Win-Loss Interview Service: Getting Started

This document assumes that a decision has been made to conduct interviews. It provides an overview of the steps to get started.

1. **NDA:** A Non-disclosure Agreement needs to be signed by PSP Enterprises to safeguard your information such as sales rep and customer names and phone numbers and the resulting Win/Loss or Reference interviews. All of which are confidential and are your property. Most companies have a standard contractor NDA agreement that PSP Enterprises will sign.
2. **Contract:** If you have a standard contractor agreement, that needs to be put in place.
3. **Purchase Order:** You will need to issue a purchase order number and provide an Accounts Payable contact name to PSP Enterprises to ensure that we follow the right procedures.
4. **Education:** We will need some training on your company to make sure we understand your product line. An overview presentation, white paper or other collateral at a mid-manager technical level would be the most appropriate. We do not need to understand everything at a detailed technical level. We would also like any industry analyses such as Gartner Magic Quadrants or other reports.
5. **Sales rep Questionnaire:** PSP Enterprises uses a Web based automatic questionnaire form you can review. Please see below for me details.
6. **Memo to Sales reps:** You will need to have a high level Manager send an email to the targeted sales reps so that they will visit our website, accept our phone calls and/or emails and respond. We can provide a sample. PSP Enterprises will require a copy of the memo you actually use.
7. **List of your key competitors:** **We need a list of your primary competitors.**
8. **Customer Questionnaire:** We need to agree on a customer interview questionnaire. Sample questionnaires are located on our website. You will need to review one of these and provide any changes you want to make. It is especially important that the list of selection criteria reflect your industry as closely as possible. RFPs are a very good source of criteria lists.

   Caution: an executive interview cannot last for more than about 20-25 minutes. They just cannot sit still for much longer. So do not try to ask a hundred questions. It cannot be done. It is possible to have what I call second level questions that are not asked of all respondents. Such as a more detailed question about “total cost of ownership” if that is a highly important criteria for that respondent.

   It is important to try to get the consultation guide as right the first time as possible. As we progress to future quarters, any changes to the list of criteria will make it difficult to compare prior quarter results statistically.
9. **Customer contact Information:** PSP Enterprises requires customer contact information so that we may call and conduct interviews. We need enough customer contacts and phone numbers to complete the target number of interviews. In most companies, only the field sales reps have this information. Sales reps are very busy people who have lots of requests thrown at them from many directions. It is sometimes difficult to get their attention and response. We address this challenge in two ways:
   a. By providing the sales rep a transcript back from any interview we can complete. However, this incentive only works in the second and subsequent quarters of the process. In the initial startup quarter, the reps do not know what they will get back.
   b. By carefully tracking and reporting who has responded. Sales reps are driven by visible metrics. Thus, only by making it clear that their response is being tracked can we insure we get them to participate. You will receive a weekly status report on who has responded. We ask that you follow up by helping us bug the reps and their managers.

Web based Customer Contact input system:

PSP Enterprises has a Web based, confidential, secure system for your sales reps to input customer contact information.

A separate secure Web site is created just for you. You provide this unique URL to your sales reps for them to enter customer contact information. There is no way for anyone except us to receive any information from this Web site and it is thus secure.

Please see the **RED** text below for the information we need to setup your web site.

The welcome text at the top of the page can be customized to you. Here you can explain to the sales reps about the program. **We need any custom welcome text you would like.**

Also, the header text of each deal input form can be customized to you. Here you can explain to the reps what kind of contests you would like from them. **We need any custom text you would like.**

We need some information about the Sales Reps or other field personal who will be responding:

1. **First Name**
2. **Last Name**
3. **Phone Number**
4. **Email address**
5. **Function** — **We need a list of acceptable Functions from you**
   Functions are like: Sales Rep, SI, Manager
6. **Region** — **We need a list of acceptable Regions from you**
   Regions are like: East Coast, EMEA, APAC

The following questions are asked of the sales reps. * = required fields.

1. *** Company Name we will be calling**
2. **A short phrase describing that company (what they do)**
3. **Vertical Industry**
4. **Last year's revenue**
5. *** Contest Type – if you are interviewing on more than one product or service**
   We need a list of the contest types from you
6. *** Was this a Win or a Loss**
7. **When was the decision made**
8. **What was the deal worth**
9. **Which Competitors were involved**
10. *** Customer Contact names, Titles, Phone number and Preferred Language**
11. **Any additional information**

In the past, it has taken reps an average of seven minutes to fill in the above per deal.