hear from? Maybe there will be customers, and their questions could be something that needs to be listened to, suppliers that you want to question, or competitors who may reveal their future plans when questioning a speaker. Is there anyone attending the session that "you want me to talk to, or listen to?"

Tip 4: Treat the "ask" as an intelligence project

You are trying to get your decision maker to make a decision. This is about providing the right intelligence to the right decision maker and having it presented by the right person in the right way to get the decision made. Without getting into too much detail, I typically, in helping CI people start or expand event intelligence initiatives, ask them to find out how the decision maker makes decisions and who do they listen to? What causes them to change their minds? Sounds like a profiling intelligence project. With this profile you (or someone else that the C trusts) should be able to make an appropriate presentation on why an investment in event intelligence is warranted.

Conclusion

Getting management buy-in for event intelligence (and intelligence in general) is an important topic for CI practitioners. I have provided four tips that I hope help, but more importantly, I am calling on SCIP members and others that read this article to provide their tips. I ask you to join me in Orlando at my trade show lunch session and share your tips or to email me your tips and experiences. Bottom line we need to work together and share our experiences in getting management buy-in. I will share your tips with those that read competitive intelligence magazine and my column. Let's help grow our profession.

References

1. Calof, Jonathan . (2008) Dear C: Please give me resources for a trade show intelligence program. Volume 11, Number 1, Jan-Feb 2008, pages 49- 52

2. Calof, Jonathan L. (1999). Overcoming competitive intelligence barriers: A SCIP tool kit. Competitive Intelligence Review, Vol 10 (1) 71-78

3. Calof, Jonathan L. (2018) SCIP annual European summit – Agility, senior management involvement and more. Competitive Intelligence Magazine, Volume 21, Number 1, 35-39

4. Goldberg, Joseph; Barak, Tim (2007), "Communicating the value of trade shows to decision-makers," in Calof Jonathan and Bonnie Hohhof, Conference and Trade Show Intelligence, Competitive Intelligence Foundation.

