



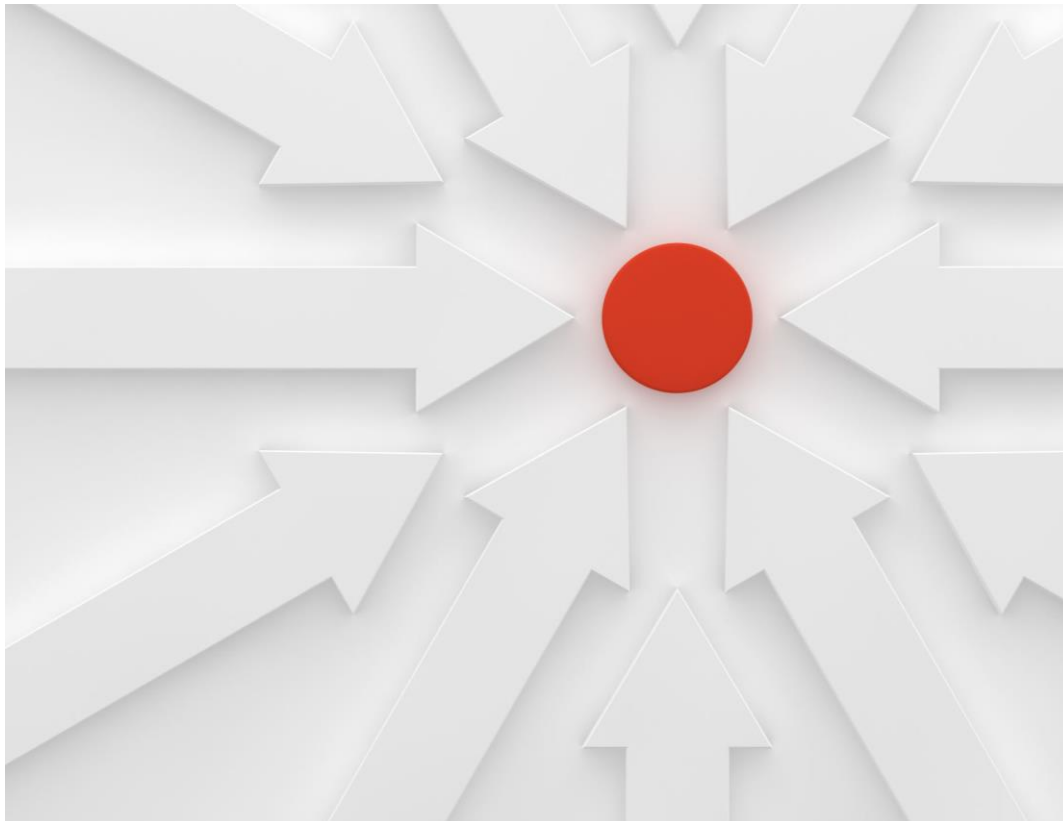
**THE DOS AND  
DON'TS OF  
WIN/LOSS  
INTERVIEWS**

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# WHY WIN/LOSS MATTERS



- Every closed-won and closed-lost deal contains strategic intelligence
- Buyers reveal how your product, messaging, and sales motion are *actually* perceived
- Insights directly influence product strategy, competitive positioning, and revenue performance
- Organizations that operationalize Win/Loss outperform peers in win rate, retention, and roadmap clarity



# WHAT IS A WIN/LOSS INTERVIEW?

A structured, post-decision conversation with a buyer to understand

- How they evaluated solutions
- What influenced their decision
- How your offering compared to alternatives
- Where your GTM motion helped or hindered the outcome
- What would have changed the result



# CORE OBJECTIVES



Reveal the *true* buyer journey



Identify friction points in sales, product, pricing, and messaging



Understand competitive dynamics and differentiation gaps



Validate or challenge internal assumptions



Convert qualitative feedback into actionable themes





**WHEN TO CONDUCT  
WIN/LOSS  
INTERVIEWS**

- **2–6 weeks after the decision** (fresh but not emotional)
- For deals that were:
  - Strategically important
  - Competitive
  - Representative of your ICP
- Mix of wins and losses for balanced insight

