

sample win-loss analysis

current quarter

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Executive Summary

The objective of this report is to present the results of the Win-Loss survey information collected by Cerado Inc. Survey information was collected from the sales force for 294 deals.

Highlights of the survey:

- Last quarter, the following deals were reported as “deferred.”

Ambrosta	Kansa Gold
London Health and Life Assurance	Bobbins, Davis, Nunn, and Roberts
Mauston Chemical	Krystan
Barber	Traverse Cityl

None of these customers appeared in this quarter’s survey. This is not surprising, however, since a different set of sales reps were interviewed. A follow-up should be done to determine if any of these “deferred” deals from last quarter closed.

- This quarter, fifteen deals were reported as “deferred” – if they are truly deferred, extra effort should be made to bring them to completion early in the quarter. Otherwise, they should be noted as losses in the future or removed from the pipeline.
- There was a balance of sales across a number of industries this quarter. Industries with the most activity included Healthcare, Global Logistics, Consumer Goods, Active Components, and Pharmaceuticals.
- The buyers came mostly from the technical ranks (72% from IT), with 17% coming from the executive suite.
- In contrast to the above finding, most of the people who *signed* for the projects were Executives (65%), with only 22% coming from IT.

It is not known if the initial contact was to the executive, or the technical buyer. If the initial contact was to the executive, who then redirected the rep to the technical contact, then the process seems to be working. However, if the initial contact and relationship was built with the technical buyer, and then the rep had to work “upstream” to get to the executive with signing authority, sales cycles might be able to be shortened by “selling higher” at the outset.

- Again, Auric Co. was the largest competitor, listed as the primary competitor in 19% of the reported deals. In addition, they were the secondary competitor in 12% of the deals. Auric was 3X more likely to be listed as the primary competitor above any other. When Auric Co. was listed as a primary competitor, Besco was most commonly listed as the second competitor in the account. Auric

Co. also benefited in at least five deals by gaining referrals from their partners, and from exploiting customer references. This mirrors information gained in the previous quarter from a separate set of reps. Developing better relationships with influencers (e.g. partners, analysts, or customer references) is strongly suggested to counter this.

- Auric won a majority of the reported deals where they were the primary competitor (22 deals out of 40). Your organization won 16 of these 40 deals, with 2 deals being deferred. Would recommend developing case studies around the deals where you beat Auric Co. (i.e. Auric was listed as first, second, or third competitor) to aid in future sales.
- After Auric, the next primary competitors were Ixtal, Besco, HAL, and newMarketing, each listed as the primary competitor in only 5%-9% of deals.
- The "other" category of competitor showed three competitive deals against exCommerce, two of which were wins. The rest of the "other" competitors were one-offs or in-house development.
- "None" (or a variant) showed up as the "primary competitor" in fifteen deals. One of these cases was a prospecting opportunity; the others (all wins excepting two deferrals) were upsells or other situations where the relationship was such that no competition was introduced. This is good.
- Healthcare/Life Sciences appears to be an increasingly important segment. In addition to the deals that were explicitly labeled "Healthcare," a number of additional deals were in Pharmaceuticals.
- This quarter showed a good balance across product lines. Again, the WorkHorse solution was the product involved in most deals, and was included in 31% of the opportunities as the primary product. The Connexxtions product was second, listed as the primary product in 18% of the deals.
- Seven products in the product portfolio were not listed as the primary product in *any* of the listed deals.

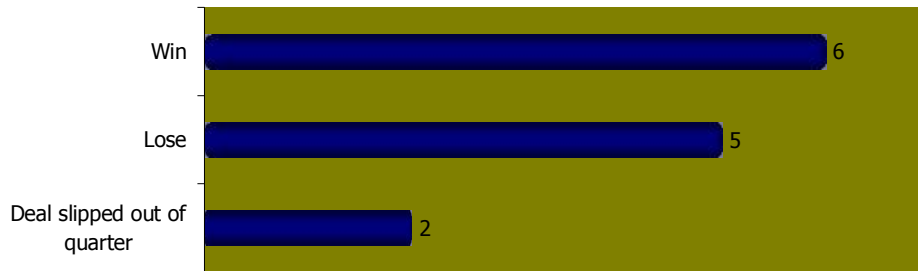
Summary graphs of the survey responses follow, as well as details on customer feedback and detailed feedback from the sales force.



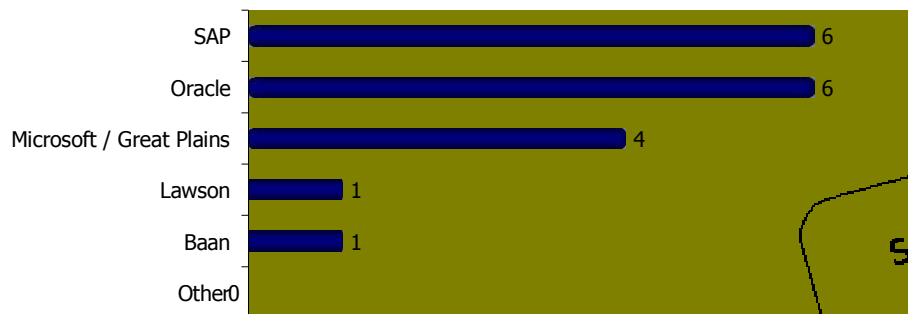
survey results summary

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QUESTION: Did we win or lose?

