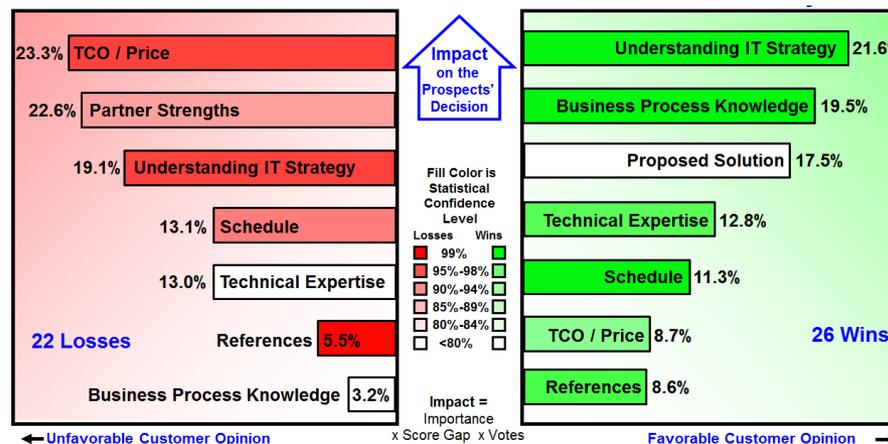




Win/Loss Sample Executive Presentation



Sample Executive Presentation

- This is a sample Executive Presentation
- It is targeted to answer the question “What”
 - “What” did you find out?
 - “What” actions should we take?
- All complex graphics have been removed from this presentation. Complex graphics take too long to explain. The only remaining graphics are the Wizard and the Battle Plan
- If the Executive asks the question “How” such as; “How did you determine this is what we need to do?” Then you can use the “Sample Manager Presentation” for more complex graphics which address “How” in more detail

Sample Presentation

- **This presentation is for a mythical company called “Active Soft” which is a project consulting company**
- **While the data for the charts is made up for this example, the actual customer comments are taken from real customer interviews. The client for these sample interviews gave PSP Enterprises permission to use these interviews for this purpose**
- **The names of the vendor companies have been changed in the comments to protect the guilty**

The sample presentation begins on the next slide

Research Objectives

- Discover customer **opinion** about you compared to the competition in both Wins and Losses
- **Rank** the reasons why you Win and why you Lose
- Find out **why** customers felt the way they did
- Focus on those **actions** most likely to result in a higher Win rate

Research Methodology

- **Executive level interviewer** (Former Gartner VP)
- **Customers not** told who sponsored research (Blind interviews)
- **Customers assured name and company name not** published
- **Customers asked if interview can be tape recorded**
- **Customers asked:**
 - **Criteria** used
 - **Relative Importance** of each criteria
 - **Vendor ratings**
 - **WHY** they rated vendors the way they did

Active Soft Interview Breakdown

48 Interviews \$48.6M

**26 Wins for
\$26.7M**

18 Over Atlas \$17.7M
8 Over TechX \$9.0M
5 Over ABC \$6.9M

You can Win over multiple competitors – you lose to only one

**22 Losses
for \$21.9M**

11 To Atlas \$10.2M
6 To TechX \$6.6M
4 To ABC \$3.3M
2 To XYZ \$1.7M

16 Telecom
9 Wins 7 Losses

20 Utilities
12 Wins 8 Losses

12 Government
6 Wins 6 Losses

**Customers were NOT told who
we were working for.
These were BLIND interviews**

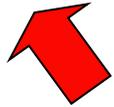
Summary of Recommendations for Active Soft

- **Impose a better partner and subcontractor evaluation and tracking system**
- **Refer and use only reliable partners and as few as possible**
- **Extend the hiring plan for BP knowledgeable experts by industry**
- **Improve how you determine competitive pricing in Utilities contests**
- **Create a TCO calculator for the Reps to use**
- **Improve the reference review and tracking system to ensure positive references are used**
- **Continue field training on discovering the customer's long-term IT strategy**
- **Begin training Salesreps on consultative selling**
- **Impose a consistent methodology in how you estimate a reliable, believable schedule for projects and focus on why you are failing to live up to promises**
- **Show Reps how Atlas will bait and switch by presenting high level experts only to deliver much lower level personnel**

Recommendations will be examined in detail in the following slides

Wizard Chart

Reasons you Lose



Criteria in the upper left corner are the key reasons you Lose to competitors. Focus action here to increase your Win rate

Losses



Impact on the Prospects' Decision

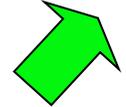
Fill Color is Statistical Confidence Level

Losses	Wins
99%	99%
95%-98%	95%-98%
90%-94%	90%-94%
85%-89%	85%-89%
80%-84%	80%-84%
<80%	<80%

Impact = Importance

$x \text{ Score Gap} \times \text{Votes}$

Reasons you Win



Criteria in the upper right corner are the key reasons you Win over competitors. Focus action here to maintain your Win rate

Wins

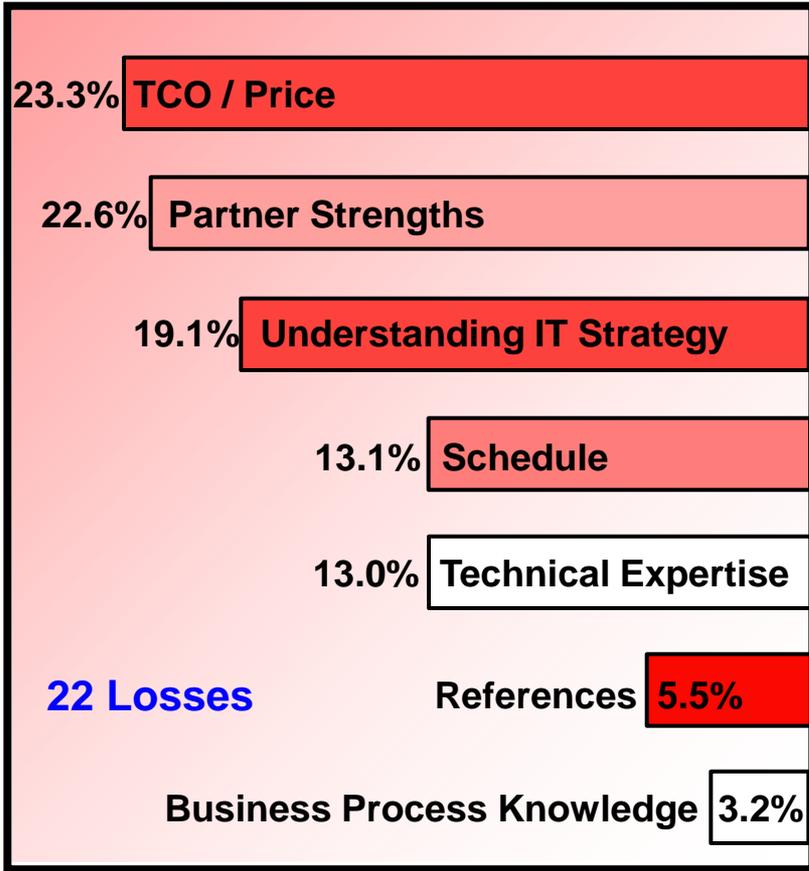
← Unfavorable Customer Opinion

Favorable Customer Opinion →

This format is PSP Enterprises' patented methodology to analyze complex decision data.

Active Soft Wizard Chart

Reasons you Lose



22 Losses

Reasons you Win



26 Wins



Fill Color is Statistical Confidence Level

Losses	Wins
■ 99%	■ 99%
■ 95%-98%	■ 95%-98%
■ 90%-94%	■ 90%-94%
■ 85%-89%	■ 85%-89%
■ 80%-84%	■ 80%-84%
■ <80%	■ <80%

Impact = Importance

x Score Gap x Votes

← Unfavorable Customer Opinion

Favorable Customer Opinion →

The length of the horizontal bars and the percentages represent the impact of that criterion on the prospects' decision.

This metric is PSP Enterprises' patented methodology to analyze complex decision data.



Battle Plan: Action Prioritization

A Battle Plan chart simplifies the Wizard by:

- **Combining the Winning and Losing side of the Wizard by subtracting the left and right side percentages**
- **The net percentages are then sorted by absolute values to rank order the criteria**
- **The resulting chart shows in priority order the criteria which Active Soft should address with action**

