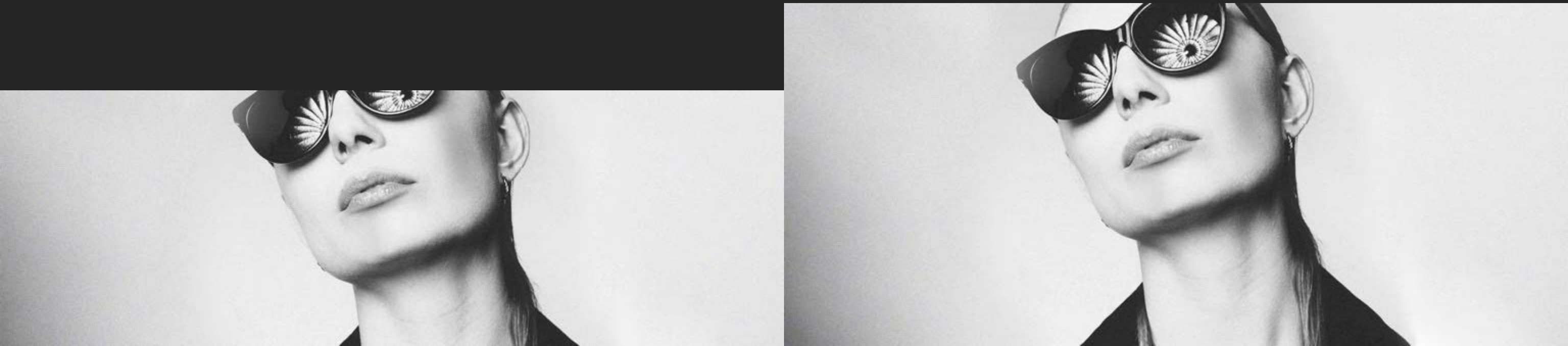


Zeitgeist Research

Win/Loss Analysis

Case Study

ZEIT GEIST
R E S E A R C H



B2B Experience

We don't like to brag... but you should know that the **most trusted brands** in the industry have chosen us.



