of your baseline analysis and select **2–3 priority areas** (e.g., energy, transport, packaging).

For each area, write down:

- **One vision** (where we want to get to), and
- **Two SMARTER goals:**
 - **One short-term** (within 12–24 months),
 - **One long-term** (5–10 years).
 -

Make sure the goals are:

- **Measurable** (numerical indicators),
- **Realistic** (costs/resources),
- **Evaluable and adaptable** (can be regularly assessed and adjusted if needed).
-

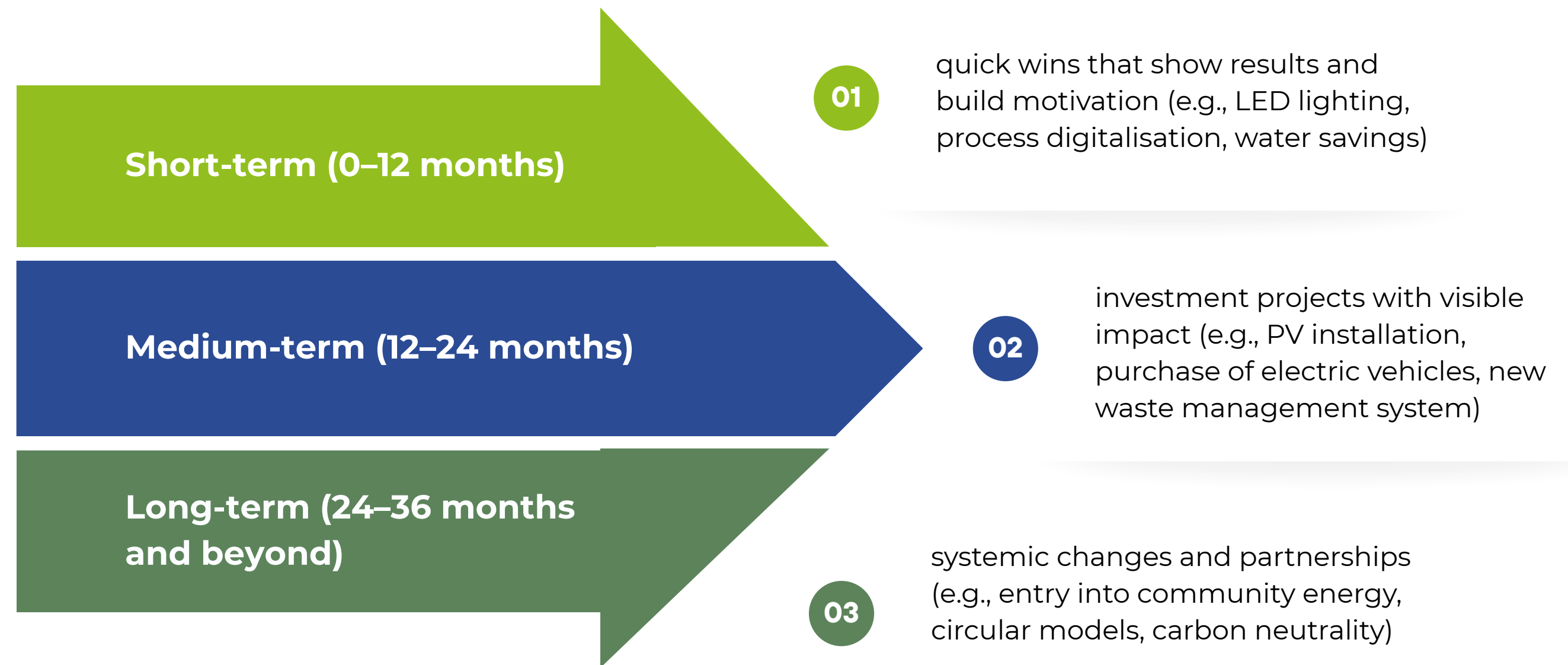
Discuss the proposals at the **family council** and include feedback from all generations.

