



WEBCAST SERIES

Win/Loss Analysis is a Key CX Component

September 28, 2016
2:00 pm ET / 11:00 am PT



Featured Speakers



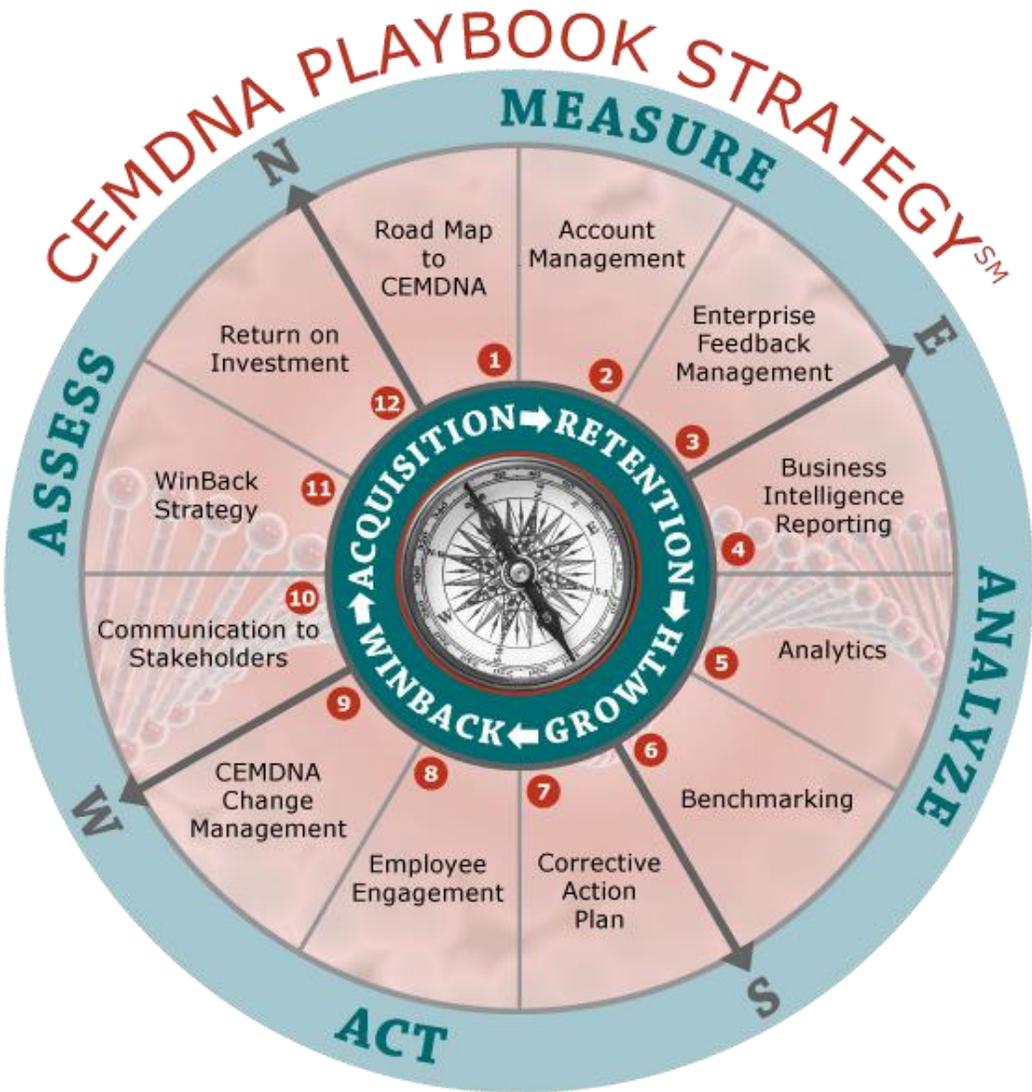
Pat Lysak
President & CEO



Bill Bradley
VP, Marketing & Business Development



CEMDNA Playbook StrategySM



Best Practices in Win/Loss Analysis: Reduce Churn and Increase Win Ratios

Pat Lysak
President & CEO



Impole Company Overview

- ❖ Leader in Market & Account Insight
- ❖ Account Level Development Thought Leadership - Proactive Tactics Advice
- ❖ Diverse Vertical Markets, Global Reach
- ❖ Account Buy Cycle & Sales Effectiveness Focus
- ❖ Support Global Best Practice Companies
- ❖ **High-Caliber Staff** applying heuristic business experience and analytics