01

THE PROJECT

Our Client + Key Challenge

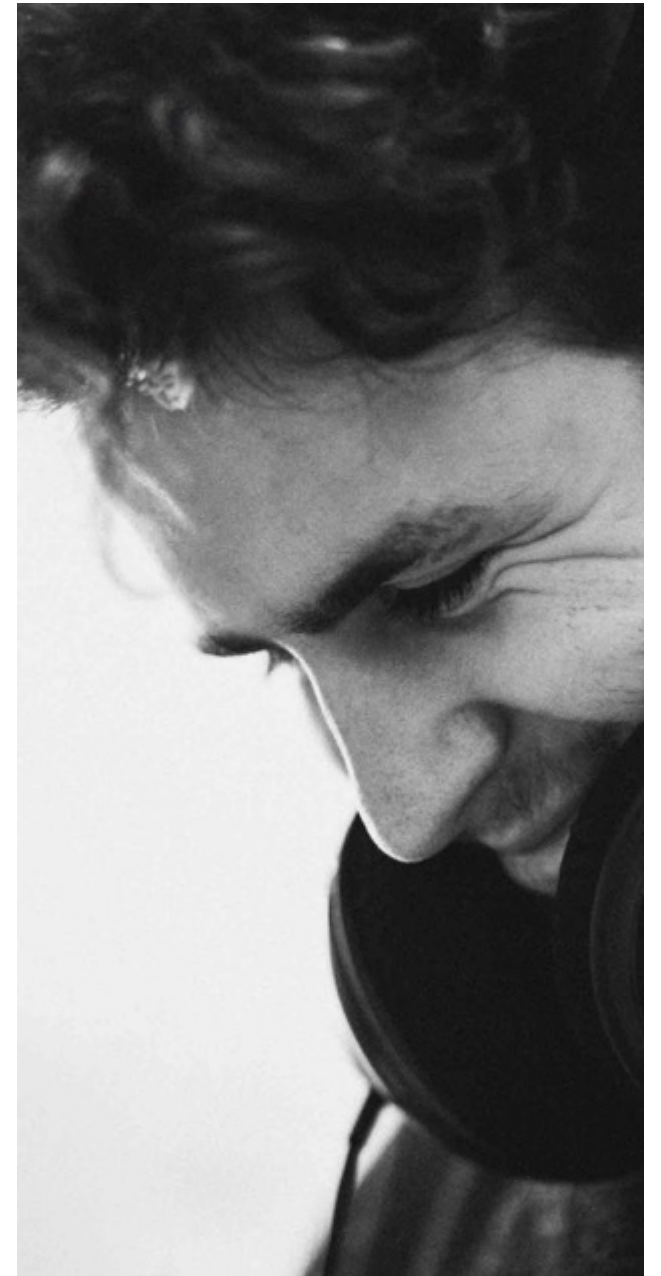
Software As A Service

Our client is a major player in the B2B Software As A Service (SAAS) space, providing mission critical software to large organizations with annual service contracts ranging from 6 to 7 figures.

Key Challenge

The sales cycle in our client's sector can be long and our client devotes significant resources to their sales and marketing efforts. This, combined with the potential to lose significant amount of revenue makes winning each account very important to the business.

Our client brought on a new SVP of Sales who's first order of business was to understand why they were winning and losing sales so they could be smarter as they approached each new opportunity.

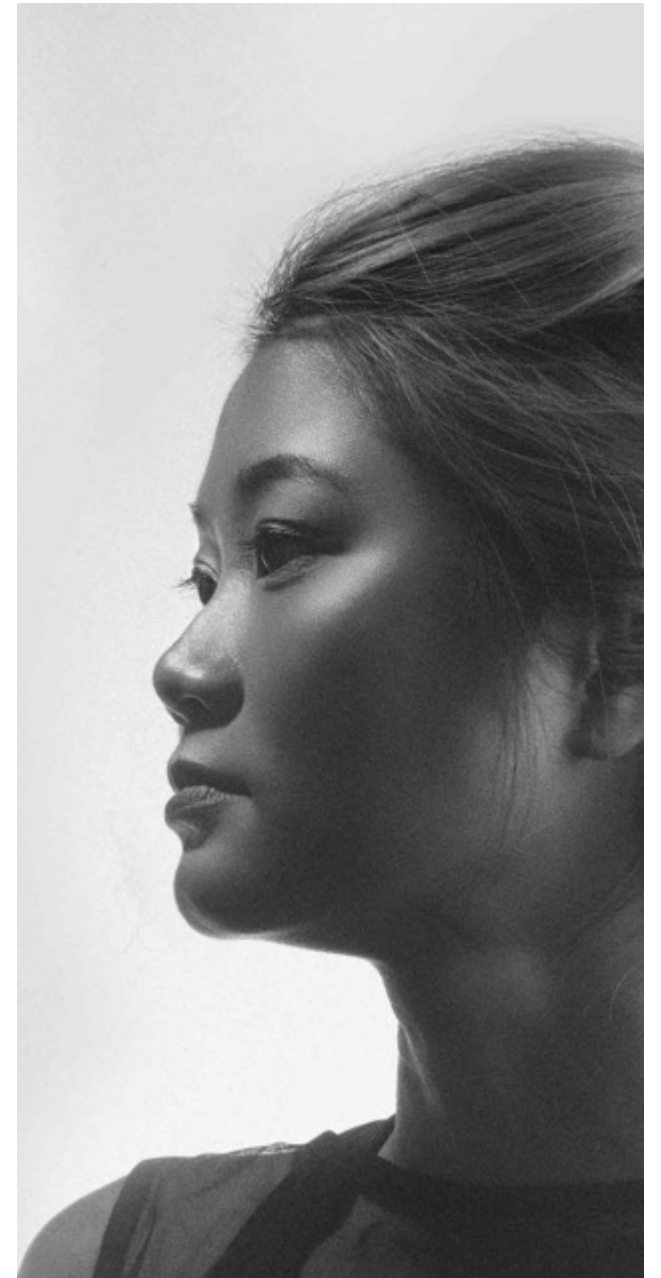


Approach

Win/Loss Analysis

In their competitive space, our client understood that they needed to set themselves up for success at each sales opportunity. One way to do that was to get smarter about why they were winning or losing sales to scale their success and avoid mistakes.

Working with our client, we implemented a continuous Win/Loss Research program designed to create an ongoing feedback loop. As sales were won and lost, we conducted an interview with the decision maker soon after the close of the opportunity, ensuring our client had clear, honest, actionable data to drive their strategy for the next opportunity.