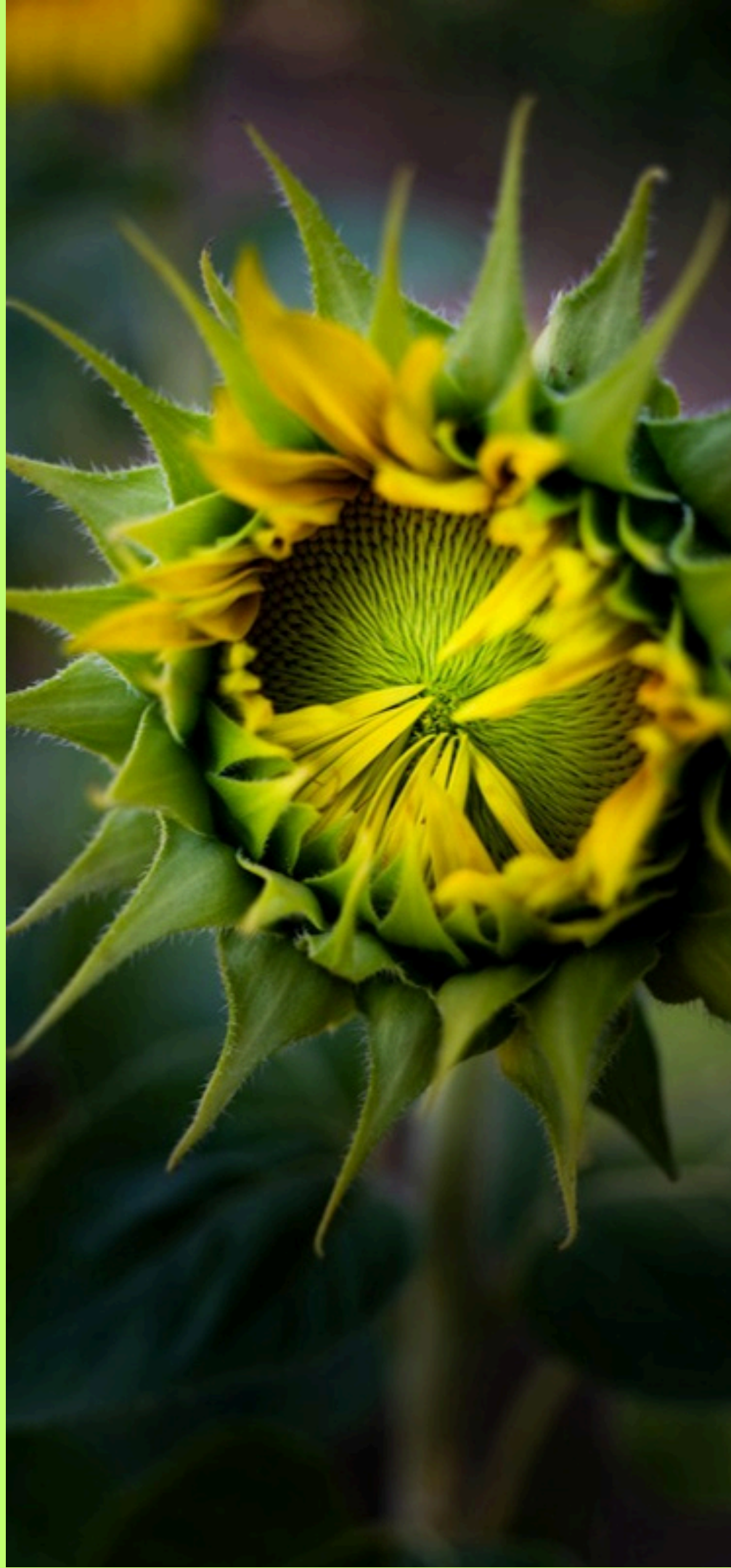


Step 3 – Milestones and Timeline

Defining a vision and goals is only the beginning. To ensure that the roadmap does not remain just on paper, it must be divided into specific milestones. **Milestones** are checkpoints on the timeline that help the company track progress, motivate employees, and respond to problems in time. For family businesses, it is important to set milestones in a way that reflects both short-term quick wins and long-term *strategic projects*.

