The Win Loss Witch-Hunt:
How you don’t want your program perceived and what to do about it

by Melissa Short

Illustrations by Mark Larson
Although the purpose of win loss analysis isn’t to identify culpability for lost opportunities, sales teams that perceive it that way can jeopardize the success of any win loss program. And, while stakeholders often recognize that support from sales teams is essential to the success of their program, they falter by confronting it insufficiently, too late, or not at all.

One of our clients recently concluded a win loss program with a data set of nearly all wins and hardly any losses because their sales team selectively chose deals for review. Their sales team wasn’t fully on board with the idea of win loss analysis, so they readily submitted wins for review but declined to share losses. Like many sales teams, they shared one of the most basic yet most prevalent concerns about win loss analysis: Who is going to see the results, and how will they use the information? When unanswered, these questions tend to prompt resistance to win loss programs, and in the case of our client, the sales team resisted by only submitting their best performances for review. Selectively submitting deals compromised the validity of results and left our client with an unbalanced data set—one that couldn’t accurately speak to its strengths and weaknesses, much less to its competitive positioning.

Our client exemplified that even win loss programs with the best intentions can experience reluctance from sales teams. The aim of our client’s program was anything but a witch-hunt: They viewed their win loss program as a tool for improvement and not a means to identify weak links. The program leaders had even established exactly what kind of information would be shared, how results would be disseminated, and who would have access to the findings. They also had measures in place to remove negative feedback that singled out a sales representative. Unfortunately, the program leaders committed a common yet impactful error. Although stakeholders understood the win loss process and the protocol it would follow, they did not openly share this information with their sales teams—nor did they provide an opportunity for their sales team to ask questions about win loss interviewing.

The lesson from this client’s experience is two-fold:

1. Sales teams need to trust the methods of collecting and sharing win loss findings
2. They also need to recognize the value they stand to gain from win loss analysis
Once our client addressed these areas, their program improved significantly. For one, their sales team no longer hesitated to submit opportunities for review—they began asking to have their deals reviewed. And, the sales representatives were among the first to read the interview transcripts and spark a discussion about the findings. With enthusiasm backing the process, the program leaders were able to shift their focus away from managing the process and instead spend more time analyzing the data and helping their organization respond to the findings. Although this level of interest may seem difficult to achieve, there are easy steps you can take to help the process.

### SET A POSITIVE TONE

Our clients that see the strongest returns on investment (ROIs) both in revenue and in sales performance approach win loss interviewing as a way to improve—and not as a way to spotlight poor performance. When looking closer, these programs share a common theme: Their executives, directors, and managers maintain a positive attitude toward their sales team even when interviews reveal a weakness or a lapse in performance. When a respondent describes a negative buying experience, these leaders push aside a fault-finding mentality and replace it with a commitment to learn from the event. They abandon the question, which individual is responsible for this lost opportunity? And replace it with, what can we learn from this, and how can we avoid this mistake in the future?

This approach is an effective means to on-board your team, and one of our clients learned this first-hand. A buyer recently criticized the interactions they had with our client’s CEO, and while many leaders would turn a blind eye or discard this kind of response as a one-off finding, this CEO responded in stride. He said the “rocky feedback” was his cue to change the relationship with his buyer. His constructive response not only helped save the account, but it also gave his company an example to follow. The CEO summed up his perspective saying, “If you did something great and you got some accolades [in a buyer interview], good for you. If you did something bad… well okay, let’s learn together.” Instead of “trapping” his team into repeating the same mistakes, this firm took the first step to create a competitive advantage: interpret a rough patch as an opportunity.

This example and others show how your response to negative feedback is the crux of your win loss program: Without a focus on learning and improvement, negative feedback is just negative feedback, and it will likely weigh your team down. Instead, your sales team will ea-
When your sales reps are confident that even their bad days on the job won’t be subject to harsh criticism, their outlook on win loss interviewing will shift from being defensive to being receptive.

Adopt best practices in managing negative feedback

One of the most sensitive topics in win loss analysis is how to handle harsh or non-constructive comments gathered in a phone interview. While these open-ended discussions often reveal the most actionable intelligence, they also allow respondents to voice their critique about a buying experience or sales representative. But when a respondent’s feedback ceases to be constructive and instead becomes overly critical, it’s time to take action. A best practice is to remove fault-finding comments that target a specific person or group unfairly or in excess. When filtering out harsh feedback, ask:

- Does it name or isolate a single person?
- Is it personal? (“I just didn’t like the sales representative.”)
- Is it easy to identify who the respondent is referring to?
- Would sharing this information have a negative impact on this person’s reputation?

