Customer Success Handoff Checklist

This checklist is a template designed to outline common items included in a Sales to CS handoff, typically aligned with the Onboard/Activate phase kickoff. The goal of this checklist is to capture information obtained during the Sales process, minimizing repetition of questions asked to the customer, improving customer experience, and maximizing internal alignment between Sales and CS.

Customer Overview

1. What is the company size? What industry do they operate in?
2. How do they make profit?
3. What is their use case?
4. What pricing plan are they on?
5. Which team(s) are using it?
6. How many people are using it to start?
7. What was the customer's general sentiment during the prospect/buying process?

Contract

1. Are there unique terms for this agreement or is there a custom SLA?
2. Who is the product/service champion?
3. Who made the final purchase decision?
4. Who else was involved in the agreement?
5. Who will be the POC moving forward?
6. Are there other stakeholders involved?

Solution

1. What pain points are they trying to address? Why did they buy?
2. Are you replacing an existing solution?
3. What other solutions were considered?
4. What were the biggest hesitations during the prospect/buying process?
5. What features are they most excited to use?

Goals

1. What are their short-term & long-term goals? What problems are they looking to solve?
2. How will they measure success?
3. What risks are involved?
4. What can failure look like?
5. What are the expectations around a formal business review? How often will they assess your business?
6. What do expansion, cross sell, and/or upsell opportunities look like? Are there any previously set expectations around timelines or terms for these?
7. What is their expectation of current and future functionality?
8. Are they hoping to participate in beta tests or are they already looking for functionality that has yet to be released?

Deployment

1. What team will be using the product/service? What is the makeup of that team?
2. What is the expected timeline for deployment?
3. If a trial period was offered, did they use it? What questions did they have during the trial period? What components were stickiest during their trial period?
4. How much do the end-users know about the product/service? What is their level of knowledge/context around the purchase? Are they aware this is coming? How are we messaging change management?
5. How will this integrate with their existing workflows? Is this uprooting their existing workflows?
6. Are there any commitments we've made that we should be aware of?

Milestones

1. Have you come up with a mutual project plan?
2. What's the cadence for contacting the customer?
3. What goals do you want to accomplish with touchpoints?
4. What milestones do you want to achieve during deployment?