



# Learning from Client Churn, Lost Opportunities, Disqualified Leads, Lack of Appointments

## SOEE what's new...

Organizations continue to face competitive pressure to protect existing clients from **cancellation** or **churn**. In addition, new sales **opportunities** are **lost**, **marketing leads** are **disqualified**, and business development **appointments** are **never scheduled**. Each area offers data and insights to understand market perception and provide feedback on current product offerings, solutions, and service levels.

Aligning process to gather **comprehensive data analytics** in all four areas can provide **accelerated insights**. These insights will further support strategy, tactical planning, and transformation ideas to maintain a competitive edge in a very dynamic marketplace.

## SOEE what's the solution...

Assimilating new data will require focus and discipline outside of **sales** and **client retention**. Organizations may find the concept of focusing on churn, losses, and disqualifications difficult to support. The concept is not to reduce emphasis on new sales and client retention, but merely **design a complimentary process** to gather data in all areas that impact revenue retention and sales growth.

Aligning **process**, **data capture**, **picklist options**, **reporting**, and **technology** allows market insights to be captured at time of disposition, while information is current and relevant.

The following illustrations highlight areas of opportunity to gather new market analytics. By designing process and picklists that **capture reasons (data)** for both **wins** and **losses**, organizations will gain multiple perspectives to balance visionary strategy with tactical plan execution.

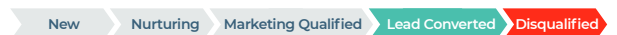
### CLIENT LIFECYCLE



### SALES PIPELINE LIFECYCLE



### LEAD GENERATION LIFECYCLE



### BUSINESS DEVELOPMENT LIFECYCLE



## SOEE what's the value...

Performance can be measured in many ways. Organizations need to **challenge** the **status quo** and continuously **search** for **new insights**. New information and viewpoints will further support talent acquisition, professional development, training initiatives, and improve leadership focus.

Understanding why clients churn, sales are lost, leads are disqualified, and appointments never set can provide **strategy alternatives** to **improving new sales** and **client retention**. In the current market environment, capturing **client**, **former client**, and **prospect feedback** will offer competitive intelligence to refine go-to-market strategy.

