Client Post-Mortem and Loss Review Form

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Date: [Date]
Account Executive (AE): [AE Name]

1. Opportunity Details

- **Client Name:** [Client Name]
- **Opportunity ID (CRM):** [ID]
- **Total Lost ARR:** [AED/USD Amount]
- **Final Loss Reason (CRM):** [E.g., No Budget, Went with Competitor, Stalled]

2. Root Cause Analysis

A. Why Did We Lose? (Check all that apply)

- [ ] **Budget:** Client could not justify the cost or TCO.
- [ ] **Authority:** Never reached the true Economic Decision Maker.
- [ ] **Need:** The problem was not critical/painful enough (Nexa-BANT failure).
- [ ] **Competition:** Lost directly to a named competitor (Specify: [Competitor Name]).
- [ ] **Internal Politics:** Failed to navigate consensus or overcome a key Blocker.
- [ ] **Technical:** NexaCore platform lacked a required feature or integration.
- [ ] **Timeline:** Project was perpetually delayed (Stalled).

B. Lessons Learned (Narrative Summary)

Provide a candid, detailed summary of what the AE would do differently if starting the sales process over today. (Minimum 200 words).
[Enter narrative summary here.]

3. Competitive Intelligence (If applicable)

- **Competitor Won With:** [Specific Product Feature / Pricing Model / Legal Term]
- **Was their proposal substantially cheaper?** [Yes / No / Comparable]
- **What was the single most persuasive thing the competitor said or did?**

4. Follow-Up Action

- **Is the account worth revisiting in the future?** [Yes / No]
- **Re-Engage Timeline:** [E.g., 12 months, after new product release, etc.]

Reviewed By Sales Director: [Signature / Date]