How to Set Milestones?





Step 3 – Milestones and Timeline

How to Set Milestones?

Delfy (CZ):

- **Milestone 1:** Installation of an additional 10 kW PV within 12 months.
- **Milestone 2:** Acquisition of a 50 MWh storage system within 24 months.
- **Milestone 3:** Achieve 80% energy self-sufficiency by 2030.

Mårdskog & Lindkvist (SE):

- **Milestone 1:** 5 biogas trucks within 12 months.
- **Milestone 2:** Expand fleet by 20% with alternative-fuel vehicles within 24 months.
- **Milestone 3:** Fully zero-emission fleet by 2035.

Milestones can be expressed in a **timeline** or in a **Gantt chart**.

For smaller family businesses, the most practical format is a **simple table: Milestone – Deadline – Responsibility – Success Indicator**.

Step 3 – Milestones and Timeline

Reflection Questions

- What are the 3–4 most important milestones we must achieve to fulfil the vision?
- What can be implemented quickly and cheaply, and what requires long-term investments?
- How can we align the timeline with financial possibilities and family decision-making?

Task for the Company

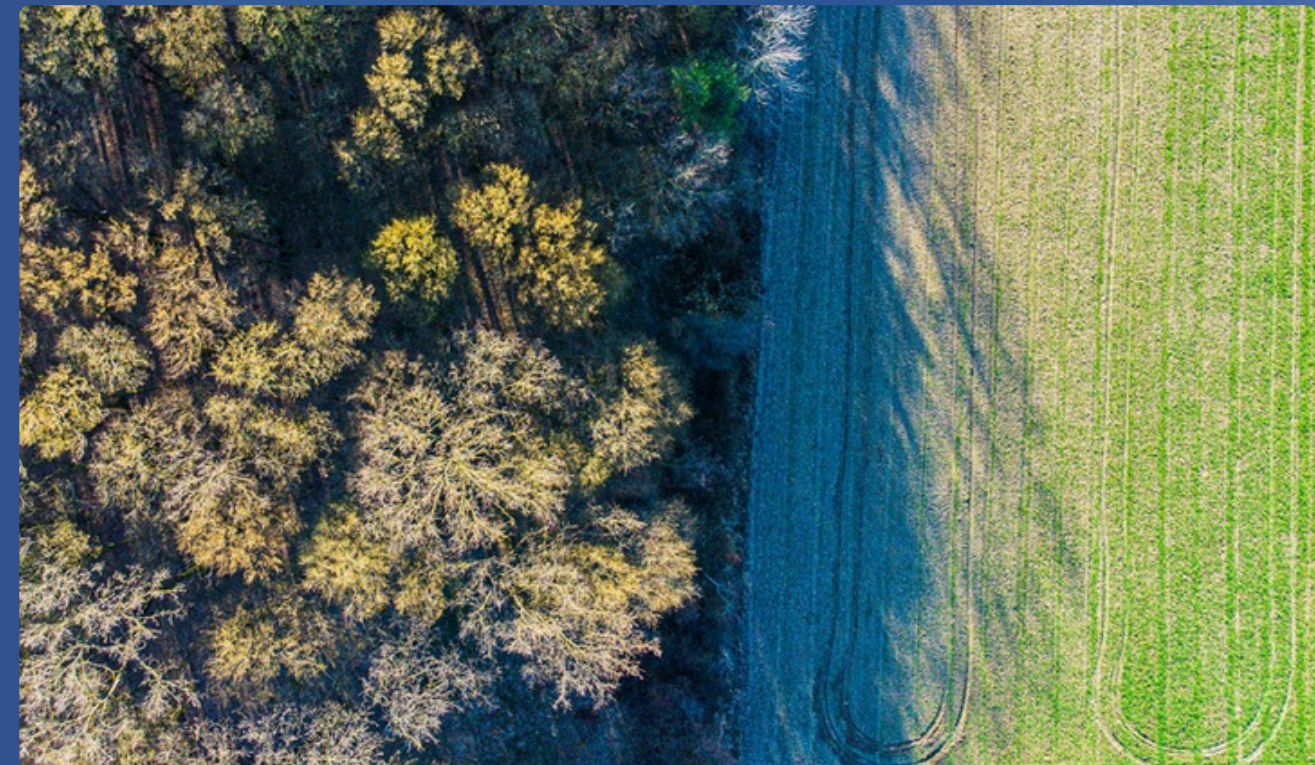
You already have the analysis completed, the vision set, and the SMARTER goals defined.