# WHO SHOULD CONDUCT THE INTERVIEW



Neutral third party or  
non-sales internal resource



Someone trained in  
qualitative interviewing



Goal: create psychological  
safety and avoid “selling”  
behavior



Interviewer must be skilled  
at probing, listening, and  
pattern recognition



# BEST PRACTICES FOR EFFECTIVE INTERVIEWS

- Use a consistent, structured interview guide
- Meet one on one
- Ask open-ended, non-leading questions
- Probe deeply on decision drivers
- Avoid defending your product or sales process
- Capture verbatim quotes for authenticity
- Record (with permission) for accuracy and analysis
- Synthesize themes across multiple interviews, not one-offs



# KEY QUESTIONS TO ASK

- **Buyer Journey & Evaluation**
  - “Walk me through how your team evaluated solutions.”
  - “What problem were you trying to solve?”
- **Decision Drivers**
  - “What mattered most in your decision?”
  - “Which criteria carried the most weight?”
- **Competitive Landscape**
  - “Which vendors were you comparing?”
  - “Where did each solution stand out or fall short?”
- **Perception of Your Offering**
  - “How did you perceive our product, pricing, and team?”
  - “What almost changed your mind?”
- **Closing Reflection**
  - “What advice would you give us moving forward?”



# ALTERNATIVE QUESTIONS TO ASK

- **Marketing**
- “How did you hear about us?”
- “What marketing materials did you use to evaluate?”
- **Sales**
- “How did you perceive our sales process?”
- “Do you have any advice on ways we can improve?”
- **Demo**
- “Which vendors were you comparing?”
- “How did you perceive our product demonstrations?”
- “Do you have any advice on ways we can improve?”
- **Perception of Your Offering**
- “How did you perceive our product?”
- “What areas of the product did you like best?”
- “What areas of the product did you think could be improved or added on”?
- **Closing Reflection**
- “What additional advice would you give us moving forward?”



# WHAT TO AVOID



Turning the interview into a sales pitch



Asking biased or defensive questions



Overreacting to single-interview anecdotes



Allowing sales reps to conduct the interview



Treating Win/Loss as a one-time project instead of a program





# TURNING INSIGHTS INTO ACTION

- Categorize themes: product, pricing, sales process, messaging, competition
- Quantify frequency and impact
- Share insights cross-functionally (Product, Sales, Marketing, Leadership)
- Prioritize changes based on revenue impact
- Build a recurring Win/Loss reporting cadence (monthly or quarterly)



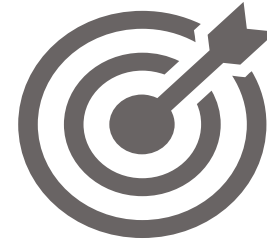
# EXAMPLE OUTPUT

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## Themes Identified:

Confusion around pricing model  
Competitor perceived as more integrated  
Strong marks for customer service  
Need for clearer ROI articulation



## Actions Taken:

Updated pricing page and proposal templates  
Added integration roadmap to sales collateral  
Refined messaging around value and outcomes



# BUILDING A WIN/LOSS PROGRAM



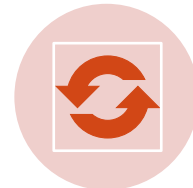
Define goals and success metrics



Standardize interview process and templates



Train interviewers



Implement a feedback loop into product and GTM planning



Use technology to track insights and trends



Commit to continuous learning and iteration



# CHALLENGE — GETTING THE INTERVIEW

- Informal, polite email not from salesperson
- 18 MINUTES
- 1 on 1
- Highlight it is for process and product improvement, not a sales call
- Use your salesperson
- Ask again!



# POINTERS

- Get Sales team on your side. Reinforce it is not to assign blame
- Be very grateful.
- Offer up availability for follow ups.

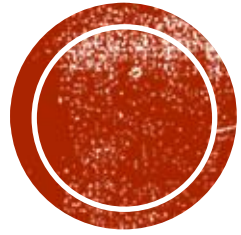




# FINAL TAKEAWAYS

- Win/Loss is one of the highest-ROI feedback mechanisms
- It reveals truths internal teams rarely see
- When operationalized, it strengthens product strategy, competitive positioning, and revenue performance
- Consistency is the key to long-term value





**QUESTIONS?**