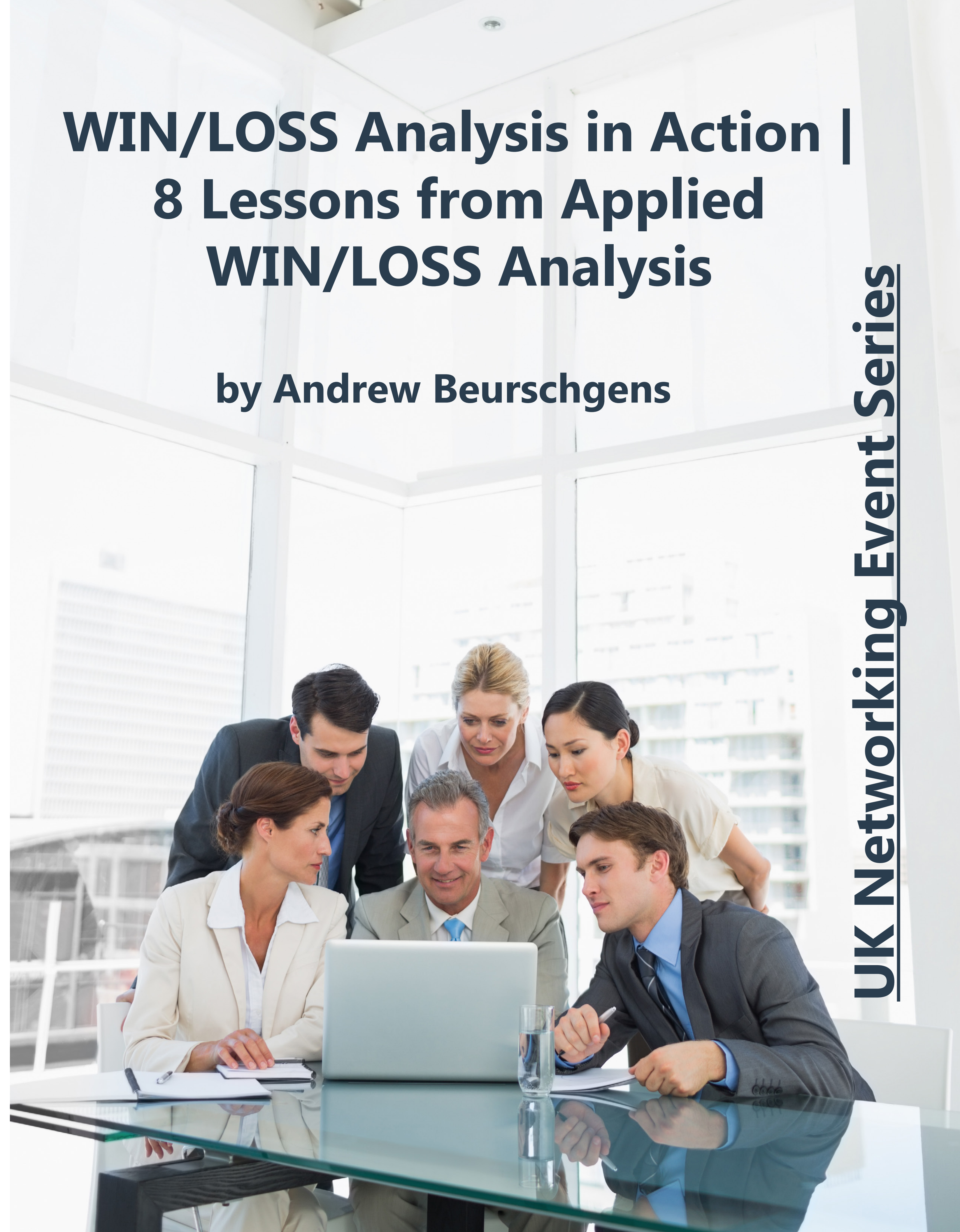
ABOUT THE AUTHOR

Jonathan Calof *is a full professor of Strategy and International Market Insight at the Telfer School of Management at the University of Ottawa; extraordinary professor at North West University in South Africa, Leading Research Fellow at the National Research University, Higher School of Economics in Moscow and Adjunct Professor at the University of New Brunswick. Dr. Calof combines research and consulting in competitive intelligence, foresight, and business analytics to help organizations develop key insights on their competitive environment and become more innovative. In recognition of his contribution to both professional practice and academic development in these fields Dr. Calof received the fellow's award from the Strategic and Competitive Intelligence Professionals (SCIP), the lifetime achievement award from Frost and Sullivan and SCIP's distinguished member award. He has over 200 publications and has given over 1000 speeches, seminars, and keynote addresses around the world on intelligence, foresight, analytics and innovation. Jonathan can be reached by email at calof@ telfer.uottawa.ca or by phone at +1 (613) 228-0509.*

WIN/LOSS Analysis in Action | 8 Lessons from Applied WIN/LOSS Analysis

by Andrew Beurschgens

UK Networking Event Series



During 2015, BI Source's Ellen Naylor and author behind *Win/Loss Analysis: How to Capture and Keep the Business You Want*, shared her approach and insights behind her 30+ years of experience with WIN/LOSS Analysis[1,2]. The SCIP UK networking event series always aims to bring back to the forum how these ideas have been implemented, for better or worse. Furthermore, the approach is one of the top 5 most sought after analysis tools/frameworks. This webinar-based event shared a practitioner's experience – broken down into 8 learnings – enacting the sage advice from Ellen's address [See Table 1: Messages from How to Capture and Keep the Business You Want] and how it was put into practice across not one, not two but three business problems since that networking event. [See Table 2: The Business Problems' Context].

Lesson 1 | WIN/LOSS is an enabler, not the destination for the business problem

In none of the cases outlined in Table 2 (below) did the stakeholder ask for win/loss analysis. It is a technique that needs to be positioned with stakeholders as the means to the end – the enabler rather than the end goal to address the business problem. It requires the analyst to be able to decipher the business problem and propose the right approach to address the challenge. In all the cases, there was an opportunity to take advantage of the catalyst for change, whether that is people changing or looking at a problem through a different perspective than the previous management.

It is worth noting the WIN/LOSS analysis approach to the bespoke business problems were in fact bespoke business problems. There is another school of thought that recommends win/loss analysis should be an ongoing program of work. However, business cultures and scope of/positioning of the CI effort are stronger determinants of positioning win/loss analysis in that way.