Now create a timeline for **12–36 months**, marking:

- **Quick wins** – activities within 12 months that can be implemented immediately.
- **Strategic projects** – investments within 1–3 years.
- **Systemic changes** – steps with a 5–10 year horizon.

For each milestone, add:

- a **responsible person**, and
- a **measurable success indicator (KPI)**.

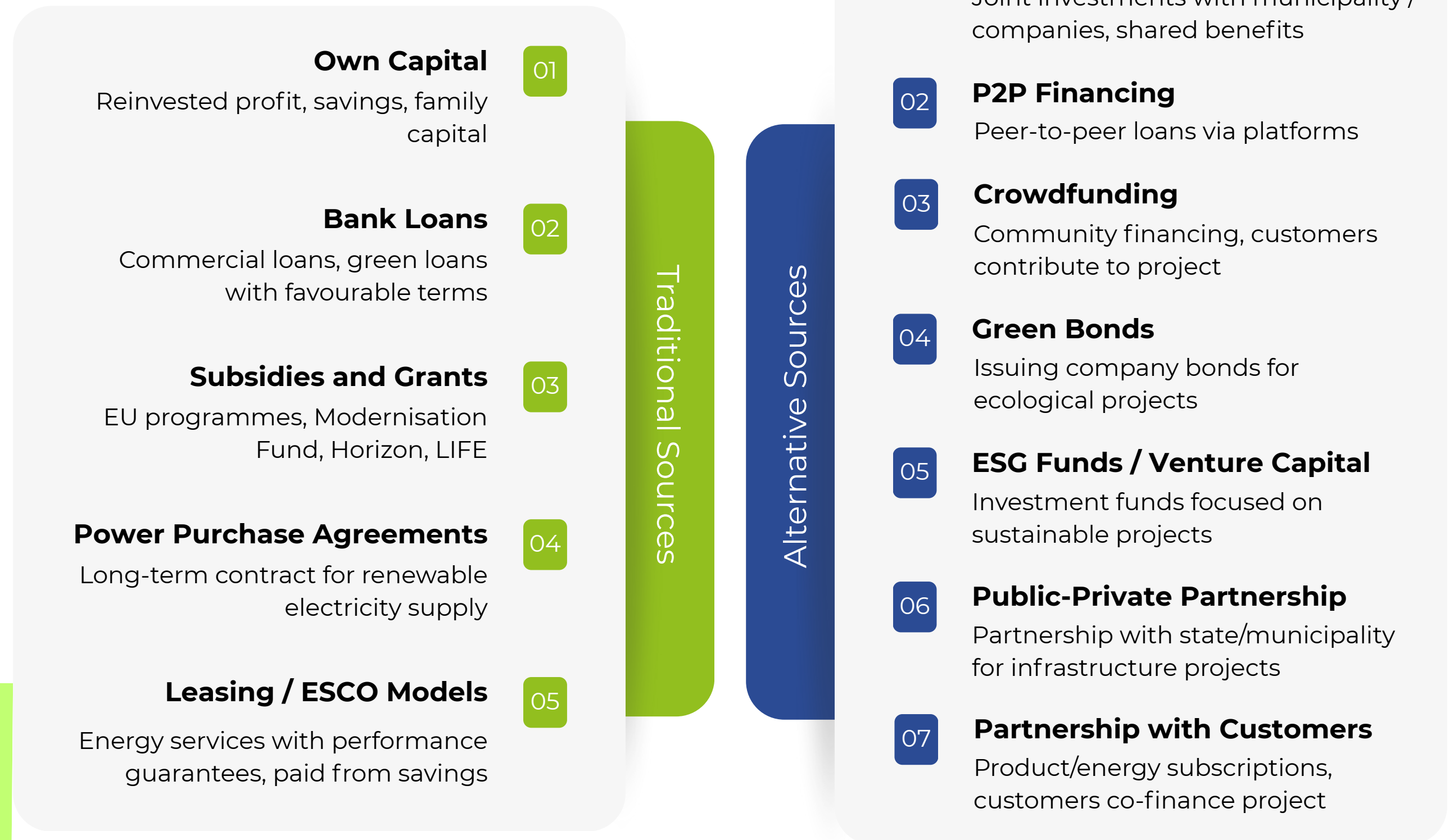


Step 4 – Resources and Financing

Without securing resources and financial coverage, a roadmap becomes just a list of wishes. Every step of the green transition requires clearly calculated **costs, resources, and financing options**. For family businesses, decision-making is typically guided not only by financial logic (ROI, cash flow) but also by **family values** and a long-term horizon that goes beyond a single generation.



Financing for Family SMEs



Step 4 – Resources and Financing

Reflection Questions

- What is the investment threshold that our family considers acceptable?
- Can we balance **economic payback with ecological benefit**?
