

# Sales to CS Handoff Checklist

## Internal handoff

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

### Account details

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

### Customer details

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

### Product details

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

### Project details

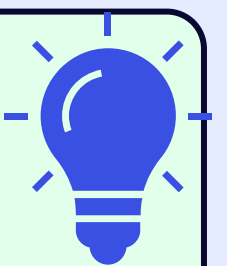
- Business goals & KPIs
- Customer expectations (timeline, training, etc.)
- Special contract terms
- Additional technical requests (integrations, etc.)

## 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)

## Handoff email template



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.  
[Sign off]