

Closed Lost Opportunity Stage



When a customer opts not to proceed with installation

Sometimes, customers within our Primary Market Area (PMA) choose not to hire us for their installation. We want to know **when** this happens and **why**, and you can help us do that.

When you know a customer isn't going to hire us for their install, change the Opportunity stage to "Closed Lost" and select a loss reason. The Closed Lost stage is only related to the install. So even if you sell an IKEA kitchen, if the customer doesn't want an install, the stage should still be marked Closed Lost.

Why we track Closed Lost Opportunities

We use the number of open Opportunities to estimate our business needs for things like staffing. When the number of open Opportunities isn't accurate, the rest of our numbers are affected. So, it's important to update the Opportunity stage to Closed Lost if you know a customer isn't going to hire us to do their install.

Why we track loss reasons

There are many reasons a customer may choose not to proceed with an installation. Knowing these reasons helps us identify pain points and improve our service.

Process

As soon as you know a PMA customer won't be hiring us for their install:

1. Change the **Stage (1)** of the Opportunity to "Closed Lost."
2. Select a **Loss Reason (2)** from the drop-down menu.

If you try to save before you've included a **Loss Reason**, you'll receive the pop-up error below.