If you’ve answered yes to any of these questions: remove these statements from the interview transcript. If you’re unsure, consider how sharing this information would impact your efforts to set a positive tone and err on the side of caution. Attributing blame or ostracizing poor performance will be counter-productive to both your win loss program and to the morale of your sales force.

In some cases, our clients retain the criticisms about a sales representative or buying process, but they do so carefully. They still remove the comments prior to circulating the interview transcript, but they retain the feedback and discuss the buyer’s perception in a private and non-critical environment. If you choose to take this approach, remember that win loss interviews provide a full view into the customer’s mind, and there is usually a back story that prompts unfavorable feedback. Instead of pointing fingers either at your representative or your customer, approach the situation by asking, what could we do to avoid that perception in the future?
OBJECTIVELY APPROACH THE FINDINGS

As you collect win loss interviews, help your team look at the findings objectively. But, what does it really look like to stay objective? Simply put: Adopt an outsider’s view. This means you and your team interpret buyer feedback without projecting your own take on it. And, it also implies you and your team accept feedback without becoming defensive. Both practices work together and are essential to assimilate findings and scale intelligence for a bigger audience.

Let buyer feedback speak for itself—and listen to it

It’s not uncommon for buyers to provide feedback about a vendor’s sales process, product, or company that isn’t quite accurate. For example, our client’s buyer indicated that a sales representative didn’t present a certain solution feature, when in fact they did. Since this feedback negatively skewed the data set, our client requested to exclude this interview from their mid-year win loss summary. Unfortunately, programs that throw out discrepancies without proper attention lose valuable customer insight. And they ignore one of the most important lessons of win loss analysis: Your customer’s opinion matters. How they interpret your company, your sales team, and your product matter. Whether or not you agree with it, your customer’s perception is their reality, and it will drive their decision-making.

Our client ultimately decided to keep the finding in their mid-year report—and this worked to their benefit. To reconcile the discrepancy, they asked, why did our customer say this, and how can we communicate with them more effectively? The answer revealed the root problem was a marketing error—not a sales problem. The buyer thought the sales representative didn’t present a solution feature because marketing collateral provided an inadequate description of it. Our client corrected their marketing message and avoided that misstep in other deals. Had this client favored their own assumptions about their market perception, they would have missed the insights altogether—something that would have cost them future deals and left their sales rep without useful instruction.

Resist becoming defensive when a buyer points out a weakness or area to improve

Staying open to feedback also depends on your sales rep’s ability to take themselves out of the equation when reviewing win loss findings. Dropping a defensive stance will enable your sales rep to look at the feedback as a chance to improve. And the implications of this mentality are advantageous for your entire company. When one sales rep can step aside and see the
bigger lesson, then they’re able to help others do the same. The result is a win loss program that provides a lesson for one person or team that is easily applied to other reps and teams.

One client, a consulting company, has used this tactic to amplify the impact of win loss intelligence. They’ve helped their sales team think beyond their own pursuits and see how others could learn from their buyers’ praises and criticisms. Their vice president explained that their consultants respond to constructive yet eye-opening feedback by helping their colleagues avoid the same mistake. They share insights such as, “When you work with this account, remember that they prefer x and y. Stay away from z.” This approach has helped them incorporate a nuanced approach to customer service and has also extended the reach of buyer intelligence in their company.

But how do you cultivate a non-defensive approach like these consultants? It starts with your positive attitude; it continues with your cautious management of negative feedback; and it depends also on your ability to coach your teams and help them respond to the findings constructively.

