BoostWinRate

A dynamic go/no-go framework for major pursuits, based on confidential extraction and synthesis of what your team sees

How to build a go/no-go decision system

The people who work on a pursuit know far more than anyone types into the CRM. Compare what 1 firm recorded about a $4 million bid for a regional bank with what 4 people on its pursuit team saw.

What the firm recorded in its CRM

Stage	**Proposal submitted**
Go/no-go score	**78 out of 100**
Win probability	**60%**
Outcome	**Lost in week 9**
Loss reason	**Price**

What 4 people on the team saw, and never wrote down

Week 2. Solution architect
"The bank's operations staff asked us 3 questions about how we hand over systems in the first month."

Week 3. Account executive
"On a conference panel, the bank's new CTO said that his last vendor change took 14 months."

Week 4. Proposal manager
"Procurement added a question about the help we would give if the bank ended the contract."

Week 5. Pricing lead
"Procurement asked us to price the transition phase as a separate line."

None of these facts seemed worth raising on its own. Anyone who put them together would have seen that the bank cared more about a safe transition than about price. The firm led its proposal with price, and the bank chose a competitor that opened its proposal with a 90-day transition plan.

Most firms already have go/no-go gates. What most firms lack is the intelligence that should decide each gate: the context, experience and expertise that people on the pursuit team gain every week but never record.

A test you can run this week. Pick your last major loss. Ask 3 people who worked on it what they heard from the client that never went into the CRM. If you get 3 different answers, this framework is for you.

This is not another go/no-go checklist. In this framework, we explain how to combine what each person on your team learns during a pursuit but never writes down, and how to turn it into an action plan: the conditions your pursuit really has to meet, and what your team can do to improve its chances of winning.

KP, Boost Win Rate
Draft for review, September 2026. For 14 years, I've interviewed and worked with sales and delivery leaders on Fortune 500 finalist presentations.

We built the examples in this draft from pursuits that people described to us, and the figures are illustrative.

Insight #1: Your gate criteria are too vague to give you the context that decides a pursuit

The go/no-go score is the least informative number in your CRM, because the pursuit lead sets it in week 1, when the team knows the least, and 1 number can't hold what 9 people know.

61%
of RFP teams name price as the main reason they lose.[1]

15%
of the loss reasons in sellers' CRM systems matched what buyers said in interviews.[2]

44%
of the reasons that sellers recorded, such as "price," described an outcome instead of a cause.[2]

Every answer in the table below was accurate when someone scored it, and every one of them left out the context that decided the pursuit, because a checklist question leaves no room for it.

What the go/no-go checklist asked	How the team answered	The context that decided the pursuit
Is the budget approved?	**Yes**	The COO's budget covered only the first phase in this fiscal year, and the firm proposed a 2-year program.
Is the incumbent vulnerable?	**Yes**	The incumbent had offered the client a price cut for renewing early, and only a partner of the firm had heard about it.
Is the timeline realistic?	**Yes**	The client had to meet a new state permit deadline, 6 months earlier than a standard schedule allowed.
How strong is our relationship?	**4 out of 5**	The client's evaluators had worked with a competitor's delivery lead at their previous company.

> **When firms add gates and scoring rigor, they make this worse.** Every added gate is another meeting in which people report what sounds important, and the facts that decide a pursuit don't sound important. Firms fix this by capturing the context behind each answer from the people who have it, and by writing the gate conditions from that context, not by scoring more strictly.

[1] Loopio, RFP Response Trends and Benchmarks Report, 2026.
[2] Clozd, comparison of CRM loss reasons with buyer interviews.

Insight #2: Your team gets new information that nobody captures or synthesizes

Your team learns something new almost every week, but nobody combines what different people heard.

On average, 9 people contribute to each RFP response,[1] and each of them hears different things from the client, its partners and its competitors. Most of what they hear seems too minor to mention in a meeting. In a 1-on-1 walkthrough of the pursuit, week by week, the same people describe what happened, and the minor facts come out. When Stasser and Titus spread the facts needed for the best decision across a group's members, only 18% of groups chose the best option.[3]

Example 1: The finance lead, the alliance manager and the proposal manager each heard a routine detail about the client's budget and plans.

Finance lead
"Procurement asked whether we could defer 40% of our fees to next fiscal year."

Alliance manager
"Our contact at the client's ERP vendor said they're scoping a related project with the same client."

Proposal manager
"A late addendum asked how our solution would fit the client's ERP roadmap."

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The bigger picture (insight)
The client is moving its spending onto its ERP vendor's roadmap, so a standalone bid will compete with that project for the same budget.

