



A GETREV FIELD GUIDE FOR DEMAND GENERATION TEAMS

The Win-Loss Signal Playbook.

How demand gen teams can turn deal outcomes into exegraphic targeting — and hand sales the signal behind every lead.

Six-step playbook + companion signal map · **2026 Edition**

INTRODUCTION

Why win-loss data belongs in demand gen

Every closed deal records why a buying group said yes or no. Those reasons point to account characteristics — and those characteristics show up as **exegraphics**: need signals, derived from AI models trained on real buying behavior, that demand gen can target.

Win-loss analysis already has a strong track record. Most of that value flows to sales and product today. Demand gen doesn't need to own the program to benefit — it needs access to the data and a repeatable way to translate it.

15–30%

Revenue increase for companies with a comprehensive win-loss approach¹

Up to 50%

Improvement in win rates — driven in part by better segmentation¹

84%

Of programs running 2+ years report higher win rates (63% overall)²

SIX STEPS

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STEP 01

Gather and validate win-loss data

Start with 6 to 12 months of closed-won and closed-lost opportunities from your CRM. Pull the recorded win or loss reason, industry, company size, deal size, and any notes. If your company runs win-loss interviews, ask for the summaries too.

~15%

How often buyer-reported reasons matched CRM entries in side-by-side comparisons.³ Validate reasons before you rely on them.

A short review with sales leaders or account executives confirms what a reason like "no need identified" really meant. Then focus on one segment at a time — one industry or one product line. Patterns are easier to see, and easier to act on, in a narrow slice.

STEP 02

Decode reasons into account characteristics

A win-loss reason describes the deal. This step describes the account behind it. For each reason, ask one question: **what was happening at this company that made them ready to buy — or not?** Most answers fall into five groups:

Growth or expansion	New locations, new service lines, funding, or rapid hiring
Technology change	A migration, a platform replacement, or tool consolidation
Leadership and personnel	A new executive, a new team, or a reorganization
Operational sophistication	Whether the team has the skills and roles to adopt a solution
Timing	Budget cycles, contract renewals, or competing priorities

Look for reasons that repeat. One deal is an anecdote. The same characteristic across five wins is a pattern worth targeting.

STEP 03

Translate characteristics into exegraphics

Every account characteristic leaves observable evidence: job postings, leadership changes, technology adoption, new locations. These need signals let you find accounts that share your winners' characteristics — before they enter a buying cycle.

Win signals tell you who to target. **Loss signals** tell you who to exclude, deprioritize, or revisit later. The signal map below and on the next page shows common examples.

Won deals: find more accounts like these

SIGNAL MAP • 1 OF 2

REASON RECORDED	WHAT IT SAYS ABOUT THE ACCOUNT	EXEGRAPHIC SIGNAL	HOW DEMAND GEN USES IT
New virtual care program needed reliable connectivity across sites	Healthcare provider expanding virtual or at-home care	Hiring telehealth or virtual nursing roles; opening multi-site clinics	Target these accounts; tell sales which expansion signal they showed
Replacing a legacy system as part of a cloud migration	Actively moving to the cloud	Hiring cloud architects or migration engineers; new cloud platform in the tech stack	Target during the migration; share the migration signal with SDRs
New security leader building out the program	Recent change in security leadership	New CISO or security leadership hire; growing security team	Reach the new leader early, while priorities are being set
Needed to scale operations after funding	Growth is outpacing current processes	Recent funding round; headcount growth in sales and operations	Target soon after funding, while budget is fresh
Consolidating tools after an acquisition	Integrating acquired companies	Recent acquisition announced; hiring IT integration roles	Target during integration; lead with consolidation messaging
Team was ready to adopt quickly	High operational sophistication	Dedicated ops or analytics roles, such as RevOps or data engineering	Use as a qualification layer to prioritize accounts

STEP 03 • CONTINUED

Lost deals: qualify out, or wait for the right momentSIGNAL MAP • 2
OF 2

REASON RECORDED	WHAT IT SAYS ABOUT THE ACCOUNT	EXEGRAPHIC SIGNAL	HOW DEMAND GEN USES IT
No need identified	Account lacked the triggers present in won deals	Absence of win signals, such as no virtual care hiring or site expansion	Exclude or deprioritize until win signals appear
Lacked resources to implement	Low operational maturity for this function	No dedicated team for the function; few related roles	Deprioritize, or target once hiring for the function begins
Chose to build in-house	Strong internal engineering capacity	Large engineering team; hiring platform or internal tools engineers	Deprioritize, or adjust messaging to build vs. buy
Budget frozen	Contraction or cost-cutting	Layoffs or hiring freeze announced	Pause; revisit when hiring resumes
Renewed with incumbent vendor	Locked into an existing solution	Competitor product in the tech stack	Time outreach to the renewal window
Not a priority this year	A timing issue, not a fit issue	New leadership or hiring tied to a related initiative	Monitor; target when signals appear

Examples are illustrative. CRM loss reasons are often incomplete — confirm them with sales before building campaigns around them.

