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CLOSED-WON HANDOFF PACKET · EXAMPLE KICKOFF PACK

Northline Analytics

Closed-Won packet for Atlas Commerce

Inventory truth layer · 12-month term · CAD $48,600 ARR

CLOSED-WON	12 September 2026
KICKOFF	18 September 2026 · 60 minutes
CHAMPION	Priya Shah, VP Operations
ECONOMIC BUYER	Marcus Chen, CFO
ACCOUNT EXECUTIVE	Jordan Hale
CSM	Elena Voss
CRM	HubSpot · deal ID NL-2841 (fictional)
PACKET STATUS	Human-reviewed · 13 Sep 2026

What was promised — written down before kickoff.

Fictional SaaS deal. Names, dollars, and systems are invented for this example.
Coldforge does not train public models on customer files.

01 · DEAL SNAPSHOT

Who this packet is for

Elena (CSM) was not on the sales cycle. This page is the one-screen brief she should be able to run kickoff from — without asking Priya to recap six weeks of calls.

Buyer	Northline Analytics — mid-market retail ops software, ~180 employees, Vancouver.
Seller	Atlas Commerce — inventory truth layer for omnichannel retail.
Product	Atlas Core + NetSuite connector. Warehouse + finance seats.
Commercials	CAD $48,600 ARR · 12-month term · net-30 · start 1 Oct 2026.
Why now	Q2 stockout lost them a regional grocery account. Peak season starts November.
Closed-Won in	HubSpot. Notes are thin. Call recordings live in a shared Drive folder.

Stakeholders

Priya Shah — VP Ops	Champion. Day-to-day owner. Will join kickoff. Only internal advocate.
Marcus Chen — CFO	Economic buyer. Wants a 90-day value proof he can take to the board.
Devon Alvarez — Warehouse lead	Admin / power user. Skeptical of another login. Train him first.
Asha Patel — IT	Okta + security review. Has not been looped in. Blocker risk.
Jordan Hale — AE	Ran the cycle. Must send the warm intro and stay for kickoff.
Elena Voss — CSM	Owns the first 90 days. Receives this packet 13 Sep.

02 · HANDOFF BRIEF

Why they bought — in their words

“We are still copying cycle counts into three tools. Last quarter that cost us a banner account.” — Priya Shah, discovery call, 22 Aug 2026

Buying trigger (do not skip in kickoff)

A Q2 stockout at the Surrey DC — inventory showed 400 units; the floor had 40 — lost Northline a regional grocery banner. Priya’s board asked for a single source of truth before November peak. That sentence is the deal. If kickoff opens with a product tour, she will feel you forgot.

Rejected alternatives

Building an internal inventory service (engineering said six months). Buying a full WMS (too heavy; they already have warehouse process). Staying on spreadsheets through peak (Marcus refused). Atlas won as the thinnest path to one number finance and the floor can both trust.

Outcome they will measure

One source of truth for on-hand quantity across NetSuite and the three warehouse sites before 1 November. Secondary: cycle-count time down from ~6 hours/week per site. Marcus will ask for this in the 90-day QBR — write the baseline in kickoff, not later.

What good looks like on the first call

Priya hears her stockout story back. Devon is named as the first trainee. Asha is invited to the security thread the same day. The two items not in the contract (24-month history, Black Friday go-live) are put on the table as confirm / defer / quote — not as silent scope.

03 · PROMISE LEDGER

What sales said — tagged

Every verbal or written commitment we could find. Agreed means it is in the order form or SOW. To confirm means someone said it and CS should not invent a yes. Not in contract is the landmine: flag it in kickoff before anyone is surprised.

#	Commitment	Source	Status	Owner
1	Inventory sync from NetSuite every 15 minutes	SOW §4.1	Agreed	Impl.
2	SSO via Okta (SAML)	Order form	Agreed	Security
3	Training for 3 warehouse leads — two 90-minute sessions	SOW §6	Agreed	CSM
4	Named CSM on a shared Slack channel during onboarding	4 Sep call	To confirm	CSM
5	Weekly executive snapshot for Marcus through go-live	Email 8 Sep	To confirm	AE / CSM
6	Sandbox tenant with production-like SKU volume	Slack 9 Sep	To confirm	Impl.
7	Role-based views for warehouse vs finance	SOW §4.3	Agreed	Product
8	CSV fallback if NetSuite connector is late	AE note	Agreed	Impl.
9	QBR at day 90 with a value proof Marcus can take to board	CFO call	Agreed	CSM
10	Priority support queue during November peak	SOW §8	Agreed	Support
11	**24-month SKU history import — not in the contract**	AE sketch, 4 Sep	**Not in contract**	AE — flag
12	**Go-live before Black Friday — date never scoped**	Verbal, champion	**Not in contract**	AE — flag

Highlight — two items will blow up kickoff if they stay quiet

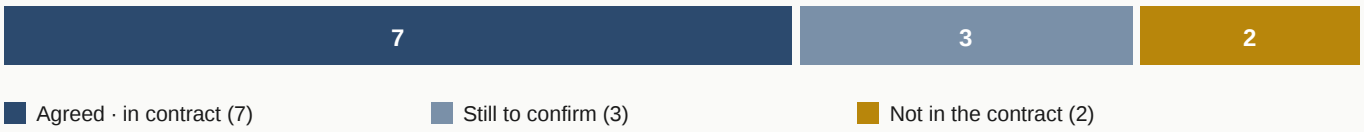
Row 11 (24 months of history) was sketched on a whiteboard on the 4 Sep call. Row 12 (before Black Friday) was never scoped against NetSuite lead time. Jordan must own both sentences on 18 Sep. Elena should not walk them back, and should not honor them blindly.

