

Win Loss Analysis: The Third-Party Advantage

Unbiased, cost effective, accurate information, straight from the source



The foundation upon which any business prospers and grows is based on two critical factors: increasing your retention rate for existing customers and improving your win ratio for new competitive opportunities.

In order to accomplish these objectives, an organization must have a system in place that allows it to track and monitor every phase of marketing, sales, and service business functions. Oftentimes, organizations will rely on internal tools, such as CRM systems, to manage and track relationships with prospects and customers, in an attempt to produce higher customer loyalty, reduced costs, and other important business benefits.

However, these internal solutions are only as good as the data they capture. When an organization needs to gather information on what is taking place during the competitive sales cycle, it typically turns to its sales executives, channels, VARs, and consultants. While this anecdotal information can be helpful, its value is often diminished by a lack of formal methodology and the objective, candid responses that come with doing a third-party interview. In order to realize the true value of a win loss or account retention program, you need unbiased, factual information that is collected directly from prospects and customers, followed by a systematic analysis of both wins and losses.

The Primary Intelligence Advantage

- Expertise in interview design
- Impartial interviews and recommendations
- Consistent, timely, and accurate data
- Actionable, easy to understand analysis

Expertise in Interview Design

A third-party win loss assessment will fill in the most important data gaps you have about the competitive environment. Capturing what took place during the sales cycle of both wins and losses can be a very time-consuming and difficult task without the appropriate expertise.

“We weren’t getting the feedback that we really needed [with our in-house solution]. I think that it boiled down to not asking the right questions.”
—VP, Product Management

Conversations with buyers that are not based on clear questions and guidelines can quickly become unfocused and unable to meet your needs. The Primary Intelligence team has more than a decade of expertise in speaking to buyers, understanding what drives the sales cycle, and creating questions that generate the most actionable information. With our Win Loss Analysis solution, your dedicated Account Consultant will work with you to design an interview guide based on proven questions and your unique needs.

Impartial Interviews and Recommendations

In many cases, it may be impossible for an organization to get unbiased, factual information without the help of a third party with experience in this type of information collection. Unlike an outside, objective third party, your internal resources will often find that buyers are unwilling to reveal their real decision criteria for fear the sales manager may attempt to reengage them in the sales process.

Primary Intelligence has years of experience performing win loss assessments. We understand the art of interviewing—how to get individuals to open up. Our proven methodologies allow us to achieve results where in-house programs fail. We have the resources to interview in multiple languages, our analysts are experts in the competitive intelligence industry, and we have cutting edge statistical tools and predictive modeling to help in our analysis.

“We were trying to eliminate the bias of internal associates doing the debrief processes on both wins and losses.”

—VP, Sales Operations

Having third-party assistance is most important in competitive losses, where information may be scarce for the losing sales team. It is a well-known fact that we tend to learn more from our mistakes than from our successes. For this reason, it is critical that a company completely understands why they lost in a competitive situation. The more an organization understands what is taking place in competitive situations, the better it can formulate appropriate strategies and processes to improve its competitive advantage. Knowing why a customer selected your company’s solution, or why they didn’t, is as important as understanding the overall decision-making processes of the marketplace.

Consistent, Timely, and Accurate Data

The art and science of selling is constantly changing. That’s why Primary Intelligence continuously improves its Win Loss Analysis program by incorporating industry best practices and the latest findings from empirical research. Consequently, you won’t find a more advanced assessment methodology for analyzing competitive opportunities.

“We needed more than a one-shot solution. We needed a process to help us stay current with what is going on in the industry, and I couldn’t do that.”

—Senior Product Marketing Manager

Our Win Loss program allows you to step back while our team schedules, conducts, and analyzes interviews with your buyers, producing qualitative and quantitative data to drive our recommendations. With our solution, you will not only be able to get feedback from more buyers, but also get critical information faster, more consistently, and with confidence that the data is accurate and easy to act on.

“We just don’t have the infrastructure from a system perspective to be able to have the data at our fingertips, to look at the history, and to allow folks to pull it up.”

—Director of Sales Operations

Actionable, Easy to Understand Analysis

Imagine being able to understand exactly what happened in both your competitive wins and losses over the last month, quarter, or year. Once an organization has this information, it can confidently adjust and refine its marketing and sales strategies to improve its competitive win ratio. An unbiased, third-party win loss assessment will give a complete picture of exactly what is taking place in your company’s marketplace and new customer base. It also gives you the ability to track and measure the effectiveness of any new strategies and processes that are implemented. It is through the application of this knowledge that your company can improve its sales and marketing strategies.

Win Loss Analysis reporting is delivered through our Horizon online dashboard. By using Horizon, you get real-time access to your win loss data with immediate access to individual profiles, trending statistics, and cross-tabulation technology. Your Account Consultant will also guide you through the data with weekly meetings, post-interview debriefs for your team, executive presentations, and on-going training for your users.

“[Primary Intelligence’s data] was going to be statistically something I could hang my hat on. I knew that I wasn’t just going to get anecdotes... and it wasn’t going to be a pretense of drawing conclusions that were really not accurate.”

—VP, Sales Operations

Gain the Competitive Advantage

Knowing why you win or lose, recognizing the red flags that have been identified through an analysis of your organization’s past wins and losses, and understanding how your competitors position themselves and what messages they present, allows you to intervene before a customer selects your competitor’s solution. The infor-

mation is there waiting to be gathered—all that is needed is the third-party expertise of Primary Intelligence to collect and analyze it. The end result is higher customer retention and a better competitive win ratio. Simply put, armed with these metrics, you can make better business decisions and increase your company’s revenues.

Win Loss Analysis: Primary Intelligence vs. In-House		
Category	Primary Intelligence	In-house
Experience	Experts in win loss collection and analysis.	Typically only perform win loss “when time permits.”
Resources	Dedicated Account Consultant and program team.	Limited resources.
Methodology	Successfully implemented and proven over time.	Will need to create based on a best guess.
Language capabilities	Capable of interviewing in most languages around the globe.	May need to receive assistance from international offices.
Analysis	Uses analysts who are experienced in reviewing raw data and use proprietary statistical models to determine trends and impact.	Staff may need to learn how to review and analyze raw data. Analysis usually limited to frequencies and some cross tabulation.
Reporting	Ability to publish first class reports designed to meet the readers’ needs. Use of executive dashboards and sales portals makes information accessible in real time.	Use of spreadsheets or Word documents to present data. Limited accessibility.
Presentation of results	Consultants present aggregated data, key findings, and recommendations to executives in an easily understandable manner.	Data typically presented to executives in raw data format.
Likelihood of success	High, with most customers repeating and expanding the project based on receiving actionable, relevant information.	Low. Project tends to cost more in resources than expected and results not delivered timely due to resource constraints.
Usability	Actionable and usable data to improve performance and results.	Interesting, but may not have an effect on ROI.

