

Win/loss interview questions

In their simplest form, win/loss interviews help you find out why a sales opportunity converted into a customer or chose a competitor over you, or perhaps chose no one at all. They take the guesswork out of the equation and enable you to understand what is and isn't working for you – and subsequently make changes to win more and lose less in the future.

The questions you ask during your win/loss interviews will depend on your specific circumstances and should be mapped against the three stages of the buying funnel: awareness, consideration, and decision. To help you on your way, here are some questions to choose from for each.

Awareness: This is the stage where the customer realizes they have a problem and begins researching solutions to solve it.

Consideration: By this point, the customer has a shortlist of providers and they begin to compare things like features, price and reviews with your competition.

Decision: Crunch time. This is the final stage of the customer's process and where they ultimately decide to choose you, your competitor, or carry on without a solution at all.

Buyer persona questions

- Please share a bit about your role and responsibilities.
- What was your previous experience in this area?

Brand perception

- How and when did you first hear about us? (i.e. webinar, guide, website, product demo, sales calls, etc.)

- What was your perception of us at the start of the evaluation?
- How did that perception change by the end of the evaluation?

Business drivers

- Why were you looking for a new solution?
- What problem were you looking to solve?
- Why now?
- What was your current solution unable to do in support of your needs?

Selection criteria

- What were your top five must-have requirements?
- Which was the most important and why?

Buying process

- How did you go about evaluating providers?
- What were the most important moments in your evaluation process?

Committee

- Who else was involved in the evaluation process?
- Please describe each person's role.
- Who else in your business advocated for this decision and why?
- Who in the business was against that decision and why?
- Who else was involved in making the final decision?

Resources leveraged

- While researching options, which resources did you use?
- What resources did you wish you had but didn't?
- If you spoke with peers, what kinds of things did they share?
- Which vendor marketing or sales content did you find to be most valuable? What was missing?
- How useful did you find our marketing and sales content? How could they be better?

Solution

- Can you please provide feedback on our solution?
- What are its strengths and weaknesses?
- How did you evaluate our solution?
- Did you participate in a product demo or trial?
- How well would you say our solution aligned with your needs?
- Were you given access to our roadmap? If so, is there anything you think we're missing? And what excites you most about it?

Competition

- Which vendors did you consider?
- What were their strengths and weaknesses?
- Was there anything notable that they had but we didn't?
- Where were we stronger than the others?
- Is there anything on our competitors' roadmaps you found appealing?

Selection

- Who did you ultimately select and why?
- What were the three things that pushed you over the edge?
- What was the winner missing that you wish they had?
- What were the primary reasons you selected/did not select us?
- What could we have done differently to have won your business?
- Do you feel content with the decision you made?

Price

- How much weight was put on the price?
- How did you feel about our pricing?
- If price was not a factor, would you have chosen a different provider?
- How did our pricing compare with the others you evaluated?

Sales

- How would you describe your interactions with our sales team?
- Did you feel like our sales team understood your pain points and needs?
- What could they have done better?

Miscellaneous

Finish off by giving your won customer or lost prospect a platform to get anything off their chest that your previous questions might not have elicited.

- [If they didn't pick you] Would you consider our solution again in the future? If not, why not?
- Would you recommend us to others?
- Is there anything else you think we should know?