Lesson 2 | Draft a proposal to increase transparency and overcome resistance

WIN/LOSS can fail before it shines due to the resistance from management, particularly sales management. The WIN/LOSS framework and approach are often seen as undermining the sales effort. As part of the sell in for case #2 [see Table 2] not only did a one-on-one take place with the new product area's lead, but also with each of its business development managers. The use of a proposal, transparently outlining the benefits of how win/loss could help achieve the goals, overcame the resistance presented. Proposals using previous WIN/LOSS executions, and how it delivered the results, allowed the next engagement to start just as successfully as the previous cases. Such was the success of presenting a proposal as part of case 1; the sales management wanted evidence-based insights to look at two additional areas outside of the proposed questions in the proposal, demonstrating proof of their commitment to the overall project.

Table 1: Messages from How to Capture and Keep the Business You Want

The Messages from Ellen Naylor
• Why Do It? Why It Isn't Done?
• Why It Works
• Strategic and Tactical Benefits of Conducting WIN/LOSS Analysis
• Who Benefits?
• WIN/LOSS Analysis Process
• How It is Ideally Done
• Logistics
• Know Me Before You Call Me!
• WIN/LOSS Templates – question ideas that are open and encourage the respondent to share
• Building Factual, Simple Analysis
• Qualitative Strengths/Weaknesses
• Successful/Less Successful WIN/LOSS Programs

Source: Ellen Naylor

Table 2: The Business Problem's Context

Three Cases Where WIN/LOSS Analysis was the Enabler behind the Business Questions	
Case #1	**Existing Mature Product** The catalyst was a change in sales management of an established part of the B2B market. The sales management had a desire to use evidence-based insight to prioritize between the sub-segments, to understand where to prioritize its efforts to continue on the trajectory of success. However, the success was not uniform. Question: where should it prioritize to continue with the success it was enjoying and what does it need to change to increase its success elsewhere?
Case #2	**New Emerging Product** The catalyst was successful and had been enjoyed through one sector, but questions were being posed how the emerging product could accelerate its success beyond this sector. Is it possible?
Case #3	**New Emerging Product** The catalyst lead to the appointment of a new proposition manager with a need to kick start the revenue stream through a 3rd party partnership prior to his arrival. The business question was focused on how the partnership accelerates revenue.

Source: Andrew Beurschgens

Lesson 3 | Quality at the input stage defines the overall quality of the output

In previous briefings on analytical techniques in action, the perennial question arises: is there a stage or a step that can be left out? [See Figure 2: Ingredients of Inputs, Activity and Outputs]. The best analogy is that of making a cake: leave out an ingredient and it might not taste the same. The same can be said for win/loss analysis. Choose the wrong accounts at the outset and you undermine the result. Do not engage with the appropriate stakeholders, and regardless of the final briefing's message, it will fall on deaf ears. In each of the three cases, engaging with the stakeholders, either as a collective group or one-on-one, was imperative in ensuring that expectations were set from the outset and that they could input appropriately.

Lesson 4 | Use SCQA to ensure you start in the right place and check for appetite for 'action'

