



5 Keys to Optimize Win-Loss Research



Choose the right time horizon

How far back do you look for relevant cases (sample)? Choose a time frame appropriate to current practices and systems and one where recall can be expected. One year is common although there are exceptions.



Plan for dynamic recruiting and interim reporting

Unlike most other types of market research, a full recruiting list typically isn't feasible at kickoff. Instead, the list grows over time, as recent wins and losses develop, usually over months. A field period may take months, so plan for interim case studies or mini-reports to provide ongoing insights.



Involve key stakeholders to optimize insights

Involve account teams to provide high-level background on recruited Wins and Losses. This helps your outside moderator zero in on your key issues and provide independent, candid feedback. Also, consider if there is more than one stakeholder audience to interview, if decisions are de-centralized or intermediaries are involved.



The right pre-notification email from your firm will maximize recruiting

An effectively worded email notification from a senior member at your firm sends the right message that you care about the voice of the customer and are using an independent agency to get truly candid feedback from valued firms. Many respondents will waive confidentiality because they want you to hear their feedback.



Consider Qual/Quant

Qual leads to a deeper understanding of the experience, while quant provides a more comprehensive measure of key factors. A combined approach –qual, then quant or “quasi-qual/quant” approach – may be best.