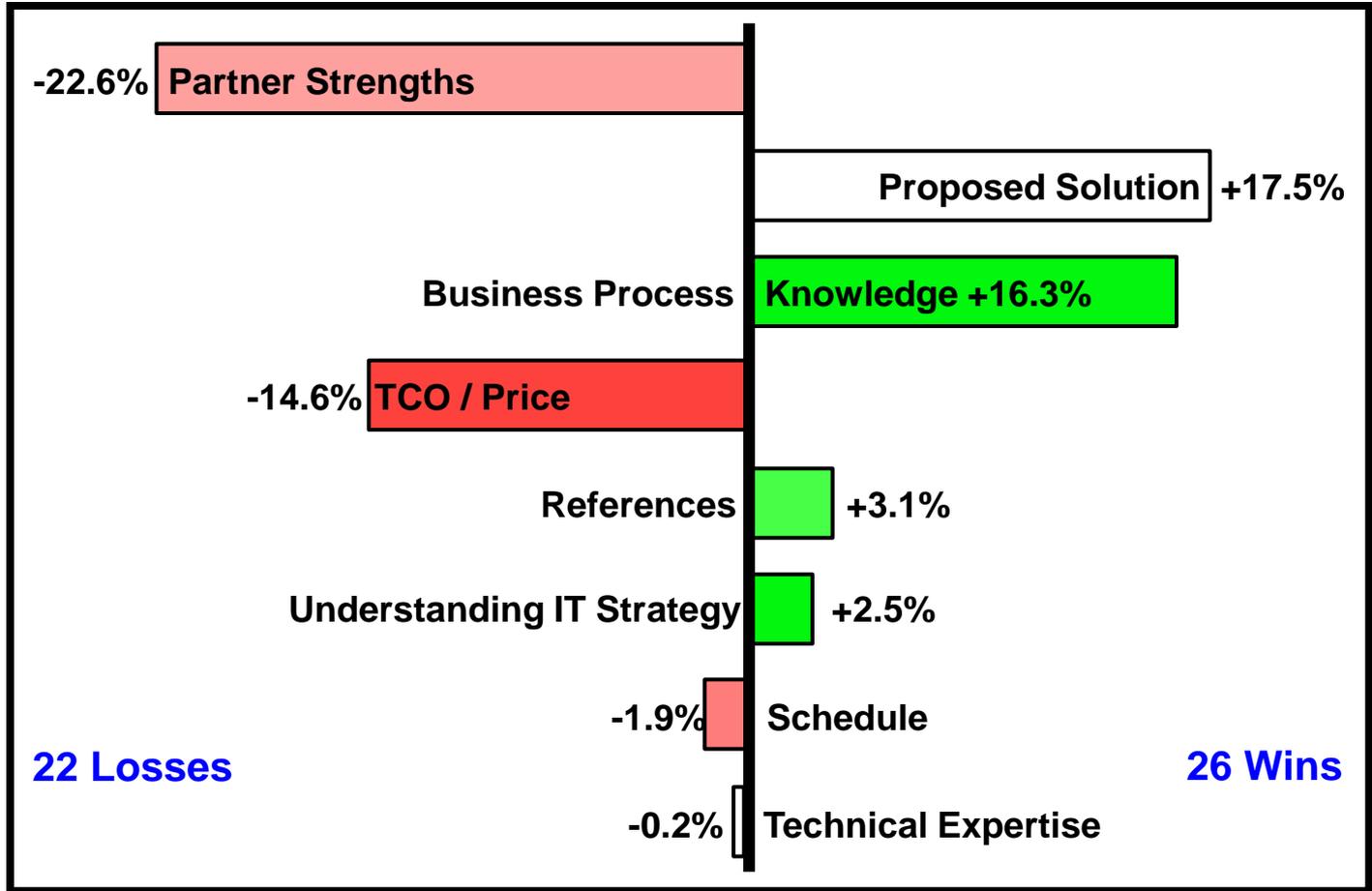
Active Soft Battle Plan



Fill Color is Statistical Confidence Level

Losses	Wins
99%	99%
95%-98%	95%-98%
90%-94%	90%-94%
85%-89%	85%-89%
80%-84%	80%-84%
<80%	<80%

Impact = Importance x Score Gap x Votes

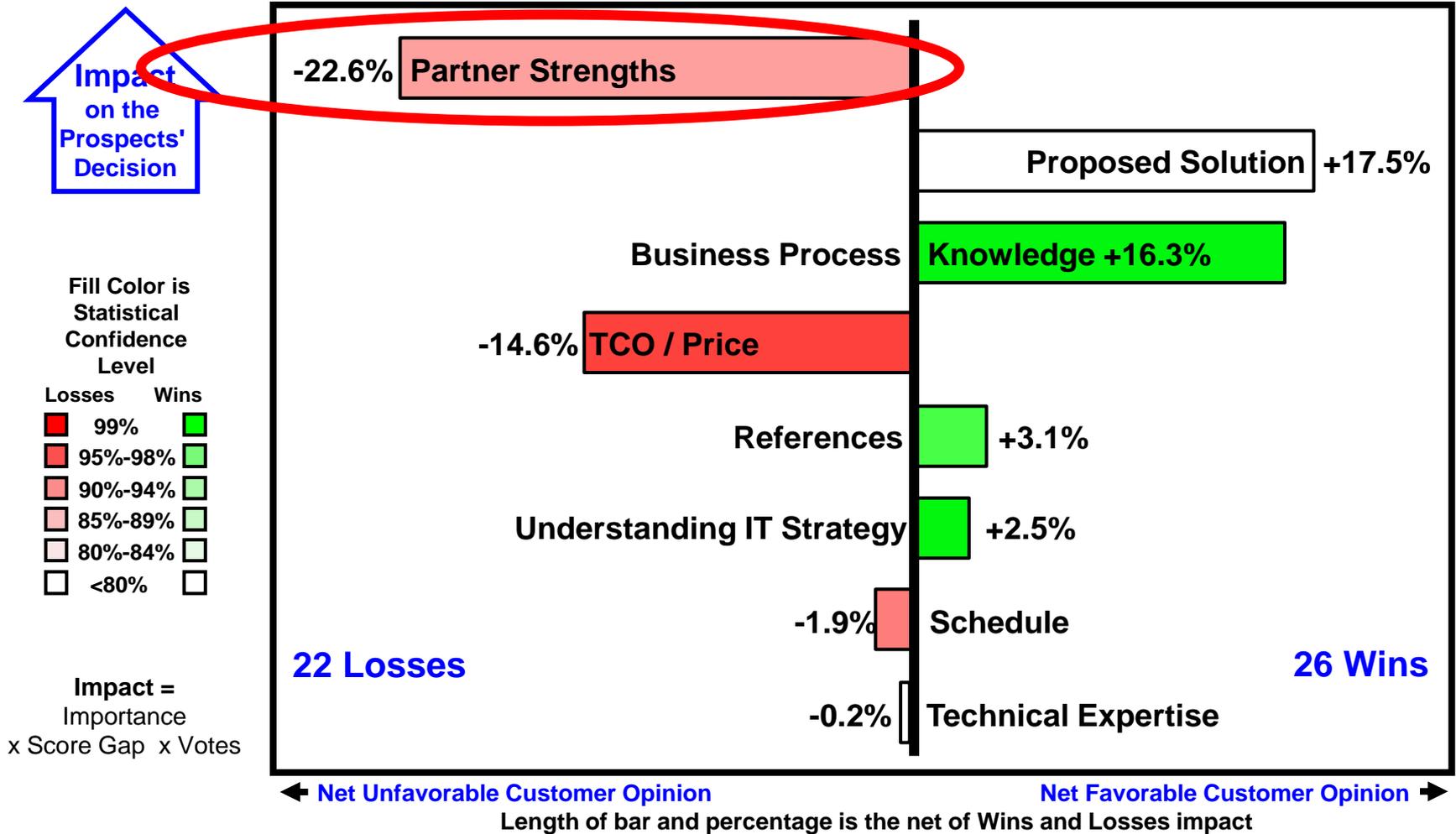


← Net Unfavorable Customer Opinion | Net Favorable Customer Opinion →
 Length of bar and percentage is the net of Wins and Losses impact

The left and right sides of the Wizard Chart are combined to determine if a criterion was mostly positive or mostly negative.

This chart shows, in priority order, the issues Active Soft should leverage if positive, and those you need to improve upon to Win more business.

Partner Strengths: Big Problem



Partner Strengths

Losses to Competitors:

-22.6%



<-- Unfavorable Prospect Opinion towards Active Soft

Net

-22.6%

Wins over Competitors:

0%

Favorable Customer Opinion towards Active Soft-->

Length of bar and percentage is impact on prospects' decision

Observations:

- **NEVER** a reason for Winning
- Sometimes multiple subcontractors end up fighting each other

Recommendations:

- Impose a better partner and subcontractor evaluation tracking system
- Refer and use only reliable partners and use as few as possible

Three Active Soft subcontractors were fighting each other: *“Little scary as to how that would function together and of course they couldn’t demonstrate it. I think if Active themselves could have come in here and put the pieces together and shown us the working solution. And stayed with the overall package rather than getting fragmented into three separate vendors it would have been a lot stronger approach. **They were fighting each other.**”*