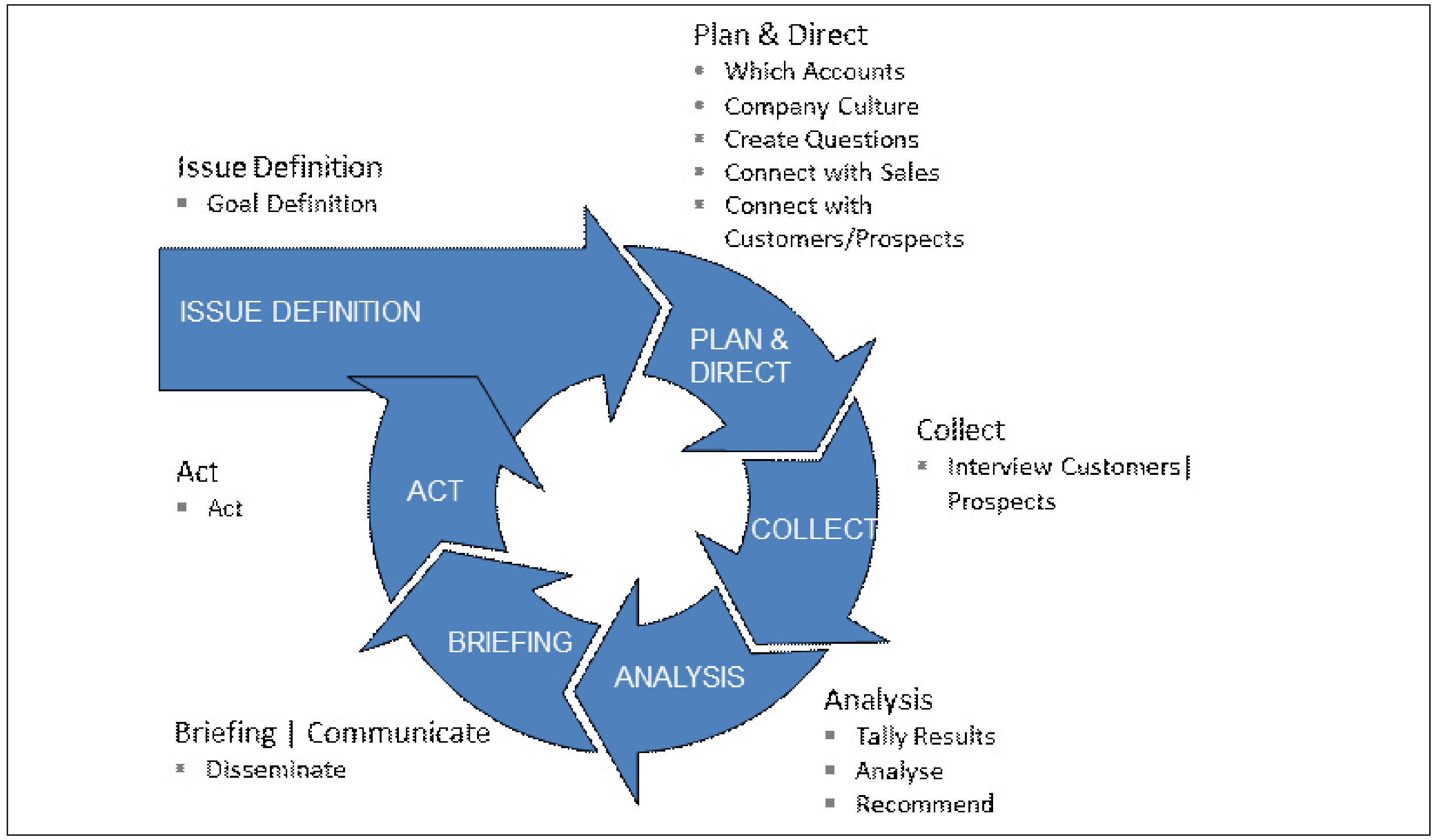
It is imperative that projects start in the right place, that they have a context and that they have a driver for action. Given that in each of the three cases the stakeholders did not explicitly ask for win/loss analysis, it was critical that each project started in the right place. To do this, use Barbara Minto's Pyramid Principle[3] to help frame the business question. What was the situation, the complication, and the question this frames? In all the three cases, the SCQ stage of SCQA [Situation, Complication, Question, Answer] helped succinctly frame the question, repeatedly and simply, when the stakeholders' senior management were quizzed on the focus of the insight.

When framing the question, it is also imperative to check the appetite for action. It is appreciated that this can be difficult in politically charged cultures and that it can, in fact, be the political culture that is driving the deliverable rather than the need for action. However, talking through the insights that might emerge from your proposal and questioning the right opportunity to sound out the real drivers for the decision support should encourage you to explore the hidden agenda!