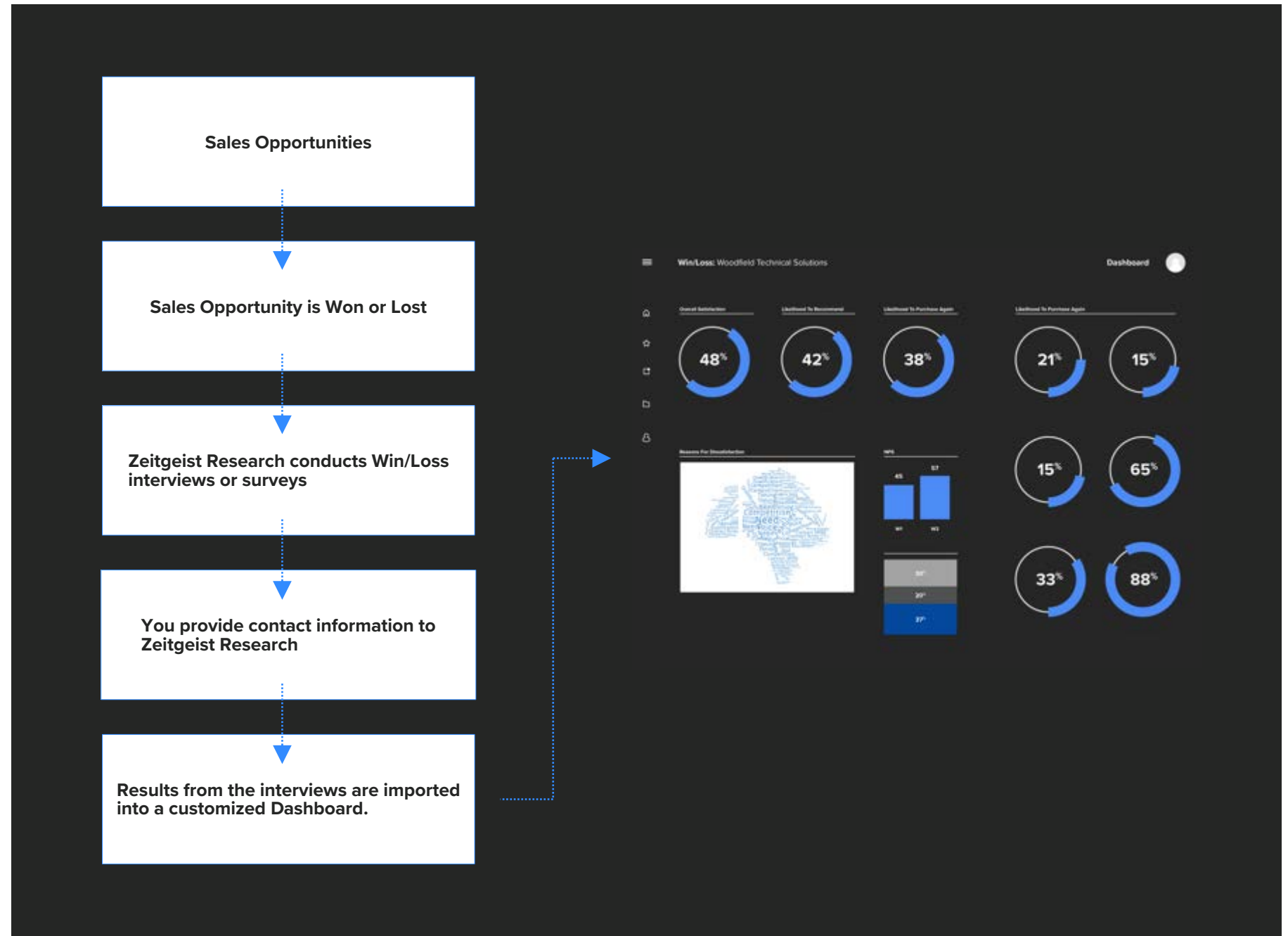


Win/Loss Z-IQ: How It Works

A Win/Loss analysis is a program designed to obtain and analyze the reasons why you won or lost an account or opportunity. This program allows you to analyze your strength and weaknesses, fine tune your sales and marketing efforts, track their success through win/loss over time, and increase sales.

