

# Win/loss analysis: Key findings

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[Quarter/Year]

# Program overview

## **Objective**

[Brief sentence on the main goal of the analysis (e.g., "To understand key drivers behind wins and losses to enhance product strategy and sales effectiveness.")]

## **Methodology**

- [Bullet points on how the data was gathered, e.g., customer interviews, surveys, and third-party tools]

# Executive summary

## Win rate

X%

## Top reasons for wins

- [Reason 1]
- [Reason 2]
- [Reason 3]

## Top reasons for losses

- [Reason 1]
- [Reason 2]
- [Reason 3]

# Executive summary

## **Recommendations**

- **[Recommendation 1]**
- **[Recommendation 2]**
- **[Recommendation 3]**

# Win rate overview

- **Current win rate** (overall and by quarter if applicable):
- **Win rate trend** (highlight any changes since the previous period):

[insert graph showing win and loss rates over the last four quarters]

# Top reasons for wins and losses

## Wins

- [Reason 1 + brief explanation]
- [Reason 2 + brief explanation]
- [Reason 3 + brief explanation]

## Losses

- [Reason 1 + brief explanation]
- [Reason 2 + brief explanation]
- [Reason 3 + brief explanation]

[Note any significant shifts in win/loss reasons compared to previous period.]

# Customer segmentation analysis

<b>Customer segment</b>	<b>Win rate</b>	<b>Loss rate</b>	<b>Top win factors</b>	<b>Top loss factors</b>
<b>Industry A</b>				
<b>Industry B</b>				
<b>Small businesses (&lt;50)</b>				
<b>Enterprises (500+)</b>				
<b>Technical buyers</b>				
<b>Business buyers</b>				

# Customer segmentation analysis

## Key insights

**Industry preferences:** [e.g., Industry A shows a strong preference due to competitive pricing, while Industry B has higher losses due to a lack of industry-specific features.]

**Size-based differences:** [e.g., Small businesses are our strongest segment with a 62% win rate, likely because they value pricing flexibility and ease of use. Enterprises have a lower win rate at 35% due to longer implementation times and more rigorous requirements.]

**Buyer persona impact:** [e.g., Technical buyers value integrations and feature robustness, but setup complexity affects conversions. Business buyers prioritize cost-effectiveness but require more advanced reporting tools.]



# Customer segmentation analysis

## Opportunities for improvement

[E.g., **For Industry B:** Consider developing or marketing industry-specific features to better meet their needs.]

[E.g., **For enterprise accounts:** Streamline the onboarding and implementation process to improve win rates among larger customers.]

[E.g., **For technical buyers:** Explore ways to simplify the setup process or provide additional onboarding support.]

# Competitive insights

## Top competitors

- [Competitor 1]
- [Competitor 2]
- [Competitor 3]
- [Competitor 4]
- [Competitor 5]

[insert graph showing win/loss rates  
against each named competitor]

# Competitive insights

## Why we win

- [Key differentiator/strength]
- [Key differentiator/strength]
- [Key differentiator/strength]

## Why we lose

- [Feature gap/weakness]
- [Feature gap/weakness]
- [Feature gap/weakness]

## Positioning feedback

[Brief notes on how your value proposition resonated compared to competitors']

# Sales process feedback

## What went well

- [Positive feedback]
- [Positive feedback]
- [Positive feedback]

## Opportunities for improvement

- [Area needing refinement or support]
- [Area needing refinement or support]
- [Area needing refinement or support]



**[Quotes to go here]**



# Product and feature feedback

## Top drivers of wins

- [Key feature that won deals]
- [Key feature that won deals]
- [Key feature that won deals]

## Top drivers of losses

- [Missing feature that lost deals]
- [Missing feature that lost deals]
- [Missing feature that lost deals]



**[Quotes to go here]**



# Pricing and packaging insights

**Pricing feedback:** [How pricing influenced decisions, positive or negative]

**Packaging insights:** [Any feedback on product tiers, packaging, or trial structures]

**Suggestions for adjustment:** [Any preliminary ideas for improvement]



# Customer success & onboarding feedback

**Positive early experiences:** [Highlights from customers' first impressions post-sale]

**Challenges or areas of improvement:** [Any onboarding challenges reported]

**Impact on retention:** [Early indicators of customer retention or churn potential]

# Recommendations & next steps

**Product development:** [Key feature or functionality suggestions to boost win rates]

**Sales enablement:** [Specific resources, training, or collateral that could help sales teams]

**Messaging & positioning:** [Adjustments to better align with customer perceptions]

**Pricing & packaging:** [Suggestions to test different pricing or product packaging options]

**Customer success & onboarding:** [Ways to improve early customer satisfaction]

# Appendix:

## Data & methodology

- **Sample size and sources**  
[Details on how many interviews, surveys, or sources were used]
- **Interview methodology**  
[Brief explanation of how interviews were conducted and data was validated]



**Thanks for listening!**

*Any questions?*