Lesson 5 | Each WIN/LOSS execution can be different in shape and size

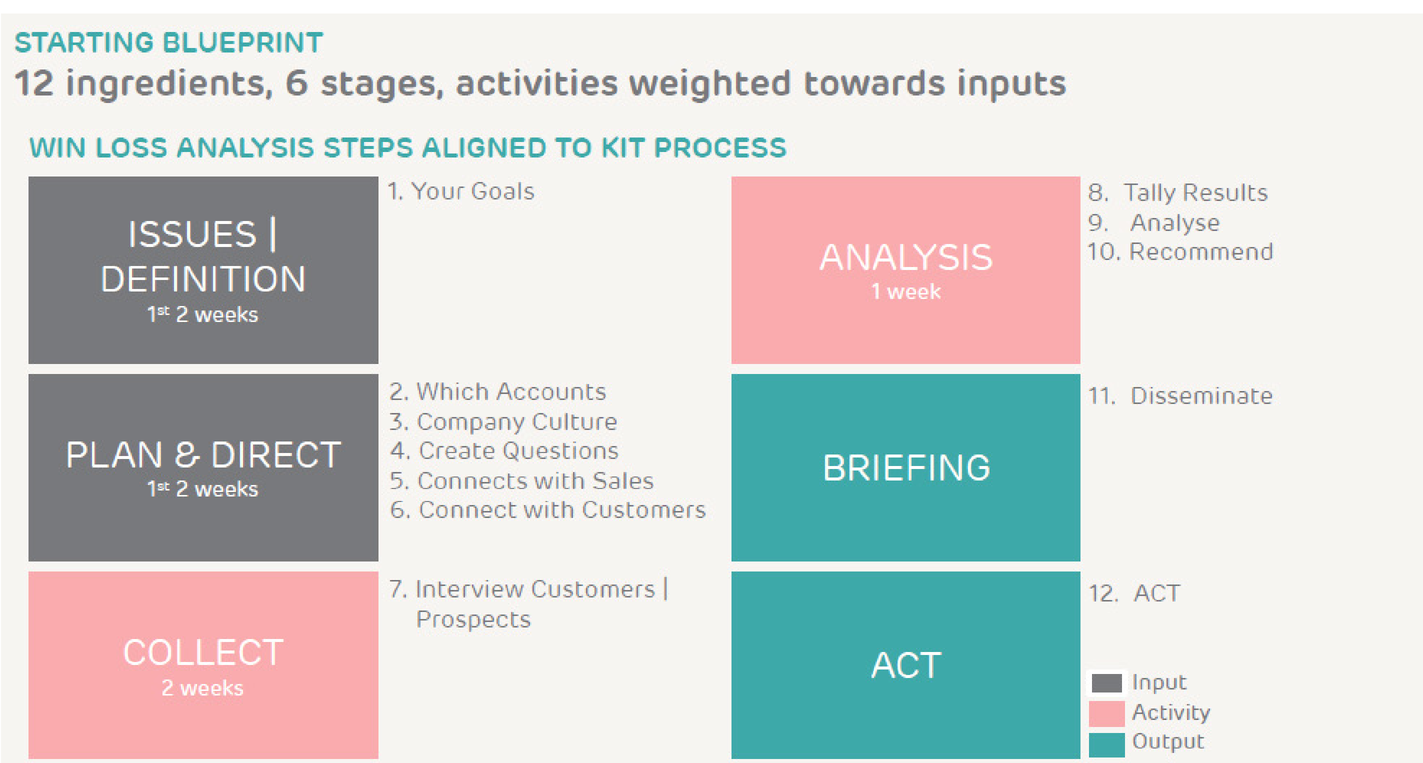
Each of the applications of Ellen's approach to WIN/LOSS were different. The difference was driven by stakeholders' comfort with the approach, the extent to which the category under review through WIN/LOSS was mature or not mature, and the level of stakeholder comfort with more qualitative than quantitative outcomes. All this drove three deliverables that were different in shape and size ranging from 72 transcripts

Figure 1: Aligning the WIN/LOSS process across the KIT process



Source: Herring, Naylor

Figure 2: Ingredients of Inputs, Activity, and Outputs



Source: Naylor

with won and lost opportunities, to another reliant just on 15 transcripts with 5 winning opportunities, 5 lose opportunities, and 5 who had yet to decide.

Ellen's message from the webinar[2] in 2015 was that if, after 3 or 4 interviews, the same message is coming back, there is no more value in undertaking 10 more interviews to hear the same thing. By focusing on 5 interviews per scenario – won, lost, or to be decided – ensured a message was synthesised from the feedback from the interviews.

Lesson 6 | Outsource or not to outsource, that is the question!

Several factors will define whether you are able to outsource some or all the program. These include overall program maturity, win/loss understanding, business culture in which the one-off deliverable or program is being launched, and where the program is sitting within the overall organization, to name but a few. If you are starting out and are unfamiliar with all the steps, then it is better to put the case forward for outsourcing the program, but working in partnership with the 3rd party you choose to ensure that maximum learnings can be had and brought back in house.

If you are familiar with the approach's steps, but your team is small, it may be best to work with a 3rd party on specific steps of the approach to ensure that the energies are best focused on the right areas, managing the internal stakeholders, undertaking the interviews as well as structuring the debrief. Having a 3rd party undertake the prospect interviewing can help to remove some of the bias that can be built into the analysis, as the 3rd party has no axes to grind and can probe further into the 'why' behind the statements shared in the structured conversation.

