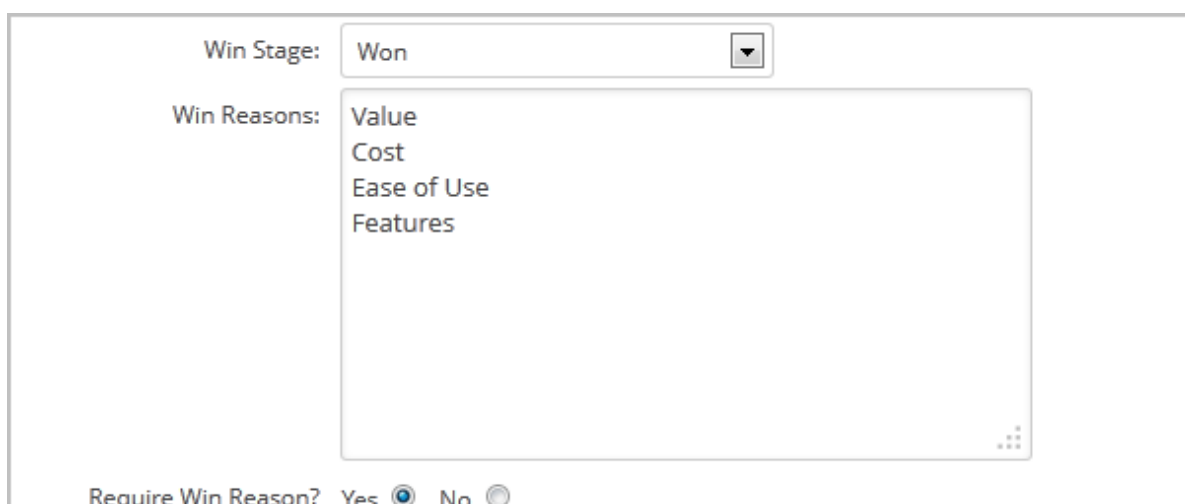# Track Opportunity Win And Loss ⚲

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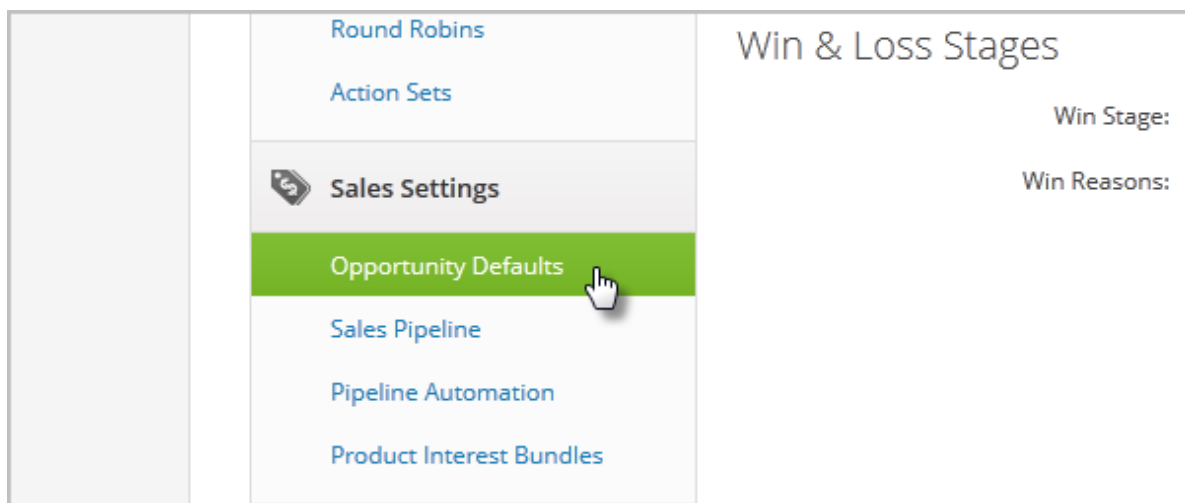
3. Select your *Win* Stage from the drop-down and enter a list of known *Win Reasons* (you can add more later.)

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.

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

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

7. Click **Save**