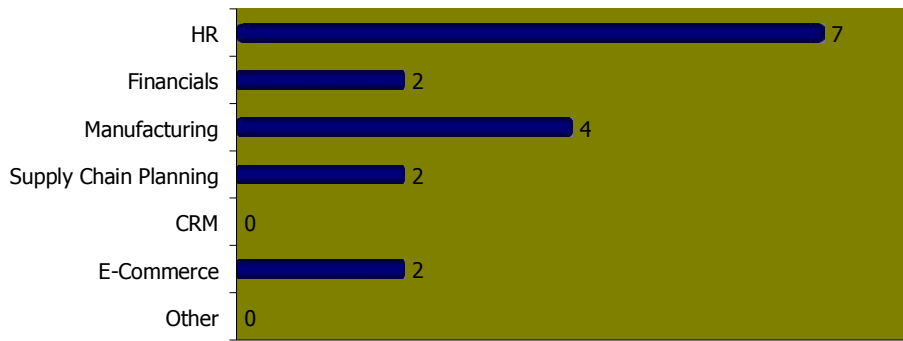


QUESTION: Who did we compete against?

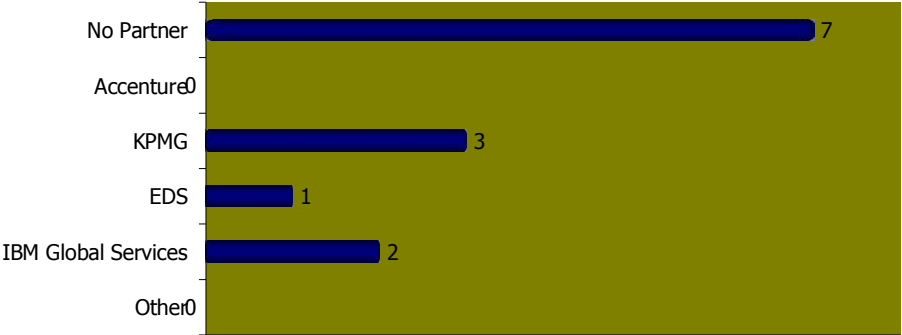


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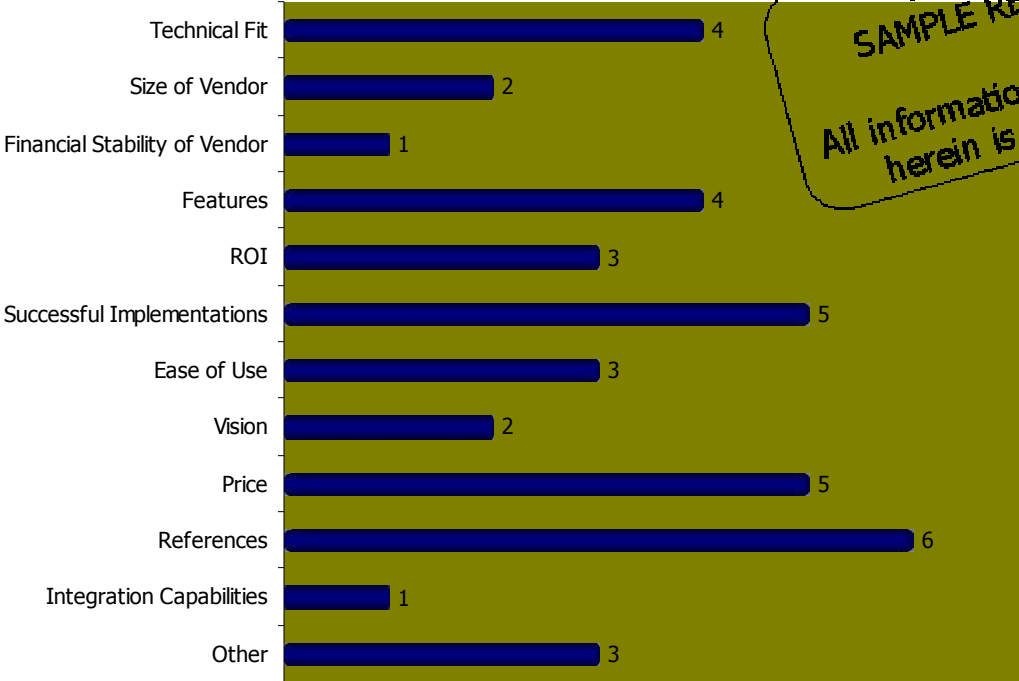
QUESTION: What product(s) were included in the deal?



QUESTION: Who did we partner with on this deal?



QUESTION: What criteria did the prospect use in this selection?



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customer and prospect feedback

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