FRONT

A GUIDE TO MANAGING CUSTOMER RELATIONSHIPS AT SCALE

# The ultimate Sales to Customer Success handoff checklist

Happy customer relationships start with smooth sales handoffs. Below are the pieces of information your customer-facing team needs from the sales process in order to build and nurture every customer relationship. Start with these pieces of information, then add anything you need to fit your team's exact needs.

## Basic customer information

- [ ] What's the company size?
- [ ] What industry do they operate in?
- [ ] How do they make money?
- [ ] What's their use case?
- [ ] What pricing plan are they on?
- [ ] Which team(s) are using it?
- [ ] How many people are using it to start?
- [ ] What was the customer's general sentiment during the exploration and buying process?

## Contract

- [ ] Are there unique terms for this agreement, or a custom SLA?
- [ ] Who is the champion for your product or service?
- [ ] Who was the final decision maker for the purchase?
- [ ] Who else did you work with to make the agreement?
- [ ] Who will be the point of contact going forward?

## Solution

- [ ] What are the pain points they're trying to fix? (Why did they buy?)
- [ ] Are you replacing an existing solution?
- [ ] What other solutions were considered?
- [ ] What were the biggest hesitations during the exploration and buying process?
- [ ] What features are they most excited to use?

## Goals

- [ ] What are their goals for the short term? Long term? (What problems are they looking to solve?)
- [ ] How will they measure success?
- [ ] What risks are involved?
- [ ] What can a failure look like?
- [ ] What are the expectations around a formal business review? How often will they assess your business?
- [ ] What's the opportunity for expansion, cross-sell, and up-sell? Are there any previously set expectations around timelines or terms for these?
- [ ] What's their expectation of current and future functionality? Are they hoping to participate in beta tests or looking for functionality that has yet to be released?

### Deployment

- ☐ What team will be using this? What's the makeup of that team?
- ☐ What's the expected timeline for deploying?
- ☐ If you offer a trial period, did they use it? What questions did they have during the trial period?
- ☐ What components were stickiest during trial?
- ☐ How much do the end users know about the product? (What's their level of knowledge/ context on the purchase? Are they aware that this is coming? How are we messaging change management?)
- ☐ How will this integrate with their existing workflows?
  (Is it uprooting their existing workflow?)
- ☐ Are there any other commitments we made that we should know about?

### Milestones

- ☐ Have you come up with a mutual project plan?
- ☐ What's the cadence for contacting the customer?
- ☐ What are the goals you want to accomplish during the touch points?
- ☐ What are the milestones you want to hit during deployment?

## ABOUT FRONT

Front redefines work communication with the first shared inbox for teams. By unifying your email, customer communication channels, and apps in one platform, Front helps teams collaborate efficiently and have more context and visibility into every conversation, to work faster and better together. Today, more than 3,000 businesses rely on Front to power their work communications. Founded in 2013 by Mathilde Collin and Laurent Perrin, Front has raised $79 million in venture funding and has 50+ employees in its San Francisco headquarters and Paris, France office.