HOW TO READ THE MAP

A lost deal isn't always a bad-fit account. Many loss reasons are timing problems — watch for the signal that says the moment has changed, then re-engage.

STEP 04

Apply signals in demand campaigns

Once you know which signals predict a win, build them into every stage of campaign planning.

Audience	Start with standard firmographic filters, then add win signals as a qualification layer. A list of healthcare providers becomes a list of providers hiring telehealth nurses or opening new clinics.
Exclusions	Use loss signals to remove or deprioritize accounts — a competitor locked in, a recent hiring freeze.
Messaging	Speak to the change the signal reveals. An account expanding virtual care needs a different message than one consolidating tools after an acquisition.
Timing	Signals have a shelf life. Reach accounts while the change is happening — soon after a new leader starts or a funding round closes.
Channels	Apply the same signal-based audiences across content syndication, webinars, paid media, and outbound, so every touch reaches the same buying groups.

STEP 05

Pass signal intelligence to sales

A lead that arrives with its signal attached is easier to work. When an account engages because it matched a win signal, make sure sales and SDRs know which signal it was and why it matters.

- Add a signal field to the lead or account record in your CRM, such as *"Signal: hiring telehealth nursing roles."*
- Include the signal in lead routing notes or handoff alerts.
- Share a short guide explaining what each signal means and how it connects to past wins.

"Your team just posted several telehealth nursing roles" opens a better conversation than "You downloaded our ebook."

The signal gives reps a relevant reason to reach out — and doubles as a qualification check further down the funnel.

STEP 06

Measure and refine

Compare accounts that matched a win signal against those that didn't. Track the same metrics for both groups:

Engagement rate on campaigns

Conversion to opportunity

Win rate and sales cycle length

Share of losses marked "no need identified"

If signal-matched accounts perform better, expand to another segment. If they don't, revisit the signal: it may be too broad, too late, or not the real driver of the win. Repeat every quarter — markets shift, and so do the signals that predict a win.

GET STARTED

Quick-start checklist

Run one segment through the full loop in a single quarter.

- ☐ Request 6 to 12 months of closed-won and closed-lost data for one segment
- ☐ Validate the most common win and loss reasons with sales
- ☐ Identify the account characteristics behind repeat reasons
- ☐ Map each characteristic to one or more exographic signals
- ☐ Build a signal-qualified audience and an exclusion list
- ☐ Add signal context to lead handoffs
- ☐ Compare signal-matched accounts to the rest after one quarter

WORKED EXAMPLE • ILLUSTRATIVE

Networking infrastructure in healthcare

A company sells networking infrastructure to healthcare providers. Here's how the six steps play out.

01	Gather and validate	The team pulls 12 months of healthcare opportunities. "No need identified" is a top loss reason — sales confirms those accounts had no near-term project.
02	Decode	Won deals share one characteristic: the provider was expanding virtual or at-home care, which put new demands on its network.
03	Translate	That characteristic shows up as signals: hiring telehealth or virtual nursing roles, and expanding to multi-site clinics.
04	Apply	Demand gen narrows the audience to providers showing those signals and leads with messaging about supporting virtual care across locations. Accounts without expansion signals are deprioritized.
05	Pass it on	Each engaged account reaches sales with its signal noted: "Posted virtual nursing roles and announced two new clinic locations."
06	Measure	The team compares signal-matched accounts to the rest of the healthcare audience and tracks whether "no need identified" losses decline.

SOURCES

1. Clozd summary of Gartner, "Tech Go-to-Market: Three Ways Marketers Can Use Data From Win/Loss Analysis to Increase Win Rates and Revenue."
2. Clozd, "Win Loss Analysis: The Ultimate 2026 Guide," citing the 2025 State of Win-Loss Analysis report.
3. Clozd, "The Ultimate Product Marketing Win-Loss Playbook."

Put your win-loss signals **to work.**

GetRev delivers AI demand generation as a managed service. We translate the patterns in your wins and losses into exographic targeting, then run demand campaigns that reach the buying groups most likely to buy — with the signal attached to every lead.

Exographic Targeting	Find the buying groups that look like your wins
Campaign Simulation	Predict response before you spend
Content & Agent Syndication	Reach those buying groups across every channel

Generate demand with AI precision. getrev.ai