- Are we ready to cooperate with partners (municipalities, other companies, banks) on larger projects?
- Do we have a backup plan if we fail to obtain a subsidy/loan?



Task for the Company

Choose **1–2 projects** from your roadmap (e.g., PV, electromobility, circular packaging).

For each project, list:

- Estimated **costs**
- Possible **financing sources** (own, loan, subsidy, partnership)
- **ROI** (return on investment)
- **Ecological benefit** (e.g., CO₂e savings, MWh saved, water savings)

The output is a **simple decision-making table** to be used at the family council.

Step 5 – Governance and Roles

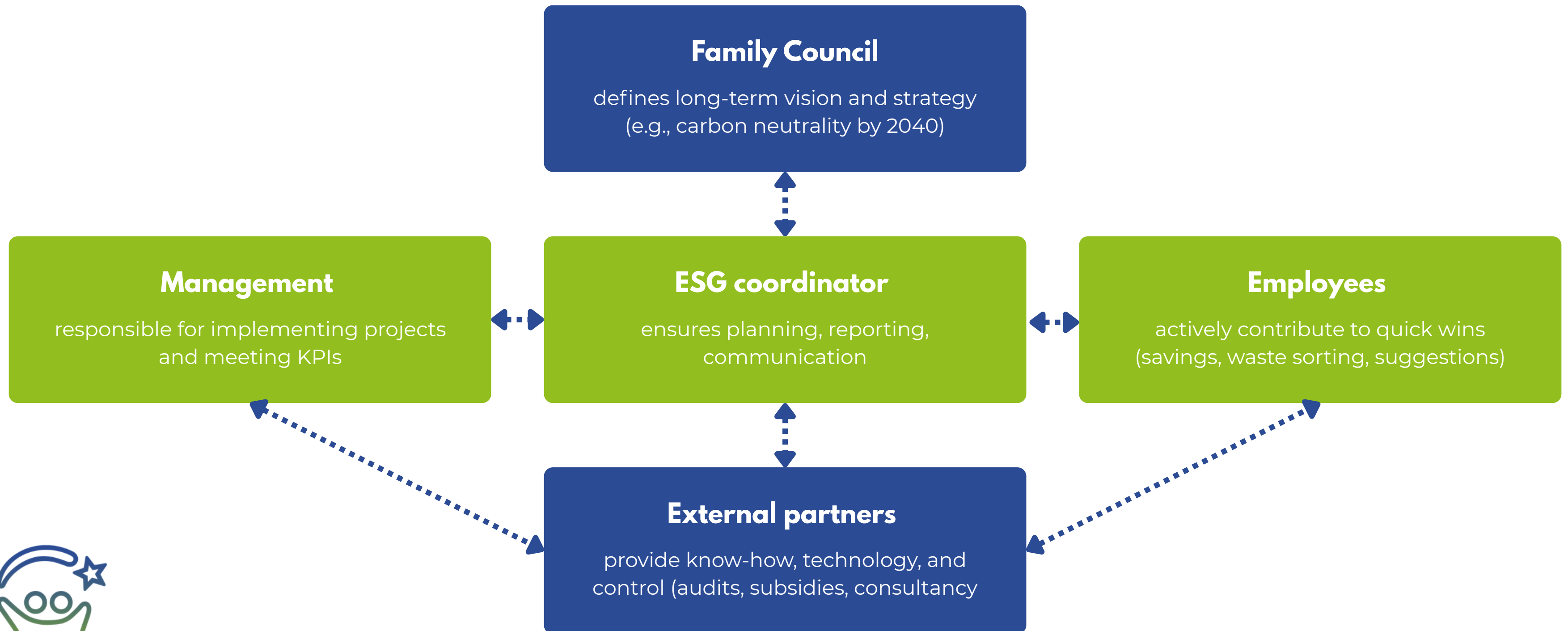
The green transformation is not only about technology and finance but also about **management and accountability**. If it is unclear who decides, who controls, and who is responsible for fulfilling the roadmap, the whole plan risks stalling. **Governance** means setting up a decision-making structure in the family business that is **transparent, effective, and sustainable in the long term**.