Help your team understand the purpose and value of win loss analysis
Sales teams often overlook the value of win loss analysis by assuming it is an exercise exclusively to evaluate their performance. While win loss analysis starts by evaluating a competitive sales opportunity, its purpose is much broader. For one, win loss interviewing is the ultimate competitive intelligence tool. The most important thing you can know about a competitor is why they win and lose business (this describes their entire market position!). Also, these interviews collect marketing intelligence, product intelligence, buyer business needs, and more. The point? Evaluating sales performance is just one of many pieces in a win loss program. Whatever your focus, there is an opportunity for your sales team to utilize the intelligence and make them more competitive in the next deal. Here are a few ways your sales team can use buyer intelligence to their advantage:

- **Build a smarter sales strategy:** Win loss interviews can effectively reveal what tactics your competitors employ to claim market share. For example, one client in the healthcare industry experienced a bidding season characterized by consistently losing to one, specific competitor in the finalist meetings. Win loss interviews not only confirmed our client’s solution was strong, but also revealed they were often the preferred vendor going
into the final presentations. But, the competitor’s tactics in these meetings swayed the buyer’s decision. With a deeper understanding of their competitor’s behavior, our client constructed an effective counter plan. In the following bidding season, the sales team utilized this competitive intelligence to stay in the finalist meetings longer and close new business opportunities.

- **Identify and pursue win-back opportunities:** Win loss interviews often uncover win-back opportunities, which give a sales team a second chance at a lost opportunity. Win-backs are deals typically lost by a thin margin and are ideal targets for follow-up calls and future business pursuits. And, these narrow losses reveal one of the most actionable pieces of intelligence: What was the buyer’s tipping point and what could the vendor have done differently to move the deal in their favor? After interviewing a lost account like this, a sales rep can see exactly how they need to re-connect with the account at renewal.

  In some instances, pursuing a win-back opportunity pays an immediate—and often unexpected—dividend. Recently, our client interviewed on an account they assumed was lost to a competitor. But through the interview, the buyer explained how they were having extreme difficulty in the competitor’s implementation process and were ready to find an alternative. This interview re-opened the dialog for our client and ultimately enabled them to recover the deal.

- **Discover smart selling tactics:** Win loss interviewing can create an ongoing advantage for your sales team by serving as a repository of intelligence. As your library of interviews builds, a sales rep can reach back to a previous deal and find similarities that apply to their current pursuit. They can pinpoint a specific deal that matches their current prospects in terms of size, industry, culture, or product and use the past insights to avoid known pitfalls or create new advantages.

**COACH YOUR TEAM WITH REGULAR DISCOVERY SESSIONS**

While your team members need to have access to the interview transcripts at their convenience, it’s also important to help them interpret and respond to findings in a structured setting. The most effective way to coach them—and also to guarantee your win loss program has impact—is to conduct regular Discovery Sessions. A Discovery Session (formerly called an, “Interview Debrief”) is a structured conversation that examines what happened in the deal, extracts the reason why each event occurred, and identifies tactical action items. By capturing
the sales representative’s perception, Discoveries not only round out buyer feedback and fill in the other side of the story, but they also provide a voice for your sales team and a clear path to improve (or repeat a best practice). This is why Discoveries are an effective tool to engage your team in win loss analysis:

- Discovery Sessions drive engagement in win loss analysis by reinforcing the notion that these interviews aren’t a tool to assess their performance but a tool to collect buyer intelligence and drive sales efficacy.
- Scheduled and frequent touch-points give your team a routine setting to share their side of the story and absorb the customer’s perspective. It gives your sales team a voice and stake in the process.
- Discovery Sessions help your team understand their buyers better and drive smarter selling. These discussions let your team peel back the layers of each deal and uncover the main decision points. These decision points become your sales team’s greatest resource as they align their sales tactics with buyer business needs.

Full circle: Discovery Sessions propel you and your teams forward

While the tone of your win loss program is set and maintained throughout your research cycle, post-interview Discovery Sessions are the single-most effective way to achieve all of the above goals in one setting. Each Discovery gives you a critical opportunity to reinforce your positive tone, to handle harsh feedback graciously, to interpret findings objectively, and to reiterate the value of each interview.

But more importantly, Discoveries propel you and your teams forward because they expose the root cause behind your buyer’s decision-making. These root causes are the nuggets of intelligence needed to win more. **To make sure your Discovery Session is a success, combine conversation with investigation.** Simply having a conversation about a deal is insufficient. Instead, you need to address why the deal went the way it did. If your teams don’t understand the “why” behind your buyers’ behavior, the insight they glean will be surface-level only and will provide limited value to them. Also, giving your team a voice in the Discovery Session will help you uncover these root causes and will also increase their investment in win loss analysis.

Take one of our clients, for example, who kept losing deals because of their lengthy sales process and inflated prices—or so they thought. From the buyer’s perspective, the sales process was too long and the prices were too high. However, during a routine Discovery Session, the buyer expressed that they were deterred by the lengthy sales process and inflated prices. The sales team was not aware of these concerns and did not receive feedback from the buyer. The Discovery Session allowed the sales team to understand the real reason behind the buyer’s decision and how they could improve their process and pricing to align better with the buyer’s needs.

