Sales-to-CS Handoff Template

Everything Customer Success needs from sales before kickoff. Fill it in on screen (the boxes are fillable) or print it.

How to use it

1. Sales fills in sections 1 to 8 within one business day of signature. Write “unknown” rather than guess.
2. List every promise in the Promise Ledger (or in section 8 for small deals).
3. Sales and CS review it together for 5 minutes. CS signs section 9 to accept the handoff, then books kickoff.

1 Account

The deal at a glance.

Account (company)

Product / plan bought

Contract value and term

Signed date

Go-live target

Renewal date and terms

Account executive (AE)

Customer success owner (CSM)

Handoff date

Links: CRM record, order form, call recordings

2 Contacts and roles

Who matters, and why. Role: economic buyer, champion, admin, technical, user, possible blocker.

Name	Title	Role in the deal	What they care about	Email / phone

3 Why they bought

Use their words where you can. Quotes beat summaries.

Trigger: why now?
What happened that made them buy this quarter?

The problem, in their words
A direct quote from a call or email, with who said it.

Alternatives considered, and why we won
Competitors, a bigger tool, building it, or doing nothing.

What would make them regret it
The outcome that would make this purchase feel like a mistake.

4 Success criteria

How the customer will judge this, not how we would.

Their definition of success
In their words, with who said it.

How they will measure it
Metric and target, e.g. "zero double-bookings in November".

By when
The date that matters to them, and why.

First milestone
Observable and dated. What will they see working first?

5 Timeline

Known dates, deadlines and blackout periods. Mark each one hard or flexible.

Date	Milestone, deadline or blackout	Hard / flexible	Notes
	Signed		
	Kickoff call		
	First milestone		
	Go-live		
	First review		
	Renewal		

6 Risks

Anything that could slow the rollout or sour the relationship.

Risk	Likelihood (L/M/H)	Impact if it happens	Owner	What we'll do

7 Technical context

What CS and implementation need to know before the first call.

Current tools (replacing or keeping)

Integrations needed
Which systems, which direction, and who authorizes access.

Data migration
What data, roughly how much, what shape it is in, who exports it.

Security, SSO, IT review
Questionnaires, SSO, approvals still pending.

Technical contact and access needed

8 What was promised

Every commitment made during the sale. For more than five, use the Promise Ledger and list the top items here.

Commitment (customer's words)	Basis	Owner	Due	Status

9 Kickoff plan and sign-off

CS signs to accept the handoff. If anything above says "unknown", agree who will find out and by when.

Three things to confirm on the kickoff call

What the customer should not have to repeat

Warm intro sent (date)

Kickoff booked (date)

Handed off by (AE) and date

Accepted by (CSM) and date

Warm intro email (sales sends, CS copied)

Subject: [Customer] + [Your company]: meet [CSM], who will run your rollout

Hi [Champion],

Thanks again for choosing [Your company]. I'd like to introduce [CSM], who will lead your rollout from here. I've walked [CSM] through [the reason they bought], [one detail only they would know] and your [date] goal, so you won't need to start from scratch.

[CSM] will send a kickoff invite for [day, date]. I'll join the first 15 minutes.

[AE]

Free template from coldforge.ca/sales-to-cs-handoff. Use it, copy it, adapt it.