How the strategy changes (action)
The firm offers to deliver the work as the ERP vendor's implementation partner, with fees phased to match the ERP program.

Example 2: These insights seem minor, but they come up during interviews as puzzle pieces that paint a clearer picture when combined.

Proposal manager
"The client asked 3 separate questions about where its data would be stored."

Solution architect
"An IT manager mentioned that the security team had a difficult audit last year."

Account executive
"The client's new CISO now signs off on every new vendor."

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The bigger picture (insight)
The client would choose mainly on security, and the CISO would have the final say.

How the strategy changes (action)
The team brings its security lead to the orals and meets the CISO before submitting, instead of treating security as 1 section out of 12.

[1] Loopio, RFP Response Trends and Benchmarks Report, 2026.
[3] Stasser and Titus, Journal of Personality and Social Psychology, 1985.

Insight #3: Not just a checklist, but what to do about it

After a loss, people write down vague reasons, but in a confidential interview, the same people explain what actually happened and what to do next time.

The people who saw a problem early usually know what would have fixed it, so the interviewer asks for both, and their answers become the action plan for the next pursuit.

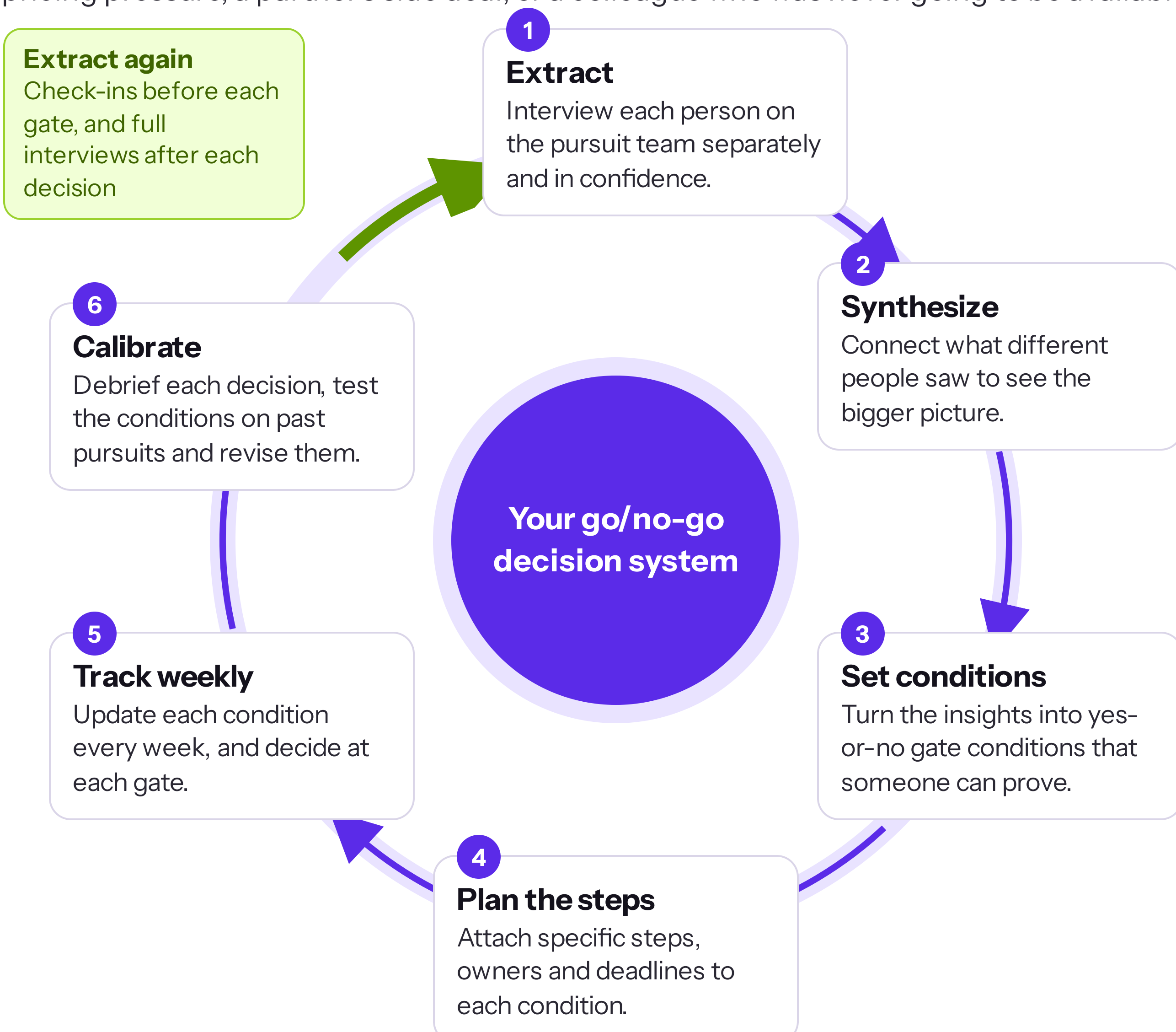
What gets written	What the team told us in confidence	What to do next time
"Pricing was a factor."	Procurement had twice named the incumbent's renewal price as the benchmark, and the pricing lead heard it both times. We priced the first year 18% above it.	**Ask procurement in week 1 which price the evaluators will compare against. Price the first year to that benchmark, and recover margin in years 2 and 3 through scope the incumbent doesn't offer.**
"The relationship could have been stronger."	Our only contact at the client was in procurement, and nobody from our firm had met the executive who owned the budget.	**Ask a partner that already works with the client, such as its cloud or ERP vendor, to co-host a small lunch on a problem that executive has spoken about publicly.**
"Resourcing was tight."	The delivery lead we named in the proposal was committed to another client until the end of the first quarter.	**Name both a primary and a backup delivery lead in every proposal, and ask their managers to confirm in writing how much of their time is free for the first 90 days. Federal buyers can reject a proposal whose named lead is unavailable at award.**[4]
"The client went in a different direction."	The client appointed a new COO in week 3, and she wanted 1 vendor for 3 services. We had bid on only 1 of them.	**When the client appoints a new executive during a pursuit, ask that executive within 2 weeks what they would change about the current vendor mix. In the pursuits people described to us, new executives often consolidated vendors in their first year.**