Methods and Tools to Use

- **Who owns the ESG / green transformation agenda?** (e.g., ESG coordinator, technical director, family member entrusted with the agenda)
- **What is the role of the family council?** (long-term vision, strategic investments, family values)
- **What is the role of management and employees?** (operational steps, implementation of quick wins, internal communication)
- **How to involve external partners and advisors?** (auditors, subsidy specialists, technology providers)
- **How to ensure continuity during generational transition?** (clearly defined competencies, documented processes, reporting)

Step 5 – Governance and Roles

Recommended role distribution model



Step 5 – Governance and Roles

Reflection Questions

- Do we have a clearly assigned **“owner” of the ESG agenda** within the company?
- Are competencies between the **family council and management** properly divided?
- How are **different generations** of the family involved in decision-making?
- Do we have a **system for regular reporting and monitoring**?



Task for the Family Business

- **Create a role map:** who is responsible for each area of the roadmap (energy, mobility, waste, packaging).
- **Appoint a main ESG owner** (family member / ESG coordinator).
- **Set up reporting:** decide how often results will be presented to the family council and management.
- **Discuss whether to involve external advisors** (e.g., for certifications, subsidies, carbon footprint measurement).

Step 6 – KPI and Measuring Success

“What does not get measured, does not get managed.” To ensure the roadmap does not remain just a list of activities, it must contain **clearly defined KPIs (Key Performance Indicators)**. KPIs show whether the company is truly progressing toward its goals.

In family SMEs, KPIs need to be:



01

Financial

ROI, savings

02

Environmental

CO₂, waste, water, OZE share

03

Social

employees, community, reputation

And most importantly: **understandable for everyone** – from owners to employees.

Step 6 – KPI and Measuring Success

What to Measure? — KPI Types for Green Transformation and Examples

Energy

annual consumption (MWh/year), % of energy from renewable sources, cost savings (CZK/EUR), % savings in energy costs, % reduction in electricity consumption



Emissions

CO₂ emissions reduction from production (Scope 1, 2, 3) (ton/year), carbon footprint per unit of production



Water & Waste

% of recycling, % of drinking water replaced with rainwater, water consumption per unit of production, hazardous waste volumes



Mobility

% of EVs in fleet, % of fleet running on biogas, reduction of CO₂ emissions per km of logistics



Products & Packaging

% of recycled materials, share of products with FSC/PEFC certification, reduction of single-use plastics



