# Sales to customer success hand-off template

You need internal processes to run your organization smoothly. Every team (and individual) needs clearly-defined roles and accountabilities to effectively.

But your new customer doesn't care about that. They just want - and expect - to continue the same 'wow' experience that made them choose your product in the first place. That's why the transition from sales to customer success is so vital to get right - and communication is key.

Use this template to create a process for your sales team to seamlessly hand off new customers to the customer success (or account management) team.

## Update the CRM

- Turn the customer's account from 'Opportunity' to 'Customer'.
- Add all background information in the 'Notes' section of the account.
- Upload the signed contract
- Add any additional customer contacts relevant to the account.

## Document background information

- Why did the customer buy the product? What problem are they trying to solve?
- Are they replacing an existing solution?
- What does success mean for the customer?
- Who is the buyer of the product?
- Who is the user of the product?
- Who are the influencers, champions, and detractors within the account?
- What are potential roadblocks one may face in making the customer successful?

## Contract details

- What are the specifics of the plan the customer has signed up to?
- What specific features will the customer be utilizing?

## Implementation details

- How much time will it take to carry out a full product demo?
- Will the customer's existing software mean integrations or extra steps need to be considered?
- Preferred work and communication style.

## Notify customer success

- Send all background information via email/Slack/project management app.

## Hand-off meeting (if necessary)

- Schedule a call between the sales rep/AE/customer success