



## WIN-RATE CHEAT SHEET

### Build out a Competitor object in your CRM.

There may be an out-of-the-box option that works or you may have to build a custom object. Either way, you'll need to connect it to your Opportunity object to capture competitors on deals.

1. Every time an Opportunity moves to a new Stage, make it mandatory for known competitors to be selected from a drop-down field.

Provide an Other option to catch new threats and apply your CI tool to begin learn about them.

Provide an Unknown option to catch reps who aren't asking the right questions. These stats represent a good sales training opportunity. By the time you reach the Needs Analysis stage in a deal, you should know who you're selling against. Carry on through the sales cycle, all the way to Closed-Lost or-Won

2. In addition to Closed-Won and Closed-Lost, add an option for Closed-No Decision to capture the deals that just faded away. They're not lost and yet so many companies make the mistake of lumping them in with the Closed-Lost part of the calculation. Stop doing that.
3. Setting an Opportunity to Closed-Lost should trigger a whole new set of forced inputs. Getting this debrief intel down as actual data is invaluable. Reps will never remember details as clearly as they do now. And they will not be eager to rehash a loss down the line. War stories are only fun to tell if you were on the winning side. Add to the generic options with things like Loss of Champion, Feature Set, Technical Incompatibility and Time to Implement. They will always want to blame it on Price—drop that to the bottom, just before Unknown. (Seriously, if someone actually selects Unknown, you might benefit from our [Win-loss Interview Checklist](#). Just saying.)

"Every soldier is a sensor", is a military axiom that translates well to sales and competitive intelligence collection. Sales reps are your frontline. They collect what is often the first intel on new competitors and trends. They are your most powerful weapon. Make it easy for them to collect and report what they learn. Use their feedback. Boost your win-rate.

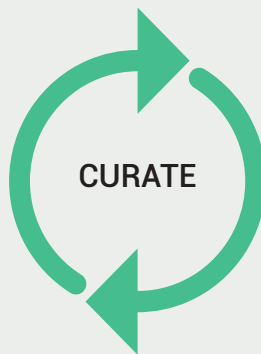
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TIM RHODES, FORMER HEAD  
OF CI, ORACLE



Collect intel shared by employees and sourced across the web



Curate and contextualize the content inside private hubs.



Distribute the intel inside Klue and existing platforms.

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