



Suhas Bhairav

AI Sales Win Loss Analysis Report Guide

**Turn CRM notes and emails into actionable
win/loss insights for high-value deals**

Deliver a repeatable AI-driven framework to reveal
why deals win or lose.

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What to Automate

This section defines automation targets for AI-assisted win/loss analysis. It clarifies what to automate and what must be human-reviewed.

Key move Start with one product line; pilot 2 weeks; document learnings.

PRACTICAL CHECKLIST

- 01** Automate: extract deal themes, competitor mentions, and buyer signals from notes and emails.
- 02** Automate: summarize each deal's narrative into a concise win/loss reason.
- 03** Keep human in the loop: review automated summaries for accuracy and bias.
- 04** Data sources: CRM activities, contact emails, calls, meetings, and notes.
- 05** Tools: AI agents for extraction, sentiment, and root-cause analysis.
- 06** Governance: approvals, access control, retention, and responsible data ownership.

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Data Sources & AI Models

Identify primary data sources and the AI capabilities needed to derive win/loss insights. Align tooling with governance and privacy requirements.

Key move Document data lineage; ensure retraining uses approved samples.

PRACTICAL CHECKLIST

- 01** Primary data sources: CRM notes, email histories, meeting transcripts, and activity logs.
- 02** Preprocessing: normalize timestamps, map fields to deal stages, remove PII where possible.
- 03** AI capabilities: entity extraction, sentiment analysis, theme clustering, root-cause inference.
- 04** Models: Claude, ChatGPT, or other agents; maintain provenance across runs.
- 05** Quality gates: confidence thresholds, human review on uncertain cases.
- 06** Data privacy: minimize PII; audit trails for access and edits.
- 07** Output artifacts: win/loss summaries, deal-by-deal notes, and top drivers.

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Adoption Plan & Metrics

This page outlines weekly adoption steps, success metrics, and governance structure for a controlled rollout. It defines roles, approvals, data handling, and risk controls.

Key move Schedule weekly 60-minute sync to review AI outputs.

PRACTICAL CHECKLIST

- 01** Week 1: scope pilot to one product line; define success criteria.
- 02** Week 2: collect 30–50 deals; run AI extraction and summaries.
- 03** Week 3: add human review checkpoints; calibrate outputs.
- 04** Week 4: share insights with leadership; adjust playbooks.
- 05** KPIs: explainability, time-to-insight, review ratio, data quality.
- 06** Ownership: assign Revenue AI Lead and Gatekeeper; establish guardrails.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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