

# The Strategic Edge

ASP's monthly update on strategy news, tools, resources and upcoming events.



## Review: Win/Loss Analysis: How to Capture and Keep the Business You Want

**Reviewed By:** John McGonagle, Managing Partner of The Helicon Group, August 2016

**Book:** Ellen Naylor, *Win/Loss Analysis: How to Capture and Keep the Business You Want*. Park Hill Press, 2016, 214 pages, \$29.95.

First a disclosure: I have known Ellen for many years and am one (of many) thanked by Ellen in the afterword. I can honestly say that I had nothing to do with this book – although I wish I had.

Ellen here deals not just with competitive intelligence (CI), a vital subject as readers of this blog know, but specifically with its application in a vital and impactful area – win/loss analysis. She is not talking about the postmortems that are held after a successful, or unsuccessful, pitch or even bid, with the sales forces. That, she properly distinguishes as win/loss interviews.

Win/loss analysis is a form of directed CI. In it, someone, inside or outside of your firm, interviews the customers you have won, as well as those you have lost. The differences are night and day. As she puts it in her understated prose, “Most often the customer has a different perspective than your internal personal as to why the business was won or lost” (p. 65). From my experience, the phrase should be “Almost always...”.

But Ellen’s real-world approach, based on her own experience, is inclusive and collegial. My comments would cause immediate objections from the sales force. Her proven approaches are designed to avoid that, and in fact, leverage the sale force as a partner in the process.

Why should strategy practitioners be interested? Because, without sales, you have no business to develop strategy for! In fact, Ellen deals directly with this in different ways throughout the book. Early in the book, she provides you with a list of the “Fifteen Strategic Benefits of Win/Loss”, among them “Which industry segments do and don’t like your solutions”. Somewhat important for strategy development, wouldn’t you admit? (p. 28). Later, she devotes an entire chapter to this (“Using Win/Loss Analysis for Strategic Decisions”), focusing on a real case of potential acquisitions and how win/loss analysis was critical to the decision-making (pp. 139 et seq.).

This approach makes “Win/Loss Analysis” an important tool for all of us involved with developing and executing corporate strategies.

### About the Reviewer

John McGonagle is the managing partner of The Helicon Group, a competitive intelligence research, analysis, and training firm, and the co-author or contributor to 16 books on competitive intelligence. A Meritorious Award winner from Strategic & Competitive Intelligence Professional, he served as chair or member of ASP’s Richard Goodman Strategic Planning Award Committee from 2008 through 2016. He can be contacted at [jjm@helicongroup.com](mailto:jjm@helicongroup.com).