**Tips for a successful debrief**

- **Reaffirm your positive tone.** Open every discussion with an emphasis on improvement and explain that comments shared in the forum should follow this commitment.
- **Identify the root causes behind best practices and problem areas.** To find best practices, talk about the biggest successes described by the buyer, and ask your team to solidify these habits. Then, focus on how your team can improve. Keep the discussion constructive and non-personal, and identify items that everyone can use in the future. Help your team analyze results objectively and try to understand the customer’s perspective, even if you disagree with it.
- **Discuss “if-then” scenarios to help your team think creatively about the findings.** For example, create an if-then scenario by taking a direct example from the interview (or embellish on the interview to create a slightly different situation) and ask your team for some possible responses or reactions to the situation. You can start the discussion by saying, “If you found yourself in this position, then how would you use this strength or overcome this hurdle?” The goal here is to help your team identify their strengths and apply them in future opportunities.
- **Create action items and follow-up on the action items regularly.** Be sure to reconnect with your team on past lessons learned and ask for examples of how they’ve used the intelligence.

Want to learn how to conduct a debrief? View our webinar and download the PowerPoint for step-by-step instructions.
the client probed their sales team for details about their selling process. How did the sales team build the pricing? What steps did they follow to outline pricing? The answer was telling: The sales team couldn’t make financial decisions for their contracts and instead had to send requests to the contracting team. Contracting, in turn, would review the request and would offer a revised pricing structure, which often didn’t align with the buyer’s needs. After all, contracting wasn’t interfacing directly with the buyer and didn’t have visibility into their needs. When sales would reinitiate the discussion with the buyer, they would find that even the new contract terms weren’t quite hitting the mark. And so, they would send the proposal back to contracting for a second iteration…and so on. This client’s Discovery Session revealed the root cause behind their lost business. The problem wasn’t a sales-specific issue. It was a process issue in the company’s contract negotiation practices, which started because their initial price-point was too high and was perpetuated by an arduous workflow.

This client realized two significant benefits from their Discovery Session. First, it gave their sales team a sense of ownership in their win loss program, which increased their interest in the process. Their sales team immediately connected the dots between their ability to sell better and the intelligence collected from win loss interviewing. And second, it uncovered deal-saving intelligence; this client has experienced a significant ROI simply from correcting a behind-the-scenes workflow.

**KEEP THE FORUM OPEN**

Just like your sales process entails frequent touch-points with a customer, win loss analysis also requires regular touch-points with your internal stakeholders and sales team. While interview debriefs can also be a useful setting to address questions or concerns, remind your team that they have an open line to share feedback and ask questions. And when they raise questions or concerns, be willing to accept their input and approach it just like your win loss interviews—with a willingness to hear the other side and see opportunities to improve. Make sure you provide a consistent example for your team and reinforce that the tone will be positive, that negative feedback will be handled graciously, and that the overarching focus will be on how to improve.

“Win loss data and its root causes are excellent sources of information to utilize in deal coaching to help sales people avoid pitfalls and employ tactics that will help win more business.”
—RoxAnne Loosle, Primary Intelligence Consultant
How to tell if your win loss program is a witch-hunt

START

Have you shown your sales team how win loss analysis is a tool to improve their competitive advantage?

YES

Do you use regular touch points to share and discuss findings?

NO

Have you used win loss analysis as a tool to find out who is responsible for lost business opportunities?

NO

When critical or negative feedback about the performance of an individual or about well-known group of individuals surfaces in the interview, do you address the feedback privately?

YES

Do you help the team or representative analyze the results objectively and try to understand the customer's perspective, even if you disagree with it?

NO

When respondents describe sales performance weaknesses, do you help the entire team learn from the experience in a positive and meaningful way?

NO

Do you remove comments from the interview transcript that do any of the following?

YES

1) Name or isolate a single person?

NO

2) Include feedback that had no bearing on the deal? (e.g. "I just didn't like the sales rep's personality")

NO

3) Could negatively impact the person's reputation?

NO

MISSED LEARNING OPPORTUNITY

BRAVO!

YES! A WITCH-HUNT!

DEFINITELY A WITCH-HUNT! TIME TO RE-EVALUATE!

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