Hello Heart + clozd

CUSTOMER STORY

Hello Heart uses win-loss analysis to identify win-back opportunities and streamline its revenue operations

After struggling to make due with inadequate data, Hello Heart chief revenue officer Tom Kahl realized that his team needed to develop a better process to collect, analyze, and share buyer feedback. That process centered around a partnership with Clozd, which paid immediate dividends. Clozd performed a series of win-loss interviews, and the resulting insights—delivered through the Clozd Platform—helped Hello Heart's team identify significant win-back opportunities and refine their sales and marketing efforts.

Seeking **real answers**

Working at a startup is a unique experience—exciting, stressful, exhausting, and (hopefully) rewarding—and as they seek to fuel rapid growth, many team members take on responsibilities that push the boundaries of their schedule.

"Like most people, when you're at a startup, you're doing everything," said Tom Kahl, chief revenue officer at Hello Heart.

Unfortunately, when you're busy "doing everything," you inevitably run out of time—or energy—for projects that would otherwise be extremely valuable. Kahl and his team at Hello Heart hit this problem head-on when they wanted to find out exactly why they were winning and losing business.

"As you're building out your team, you're really running a thousand miles an hour, and you don't have time to do a lot of analysis," Kahl said. "And what analysis you're able to do is pretty anecdotal, so you're relying exclusively on what you hear yourself, or you're relying on your sales team."

Anecdotal analysis, however, is often biased, incomplete, or incorrect—and relying on this type of data can lead you in the wrong direction strategically.

"A lot of times you hear what you want to hear, and **you're just getting a sliver of what the prospect or your customer is actually thinking,**" Kahl said.

Buyer data gathered from one-off anecdotes and second-hand perspectives lacks the credibility and depth his product, marketing, and sales teams need to make changes that actually move the needle.

"You're caught flat-footed because you've just got nothing but anecdotal, ad hoc information, and there's no rigor or rubric to what you're saying—and you just don't look like you're in the game," Kahl said. "We knew that we needed to get our act together and have a strategy for doing proper win-loss analysis."

So in 2022, Hello Heart partnered with Clozd to deliver the buyer feedback they wanted but were unable to get themselves.

Uncovering hidden problems

Over the last year-plus, Clozd has performed 85 interviews with Hello Heart's buyers. Based on that feedback, Tom and his team have seen real, cross-functional improvement in a range of areas.

Identifying win-back opportunities

Clozd has found that 1 in 10 closed-lost deals present legitimate chances to win back those opportunities, and as part of their win-loss program, Hello Heart leaned on Clozd to help resurrect a handful of deals they assumed they'd lost.

"We had 10–15 key deals where the prospect had been ghosting us for a while, so we set up a Clozd interview to try to surface what's really going on there," Kahl said. "We were able to resurface and re-open a few of those opportunities, which is huge."

One of those deals is worth half a million dollars.

"The sales rep heard a 'no' but the Clozd interviewer heard 'not now.'" Kahl said. "And by time we went over the interview, the 'not now' had become 'now we're actually ready.' So if that Clozd interview hadn't happened, we probably would've just put that deal to the side and not pursued it. **Instead, we've got a late-stage $500K opportunity in our hands.** It's not done yet, but that's one example—and we've had a few others like that."

Refining their sales motion

In addition to identifying win-back opportunities, Hello Heart has used buyer feedback to find areas where they can improve their sales process. Hello Heart's deals involved a high number of stakeholders, and they used buyer feedback to identify one specific stakeholder that they weren't proactively selling to enough.

"In terms of changing the sales process, it helped us identify big blind spots," Kahl said."We heard it again and again in the Clozd interviews that this specific group wasn't engaged enough in opportunities. So that was a big change that we made."

Optimizing their marketing messaging

Having access to detailed, unbiased interview responses also helped Hello Heart's team sharpen their messaging—and it provided a mechanism for them to develop a better understanding of how that new messaging is being received.

That last part—having a clear idea of how your messaging resonates with your prospects—has been especially important as they seek to differentiate themselves from their competitors.

"Our marketing team and the whole sales go-to-market team is working really hard to get sharp, but we don't really know what sort of impact it's having unless we have a third party like Clozd in the interviews," Kahl said. **"We've been able to measure the shift in our messaging and how it's making its way through to our prospects and customers."**

These changes have been especially impactful because of how quickly they've been implemented. Besides providing the industry's top buyer intelligence platform, Clozd delivers useful insights and analysis within a day or two of the interview.

"It's been really good because sometimes there's a really high-impact interview we want to have," Kahl said. "We know when it's scheduled, and within 48 hours we get the interview, synthesis, and the report—and then we can act on it right away. It's a really nice, efficient process."

GET TO KNOW

Hello Heart

Founded in 2013 and headquartered in Menlo Park, California, Hello Heart is a health technology company that's focused exclusively on cardiovascular health. Nearly half of all adults have high blood pressure, also known as hypertension, making it the most prevalent chronic condition in America. Through a connected mobile app that uses artificial intelligence, behavioral science, and personalized digital coaching to drive lifestyle changes, Hello Heart partners with employers to help people embrace healthier behavior that can reduce blood pressure and the cost of medical claims.

Win-loss analysis with Clozd is not a big lift. You can turn it on quickly, so it's something that you can actually do now and have an impact on your sales year versus waiting another year."

Tom Kahl
Chief Revenue Officer

We've found two additional side benefits as we've spent the last six years going out and engaging with buyers. One thing is that we find win-back opportunities—where something happened and the deal just kind of stalled out, but they're interested in re-engaging. We also find deals that are at-risk, where it could be a win but the buyer says something like, 'You know, I did it, but the implementation's not going smoothly,' or there's some other issue that we uncover."

Spencer Dent
Co-founder and Co-CEO at Clozd