A Win/Loss program can help you:

- Increase the effectiveness of your sales organization by providing insights that help you to better position and package your solution and stand out with your message.
- Get a solid understanding of how and why your competitors succeeded.
- Identify key drivers for winning or losing business.
- Identify unmet needs and uncover potential product development ideas.

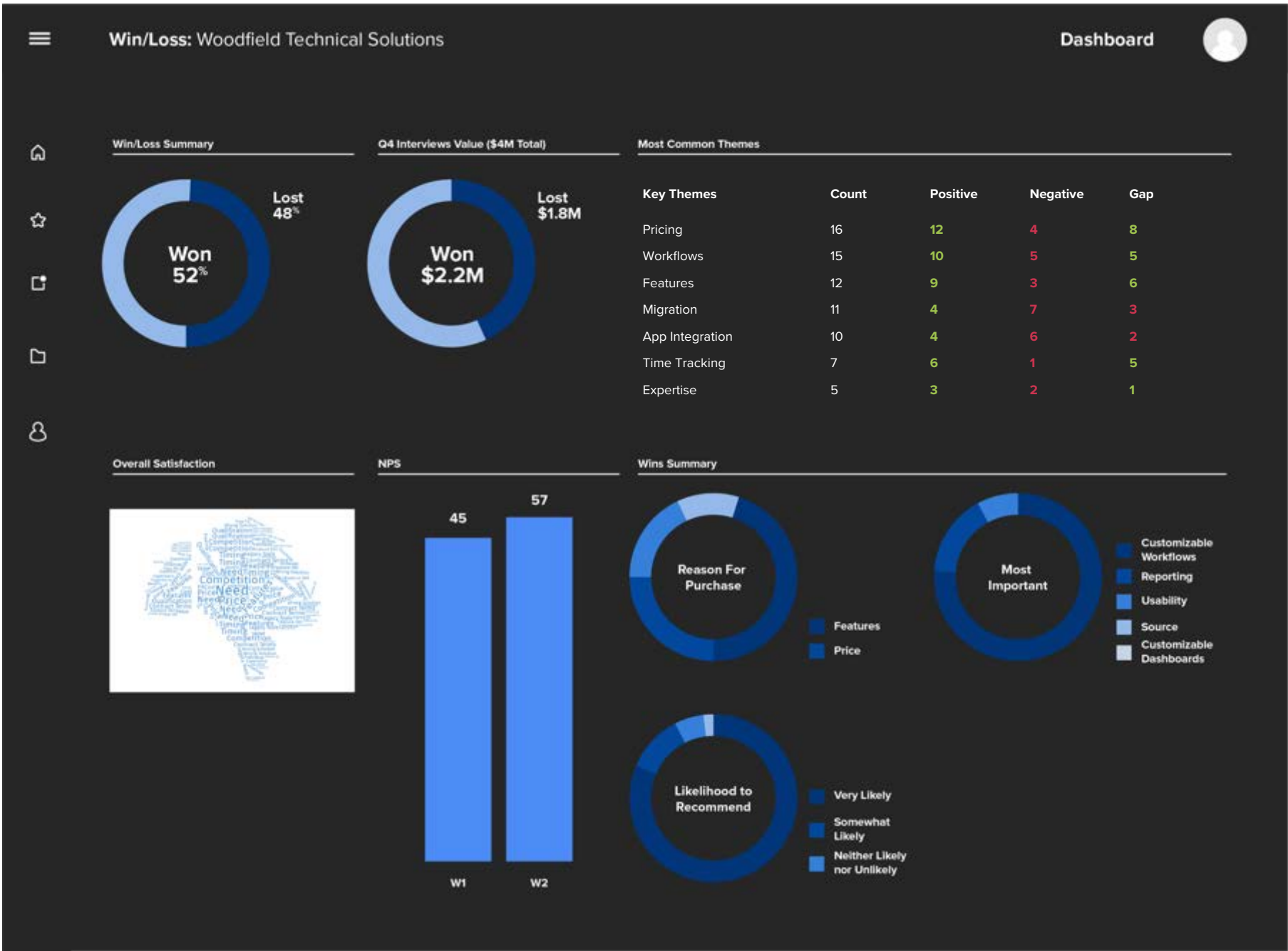


Our Findings



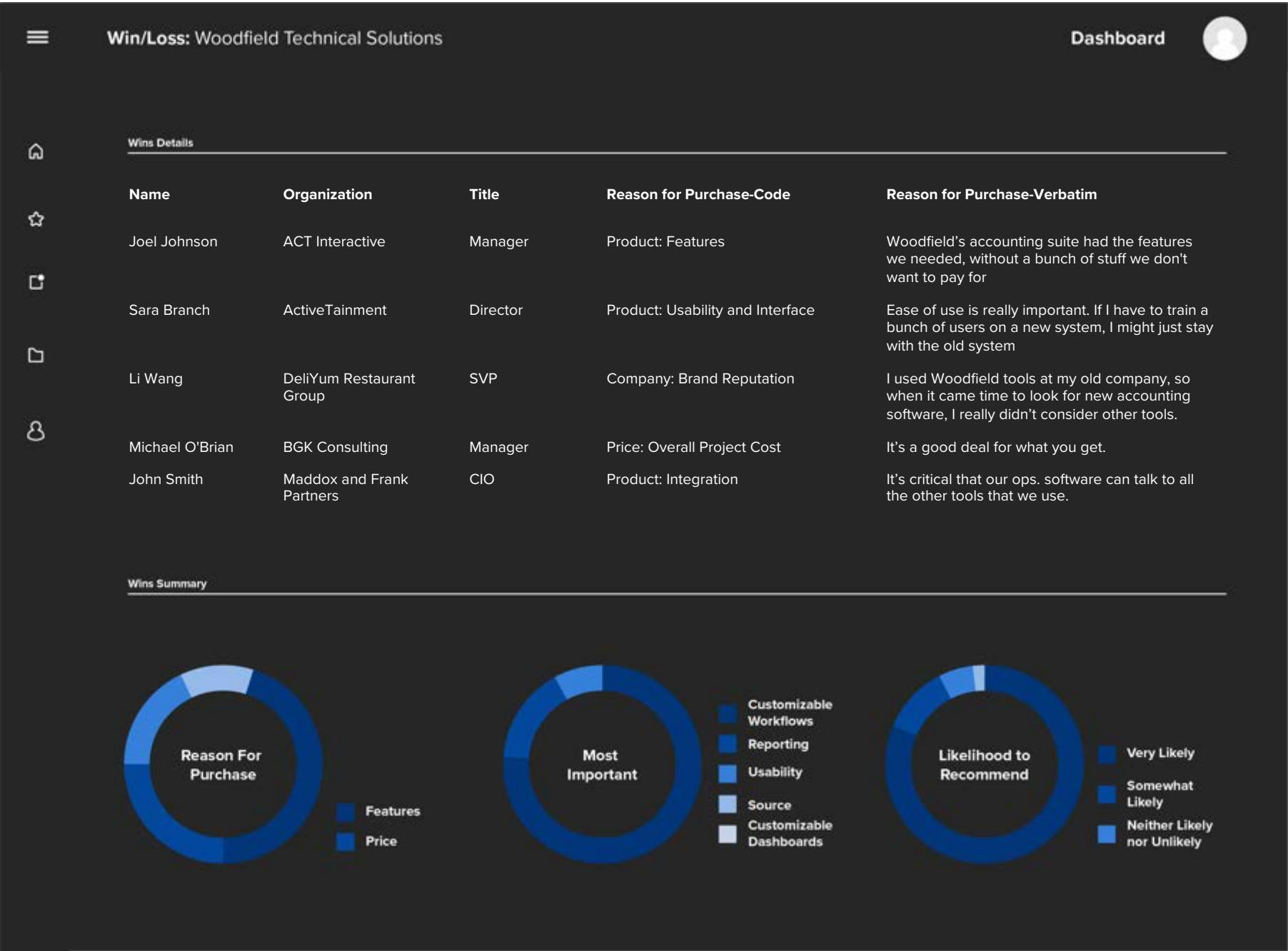
High-level Insights Within Easy Reach

A custom-designed dashboard allowed our client’s SVP of Sales easy access to key metrics and understand key areas that were driving sales wins and losses.



Customizable Workflows are a Key to Wins

Drilling down into the data, our client was able to see that their excellent workflow solution was a key reason why they won accounts. The SVP of sales used these insights to rewrite sales scripts and ensured this feature was highlighted.



Value is More Important than Price

Based on this research, we buyers were focused more on value than the price of the tool. Our client used these insights to refocus their messaging away from low-pricing to the value they can bring an organization.