Active Loss to Atlas at a state telecom department for \$3M to \$4M

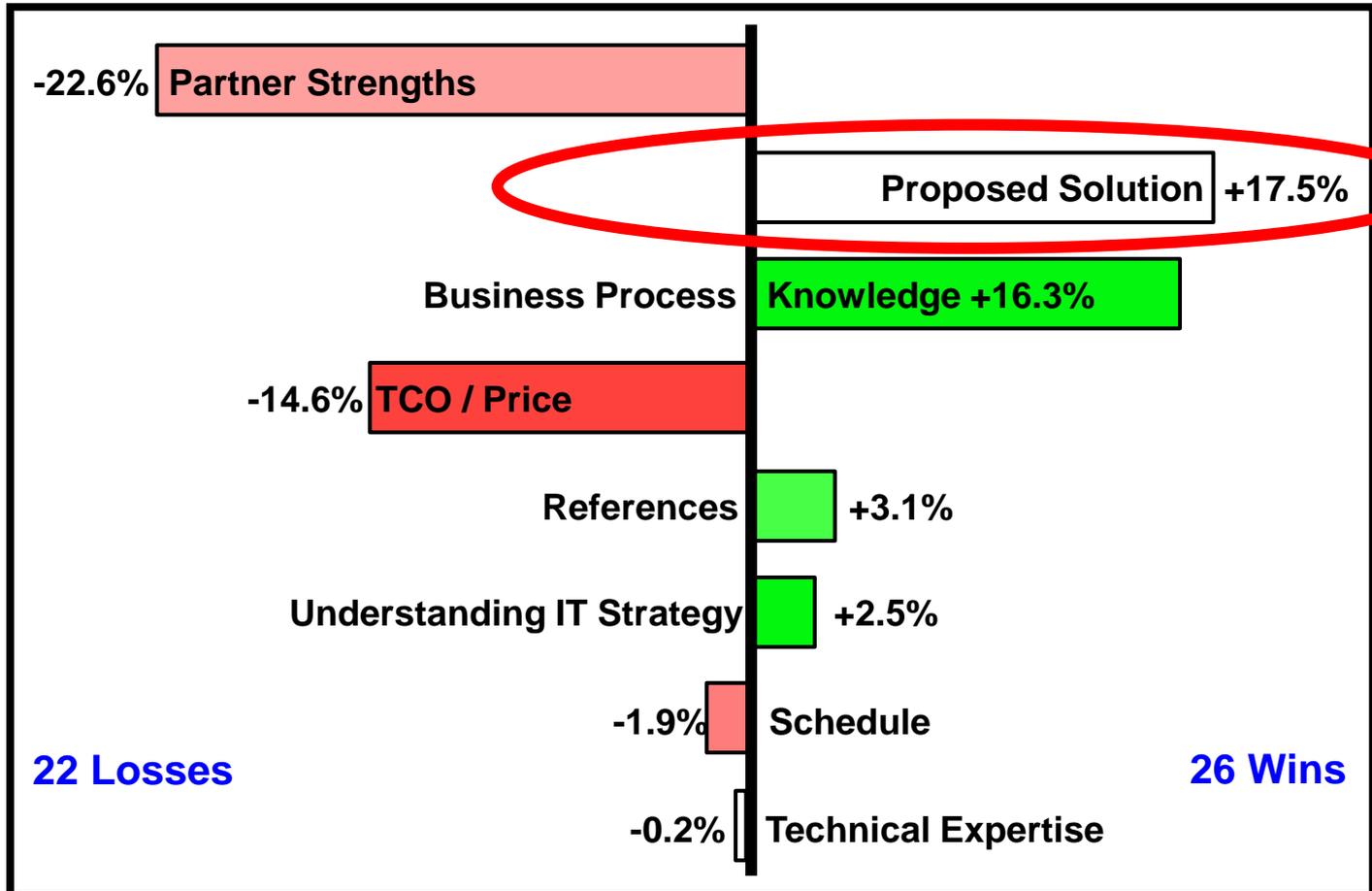
Active over-committed on technical staff: *“It turned out that **Active did not have the bodies.** They just took on far, far more work than they could do in-house, and at the last moment, they went out and got a lot of contractors, **most of whom did not know their a - - from a hole in the ground.**”*

Active Loss to TechX at a retail company for \$4M in UK

Verbatim Blind Customer Comments

- These customers did not know they were talking to you. They were “**Blind**”. They had no reason to slant their comments either for or against you or your competitors
- These comments were **NOT** written by anyone in your sales or marketing departments and then signed by the customer
- These are “direct from the horse’s mouth” comments as if you were a **fly on-the-wall** listening to two Executives discussing why they made their decision
- There are **no stronger, more powerful statements**
- You can use these statements as **proof** for any messages you are sending to your Salesreps or Management

Proposed Solution: Key Strength



Fill Color is Statistical Confidence Level

Losses	Wins
99%	99%
95%-98%	95%-98%
90%-94%	90%-94%
85%-89%	85%-89%
80%-84%	80%-84%
<80%	<80%

Impact = Importance x Score Gap x Votes

22 Losses

26 Wins

← Net Unfavorable Customer Opinion Net Favorable Customer Opinion →
Length of bar and percentage is the net of Wins and Losses impact

Proposed Solution

Losses to Competitors:

0%

<-- Unfavorable Prospect Opinion towards Active Soft

Net

+17.5%

Wins over Competitors:

+17.5%

Favorable Customer Opinion towards Active Soft-->

Length of bar and percentage is impact on prospects' decision

Observations:

- You NEVER lose over your proposed solution – this is a unique strength

Recommendations:

- Continue to sell your proposals with confidence

Active won over this client with a great demonstration: *“Active demonstrated their concept with a prototype with a real system on a laptop. And during a one on one meeting they demonstrated the solution of a specific user problem, so, that we could really see whether all these points that we required could be managed and what the solution would look like. So, **we saw how a product would really look** like that would be a solution for our problem. So, that was the positive effect.”*

Active Win over Atlas at a local government for \$800K in Australia

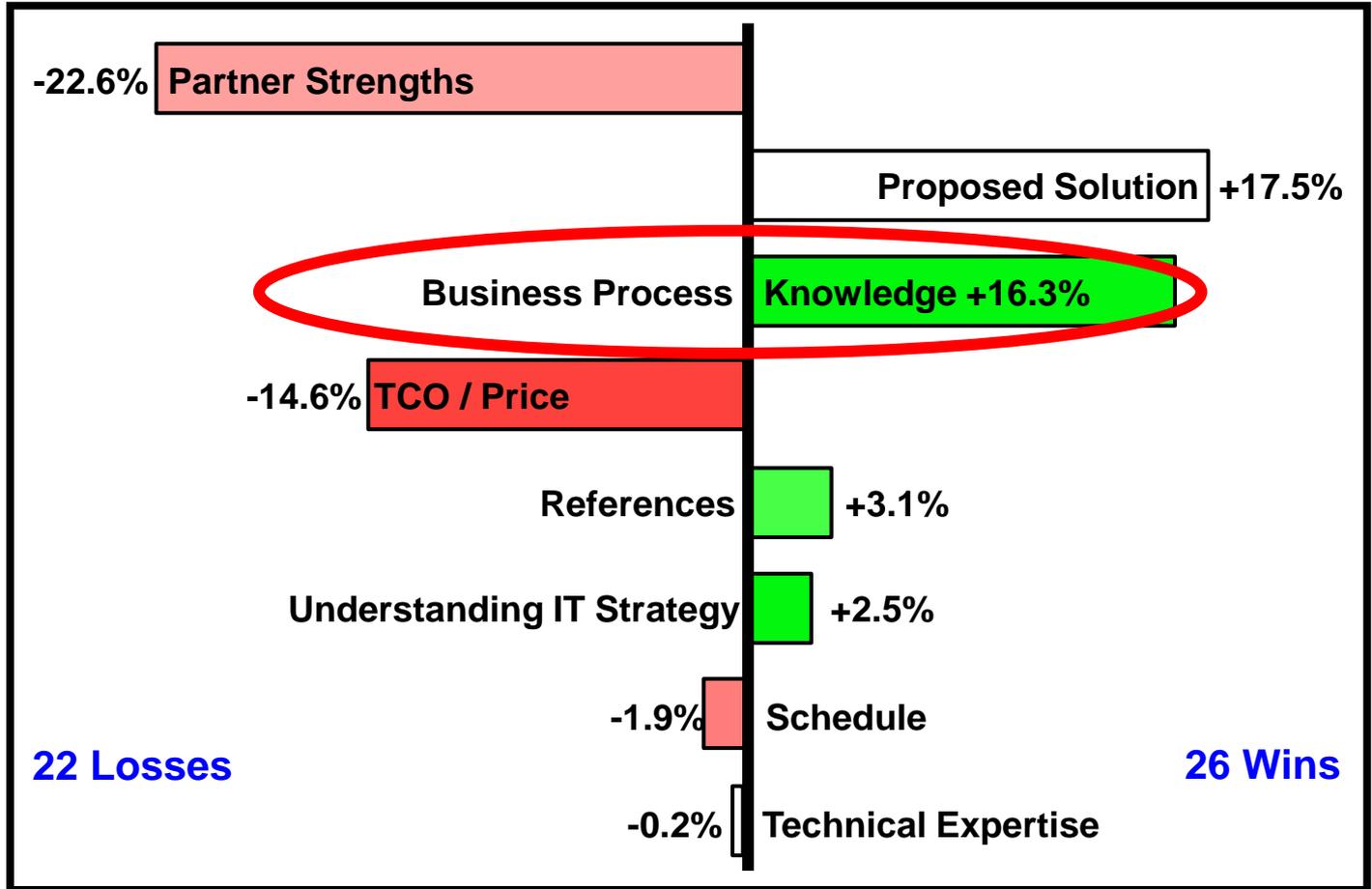
The Active solution was the most flexible and easy to use: *“Active proposed a **complete product** which was user-friendly and was well-suited to our needs...And the way Active presented itself as an integrator made us feel confident. We also felt that it was easier to integrate new functions into the Active product.”*

Active Win over multiple competitors at a government agency in France

Active provided a complete solution for this customer, including needed resources, understanding their strategy, and flexibility: *“Active seemed to have the **complete solution** that we were looking for, rather than the other three, we would have had to have gone to additional vendors to complete the solution that we were looking for really.”*

Active Win over multiple competitors at a newspaper for \$1.1M UK

Business Process Knowledge: Key Strength



Fill Color is Statistical Confidence Level

Losses	Wins
99%	99%
95%-98%	95%-98%
90%-94%	90%-94%
85%-89%	85%-89%
80%-84%	80%-84%
<80%	<80%

Impact = Importance x Score Gap x Votes

22 Losses

26 Wins

← Net Unfavorable Customer Opinion

Net Favorable Customer Opinion →

Length of bar and percentage is the net of Wins and Losses impact

Business Process Knowledge

Losses to Competitors:

-3.2%

<-- Unfavorable Prospect Opinion towards Active Soft

Net

+16.3%

Wins over Competitors:

+19.5%

Favorable Customer Opinion towards Active Soft-->

Length of bar and percentage is impact on prospects' decision

Observations:

- Good results for BP knowledge but somewhat negative in Utilities and Government

Recommendations:

- Extend the hiring plan for BP knowledgeable experts by industry

Active demonstrated good business knowledge: *"Active Consulting had people **who were justice and public safety specialists**, who were actually assigned to the project and they stated that right from the get go. The depth of knowledge in the subject area was critically important to us. We were very impressed and their technical people are good too. And they were nice. They weren't arrogant. They worked very closely with the team and you could see they would work as a team."*

Active Win over Atlas at a law enforcement agency for \$34M

Active demonstrated that they also had the business knowledge: *"Active really demonstrated that they knew a lot of **both business processes and the technology**. They understood it very well. It had to do with involving the right people during the process selection. Active did very well on that. Andersen not so well."*

Active Win over XYZ Consulting at a communications company for \$3M

And Active did not have the experience and needed process knowledge: *"Actually **they didn't have experience** on that reconciliation side at all. Well, at all is too much to say but they had very little knowledge about these processes."*

Active Loss to Ultra at an Utility for \$1M

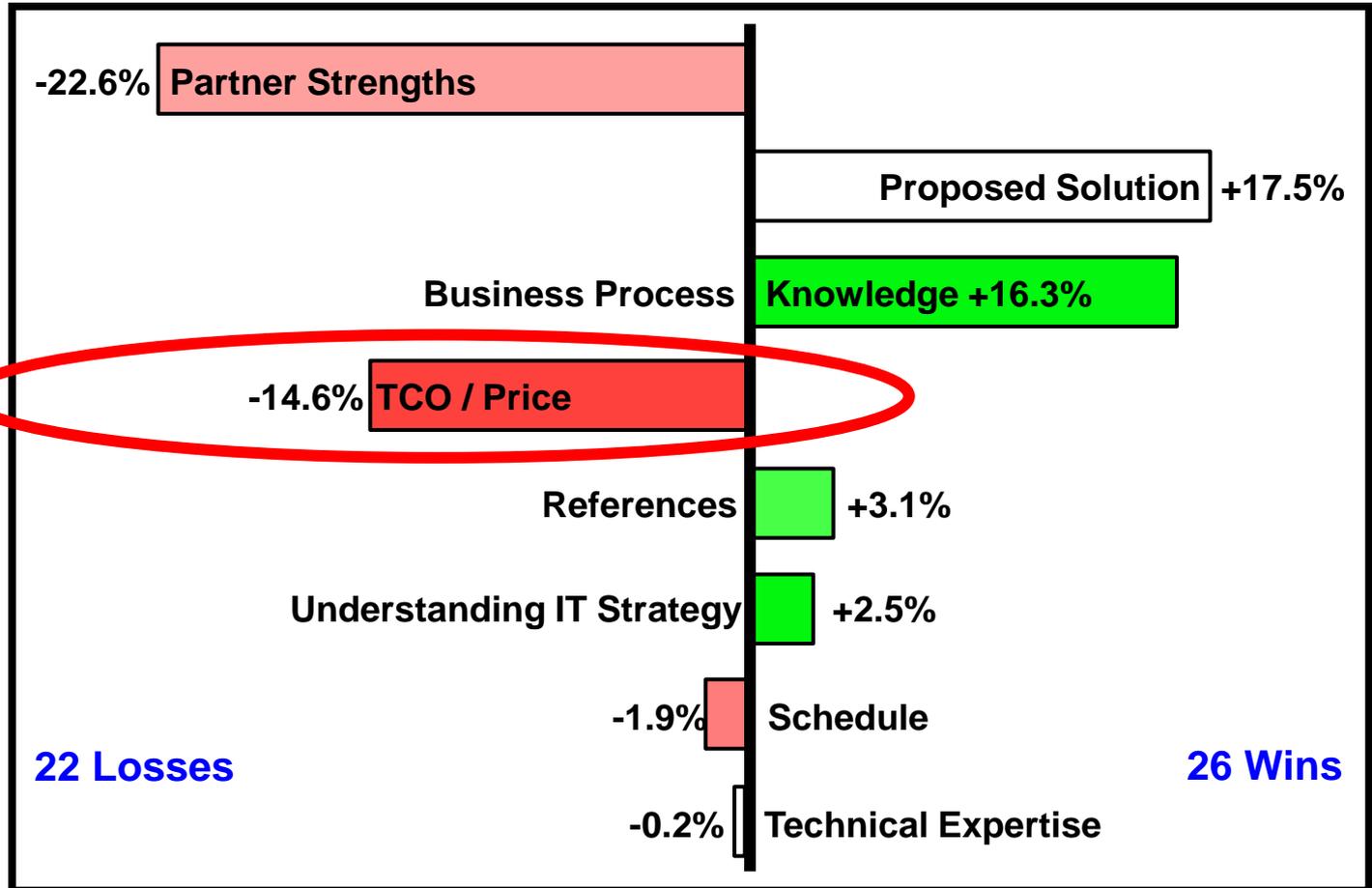
TCO/Price Value Proposition: Key Problem



Fill Color is
Statistical
Confidence
Level

Losses	Wins
99%	99%
95%-98%	95%-98%
90%-94%	90%-94%
85%-89%	85%-89%
80%-84%	80%-84%
<80%	<80%

Impact =
Importance
x Score Gap x Votes



22 Losses

26 Wins

← Net Unfavorable Customer Opinion

Net Favorable Customer Opinion →

Length of bar and percentage is the net of Wins and Losses impact

TCO/Price

Losses to Competitors:

-23.3%



<-- Unfavorable Prospect Opinion towards Active Soft

Net

-14.6%

Wins over Competitors:

+8.7%



Favorable Customer Opinion towards Active Soft-->

Length of bar and percentage is impact on prospects' decision

Observations:

- There is still a pricing problem in the Utilities space

Recommendations:

- Improve how you determine competitive pricing in the Utilities contests
- Create a TCO calculator for the reps to use

Active won by providing this client with the best solution for a reasonable price:

*"The interface, the taking of material in, working out of a database. Having the same language going across to pagination and layout. Seamless in doing that. **It was far more integrated than the others.** The price was very reasonable for what we purchased."*

Active Win over two competitors at a newspaper for \$1M

Active pricing was not clear: *"The pricing, there seemed to be **no structure** to it. [So, you didn't have any way of knowing how they got to their price?] That's right, and neither did they!"*

Active Loss to ABC at an telecommunications company for \$5M in the UK

TechX charged for every little thing: *"Like I said **we got charged for everything** at TechX. So, I was not very pleased with that. I spent a lot of time fighting about charges that I shouldn't have received."*

Active Win over TechX at a manufacturing company for \$2.9M

TCO/Price

Active needed to show the client what was included in your price: *“It was difficult to establish, especially on the Active side how they’d come about with the figure that they’d come up with. So **we couldn’t really see what it was behind the Active figure**, that was causing the significant increase over the other one. They needed a better breakdown of the prices. [Because you might have liked what they had if they had been more specific?] Yes.”*

Active Loss to ABC at a retail company for \$570K in the UK

Atlas Lost because they low-balled on price and did not convince the customer that they knew their business: *“Atlas’s solution was incomplete. Their understanding of our business was poor. It didn’t appear that they understood what we were doing. **Their bid was too low to be believable.**” “we had this fear that they [Atlas] had left it out on purpose. Our concern was that they overlooked a lot. And that we were going to end up with a less than desirable solution. Or have to pay a lot more.”*

Active Win over Atlas and ABC at a state government department for \$4M

The price was just not right: *“I think cost had a lot to do with it and also their [the competitor’s] level of enthusiasm really. They [Active] just kept hammering us that they wanted to sell us a 100 user license and how much more cost effective it would be in the long run for us to do that, where we kept on explaining to them over and over again that we do not see this user base increasing for the next 5 years over 25 people, and **they just wouldn’t listen to us.**”*

Active Loss to a small company at a state government department for \$600K

Both Active and Atlas overcharged: *“Both of them did very poorly because **they were very greedy** on this project in terms of price. They [Atlas] were just like eons beyond. They must have thought that we were just the dumbest people on the planet.”*