Governance & Culture

number of trained employees, number of employee eco-innovation proposals, ESG reporting (GRI/CSRD compliance)

Step 6 – KPI and Measuring Success

Tools for Measurement and Reporting

Internal
spreadsheets

(Excel, Google Sheets)
– simple starting
point

Goal Setting

(Power BI, Tableau) –
clear real-time
visualizations

Resource
Gathering

(Plan A, Sweep,
Sphera) – integrated
data on energy,
emissions, and
finance

Implementation
Strategy

GRI, CSRD, ISO 14001,
Science Based Targets

Step 6 – KPI and Measuring Success

Reflection Questions

- Which 3 indicators are the most important for us – economic, ecological, or social?
- Can we collect the data ourselves, or do we need external reporting software?
- How often will we evaluate KPIs, and who is responsible?
- How do we communicate KPIs to employees and partners – so they motivate rather than overload?



Task for the Family Business

1. Select **5 KPIs** that best reflect your vision and goals.
2. For each KPI, specify:
 - **Unit of measurement** (MWh, %, t CO₂e),
 - **Target value** (e.g., “reduce by 20% by 2025”),
 - **Responsible person**,
 - **Measurement frequency** (monthly, quarterly, annually).
3. Create a simple **KPI dashboard** (table or visualization) to be shared regularly with the family council and employees.



Step 7 – Communication and Stakeholder Engagement

The success of green transformation is not measured only by achieving technical goals or financial returns. Another important factor is how results are perceived by different stakeholder groups – family, employees, customers, and the wider community. Only when all these pillars are engaged in the process does the roadmap become a true tool of change, not just an internal document.

The 4 Pillars of Success Evaluation – Family, Employees, Customers, Community

Each pillar – family, employees, customers, and community – has different expectations and a different timeline for recognizing changes. **Family** evaluates progress early during family councils and investment decisions. **Employees** begin to feel the impact once concrete measures enter daily operations. **Customers** react when new products or services appear. And **community** perceives success in the longer term, once the company consistently contributes to regional development. That's why it is important to set up a **regular cycle of evaluation and communication**, showing progress both continuously and in the long run.

Step 7 – Communication and Stakeholder Engagement

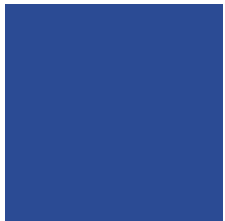


Pillar	Reflection Questions	Indicators (KPIs)	Communication Formats
Family	Are goals aligned with family values? Do different generations take part in decision-making? Does the family see long-term meaning in transformation?	Family satisfaction with roadmap implementation (surveys, discussions). Number of family members engaged (incl. younger generation). Number of family council meetings dedicated to ESG.	Family council meetings and minutes. Internal reports summarizing progress. Intergenerational workshops.
Employees	Do employees feel part of the change? Do they understand the reasons behind each measure? Do they have opportunities to suggest innovations?	% of employees trained in ESG/renewables. Number of improvement suggestions submitted. Employee satisfaction from internal surveys. Staff turnover.	Intranet and newsletters. Workshops and training. Gamification (competitions for best ideas). Apps for tracking savings.
Customers	Do customers perceive the company as sustainable? Are they willing to prefer greener options even if they cost more? Do they see added value?	Growth in sales of eco-products/services. Customer loyalty (NPS). Number of positive mentions in reviews/media. Number of customers engaged in sustainability initiatives.	Marketing campaigns (storytelling, certifications on products). Social media, company website. Customer surveys, focus groups. Podcasts, impact videos.
Community & Public	Do we contribute to sustainability in the region? Do we cooperate with municipalities, schools, NGOs? How are we perceived by the public?	Number of community projects joined. Number of partnerships (schools, municipalities, associations). Media coverage (positive vs. negative mentions). Level of community trust (surveys).	Press releases, local media. Partnerships with schools and municipalities. Open-door days, community events. Transparent ESG report accessible to the public.