Lesson 7 | Simple analysis told in a story accelerates the question 'what now?'

Once the transcripts are back and the feedback has been tallied, simple hypotheses can be stated to drive the analysis. The simpler the analysis, the easier it is to synthesise into an active statement to drive action. For example, using a simple 2 x 2 [See Figure 3] clearly shows that Competitor B is a bigger threat to your company than Competitor D, because Competitor B enjoys a higher win rate than Competitor D, despite appearing as often as each other. The feedback in your transcripts, if structured well enough at the input stage, will give you the answers to 'why' you have beaten Competitor B and 'why' Competitor B has beaten you.

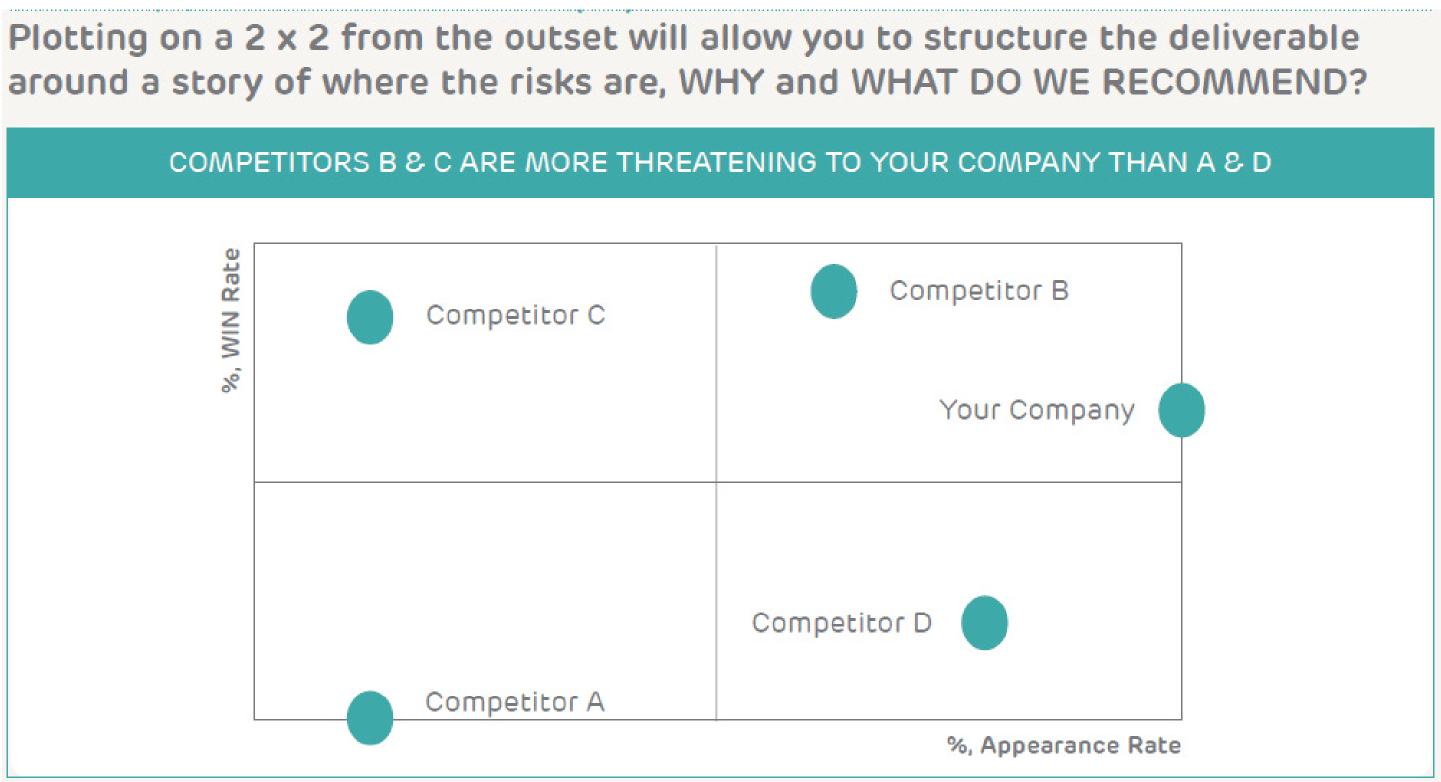
An approach that was adopted in the two of the cases outlined in Table 2 was a question that explored the future: 'Thinking back to the criteria you used to evaluate the project and its bidders, which broad area and sub categories would you invest in to deliver more value for your business?' This allowed the WIN /LOSS analysis projects to adopt a future looking perspective and present several hypotheses to kick start proposition development at a later stage.