04 · AT A GLANCE

Where the promises sit

This is not a dashboard. It is so Elena can see, in one look, that most of the deal is clean — and exactly which two lines are the risk.

12 commitments captured from calls, Slack, and the order form



First 28 days after signature



Packet delivered next business day (13 Sep). Kickoff on the 18th, before Asha's security review has even started — so the agenda includes a 10-minute security path, not a shrug. NetSuite field mapping is the critical path: the contractor who owns it has a last day of 24 Oct. First-value checkpoint on 9 Oct is a live count match at Surrey, not a slide.

Time-to-value hypothesis

Without this packet	Kickoff becomes archaeology. History import and Black Friday land as 'we thought that was included.' TTV slips past peak.
With this packet	Kickoff confirms scope in 15 minutes. History import is quoted or deferred. Go-live is planned as a November-safe date, not a hope.

05 · KICKOFF AGENDA

18 September · 60 minutes

Not a product tour. Priya already sat through two demos. The call exists to prove Atlas remembers the deal, name the risks, and leave with dates.

Time	Lead	Purpose
0–5 min	Jordan (AE)	Warm intro. Why Elena is here. Confirm attendees (Priya, Devon; Marcus optional; Asha missing — name that).
5–15 min	Elena	Replay the buying story: Surrey stockout, three tools, November peak. Pause. Let Priya correct anything.
15–25 min	Elena + Jordan	Promise ledger. Walk agreed items quickly. Stop on rows 11 and 12. Confirm / defer / quote.
25–35 min	Elena + Devon	Success criteria. Baseline cycle-count hours. Who signs off a live count match.
35–45 min	Elena	Security and access. Okta owner is Asha — get her in the thread today. Sandbox timeline.
45–55 min	All	14-day plan. NetSuite contractor coverage. Training dates for the three leads.
55–60 min	Elena	Recap: decisions, owners, next meeting. Jordan stays on until the recap is in writing.

Highlighted row is the promise-ledger block — the part most kickoffs skip, and the part that keeps trust.

06 · WARM INTRO + AE–CSM SYNC

Jordan sends this before Elena ever emails Priya

Draft — AE → champion, CSM copied

Priya — introducing Elena Voss, who will run your onboarding. Elena has the Closed-Won packet: why you bought (Surrey stockout, one number before November), the promise list, and a 60-minute kickoff agenda for the 18th. Two items we flagged as not in the order form — 24-month history import, and a Black Friday go-live — we want to confirm with you on that call rather than surprise anyone later. I've asked Elena to start from your words, not a product tour. I'll be there. — Jordan

Internal AE ↔ CSM sync (15 min, same day as packet)

Jordan keeps	Relationship with Priya through kickoff. Owns rows 11–12. Does not disappear into the next cycle.
Elena keeps	Agenda, Slack channel, security thread with Asha, training calendar, 90-day QBR draft.
Do not say	'We can probably do the history import.' Either quote it or defer it on the 18th.
If Marcus joins	Lead with the 90-day value proof, not architecture. He bought a stockout fix.

Warm intro is part of the packet so CS never cold-starts the account. If this email does not go out, the rest of the pages are incomplete.

07 · RISKS & NEXT 14 DAYS

What can still break this

Contractor cliff	NetSuite mapping is owned by an external contractor whose last day is 24 Oct. Capture field map in week one.
Security not started	Asha Patel (IT) is not in the deal. Okta + review can add 3 weeks. Invite her 13 Sep.
Single champion	Priya is the only advocate. If she is out, Devon cannot move budget. Keep Marcus on the 90-day thread.
Peak-season date	A November go-live without a scoped cutover is how you get a failed count on Black Friday.
Thin CRM	HubSpot Closed-Won note is two sentences. This packet is the system of record until CS writes the CSM notes back.

Next 14 days (owners already named)

13 Sep — Elena reads packet; Jordan sends warm intro. 15 Sep — Asha invited; sandbox requested. 18 Sep — kickoff. 19 Sep — recap in writing, including the two not-in-contract decisions. 22 Sep — NetSuite contractor working session. 25 Sep — field map v1. 9 Oct — first live count match at Surrey (first-value checkpoint).

How this packet was made

Paste-to-packet: call notes, HubSpot comments, and the order form. AI drafted; a person at Coldforge reviewed it. Atlas keeps these files. Northline never receives a Coldforge login. Nothing here is a legal redline — it is so kickoff is a plan, not archaeology.

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