Active Win over Atlas at a law enforcement agency for \$34M

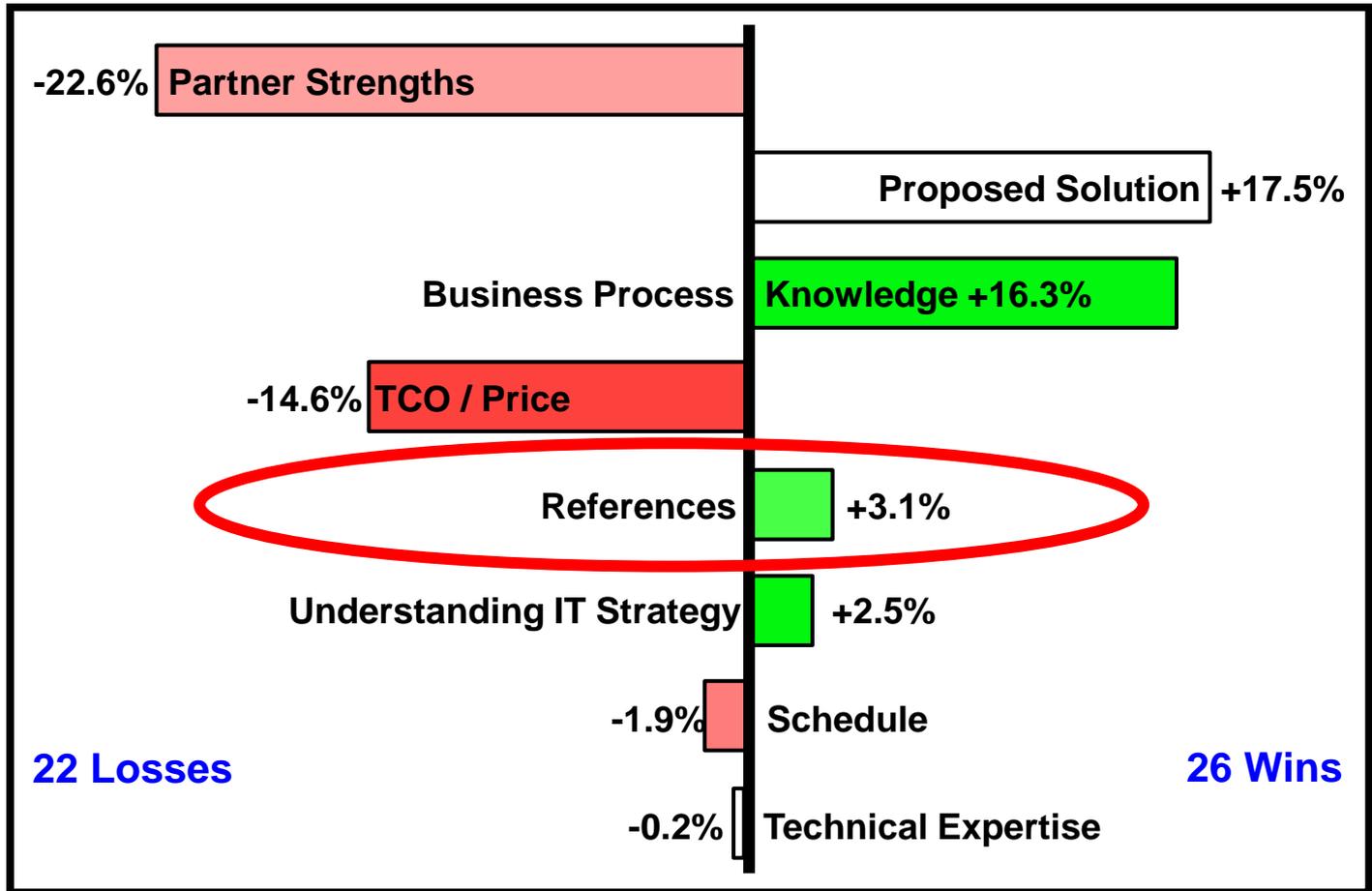
References: Inconsistent References



Fill Color is Statistical Confidence Level

Losses	Wins
99%	99%
95%-98%	95%-98%
90%-94%	90%-94%
85%-89%	85%-89%
80%-84%	80%-84%
<80%	<80%

Impact = Importance x Score Gap x Votes



← Net Unfavorable Customer Opinion

Net Favorable Customer Opinion →

Length of bar and percentage is the net of Wins and Losses impact

References

Losses to Competitors:

-5.5%

<-- Unfavorable Prospect Opinion towards Active Soft

Net
+3.1%

Wins over Competitors:

+8.6%

Favorable Customer Opinion towards Active Soft-->

Length of bar and percentage is impact on prospects' decision

Observations:

- Sometimes you refer customers to negative references

Recommendations:

- Improve the reference review and tracking system to ensure positive references are used

References in the United States helped to Win this order: *“The Active one gave **better testimonies** as references. Their reference sites were excellent. It gave us a lot of confidence.”*

Active Win over Atlas at a bank for \$5.5M in UK

The right reference sites were used: *“I would rate Active **reference sites as actually swinging the pendulum**. And the reference sites that they used seemed to be overjoyed with how it went. To the fact that they did it on time over a weekend without a single hitch. That they were very methodical.”*

Active Win over TechX at a manufacturing company for \$2.9M

Active did not perform well at the reference sites: *“The project team went but the feedback I got on that was that on Active; **they came back with doubts**.”*

Active Win over Atlas and TechX at a state government department for \$4M

Active lost this business primarily because of references. Active had the most relevant references but the references actually hurt you: *“They [Active] actually had some references that we talked to **had a lot of problems**.”*

Active Loss at an Airline

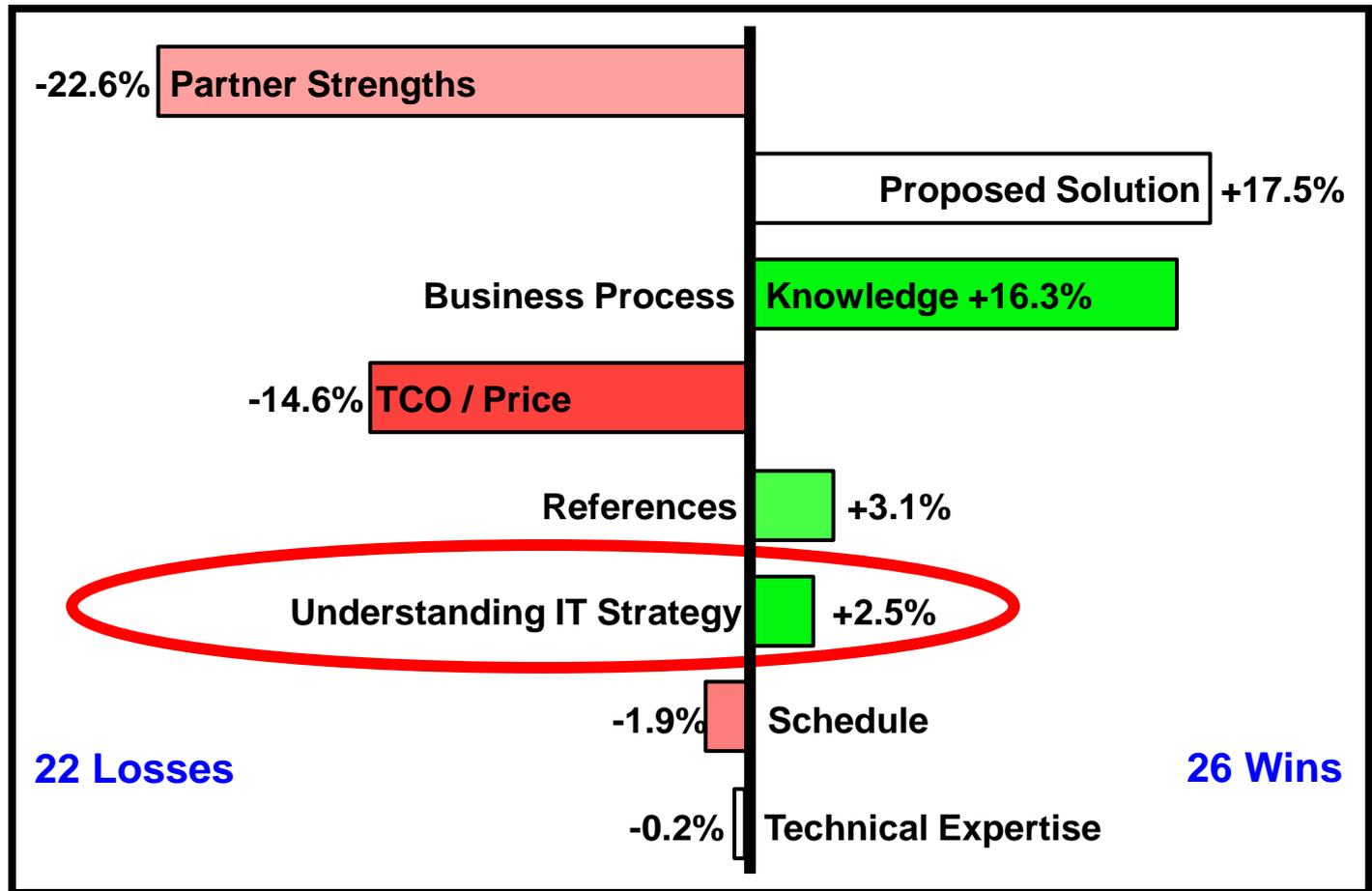
Understanding IT Strategy: Inconsistent field execution



Fill Color is Statistical Confidence Level

Losses	Wins
99%	99%
95%-98%	95%-98%
90%-94%	90%-94%
85%-89%	85%-89%
80%-84%	80%-84%
<80%	<80%

Impact = Importance x Score Gap x Votes



← Net Unfavorable Customer Opinion

Net Favorable Customer Opinion →

Length of bar and percentage is the net of Wins and Losses impact

22 Losses

26 Wins

Understanding IT Strategy

Losses to Competitors:

-19.1%

<-- Unfavorable Prospect Opinion towards Active Soft

Net

+2.6%

Wins over Competitors:

+21.6%

Favorable Customer Opinion towards Active Soft-->

Length of bar and percentage is impact on prospects' decision

Observations:

- There is still a problem in Government
- You still have too many negatives

Recommendations:

- Continue field training on questioning the prospect on their long-term strategy
- Begin training on consultative selling

Active really understood the client's IT strategy, Atlas did not: *"I would give Active Consulting a very high rating because **they really got what we were trying to do**. [Atlas] just tried to pedal mainframe stuff because that's where [they] made more money."*

Active Win over Atlas at a law enforcement agency for \$34M

Active matched the IT strategy perfectly: *"We needed to be able to deliver financial goods, financial services, using all mechanisms of communication i.e., the Internet i.e., integrated telephony and so on. And **the only organization that was also looking to do that and had already delivered**, were able to deliver an Internet solution was Active."*

