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 |
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| * 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? |