Focus of this webcast

	Net New	Renewal
Win	✓	
Loss	✓	✓

Reasons Companies Implement Win/Loss

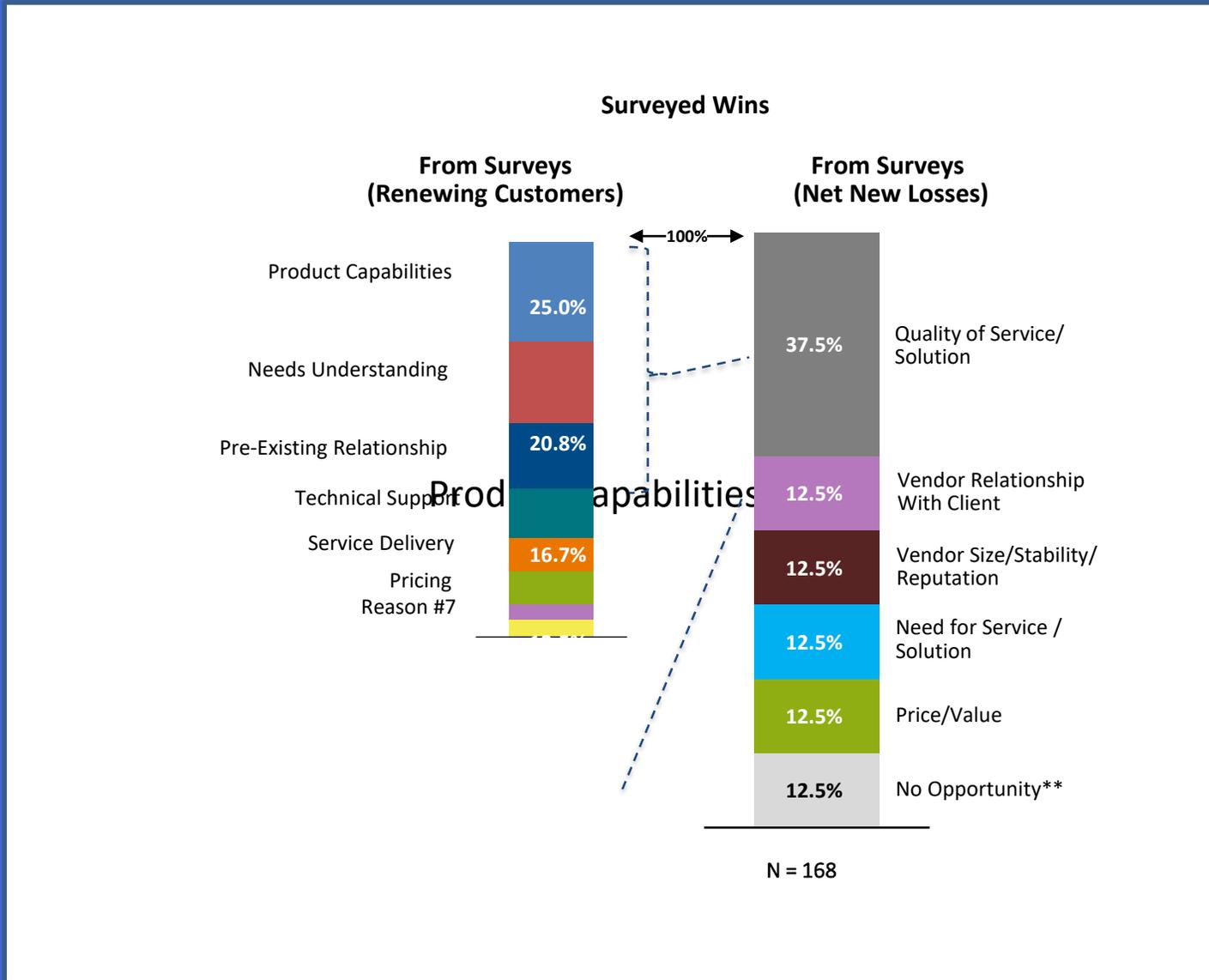
- ❖ The customer buying process is rapidly evolving, almost radically, driven by customer
- ❖ Want to improve CX
- ❖ Why renewing Or not?



