



CASE STUDY

Community Brands went **all-in** on win-loss analysis with Clozd

About **Community Brands**

Community Brands makes software that fuels social good. Over 100,000 clients in associations, nonprofits, and K-12 schools use Community Brands’s software to succeed faster, grow stronger, and achieve more social good. Community Brands’s software offerings include membership management, career centers, learning, accounting, mobile giving, peer-to-peer fundraising, donations, admissions, enrollments, and events. Community Brands empowers all of its diverse customers to create memorable experiences for their members, donors, volunteers, and families.

Problem

Community Brands has been growing fast, organically, and through acquisitions. Throughout this period of growth, Community Brands’s various sales teams would try to gather information on why they would lose deals, so as the product marketing team grew, win-loss became a natural adoption. However, they still didn’t know why they were losing deals. The win-loss surveys the product marketing team sent out were not

getting much of a response largely because the reachout was perceived as an attempt to re-engage potential customers. When Tirrah Switzer Community Brands’s Director of Product Marketing) would get someone to sit down and interview, she felt like she wasn’t getting the information she wanted out of the conversation. “The skills I developed for case study interviews didn’t necessarily translate well into win-loss interviews,” said Switzer.

Solution

Community Brands needed a solution with better win-loss feedback response rates and that would ultimately get to the root of why each deal was won or lost. Ideally, the solution would also report that information back in a digestible format. After conferring with the product marketing community, Switzer reached out to Clozd because she believed they provided the best solution for her needs.

Switzer found that Clozd fulfilled all of her requirements for a solution. Clozd’s experience conducting win-loss surveys and interviews meant that they could achieve a higher response rate. And, Clozd’s qualified consultants had the interview experience and skills to uncover the real reason each deal was won or lost. Switzer wasn’t necessarily looking for software but found Clozd’s robust reporting platform to be a happy surprise.



“ I felt that because I did [win-loss] DIY, I **knew how important it was to have someone who was an expert at interviewing...** [It’s] easier to do a case study than a win-loss [interview].”

Tirrah Switzer

Result

After implementing Clozd’s win-loss analysis program, Community Brands was able to find value in two ways. First, they found value by leaning on the expertise of Clozd’s consultants. Having a relationship with a consultant who understands their clients and what is important to the company was enormously valuable to Switzer. Not only could their dedicated Clozd consultant teach Community Brands’s team how to gather the best information, they also could identify trends and themes across interviews that Switzer said she would have missed. From the interviews conducted by Clozd, Community Brands found a competitive advantage that they had entirely missed. Just by talking about this newly discovered competitive advantage, they increased win rates.

The second way Community Brands found value in Clozd’s solution was by ensuring that every department was taking advantage of the win-loss insight Clozd uncovered. Sharing insights widely helped specific departments figure out what they are good at and need to continue doing, as well as helped them see what needs to be changed. Product, support, marketing, and sales are all using the valuable

information provided by Clozd. How did that happen? Switzer drove internal adoption of the win-loss program and evangelized the importance of the data gathered from win-loss surveys and interviews. When Clozd presented its final readout, she made sure to include the leaders from every department. She showed each person the findings, shared various quotations from the interviews, and gave them the next steps for their department and for the entire company.

A lot of the win-loss findings Clozd provided Community Brands validated what they were doing right. For example, Switzer went to the product team and saw that its product roadmap was lined up well, which was a huge morale boost. Community Brands has been able to use the information Clozd gleaned to roll out accurate competitive ads and improve messaging and pricing. Win-loss information also helped Community Brands build collaboration between sales and product marketing. Because sales reps know Switzer is trying to figure out why they are winning and losing deals and is going to do something with the information, they are excited to collaborate.

Going forward

“ We are building a culture where everyone is invested in knowing win-loss information. **People are excited to digest the feedback from win-loss interviews.** We now have multiple product lines requesting to take part in the win-loss program.”

Tirrah Switzer