SALES → CS HANDOFF BRIEF

Northline Analytics

Starter Brief for Atlas Commerce · Inventory truth layer · 12-month term

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
Source notes	HubSpot deal notes + three call transcripts (fictional)
Brief status	Human-reviewed · 13 Sep 2026

What this brief is for

Elena was not on the sales cycle. This brief tells her why Northline bought, what could stall the account and who matters, so she can open kickoff from the deal instead of asking Priya to recap six weeks of calls.

Fictional SaaS deal. Every name, number and system is invented for this example. How long a real brief runs depends on the notes you send.

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 (open kickoff with this)
A Q2 stockout at the Surrey DC: the system showed 400 units, the floor had 40. Northline lost a regional grocery banner. Priya’s board asked for one source of truth before November peak. If kickoff opens with a product tour, she will feel the story was lost.

Outcome they will measure

One on-hand number across NetSuite and the three warehouse sites before 1 November. Secondary: cycle-count time down from about 6 hours a week per site. Marcus will ask for this at the 90-day review, so record the baseline at kickoff.

Alternatives they rejected

An internal inventory service (engineering estimated six months), a full WMS (too heavy for their process), and staying on spreadsheets through peak (Marcus refused). Atlas won as the thinnest path to one number finance and the floor both trust.

Deal snapshot

Buyer	Northline Analytics: mid-market retail ops software, about 180 staff, Vancouver
Product	Atlas Core + NetSuite connector · warehouse and finance seats
Commercials	CAD $48,600 ARR · 12-month term · net-30 · start 1 Oct 2026
Why now	The Q2 stockout and November peak season

What could stall the account

IT not looped in	Asha Patel (IT) owns Okta and the security review and has not seen the deal. **Invite her to the security thread the day of kickoff.**
Single champion	Priya is the only internal advocate. If she is pulled into peak planning, the rollout has no owner.
Skeptical power user	Devon Alvarez (warehouse lead) does not want another login. Train him first and make him the first win.
Hard date	November peak is fixed. Any slip past late October turns the project into a post-peak story.

Who matters

Priya Shah · VP Ops	Champion and day-to-day owner. Joins kickoff.
Marcus Chen · CFO	Economic buyer. Wants a 90-day value proof for the board.
Devon Alvarez · Warehouse lead	Admin and power user. Train first.
Asha Patel · IT	Okta and security review. Blocker risk until included.
Jordan Hale · AE	Ran the cycle. Sends the intro and stays for kickoff.
Elena Voss · CSM	Owns the first 90 days. Receives this brief 13 Sep.

Want the promises checked too? The Kickoff Pack adds a promise ledger (agreed, still to confirm, or not found in the contract), a timed kickoff agenda and the warm intro email. coldforge.ca/kickoff-pack