Blackblot® PMTK Win/Loss Analysis Questionnaire

<Comment: Replace the Blackblot logo with your company logo.>

Company Name: <Enter company name>
Product Name: <Enter product name>

Date: <Enter creation date>
Contact: <Enter contact 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 revision date>	<Revision #>	<Enter your name>	<Enter name>

Table of Contents

1. <u>Introduction</u>

   1.1. <u>Document Objective</u>

   The purpose of this document is to present a sales process and product-oriented questionnaire used to elicit 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 improve products and develop better sales functions.>

2. <u>Win/Loss Analysis Objectives</u>

   2.1. <u>Section Objective</u>

   This section describes the objectives of the Win/Loss analysis process.

   <Comment: This section helps more clearly define what Win/Loss analysis is trying to obtain. It serves as a reminder/guideline to the interviewer and helps readers understand the purpose of the analysis.>

   2.2. <u>Win/Loss Analysis Objectives</u>

   - Analysis of customer purchase decision factors.
   - More information on the actual buyer/decision-maker.
   - Uncover the true reasons for winning and losing deals.
   - Improve sales force performance with targeted sales tools and information.
   - Improve understanding of the target market trends and needs at any given time.
   - Understand marketing reaction levels to marketing mix changes.
   - General exploration of key issues in marketing and sales that need revision.
   - Mapping the competitive landscape and the company's perceived positioning.
   - Gaining a customer perspective on which product features are most important or critical to make a sale.

   2.3. <u>Win/Loss Analysis Desired Outcomes</u>

   - Developing and reinforcing best practices in the sales cycle.
   - Identifying, correcting, or eliminating any obstacles, stages, or practices in the sale cycle perceived as ineffective or inappropriate.

3. <u>Product/Market Overview</u>

   3.1. <u>Section Objective</u>

   This section provides a general overview of the product and market.

   <Comment: This section helps to clearly define baseline information for the reader and interviewer before the actual Win/Loss analysis interview.>

   3.2. <u>Market/Customer Description</u>

   <Define and describe the target market and customer profile the product is targeted at. Also, list the key characteristics of the target market and customer.>

3.3. Product Description
<Define and describe the product that solves the market problem.>

4. Win/Loss Analysis Questionnaire/Form
4.1. Section Objective
This section describes the general process of querying a customer regarding the specific business deal and the buying decision.

4.2. Win/Loss Analysis Questionnaire/Form

Background Information	Details
Date	<Enter text.>
Company Name	<Enter text.>
Company Address	<Enter text.>
Interviewee #1 (Name, Title, Phone, Email)	<Enter text.>
Interviewee #2 (Name, Title, Phone, Email)	<Enter text.>
Interviewer Details	<Enter text.>
Relevant Product(s) or Product Line	<Enter text.>
Original Deal Outcome (Win/Loss)	<Enter text.>
Comments:	<Enter text.>

Interview Questions	Answer
Corporate Identity and Perception	
How do you perceive our company? (leader, follower, innovator)	<Enter text.>
What is your general opinion or impression of our company?	<Enter text.>
What is your general opinion or impression of our products?	<Enter text.>
What are our company's merits?	<Enter text.>
What are our company's faults?	<Enter text.>

Sales Force Evaluation	
Rate your overall level of satisfaction with the company's salesperson(s) you interacted with.	<Enter text.>
Rate your overall level of satisfaction with the product information provided to you by the salesperson.	<Enter text.>
What could the salesperson improve in the next engagement with you?	<Enter text.>
Were you satisfied with the product demonstration?	<Enter text.>
How could the product demonstration have been improved?	<Enter text.>
Are you satisfied with the offer that was made to you? (presentation, wording, clarity, price, projected value, extras)	<Enter text.>

Buying and Evaluation Information	
What factors were used to select the competing products? (price, availability, innovativeness, support, personal contact, previous experience, reputation, functionality)	<Enter text.>
Who evaluated the products?	<Enter text.>
What process was used to evaluate the products?	<Enter text.>
What were the top three criteria used to evaluate the products?	<Enter text.>
What sources were used to gather information on the products?	<Enter text.>
Who made the buying decision?	<Enter text.>
What criteria/process was used to achieve a buying decision?	<Enter text.>
What sources were used to gather information on the products?	<Enter text.>

Win/Loss Outcome	
What were the reasons for our win (or loss)?	<Enter text.>
What were the reasons for our competitors' win (or loss)?	<Enter text.>
What were our strongest/weakest points in the entire process?	<Enter text.>
What were our competitors' strongest/weakest points in the entire process?	<Enter text.>

<Comment: Many additional topics and questions can be added to the questionnaire, subject to necessity. In the actual interview, make sure you constantly focus on the main points you wish to elicit and be concise. Avoid developing a questionnaire that is overbearing and excessively granular.>

4.3. <u>Parameters List</u>

The following is a list of parameters that can assist or confine the interviewee when answering the Win/Loss analysis questionnaire.

- Company – Financial viability
- Company – Key partnership
- Company – Local presence
- Company – Visibility
- Price – ROI
- Price – Structure/Model
- Price – Total deal price
- Product – Features
- Product – Installation
- Product – Scalability
- Product – Security

- Product – Stability/Robustness
- Product – Usability
- Product – User Management – TCO
- Relationship – Existing customer/vendor relationship
- Relationship – Personal relationship with the customer
- Service – Deployment
- Service – Support
- Service – Training

<Comment: As a matter of preference when conducting a Win/Loss analysis interview, it is possible to present the interviewee with open-ended or multiple-choice questions. There are obvious advantages and disadvantages to either approach.>

4.4.   Competition Summary Table

Competitor	Their Top 3 Advantages	Their Top 3 Disadvantages	Comment / Recommendation for Improvement
<Competitor Name.>	<1. Advantage.> <2. Advantage.> <3. Advantage.>	<1. Disadvantage.> <2. Disadvantage.> <3. Disadvantage.>	<Enter Recommendation for Improvement.>

<Comment: This table allows you to review the competitors who participated in bidding for the deal and draw recommendations regarding your own company.>

5.   Supporting Data
5.1.   Section Objective
This section provides data supporting claims, assertions, assumptions, and statements made throughout this document.

5.2.   Assumptions
<Describe any assumptions made while preparing this document.>

5.3.   Research Information
<If relevant, describe and list the type and scope of research conducted while preparing this document.>

5.4.   Product Diagram/Architecture
<If relevant, describe the product's architecture and modules accompanied by a schematic diagram.>