“

We like to look at the value we're getting out of a tool, rather than what it costs. A cheap tool that's junk is worse than an expensive tool that's great.

—Anika, Digital Data Solutions

“

I don't really care about the cost. If it saves me time, which is money, I'm OK with it costing more than a tool that makes my team less efficient.

— Justin, DataMart Inc.

“

We're a high-volume, low-margin coding shop. I need a tool that keeps us on track and delivering on time. If I have to pay a few bucks more for a tool so I can keep my clients happy, who cares?

—Kahaan, CodeHouse

Our Recommendation



Our Recommendation

Deliver Value To Win Sales

Selling SAAS in a very competitive space is a challenge and our client needed to better understand why they made or lost a sale so they could continuously refine their strategy. Through our Win/Loss Analysis, we identified 2 key areas that made their brand stand out from the crowd.

We found that customers need a solution that is customizable to fit their specific needs; not the one-size-fits-all solutions common in this marketplace. With this insight, our client rewrote their sales scripts, messaging and collateral to ensure they all highlighted the ability to customize their solution.

The brand also shifted away from trying to compete on price and instead focused on communicating the value their solution could bring to an organization.

Additionally, our client created a new product roadmap to develop new features that would add additional value.



02

ZEITGEIST RESEARCH

WHO WE ARE.

The Company

Zeitgeist Research is a virtual, boutique, full-service research company working with Fortune 500 companies, ad agencies, and start ups.

Zeitgeist Research works with clients from a wide range of backgrounds, about half of all projects are B2B and half are B2C.

The Founder

The company was founded in 2012 by Dr. Manfred Bluemel, Ph.D., who was head of consumer insights at [Amazon](#) for eight years where He was inspired by Jeff Bezos' philosophy of customer obsession. And it shows: Zeitgeist's current NPS is 92!

The Z-Team

Other Z-Leaders are Dr. Bill Sallas, Ph.D., our behavioral psychologist leading the qualitative team and Kelley Raleigh, former Director of Insights at Samsung, Dannon, and PepsiCo and head of the quantitative research team at Zeitgeist.

WHY WORK WITH US?

Experience

All your research projects are managed by senior research professionals who each have **10+ years** of experience.

As a result, our reports are strategic and tell a story.

Quality

Our customer obsession and relentless feedback loop as well as our strategic reports have earned us an **NPS of 92**, reflecting the quality and service level we deliver.

Fast

If you need results in days, not weeks, our Basic or Accelerated research solutions are your answer.

Fully customizable Bespoke projects can be turned around in three weeks.

Innovative

We provide several advanced methodologies, from advanced analytics to neuro-science, for you to choose from that fit your budget.

Variety of Research Solutions

Our full-service Research Solutions offer products and approaches at every price level and sophistication.

Affordable

We deliver high-quality research at a fraction of the price with full cost transparency.

There are no games at Zeitgeist Research. Our detailed line-by-line item pricing, allows you to scale the project up or down to fit your budget.

TYPE OF RE- SEARCH

Advertising

- Ad Concept Testing
- Ad Creative/Copy Testing
- Ad Effectiveness
- Message Testing

Brand

- Awareness, Attitudes, and Usage (AA&U)
- Brand Tracking
- Positioning
- Personas
- Segmentation
- Value Proposition

Acquisition and Retention

- Customer Satisfaction
- Decision Journey/Path-to-Purchase
- Logo Testing
- Name Testing
- Packaging
- Product Concept
- Target Market Sizing and Definition
- Win/Loss Analysis

Employee Surveys

- Employee Satisfaction
- Discrimination Assessment

METHO- DOLOGY

Qualitative

- Focus Groups
- In-Depth Interviews (IDIs)
- Online Bulletin Boards
- Shop-Alongs
- Intercepts
- Ethnography
- Eye Tracking

Qual. Neuro-response

- Facial Coding

Quantitative

- Online Surveys
- Phone Surveys

Advanced Analytics

- NLP Sentiment Analysis
- Key Driver Analysis/Regressions
- MaxDiff
- TURF
- Conjoint, etc.

Quant. Neuro-response

- Intuitive Associations



ZEIT GEIST
R E S E A R C H

Thanks for taking the time to learn more about Zeitgeist Research.

Stop Guessing. Contact Us.

info@zeitgeistresearch.com