[4] GAO, Paradigm Technologies, B-409221.2, 2014.

The framework

A firm runs this framework as a cycle of 6 elements and repeats the cycle with every major pursuit.

1 person from outside the pursuit's reporting line, whom we call the interviewer, runs all 6 elements, and the pursuit team spends about 3 minutes a week on updates. In a 1-on-1 walkthrough, people mention the routine facts, and in confidence, they mention the rest: pricing pressure, a partner's side deal, or a colleague who was never going to be available.



Why the cycle returns to extraction

What people on the team know changes every week, so a firm that extracts only once decides with facts that are weeks old. Before each gate of a live pursuit, the interviewer holds a 10-minute confidential check-in with each team member, and after each decision, the interviewer runs full 30-minute interviews. Each round updates the conditions and the plans.

Why each element matters

Each element prevents a specific mistake that we saw repeatedly in the pursuits people described to us.

In a 2023 survey, 62% of companies that used a third party for win/loss interviews were satisfied, against 28% of those that ran the interviews themselves.[5]

Element	What happened without it	What happens with it
1 **Extract**	In the group debrief, the pricing lead said only that "pricing was a factor."	In a 1-on-1 interview, the same pricing lead said that procurement had twice named the incumbent's renewal price as the benchmark.
2 **Synthesize**	An analyst heard that a similar project had stalled 2 years earlier, the engagement manager knew the budget covered only the first phase, and nobody connected the 2.	The interviewer connects the 2 facts, sees that the client won't trust another large program, and the firm proposes a 6-week diagnostic first.
3 **Set conditions**	2 pursuit leads at the same firm scored the same client relationship as a 2 and a 4, and neither had met the budget owner.	The interviewer writes the condition as "someone from our firm has met the budget owner," and the account executive answers with a calendar entry.
4 **Plan the steps**	The team marked the condition "at risk" for 6 weeks and submitted the proposal anyway, because nobody had a step to take.	The plan names the step, the owner and the week: the alliance manager asks the client's ERP vendor to co-host a lunch, and the account executive meets the budget owner in week 2.
5 **Track weekly**	In week 5, the account executive learned that the new CTO would decide, but the plan still named procurement as the decision-maker.	On Friday, the pursuit lead marks the CTO meeting as blocked, and on Monday, a former colleague of the CTO calls him.
6 **Calibrate**	A firm kept a condition that would have stopped its 2 largest wins, because nobody tested it on past pursuits.	A test on 10 past pursuits shows that 1 condition would have stopped a win, so the interviewer rewrites it first.

[5] Pragmatic Institute and Clozd, State of Win-Loss Analysis Report, 2023.

How it fits with what you already use

Keep your gates and your qualification method, and use this framework to supply the evidence for each check.

