Template

Sales to Customer Success Information Flow

Use this template to document the process of handing off a new customer to the customer success team. [Learn more](#) about this template.

Background information

To successfully set a new customer up with a Customer Success Manager (CSM), the following questions should be documented from the sales process:

1. Why did the customer buy the product? What problem are they trying to solve?
2. What does success mean for the customer?
3. Who is the buyer of the product?
4. Who are the influencers, champions, and detractors within the account?
5. What are potential roadblocks one may face in making the customer successful?

Update their account in our CRM

Follow these steps to alert the team manager and update the account's instance in our CRM.

- Turn this customer's account in the CRM 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

Notify the customer success team

Follow the steps below to alert the team manager:

Email all background information to [xxx@yyy.com and xxx@yyy.com]

Post in the #cs-team Slack channel tagging @teammanager using the following summary language:

- New Customer Handoff - Company Name
- Company Size
- Software Package
- Customer Contact: Name, Role, Email

We will follow up in Slack once a CSM is assigned.

Schedule a Handoff Meeting

At that time a meeting needs to be set between the account executive and CSM for a clean information handoff. The assigned CSM will reach out to the AE to schedule a call and review the account information.