

Guide: Scoping Your Win-Loss Program



A blanket approach to win-loss analysis won't deliver the results you need. For your program to drive strategic action, it must **align with how your business is structured**. That means starting with a clear understanding of how your organization looks at itself—and ensuring your program mirrors that view. Use this guide to help you accurately scope and set up your program for success.

How Does Your Business Look at Itself?

B2B organizations structure their operations in different ways, and your win-loss program should reflect that structure. Aligning the way you collect, segment, and analyze feedback with how your business organizes itself is key to delivering relevant insights.

Here are common ways companies segment their deal universe:



Industry/Vertical

Grouping deals by industry (e.g., Healthcare, Finance, Technology) helps isolate trends and buyer behaviors unique to each vertical.



Geography

Regional variations can significantly affect win-loss outcomes. Understanding performance across geographies (e.g., North America vs. EMEA) ensures a global program reflects local realities.



Market Size

Segmentation by company size—SMB, mid-market, and enterprise—helps highlight differing sales dynamics, decision criteria, and competitive pressures.

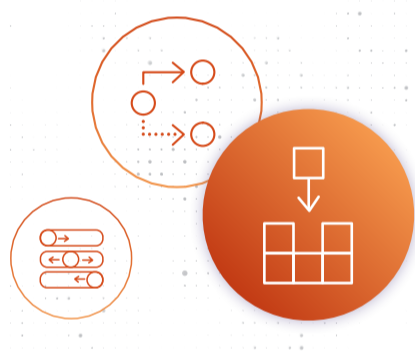


Business Unit

Different business units may serve distinct markets or offer different products. Segmenting at this level helps tailor feedback to each unit's goals.

How Many Products Are in Each Segment?

After you define your key segments, the next step is to map your product portfolio to each. Which products are you actively selling into each segment? The more granular your understanding, the more precise your insights will be.



Make sure your program accounts for:

- Product variations across geographies or industries
- Cross-sell or bundled offerings
- New or strategically important products needing focused feedback

What is Your Deal Universe by Segment and Product?

With your segments and products defined, quantify your deal volume. Understanding your total deal universe within each segment-product combination is essential for setting realistic feedback targets.

Tip: Aim to gather feedback from at least **10% of your deal universe**—whether through qualitative interviews or quantitative surveys. This sample size will give you a strong foundation for spotting trends and guiding improvements.

Ready to Scope? Use This Template

Add the segments and products you'd like to include within your program. In the empty corresponding cells, add in the expected annual deal universe for each product within your segment.

	[Product 1]	[Product 2]	[Product 3]
[Segment 1]			
[Segment 2]			
[Segment 3]			
[Segment 4]			

Need help building a program that's custom-fit to your business?

Let's talk. Tailored scoping leads to meaningful insights—and meaningful results.