Active Win over TechX at builder/mortgage company in the UK

Active lost this project because you failed to understand the clients IT Strategy: *"Some of them would have come up with ideas which would have been fine if you were selling tins of beans or if you were a supermarket chain. But **they hadn't grasped the understanding of our business** as well as obviously our structure change."*

Active lost to ABC at a hotel company for \$100K in the UK

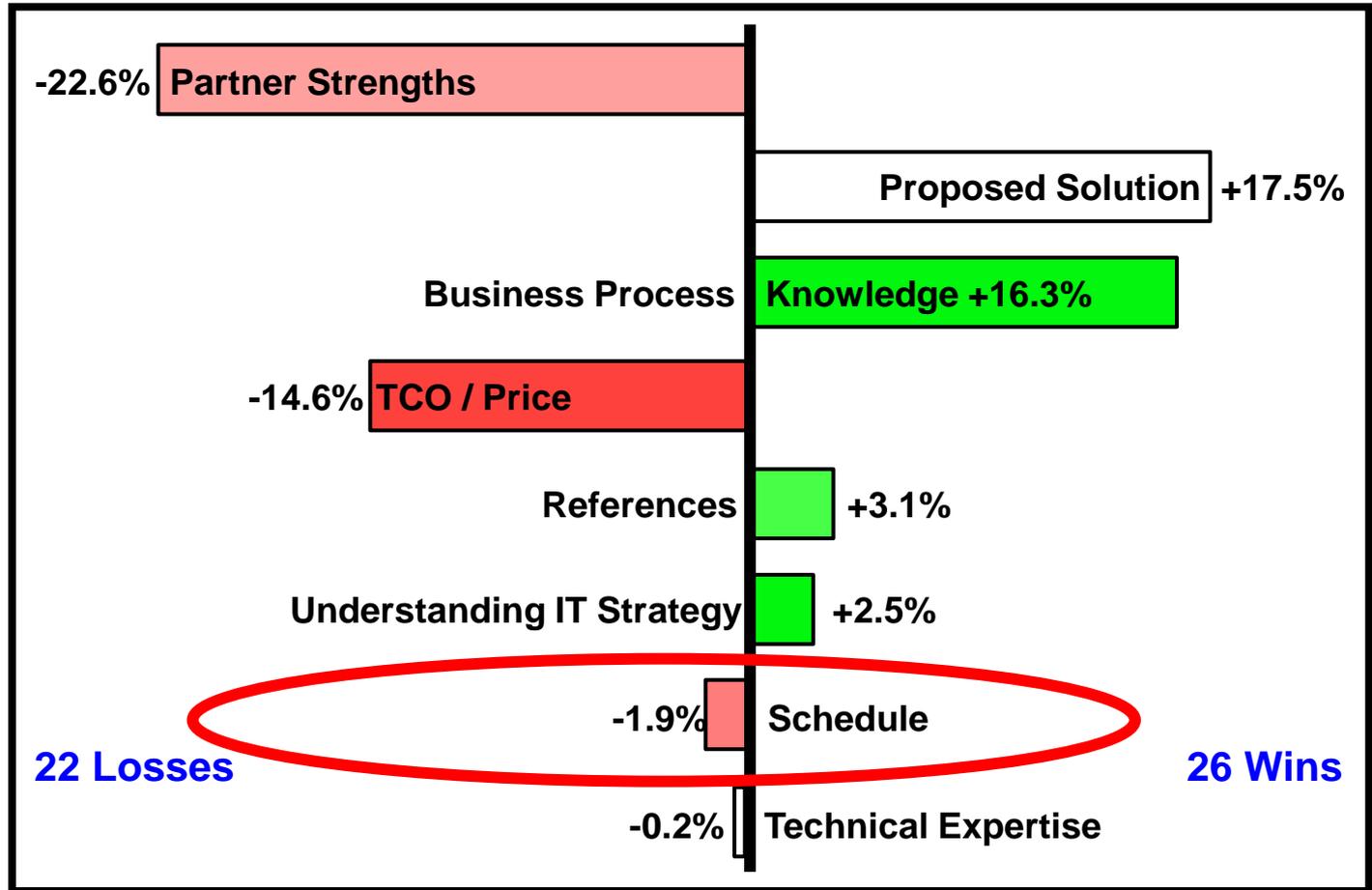
Schedule: Inconsistent field execution



Fill Color is Statistical Confidence Level

Losses	Wins
99%	99%
95%-98%	95%-98%
90%-94%	90%-94%
85%-89%	85%-89%
80%-84%	80%-84%
<80%	<80%

Impact = Importance x Score Gap x Votes



22 Losses

26 Wins

← Net Unfavorable Customer Opinion

Net Favorable Customer Opinion →

Length of bar and percentage is the net of Wins and Losses impact

Schedule

Losses to Competitors:

-13.1%

<-- Unfavorable Prospect Opinion towards Active Soft

Net
-1.9%

Wins over Competitors:

+11.3%

Favorable Customer Opinion towards Active Soft-->

Length of bar and percentage is impact on prospects' decision

Observations:

- Your scheduling estimating practices are inconsistent
- Too much negative movement in the Wins!

Recommendations:

- Impose a consistent methodology in how you estimate a reliable, believable schedule for projects
- Focus on why you are failing to live up to promises

Active delivered the project right on time: *“And we are **really right on time** in our schedule with this company.”*

Active Win over Atlas at a local government for \$800K in Australia

With the Active process, there was no way to predict when deliverables would happen: *“With Active it would have meant putting it into a process, and **waiting for it to pop out the other end**, no matter how hard we pushed. When we did the reference visit, that was actually borne out.”*

Active Loss to ABC at an telecommunications company for \$5M in the UK

Atlas would not commit to meet the schedule: *“Atlas was **not willing to meet the schedule**. “Active Consulting griped but was willing to meet it. When a vendor just stands up and says. “Your timetable is ridiculous. Forget it we’re not agreeing to it.” That doesn’t really endear them to us. That’s what Atlas did.”*

Active Win over Atlas at a law enforcement agency for \$34M

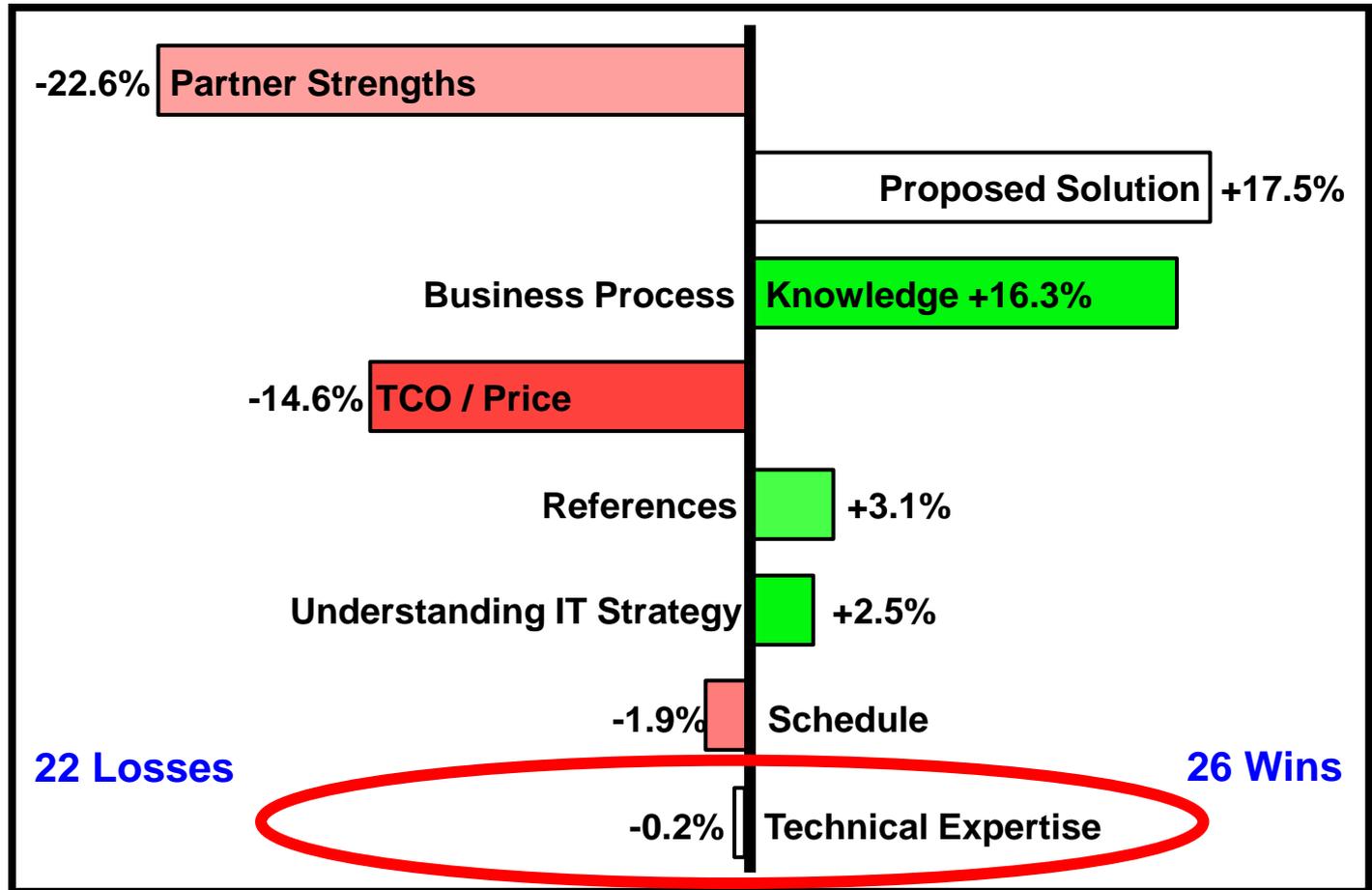
Technical Expertise: Dead Even



Fill Color is
Statistical
Confidence
Level

Losses	Wins
99%	99%
95%-98%	95%-98%
90%-94%	90%-94%
85%-89%	85%-89%
80%-84%	80%-84%
<80%	<80%

