

8 Steps to Conducting a Sales Win/Loss Analysis

Friday, February 7, 2014 - Written by: [Jeff Kalter](#)



- **Select a Company to Do the Win/Loss Interviews**

It's best to use an outside company to do win/loss interviews because respondents will be more open with them.

- **Appoint an Internal Project Leader**

You need to designate a staff member to be a liaison between your sales department and the external interviewers. This person should understand sales, but be removed enough to be objective. Sales leaders themselves may be resistant to this program because you're going to be probing sales team successes and failures.

- **Get the Team on the Same Page**

Coordinate a meeting between your sales director, marketing director, representatives from the research company, project manager, and other affected department heads so they can clearly understand the project's goals and support it.

- **Get Interviewers Up to Speed**

Once everyone is clear on the objectives, train the interviewers on your products/services and provide them with sales literature. Also, inform them about your sales process. This will help them converse fluently with the interview respondents.

- **Gather Win and Loss information**

If you use a CRM system, your project manager can collect data on recent sales wins and losses from it. If no tracking mechanism is in place, ask your sales personnel to report on recent sales successes and failures.

- **Create a Discussion Guide for Interviews**

The company doing the research should create a discussion guide for the interviews which sets up a framework for interviewing. If marketing, sales, operations, and other affected department leaders approve it, they should be on board when findings come in. Specific areas you'll want to cover in the guide can be found in [10 Questions to Ask in a Win-Loss Analysis Interview](#)

- **Conduct the Interviews**

When deciding who to talk with, remember that those who recently were involved in the sales process will offer the best information during interviews. People who have considered your offering within the last few weeks will be more likely to remember the reasons they did or didn't choose you.

- **Present the Findings**

Members of your sales and marketing teams need to hear the feedback so they can work to improve the sales process. It's crucial, therefore, to establish a system for delivering timely and uncensored interview reports to everyone

involved. The research company should present the big-picture analysis to relevant departments and upper-management while sales people should receive individual feedback.

With the right structure in place, a win/loss analysis program will give you the critical insights you need to refine your sales process and to win more business.

For information about how 3D2B can help you with win/loss analysis, visit <http://www.3d2b.com/> or call +1 718-709-0900 or +39 06 978 446 60 (EMEA).

Published in

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