Benefits of Win/Loss Analysis

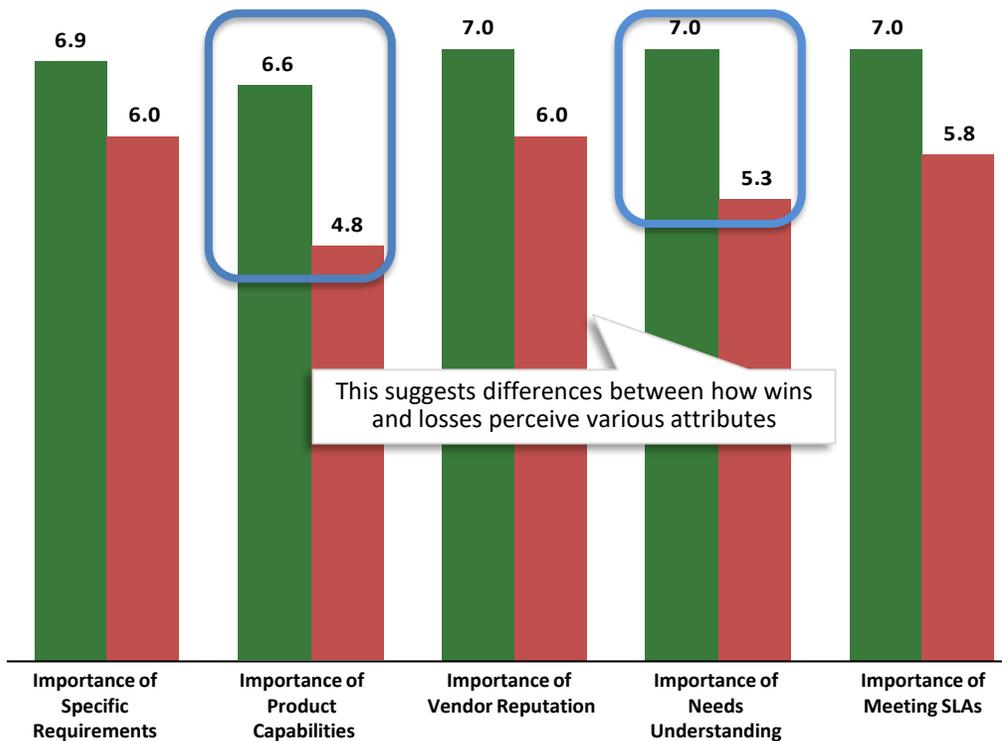
- ❖ Learn organization's strengths & opportunities to improve
- ❖ Tool in Customer Experience
- ❖ Provides competitive advantage

Win Reasons: From Net New Surveys

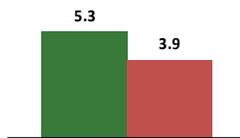


Wins vs. Losses: From Surveys

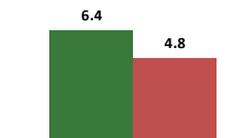
Client Business Impact Measures (Scale: 1-7), Average



