

Win-loss interview guide

Interview every win, loss and no-decision above your size threshold each quarter, within 30 days, with a neutral interviewer. Eight questions in 30 minutes. The buyer talks; code afterwards.

Min	Question	Listen for
0-3	Thanks, purpose, confidentiality, permission to take notes	Trust
3-7	What made you look for something new in the first place? What was happening in the business?	The real trigger
7-10	Why that moment, rather than half a year earlier or later?	A dated event, or none
10-14	Who had a say in the decision, and who could have blocked it?	Buying group; did we meet the signer?
14-18	What else was on the table, including staying as you were or building it in-house?	The true competitive set
18-22	What tipped the choice? Which factor carried the most weight?	Product, price, value case, risk, relationship
22-25	Was there a point where it could have gone the other way?	Where the deal turned
25-30	How did the selling team come across, from first call to proposal? What should they stop doing? Can we check in again in six months?	Process and people; a future opening

Coding frame (one primary reason, up to two secondary)

Code	Means
Product	A capability we lacked, or one they valued more elsewhere
Price	Price or packaging, after the value was accepted
Value case	The business case was never made, or not believed
Relationship	Trust, speed of response, access to executives
Risk and safety	The buyer went with what felt safer: incumbent, larger vendor, or no change
Timing	Budget cycle, reorganization, priorities moved
Paper process	Legal, security or procurement slowed or stopped it
No decision	Nothing happened; record why

Also log

Stage reached, competitor, whether the economic buyer was met, days from first meeting to decision, and the trigger that started the project. Before reading reasons, split losses into neglect deaths (never qualified, stuck in discovery, closed by a cleanup rule) and contested losses.

Quarterly review output

Three to five changes with an owner and a date (qualification, messaging, enablement, pricing or packaging, product). Check two quarters later whether the top loss reason shrank.