

# Sales to CS Handoff Checklist

by  Flowla

## Internal handoff

Make sure to collect and share the necessary information about the customer and the project internally.

### 01 Account details

- Company size
- Company industry
- Pricing plan
- Number of seats

### 03 Product details

- Use case(s)
- Priority features
- Current toolset
- Competitive evaluation

### 02 Customer details

- Name & contact info
- Department
- Role & responsibilities
- Other stakeholders  
(organizational structure)

### 04 Project details

- Business goals & KPIs
- Customer expectations  
(timeline, training, etc.)
- Special contract terms
- Additional technical requests  
(integrations, etc.)

## External handoff

Complete the handoff with the customer.

- Introduce the CSM to the customer
- Hold a formal handoff meeting (optional)
- Reiterate the project goals and expectations with the customer
- Outline the project timeline and a mutual action plan
- Share any useful resources
- Organize the workshop/kickoff meeting (optional)

Check out the  
**handoff email template**  
on the next page!

# Handoff email template



New Message



To **Your new customer**

Subject **Next Steps: Getting Started with Flowla**

Hi [First name],

Thank you for the nice chat today. [Meeting summary of any information you would like to reiterate.]

I'd like to introduce you to [Name], our Customer Success Manager. As agreed, she'll help you get started with [Product] and show you how to get the most out of it considering your use case.

Let's set up a workshop meeting as a next step.

Best,

[Sign off]

SEND



## Streamline your processes with Flowla

Flowla simplifies internal and external handoff from sales to CS team by offering a single, intuitive space to share information and collaborate. Sell, onboard, renew, and upsell more easily, while providing an outstanding customer experience

