Easy Tech Marketing

B2B product marketing for technology companies

Win/Loss Analysis process

How to get relevant info from your customers right after they evaluated your company and product

My process is:

1. Get the recent (within a week) closed deals from the CRM (wins & losses)
2. Email outreach and ask for ten minutes of their time
3. Have a pre-call meeting with the sales manager to understand the background beyond what was put in the CRM

Call Script:

- Intro & Thank you

- State purpose: we want to learn as an organization, about all our touch points with customers

- If they want to keep it confidential: that's ok, too, and only aggregated info will ever go to the rest of the company

> ***-What product did the customer evaluate?***
>
> ***-Which other companies were competing on this opportunity?***
>
> ***-Why was our company included?***
>
> ***-Why did/didn't we win the business?***
>
> ***-Who was involved in the decision?***
>
> ***-What was your perception of our sales team?***
>
> ***-What did you think of our proposal?***
>
> ***-Were you comfortable with our capabilities?***

> ***-What did you think of our pricing?***
>
> ***-How did we compare to our competition?***
>
> ***-What advice would you give us on working with you in the future?***
>
> ***-What additional comments do you have?***

It is important that the information is than handled with care: that any comments on the on-going project are forwarded to the sales and project managers. Also, any negative feedback on individuals should likely not be forwarded: this process needs the cooperation and support of everyone in the company in order to not turn into a witch hunt.

About

Easy Tech Marketing is a Vancouver-based consultancy advising fast-growing tech companies how to market a product to new markets. We love tech, and know how to reach your B2B audience.

Visit us at easytechmarketing.com

Follow the CEO & founder, Johanne Lemaire, on Twitter @J_Lemaire

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