Likelihood to Recommend Client (Scale: 1-7), Average



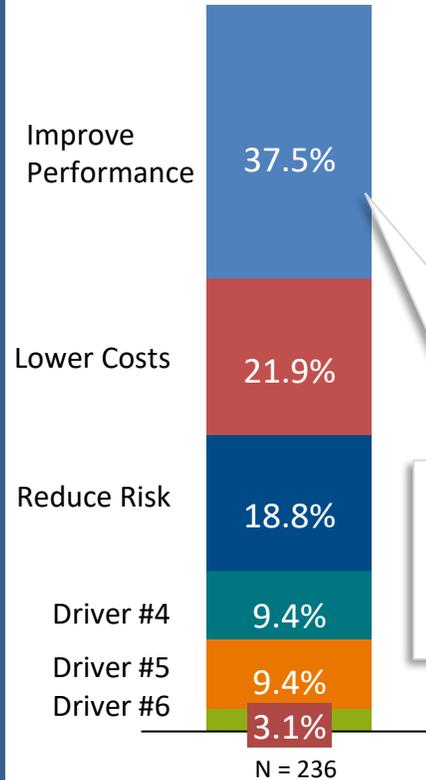
Sales Team Ranking (Scale: 1-7), Average



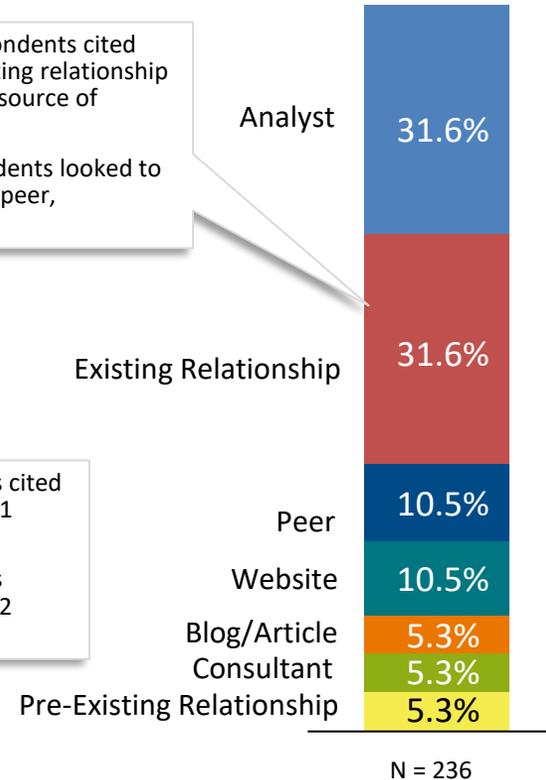
■ Wins ■ Losses

Drivers and Information: Survey Results from Net New Accounts

Business Drivers



Sources of Information



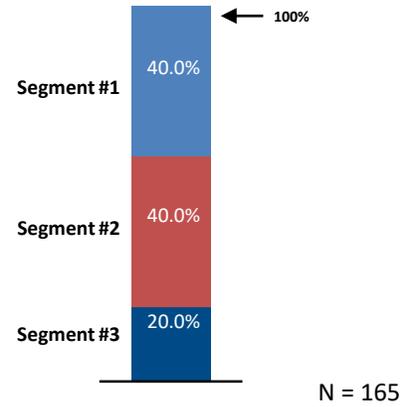
- Almost 1/2 of respondents cited existing or pre-existing relationship with Client as their source of information
- Over 1/3 of respondents looked to recommendations (peer, consultant, analyst)

- Almost 1/2 of respondents cited Improve performance as #1 theme as a driver
- Almost 1/3 of respondents indicated Lower Costs as #2 theme

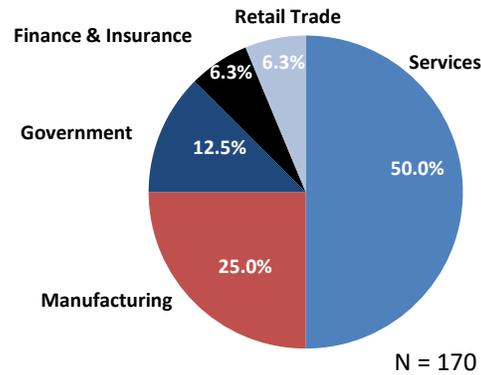
Survey respondents may indicate more than one answer for each of these questions

Survey Demographics (cont.)

