Win/Loss Review

Part of: Habit 10 – Performance Routines

Why you need it: A Win/Loss review is an important performance routine. It's a short, focused conversation or write-up that helps us learn

Execution

03

Time	Level	Audience	Benefit
<60 minutes	Simple	Sales Person	Practical Tool

About this guide

- This is a simple template that you can use for win/loss reviews
- These reviews should be collaborative (salesperson can complete with manager or complete alone but there should be a conversation with the sales manager or team)

Tips for success

- Peer-learning
- Psychological safety
- Active learning process
- Honesty (think beyond price!)

What you'll get out of it

- A structure that allows you to objectively pull out learnings
- Routine to drive learnings and performance

Useful links

- Execution: Performance Routines
- Execution Overview
- Sales Excellence
- Sales Excellence toolkit

Win/Loss Review

Customer Name:	
Opportunity Value: £	
Sales stage reached:	
Decision Date:	
Product/Service:	
Type of customer:	

Outcome [make this a tick list]

- [ ] WIN - New Business
- [ ] WIN - Existing Customer Expansion
- [ ] LOSS - To Competitor Name: _____
- [ ] LOSS - No Decision/Delayed
- [ ] LOSS – Other: _____

Win/Loss Review

Stated Reason for Loss/Win from customer:

Factor	Rating (1-5)	What worked well	What worked well?	What could be improved?
Understanding Customer Needs		How effectively did we identify and prioritise the customer's specific challenges, pain points, and business objectives?		
Solution/ Product Fit		How well did our proposed solution address the customer's requirements? Did we clearly demonstrate the value proposition?		

Win/Loss Review

Factor	Rating (1-5)	What worked well	What worked well?	What could be improved?
Relationship Strength		How would you assess the quality of relationships with key stakeholders? Consider trust level, communication quality, and access to decision makers.		
Pricing Strategy		Was our pricing approach appropriate for the perceived value? How effectively did we position ROI and handle price objections?		
Competitive Positioning		How effectively did we differentiate from competitors? Did we understand and address competitive threats appropriately?		
Sales Process Execution		How well did we manage the sales cycle? Consider proposal quality, follow-up effectiveness, and internal collaboration.		

Win/Loss Review

Learning & Action Planning

What were the 1–2 most decisive factors in this outcome?

What surprised us most about this opportunity?

Win/Loss Review

Actions for Improvement:

1.

2.

3.

Knowledge to Share:

Which insights from this review should be shared with the wider business and who will share it?