Impact =
Importance
x Score Gap x Votes



← Net Unfavorable Customer Opinion

Net Favorable Customer Opinion →

Length of bar and percentage is the net of Wins and Losses impact

Technical Expertise

Losses to Competitors:

-13.0%

<-- Unfavorable Prospect Opinion towards Active Soft

Net
-0.2%

Wins over Competitors:

+12.8%

Favorable Customer Opinion towards Active Soft-->

Length of bar and percentage is impact on prospects' decision

Observations:

- Dead even between the competitors

Recommendations:

- Show Reps the competitor tactics attacking your expertise

Active really impressed this client with your experts: *“I’d rate Active **excellent** all the way across the board for the **expertise**. It’s just miles and miles deep.”*

Active Win over TechX at a manufacturing company for \$2.9M

The client felt Active did not have the technical experience in call centers: *“They had a **bit less technical expertise** in the call center application.”*

Active Loss to XYZ at a utility company for \$16M in Belgian

Atlas tried to bait and switch professionals: *“Atlas brought in their court and public safety experts to close the business but they were only putting their services people out here to do the project with no court or jail knowledge. Atlas **flashed** all these, you know, **hot shots** in front of us. And when we actually pushed them. Well, no they’re really not going to be here. They’ll be available by phone.”*

Active Consulting Win over Atlas at a law enforcement agency for \$34M

Other Issues:

Active had performed poorly on support: *“We had had some issues with Active Consulting in the past on correcting problems. Taking a long time to do so or actually in one case Active Consulting had come out here to correct a variety of minor problems and spent a week here and at the end of the week the entire system was down. I mean, **they made it worse**. At the end of the week they had totally trashed the system. We were rather upset with them.”*

Active Loss to a small local company at a state government department for \$400K

Your support sometimes comes from too many places: *“Some of our support comes from one place, some comes from another. I guess for them to get a 10, **I would like to make that a little bit more seamless** on some of the support issues and their applications also.”*

Active Win over ABC at a manufacturing company for \$2.9M

The client is concerned about Active’s ability to support the solution in the UK: *“Our main concern with them is their **ability to support the product** on an on-going basis and increasing customer base. And they’re very reliant on third party suppliers for their technical expertise, contact staff and so on. They don’t have the skills in-house. They could do with putting more of their development money or more of their finance into increasing the resources available.”*

Active Win over Atlas at an insurance company for \$12M in the UK

Active was tripping over their own organization: *“Let’s say we dealt with the UK Active office, ... for a card product hand off to New Zealand, and so we would be paying a project manager in the UK, who would then be paying a project manager, either an intern or financing, in New Zealand, **but have no real leverage over**. And it would pop out, if you were lucky, sometime. And, when we actually went through the reference site, this was the exact problem they were having, the company was having to manage Active’ end game rather than just the local site. So timeliness of getting new products to market was very difficult. So that was a major problem. And as we proved with TCS, their ability to change, they took their product, and our current product, slammed it together, and changed it to Japanese, and employed it in the country in 12 weeks!”*

Active Loss to xyz at an telecommunications company for \$5M in the UK

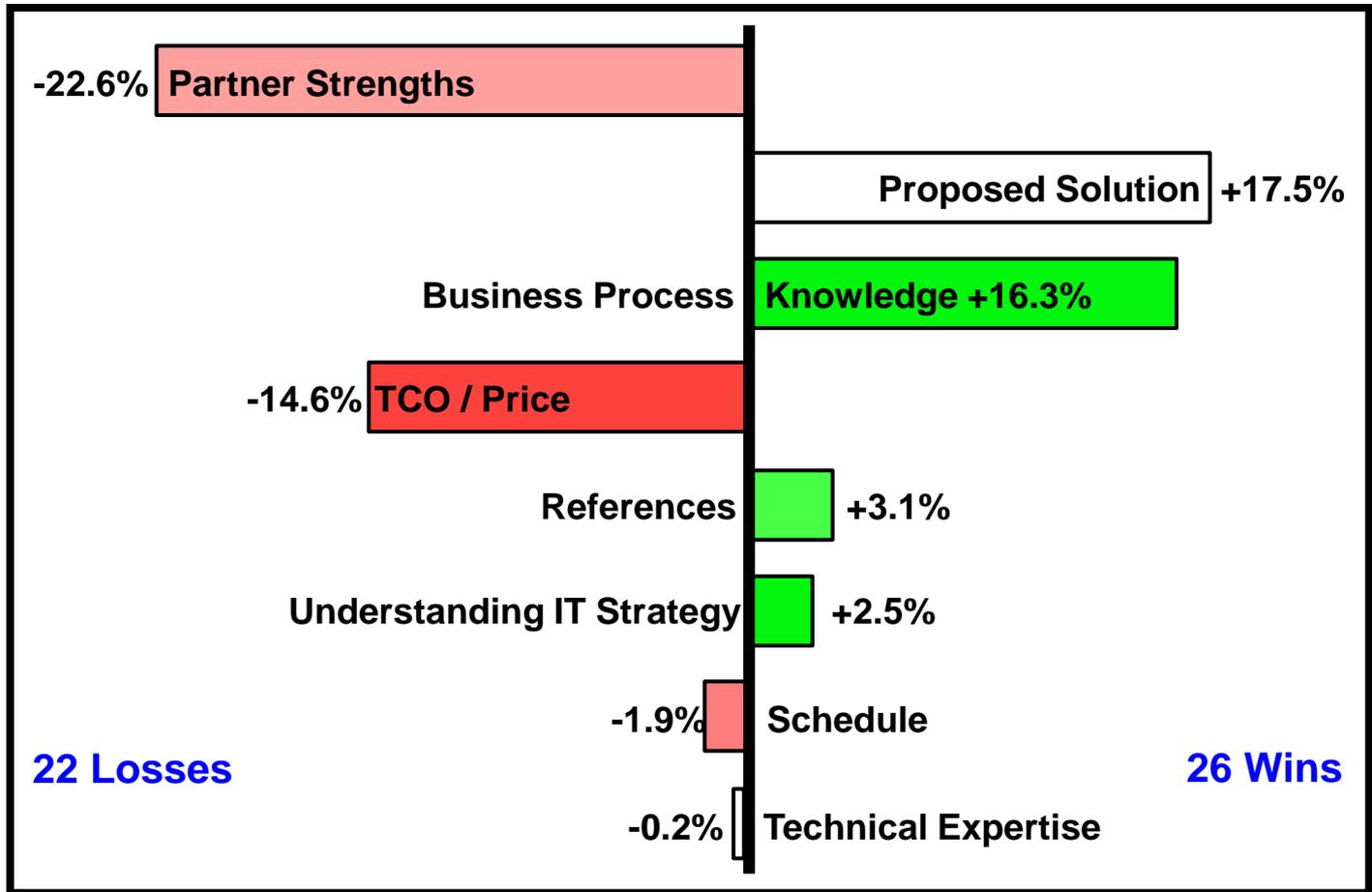
Active Soft Battle Plan



Fill Color is Statistical Confidence Level

Losses	Wins
99%	99%
95%-98%	95%-98%
90%-94%	90%-94%
85%-89%	85%-89%
80%-84%	80%-84%
<80%	<80%

Impact = Importance x Score Gap x Votes



← Net Unfavorable Customer Opinion Net Favorable Customer Opinion →

Length of bar and percentage is the net of Wins and Losses impact

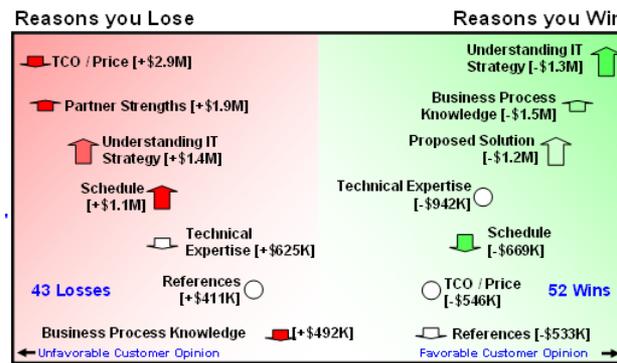
The left and right sides of the Wizard Chart are combined to determine if a criterion was mostly positive or mostly negative.

This chart shows, in priority order, the issues Active Soft should leverage if positive, and those you need to improve upon to Win more business.