Lesson 8 | Two acid questions to gain intangible measurement before ACTION is observed

When all is said and done, the objective of WIN/LOSS analysis and other business analysis, when packaged correctly into a coherent, action-oriented message, is action. However, this may be the first win/loss analysis executions too early in their cycle to understand the impact of action. These may be the first steps before they can be called a WIN/LOSS analysis program for they have not been repeated yet. To understand their intangible benefit, two questions come to mind: are we better off now than we were before the project and would we do it again? Obtaining 'yes' to both these questions is proof that the findings have landed in a compelling way. The message was simple and the analysis and synthesis was structured to deliver the intangible benefits.

Considering these 3 cases, were the intangible measures achieved? Yes! Are we at a stage now where we can say that action has been taken because of the project's findings? I would say the jury is still out explicitly, but implicitly, yes. Case 1 made a number of recommendations including deprioritizing a specific vertical given the unearthed bidding dynamics that were taking place in that sector; it outlined how each of the competitors were winning in each of the sectors, providing a set of

Figure 3: Simple Analysis to Drive Action



Source: Beurschgens

recommendations as to how to combat them given the decision criteria that were at play in that sector, and it proved that with line of business engagement, and the proactive showcasing of the value added services portfolio, a higher win/rate was enjoyed. In the other 2 cases, the jury is still out.

Networking Event Series

The SCIP UK Chapter hosts a series of webinars throughout the year. These events bring together practitioners from all corners of the discipline: service providers, consultants, academics and practitioners to address topics as identified from the previous events' feedback. The webinar format has also proven to attract a wider audience and reduces the barrier to participate because no additional travel is required during the day.

The series aims to increase the understanding and awareness of desired themes among SCIP members and non-members as well as take the discipline to different business practices through co-hosting opportunities with other professional organizations and membership bodies. It is about creating an environment to discover, enhance, exchange and problem solve. To understand the previous networking events' discussion themes, go to the SCIP UK chapter page for a complete running order as well as the link for the many that have been published in SCIP's Competitive Intelligence Magazine article, helping to form SCIP's Body of Knowledge.

The SCIP UK Chapter is grateful to all speakers' passion and ability to share, without whom there would be neither a networking event/webinar nor the creation of a rich exchange of ideas and learnings. The opportunity to speak at these events is open to anyone, United Kingdom-based or just passing through, subject to meeting the growing list of event topics. Engagement with attendees is typically around five streams, centred on case studies to bring out applied learnings, namely: 'Innovative Integration of CI within the Business', 'Professional Growth in CI', 'Analysis in Action', 'Mastering Information Overload' and 'Communicating with Impact'.

We encourage others to come forward to introduce the group to new perspectives, experiences and learning. Everyone's application of CI brings new perspectives as CI from one company to the next is different. What links all the prospective speakers, regardless of their background or role within the competitive intelligence profession, is a passion for the discipline. Along with all the volunteer speakers to date and those that have yet to

take advantage of the opportunity, they are all unique examples of characters continuing to fix the discipline more firmly on the map! What is the next step? Register your interest and details with Michelle Winter mwinter@scip.org to explore speaking opportunities and/or to be proactively kept abreast of forthcoming events in the UK.

References

1 'Q&A by Ellen Naylor | WIN LOSS Analysis | How to Capture and Keep the Business You Want'
SCIP Global eSeries, I am SCIP, May 2015,
http://bit.ly/2a8Aq9c

2 'From Lisbon to London and Denver to Rochester, the SCIP eSeries All Over'
I am SCIP, May 2015 http://bit.ly/2aaI44z

3 'The Pyramid Principle' Barbara Minto,
http://amzn.to/2a8HNur

ABOUT THE AUTHOR

Andrew Beurschgens *is the Head of Market Intelligence at EE, the consumer home and broadband line of business, which has been acquired by BT. In cooperation with other volunteers from both the practitioner and supply side of the competitive intelligence discipline, Andrew is acting Volunteer Chair of the UK Chapter. He is a former SCIP Catalyst and recent Distinguished SCIP Member Award winner, recognised for his volunteer services to the profession and its members, and has served on the SCIP Board.*