With Shipley's decision points and MEDDICC's fields, a team knows what to check, but not how to find out what its own people already know.

What you already use	What it asks	What this framework adds
Shipley decision points	Should we pursue, bid and submit?	**Conditions based on your own wins and losses, updated with new check-ins before each gate**
MEDDICC: Economic Buyer	Who owns the budget?	**Proof that someone met that person, and the steps to arrange the meeting**
MEDDICC: Decision Criteria	How will the client decide?	**What the client asked about more than once, and who attended which meetings**
MEDDICC: Competition	Who else is bidding?	**What partners and the client's own staff say about the incumbent**

Where this framework can fail

- If leaders react badly to what they hear, people will stop talking, whatever the written rules say.
- Conditions drawn from 5 to 10 pursuits are hypotheses. Test them against every new outcome.
- The quality of each insight depends on the interviewer's experience, so the interviewer checks each insight with 1 or 2 people on the team before the gate call.
- A pursuit shorter than 3 weeks leaves little time for check-ins before each gate.

Running it, part 1: Extract

The interviewer talks with each person for 30 minutes, 1 at a time, and asks for dates and facts before opinions.

1. **Within 10 days of a decision,** the sponsor invites the 3 to 6 people who worked on the pursuit and attaches the confidentiality rules. The sponsor's assistant books the slots the same day, because when busy people schedule themselves, a 2-week process often takes 6 weeks.
2. **The interviewer comes from outside the pursuit's reporting line,** from another business unit or an outside firm, and talks with team members before their managers.
3. **Before each gate of a live pursuit,** the interviewer holds a 10-minute check-in with each team member and asks 2 questions: "What have you learned since the last gate?" and "What could change our decision or our plan?"

The questions, in order

1. "Can you walk me through the pursuit week by week, from the day it arrived?"
2. "At the go/no-go meeting, what did you know that wasn't reflected in the score?"
3. "What did you learn after that meeting, and did the team change its plan?"
4. "In many pursuits, someone heard something early that turned out to decide the outcome. Did that happen here?"
5. "What did the client ask about more than once, and who was missing from a meeting you expected them to attend?"
6. "What could the team have done about it, who would have done it, and by which week?"
7. "What didn't I ask that I should have?"

What each person hears that nobody else does

Proposal or bid manager
The proposal manager knows which questions the client asked more than once, and which requirements appeared late.

Solution architect
The solution architect hears what the client's staff say about the incumbent when their managers aren't in the room.

Finance or pricing lead
The finance lead knows which line items procurement pushed on, which shows what the client plans to compare.

Account executive
The account executive sees whom the client's people defer to in meetings, who is often not the person at the top of the org chart.

Delivery lead
The delivery lead knows which of the client's staff asked about working with the team, which shows who expects to run the project.

Alliance manager
The alliance manager hears what the client's other vendors know about its budgets and upcoming decisions.

Running it, part 2: Synthesize

The interviewer connects facts that different people heard, sees the bigger picture that nobody saw alone, and states what the team should do differently.

1. **Within 24 hours of each interview,** the interviewer transcribes the recording and removes names, companies and identifying details, with AI models that run on the interviewer's own computer.
2. **Within 48 hours,** each person reviews their own points and marks each one to be used, used only without any detail that could identify them, or not used.
3. **The interviewer sorts the points by what they reveal:** the client's real priorities, who will decide, the competition and the firm's ability to deliver.
4. **The interviewer looks for points from different people that explain each other,** and asks: "What would have to be true for all of these to be true?"
5. **The interviewer writes each insight with its consequence:** what the client really cares about, and how the pursuit's focus, message or team should change.
6. **Before the gate call,** the interviewer checks each insight with 1 or 2 people on the team.

A worked example: the regional bank from the cover

Solution architect
The operations staff asked 3 questions about the handover in the first month.

Account executive
The new CTO said that his last vendor change took 14 months.

Proposal manager
Procurement asked about help if the bank ended the contract.

Pricing lead
Procurement asked for the transition to be priced separately.

The insight, written by the interviewer
The bank fears another long, painful vendor change more than it cares about price. The firm should lead its proposal with a 90-day transition plan, name the transition lead and offer help if the bank ever ends the contract. The account executive should ask the CTO what went wrong in his last vendor change.

A restated fact, which changes nothing
"The bank asked several questions about the transition."

An insight, which changes the pursuit's focus
The bank will choose the vendor that makes the transition safest, so the firm should compete on transition risk, not on price.

