

Win/Loss Review Template

A structured way to actually learn something from closed deals instead of just moving to the next one.

Deal: _____

Outcome (Won / Lost): _____

Deal Size: _____

Sales Cycle Length: _____

Reviewed By: _____

What Was The Real Reason?

Not the surface reason ("price"); the actual underlying reason this deal was won or lost.

What Happened During The Sales Process

What went well? What would you do differently? Where did the deal almost stall, and what got it moving again (or didn't)?

If Lost: Who Did They Choose Instead?

And why, as specifically as you can find out.

If Won: What Almost Made Them Say No?

The closest this deal came to falling apart.

One Thing To Change Going Forward

Not a list; one specific, actionable change based on this deal.