

Lost Deal Analyzer — SOP

How this module works

Automatically tracks every lead marked Lost, helps you see why deals are being lost, and gives you tools to win some of them back. It never marks a lead lost itself — that always happens elsewhere (Leads), and the moment it does, this page picks it up automatically.

SECTIONS

● KPI Row Total Lost Deals, Value Lost This Month, Avg Days to Loss, Recovery Potential, and Win Rate for the selected period.	● Loss Patterns Loss by Reason and Loss by Source — where deals are actually falling through.
● Lost Deals Table Every lost deal, filterable by source/reason/team member/date, with per-deal actions.	● Recovery Opportunities The 6 lost deals currently scoring highest on a live, deterministic recovery score — no AI call, computed instantly from the reason, engagement, and how recently it was lost.

STEP-BY-STEP WORKFLOW

- 1 A lead becomes Lost automatically the moment its status changes to Lost anywhere in the app — nothing to do here to make it show up.
- 2 Set a loss reason on each deal (click the reason badge in the table) — patterns below only work once reasons are logged.
- 3 Click Analyze on a deal for an instant, deterministic read on why it was lost and a suggested win-back message.
- 4 Click Bulk Insights for the same kind of read across every lost deal at once — top loss reason, missing reasons, recoverable deals.
- 5 Use Win-back to send a ready-made WhatsApp message, or Reactivate to move a deal straight back into Warm, Hot, or New.
- 6 Export (top-right) respects whatever period and filters are currently active.

CONNECTIONS

● Leads Every lost deal here is a real Lead — marking a lead Lost anywhere in the app automatically populates this page, and Reactivate sends it straight back into the Leads pipeline.	● Proposals Shows whether a proposal was ever sent before the deal was lost — a strong signal for how early the deal actually fell through.
● Settings — Categories Loss reasons are managed from Settings, not hardcoded here — adding or renaming a reason there shows up on this page immediately.	