How to get honest answers in the interviews

- Ask for dates and documents rather than opinions. People answer "When did you first meet the CIO?" more honestly than "How was the relationship?"
- Ask "What could the team have done about it?" after every point the person raises. The people who saw a risk early usually also know what would have dealt with it.

Running it, part 3: Conditions, weekly tracking and calibration

Each condition has a yes-or-no question, a proof, a gate and a fallback, and the interviewer tests new conditions on past pursuits before the firm adopts them.

Typical checklist criterion	Condition that someone can prove
Relationship strength, from 1 to 5	Before gate 2, someone from our firm can explain, in the client's own words, why the client is running this RFP now.
Solution fit, from 1 to 5	If the client's executives describe a painful past vendor change, the team opens the proposal with a transition plan and names the transition lead before gate 2.
Incumbent risk, from 1 to 5	By the second gate, the team knows when the incumbent's contract ends and has spoken with 2 of the client's users about the incumbent's service.

Every week of a live pursuit

On Monday, the interviewer sends the pursuit lead the open conditions for the next gate and the step that matters most that week. On Friday, the pursuit lead takes about 3 minutes to mark each condition as done, not yet done or blocked. Before the next Monday, the interviewer sends the next step from the plan for each blocked condition. At each gate, the sponsor and the pursuit lead hold a 15-minute call and decide to continue, pause or withdraw.

Before the firm adopts new conditions

The interviewer picks 5 to 10 pursuits from the last 12 months, finds the week in which each new condition would have failed, does the same for the current criteria, and adds up the senior hours spent after the week in which each pursuit would have been stopped.

An example with 10 past pursuits, 5 won and 5 lost	Current criteria	New conditions
Losses that the firm would have stopped	0 of 5	**4 of 5**
Wins that the firm would have stopped by mistake	0 of 5	**1 of 5**
Median week in which the firm would have stopped	No stops	**Week 2**
Senior hours that the firm would have saved	0	**1,120**

These figures are illustrative. A firm can't prove a result with 10 pursuits, so the interviewer repeats the test as more pursuits close.

Running it, part 4: Confidentiality rules and the operating procedure

The interviewer can't protect a point that only 1 person could know, so the rules say what happens to those points.

1. **No quotes, names or roles.** The interviewer writes every finding in their own words, and mentions a person's role only if that person agrees.
2. **Protection for points that only 1 person could know.** If a point could reveal who said it, the interviewer uses it only with that person's approval and removes any detail that could identify them.
3. **Each person reviews their own points first.** Within 48 hours, each person marks every point to be used, used only without identifying details, or not used.
4. **Local AI only.** The interviewer transcribes and analyzes recordings with AI models on a computer the interviewer controls, never with a cloud AI service, and deletes them after a fixed period.
5. **The firm agrees not to identify anyone.** Leaders agree in writing not to ask for recordings or transcripts and not to try to find out who said what. The firm learns how many people took part, not who took part.

If someone describes illegal conduct, harassment or a risk to someone's safety, the interviewer may be required to act on it, and says so in the invitation.

The operating procedure for a major pursuit

Step	When	Who	If it doesn't happen
1. Set the conditions and plans for each gate	At the go decision	Interviewer, approved by the sponsor	The sponsor doesn't approve the pursuit budget.
2. Send the open conditions on Monday, mark each one on Friday, and send the next step for each blocked condition before the next Monday	Every week	Interviewer and pursuit lead	After 2 missed Fridays, the interviewer tells the sponsor.
3. Hold 10-minute confidential check-ins with the team	Before each gate	Interviewer	The sponsor decides with the Friday updates only, and records that nobody was interviewed.
4. Decide to continue, pause or withdraw	At each gate	Sponsor and pursuit lead	The sponsor pauses the pursuit until the call happens.
5. Interview the team and connect what people said into insights	Within 2 weeks of the outcome	Interviewer	The interviewer reports with the interviews completed.
6. Revise the conditions and plans	Each quarter	Interviewer, sponsor and leaders	The firm keeps the current conditions until the next review.

Your review

Please share any pursuit tactics, and I'll credit you as a contributor on the website and in the framework report when we publish it.

Feel free to send me an email with your answers, or schedule a call to discuss them.

1. How to progress a stalled deal

2. A couple of common reasons to drop a deal when the go/no-go says go

3. Where would this framework fail at your firm?

4. Any other pursuit go/no-go decisioning or process insights?

5. A pursuit where the real story never made it into the CRM

How you'd like to be credited

- [ ] By name and title: __________
- [ ] By role only: __________
- [ ] No credit

Sources

We took the research and survey figures in this draft from the sources below, and we built the pursuit examples from pursuits that people described to us.

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