Step 7 – Communication and Stakeholder Engagement

Practical Company Examples - DELFY



Pillar	Reflection Questions	Indicators (KPIs)	Communication Formats
Family	Are investments into PV and heat pumps aligned with the long-term vision? Are younger generations involved in decision-making?	80% energy self-sufficiency by 2030. Number of family members involved in projects (father + son). Number of family councils dedicated to ESG.	Quarterly family meetings. Meeting minutes on investments. Family ESG workshops.
Employees	Do employees understand why digitalization and waste sorting are being introduced? Are they contributing their own ideas for savings?	% of employees trained in sustainability (target: 100% by 2025). Number of improvement suggestions (target: 10 per year).	Internal newsletters about savings. Company ESG training. Contest for best eco-idea.
Customers	Do customers perceive the company as sustainable? Are they willing to pay more for products stored with renewable energy?	20% growth in sales of “green-stored” products. Number of positive customer reviews.	Storytelling on website about PV and e-mobility. “ECO storage” label on invoices. Regular customer newsletters.
Community & Public	Does Delfy contribute to regional development (e.g., educational events about photovoltaics)? How is the company perceived by the local public?	Number of community events (target: 2 per year). Media coverage in regional press.	Company open days. Cooperation with local schools. Impact report published on website.



Step 7 – Communication and Stakeholder Engagement

Reflection Questions

- Can we clearly define today who our key stakeholders are (family, employees, customers, community)?
- Does each group perceive the benefits of our green transformation in the same way, or do their expectations differ?
- How do we currently gather feedback from stakeholders – and how do we use it?
- Are we prepared to communicate not only successes but also challenges and obstacles?
- Do we use appropriate communication formats for different groups (family council ≠ social media ≠ municipal council)?



Task for the Family Business

Create a simple stakeholder map (family – employees – customers – community).

For each group, add:

- What they expect from us (benefits, values, changes).
- How we will evaluate their satisfaction (KPIs, surveys, feedback).
- How we will communicate results to them (family council, intranet, newsletter, community events, social media).

Discuss within the family council whether our communication is balanced today – are we overlooking any pillar?

Final Thought

The green transformation of family businesses is not a one-off project but a long-term journey. A roadmap helps structure this journey and shows that even small steps matter if they lead to a clear vision. Every family business has its own values, traditions, and resources – and these can become the key to success. It's not only about saving energy or reducing emissions, but about creating a legacy that future generations can be proud of and that will ensure stability over time.



More to explore (Resources & Further reading)

- **ESG News.** (2025). ESG News – Sustainability News, ESG Investing, Events ... ESG News.

A website full of current news, reports, and analytical articles on ESG trends, green technology, regulation, and climate finance. Link to the website: <https://esgnews.com/>.

- **FamilyBusiness.org.** (2025). Family Business – Improving entrepreneurship and family business effectiveness through research and sharing of best practices.

International portal with a rich database of articles, research, and case studies on family businesses, their values, succession, and sustainability. Link to the website: <https://familybusiness.org/>.

- **IMD – Institute for Management Development.** (2024). How green are family businesses? iBy IMD.

Blog and research studies dedicated to how family businesses approach ecological transformation, including their specific advantages and challenges. Link to the website: <https://www.imd.org/>.

- **Family Firm Institute (FFI).** (2025). Family Business Review & FFI Practitioner.

Professional association with access to the peer-reviewed journal Family Business Review and practical newsletters focused on strategy, governance, and sustainability in family businesses. Link to the website: <https://www.ffi.org/>.

- **Circular Economy Alliance.** (2025). Circular Economy Alliance: Home.

A platform focused on education, knowledge sharing, and supporting the adoption of circular economy principles in businesses, including family firms. Link to the website: <https://circulareconomyalliance.com/>.

- **IESE Family Business Blog.** (2025). The “S” in ESG: Social commitment in family business.

University blog reflecting on the role of social responsibility and values in family businesses, offering practical insights on the connection between ESG and family dynamics. Link to the website: <https://blog.iese.edu/family-business3/>.

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