Deals Analyzed by Segment (Where Available)

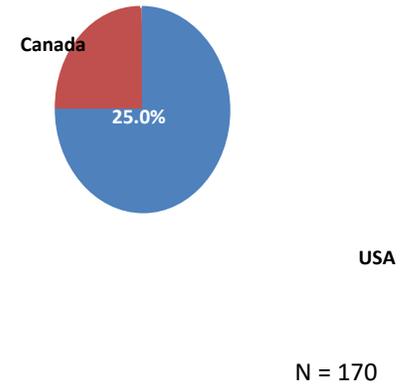


Deals Analyzed – by Industry



Surveys

Surveys by Country



How to Establish a Win/Loss Program

- ❖ Understand business drivers
- ❖ Socialize & gain organizational approval
- ❖ Develop objectives
- ❖ Shape program to achieve objectives
 - ❖ How to structure program: online/phone quantitative/qualitative
- ❖ Anticipate how the organization will handle results

Considerations for Best Practices

- ❖ Organization's Objectives
- ❖ Research Tools
- ❖ Intelligence Reporting
- ❖ Organization Culture
- ❖ Functional Learnings

Understanding Organization Objectives

- ❖ Tool in Customer Experience
- ❖ Learn why organization's loss rate is increasing & to improve
- ❖ Provides competitive advantage

The Organization's Culture

- ❖ Willingness to embrace learnings
- ❖ How results are digested by the organization
- ❖ Short term or long term gain

Reporting the Information & Learnings

- ❖ By individual account
 - ✓ For supporting detail
- ❖ Consolidated results
 - ✓ For micro & macro trends
 - ✓ Competitive Analysis
 - ✓ Product/Services Analysis
 - ✓ Strengths & Weaknesses in selling process

