

Win/Loss Analysis

Report -

Template V. 2.1



Company Name: <Enter company name.>

Product Name: <Enter product name.>

- **Date:** <Enter date.>
- **Contact:** <Enter your name.>
- **Department:** <Enter department name.>
- **Location:** <Enter location.>
- **Email:** <Enter email address.>
- **Telephone:** <Enter telephone number.>

Document Revision History:

Date	Revision	Revised By	Approved By
<Enter date.>	<Revision #.>	<Enter your name.>	<Enter name.>

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Evaluation Copy

1. Introduction

1.1. Document Objective

The purpose of this document is to present sales process and product oriented recommendations and data derived from unbiased feedback from company employees and customers involved in the sales effort and buying decision process after winning or losing a deal.

<Comment: Win/Loss Analysis is a process whose output helps to improve both products and sales functions.>

2. Win/Loss Analysis Report Form

2.1. Section Objective

This section describes the information obtained during win/loss analysis interviews and the resulting conclusions.

2.2. Win/Loss Analysis Report Form

Information	Details
Customer's Perception of Company	
Customer's opinion of the company:	<Enter text.>
Customer's opinion of the products:	<Enter text.>
Customer's opinion of the sales process:	<Enter text.>
Customer's key buying decision factors:	<Enter text.>
Customer's Perception of Competition	
Customer's opinion of the competition:	<Enter text.>
Customer's opinion of the competing products:	<Enter text.>
Customer's opinion of the competitor's sales process:	<Enter text.>
Analysis and Results	
Overall assessment of the company's customer engagement process:	<Enter text.>
Relevant conclusions:	<Enter text.>
Resulting recommendations:	<Enter text.>
Action items:	<Enter text.>
General Comments:	<Enter text.>

3. Supporting Data

3.1. Section Objective

The section provides data in support of claims, assertions, assumptions, and statements made throughout this document.

3.2. Assumptions

<Describe any assumptions made when writing this document.>

3.3. Research Information

<If relevant, describe and list the type and scope of research conducted in the course of writing this document.>

3.4. Product Diagram/Architecture

<If relevant, describe the product's architecture and modules accompanied by a schematic diagram.>