Summary of Recommendations for Active Soft

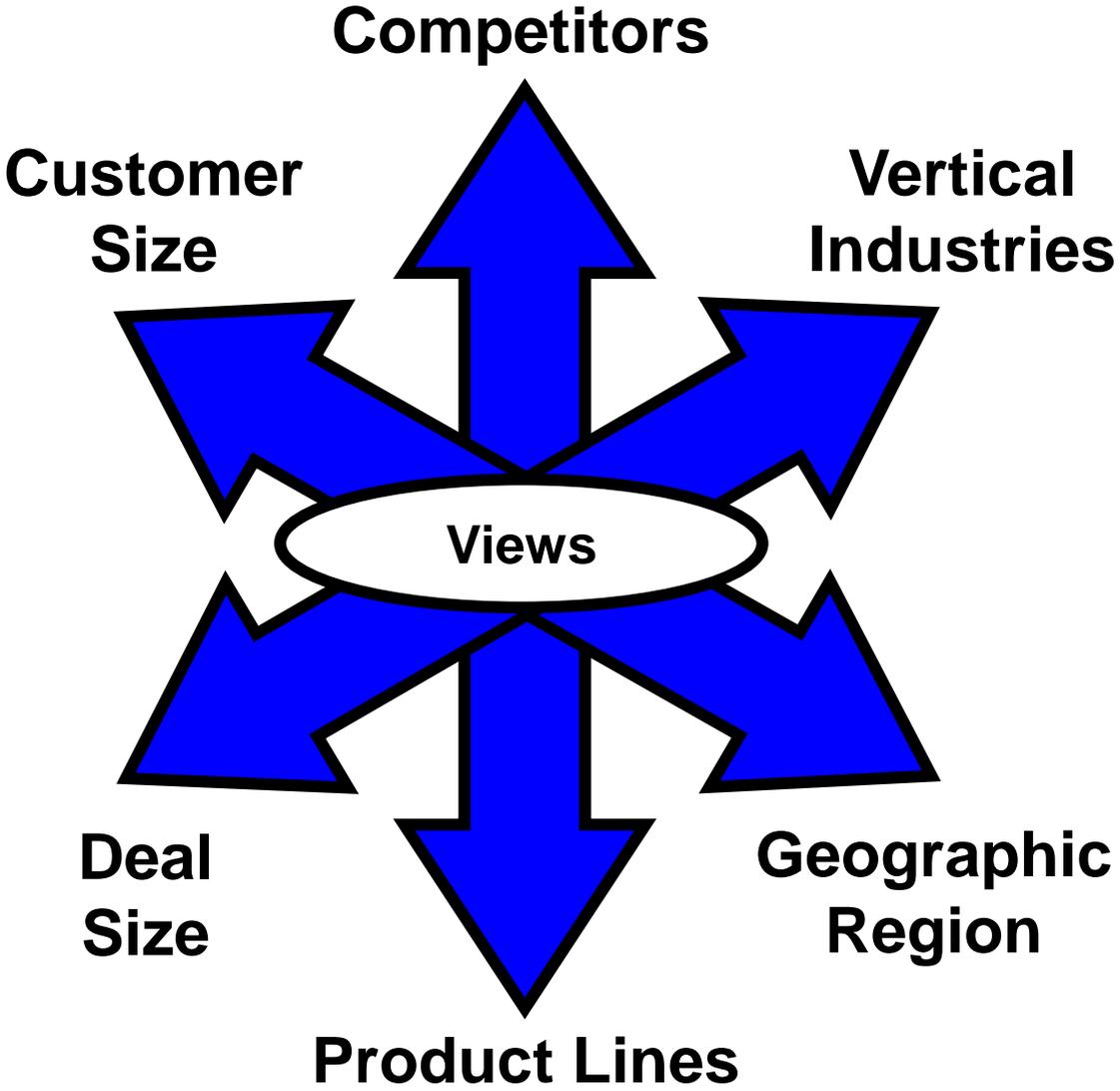
- **Impose a better partner and subcontractor evaluation and tracking system**
- **Refer and use only reliable partners and as few as possible**
- **Extend the hiring plan for BP knowledgeable experts by industry**
- **Improve how you determine competitive pricing in Utilities contests**
- **Create a TCO calculator for the Reps to use**
- **Improve the reference review and tracking system to ensure positive references are used**
- **Continue field training on discovering the customer's long-term IT strategy**
- **Begin training Salesreps on consultative selling**
- **Impose a consistent methodology in how you estimate a reliable, believable schedule for projects and focus on why you are failing to live up to promises**
- **Show Reps how Atlas will bait and switch by presenting high level experts only to deliver much lower level personnel**

Win/Loss Sample Executive Presentation



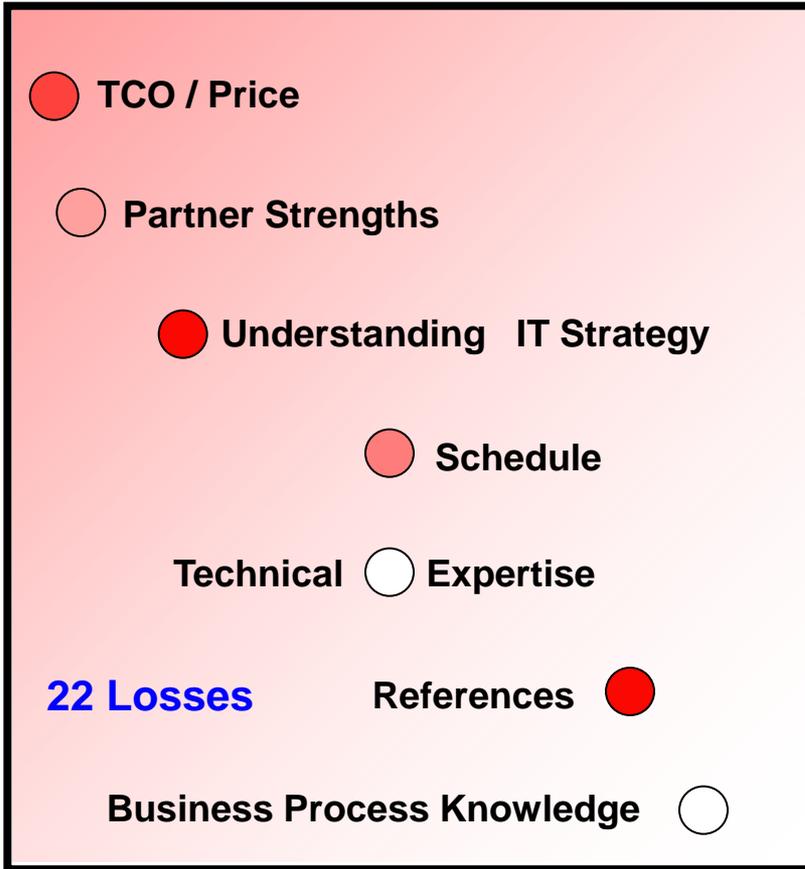
Breakdown by Demographics

If you have enough interviews, you can break down the results by any demographic you want. Each breakdown provides input to your product development, service, and marketing groups on what your customers want them to do. This information will find its way into every part of your company.

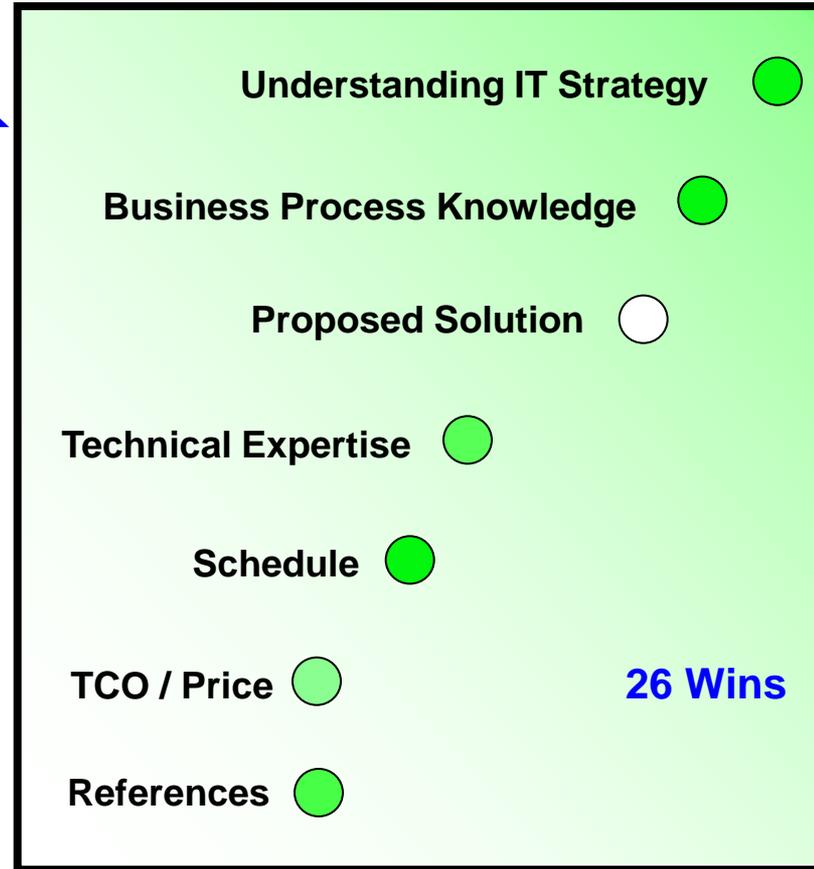


Wizard Chart

Reasons you Lose



Reasons you Win



Fill Color is Statistical Confidence Level

Losses		Wins	
Red	99%	Green	99%
Dark Red	95%-98%	Light Green	95%-98%
Light Red	90%-94%	Very Light Green	90%-94%
Lighter Red	85%-89%	Lightest Green	85%-89%
Very Light Red	80%-84%	White	80%-84%
White	<80%	White	<80%

Impact = Importance

x Score Gap x Votes

← Unfavorable Customer Opinion

Favorable Customer Opinion →