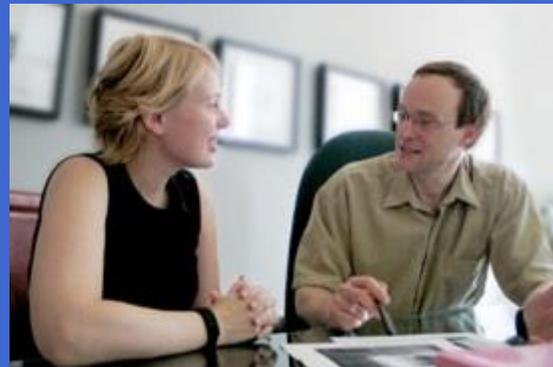
How to Succeed with a Win/Loss Program

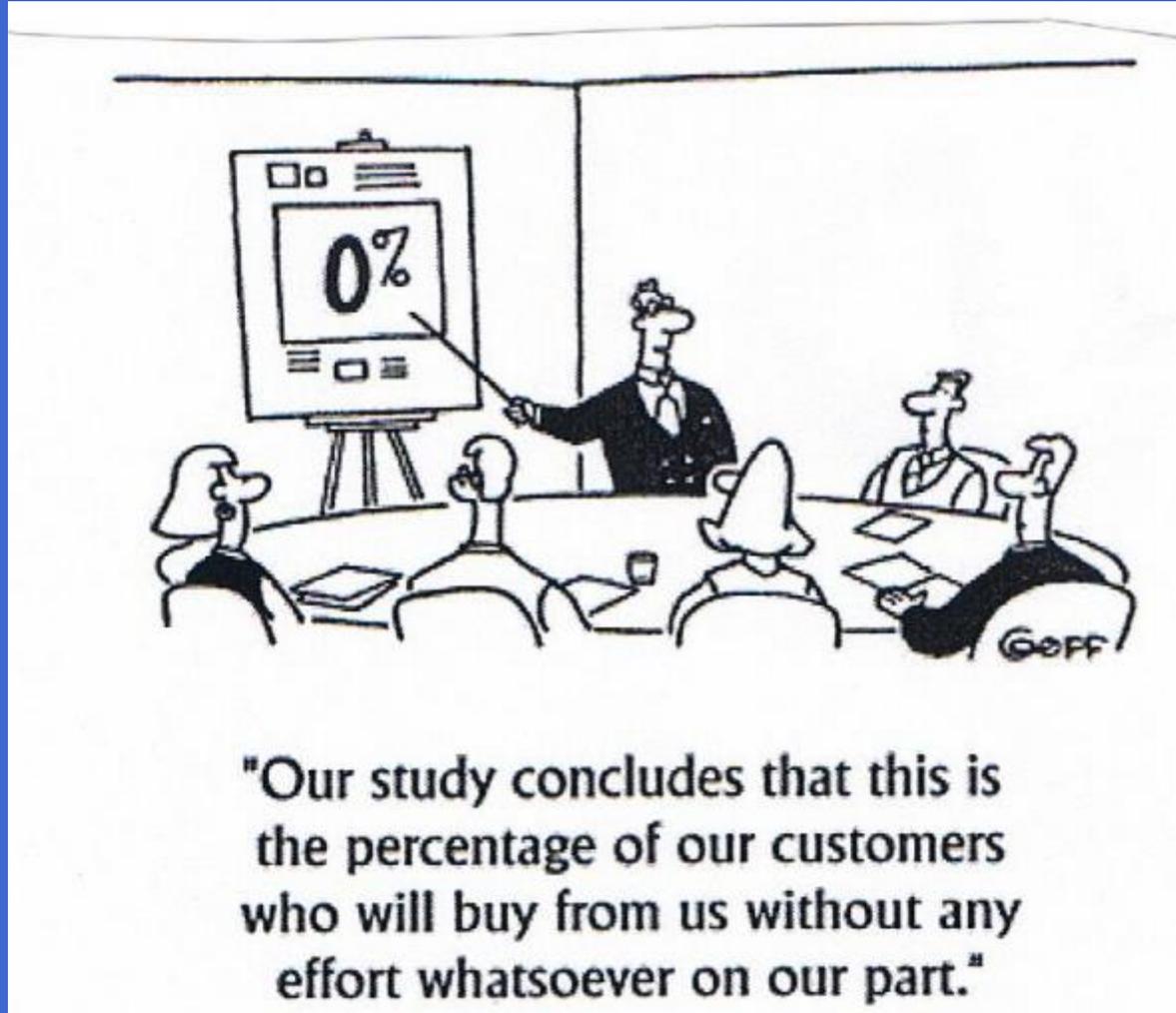
- ❖ What can go wrong and kill the program before it succeeds?
- ❖ Examples of success
 - ❖ Accounts pending, not lost
 - ❖ Process improvements



Key Learnings

- ❖ Understand objectives first
- ❖ Obtain organization approval
- ❖ Institutionalize & sustain the program





Using Stakeholder Communications to Tell Your CX Story

Bill Bradley
VP Marketing & Business Development



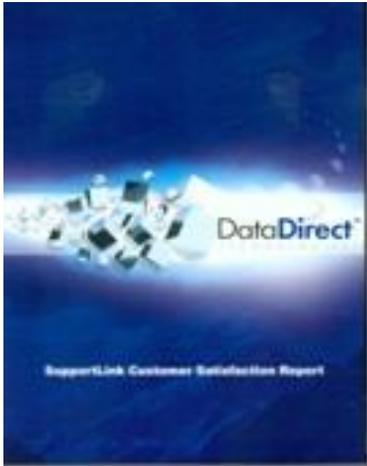
What Makes Your Company Successful?

- Your products and services?
 - Features and benefits
 - Performance
 - Pricing
 - Core technology/innovation
- No! It's your customers!
 - How satisfied and loyal are they?
 - How likely are they to continue to buy from you despite all the other choices?

Who are Stakeholders?

- Customers
- Employees
- Partners/Suppliers
- Investors/Shareholders
- Even prospects

Examples of Stakeholder Communications



Customer Satisfaction Annual Report



CX Case Studies/
Customer Testimonials



Voice of the Customer Video



CX Infographic

More Examples



Public Relations



Social Media



Competitive Satisfaction/
Loyalty Analytics



CX Certified Report Card

Summary

- Capitalize on your most valuable asset: excellence in customer service & support
 - Attract more customers
 - Retain more customers
 - Grow customer share of wallet
 - Win back lost customers
- Win more and lose less!

Thank You! Q & A



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