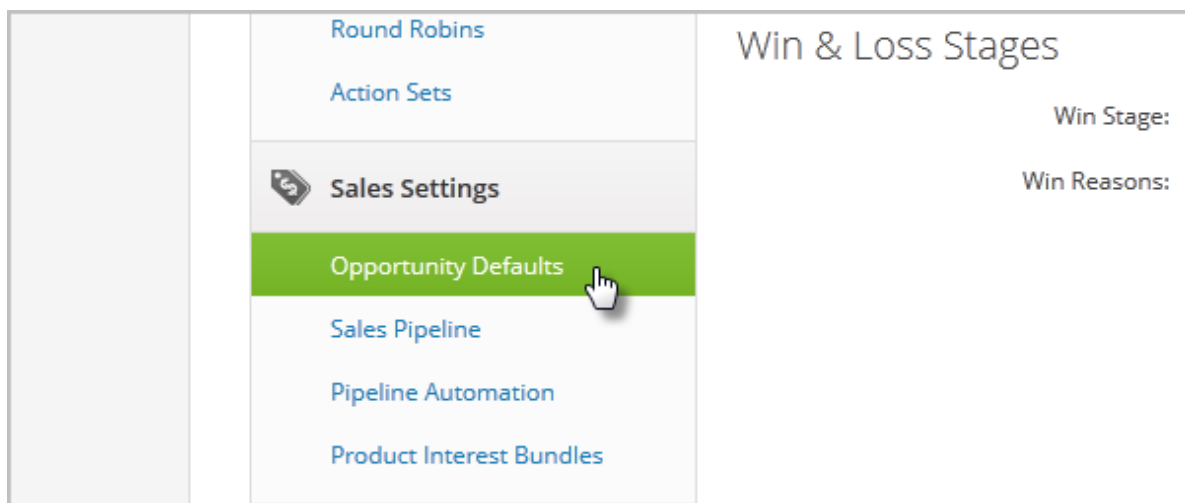


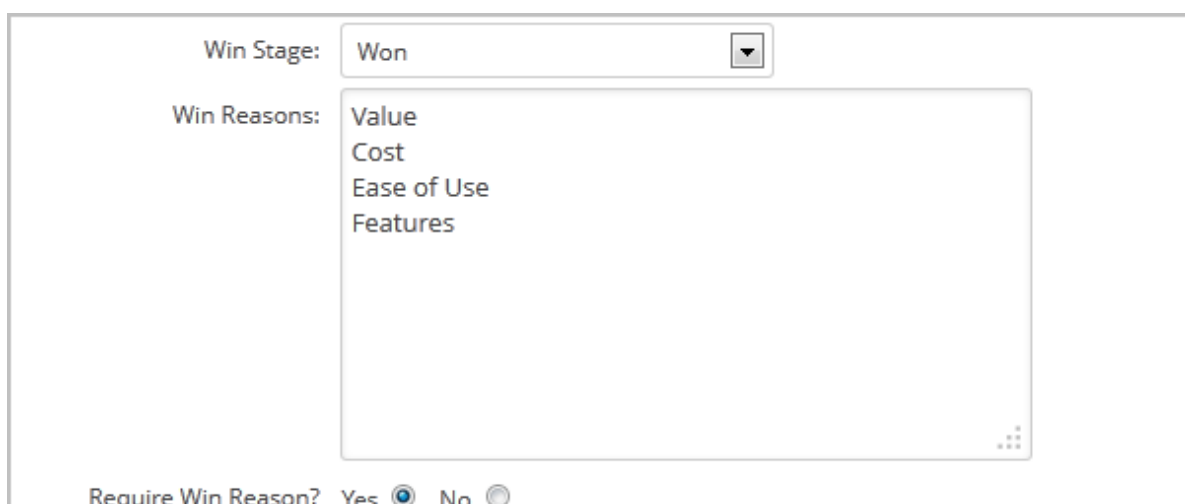
Track Opportunity Win And Loss

Tracking the reasons prospects do or do not buy from you will help you refine your sales and marketing strategy. It will enable you to proactively address common objections (loss reasons) and reinforce your strengths (win reasons) throughout the lead nurture and conversion process. It can also help you collect intelligence that can lead to product and /or service changes that will make your company more attractive than your competition. The win/loss data is stored in individual opportunity records and can be used in opportunity searches (CRM > Opportunities.)

1. Go to **CRM > Settings** in the main navigation menu.
2. Click on **Opportunity Defaults** in the settings menu.



3. Select your *Win Stage* from the drop-down and enter a list of known *Win Reasons* (you can add more later.)

A screenshot of the 'Win & Loss Stages' configuration form. It features a 'Win Stage:' label followed by a dropdown menu currently set to 'Won'. Below this is a 'Win Reasons:' label followed by a large text area containing the text: 'Value', 'Cost', 'Ease of Use', and 'Features'. At the bottom of the form, there is a 'Require Win Reason?' label with two radio buttons: 'Yes' (which is selected) and 'No'.

4. (Optional) Select *Yes* to require a win reason when a sales person moves the

opportunity to the Won stage. When a sales rep moves an opportunity record to this stage, the win reasons will show up in the opportunity record. If you require a win reason, the sales rep won't be able to save the opportunity until they select a reason from the list.

Require Win Reason? Yes No

Loss Stage: Lost

Loss Reasons: Cost
Lost to competitor
Not a good fit
Not the decision maker

5. Select the *Loss Stage* from the dropdown and enter a list of known *Loss Reasons* (you can add more later.)

Loss Stage: Lost

Loss Reasons: Cost
Lost to competitor
Not a good fit
Not the decision maker

Require Loss Reason? Yes No

6. (Optional) Select *Yes* to require a loss reason when moving the opportunity to this stage.
7. Click **Save**