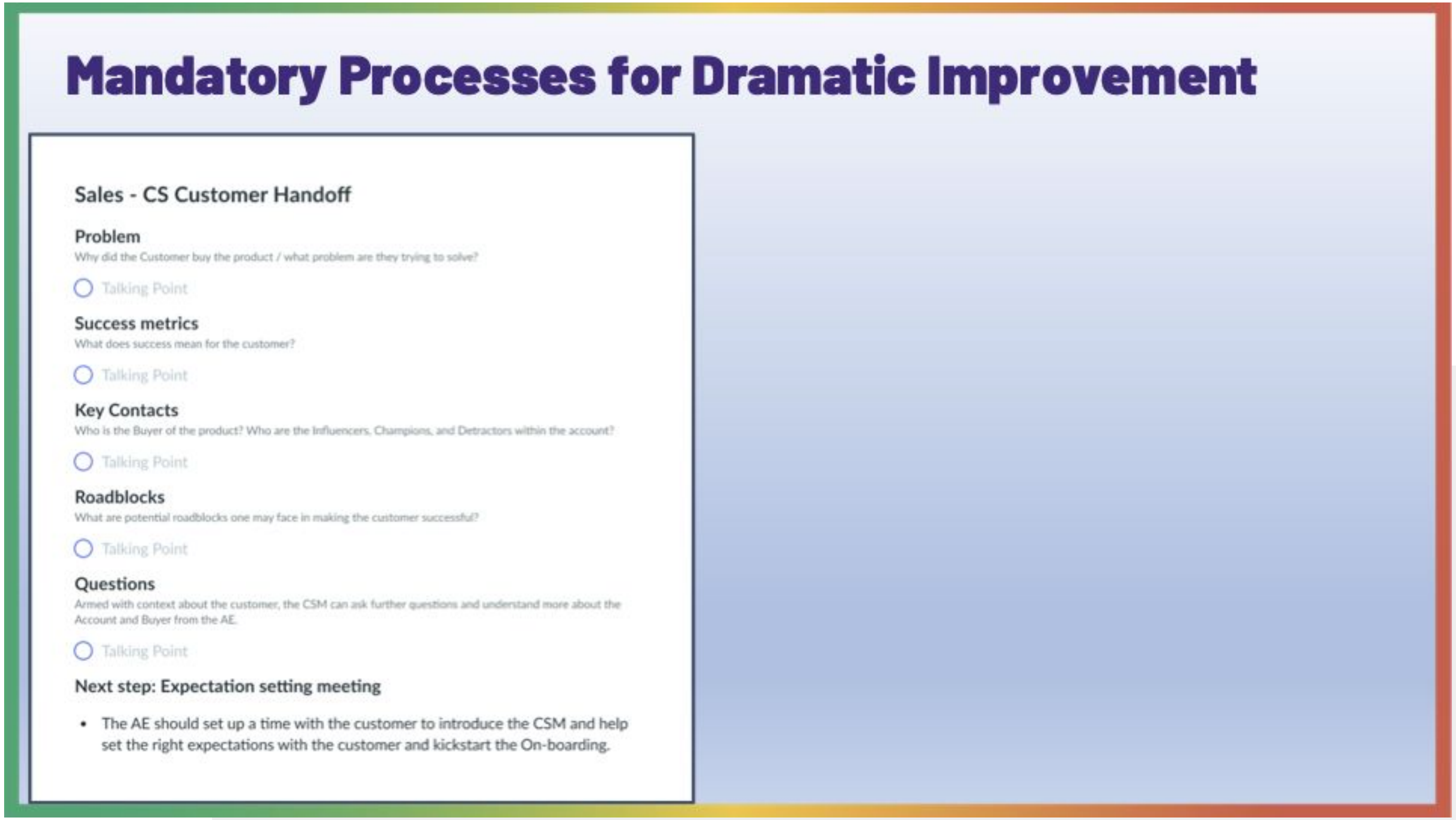
# INFINITE RENEWALS

POST SALES SAAS EXPERTS

# Transition Points

PREPARED BY INFINITE RENEWALS

# Sales to CS Handoff



**Assessment:** Not consistently capturing customer goals and tracking success
**Recommendation:** Introduce success driving activities across the journey

### SALES HANDOFF

- Internal Document
- Company overview
- Contract Overview
- Key Stakeholders
- Internal Relationship map
- Goals and Outcomes
- Customer Assessment
- Technical Configuration
- Implementation Details
- Assets

*optimize existing*

### KICKOFF DECK

- External Document
- Team introductions, roles and resources including Support vs. Success
- Align on goals
- Present the customer journey
- Implementation Phase Overview
- Success planning, business reviews introduction

*optimize existing*

*pre-post launch*

### ACCOUNT PLAN

- Internal Document
- Top tier customers - review cadence
- Leverage Sales Handoff document as basis
- Account status
- SWOT analysis
- Strategic plan

### SUCCESS PLAN

- External Document
- Shared responsibility w/ customer
- Top tier customers - review cadence
- Leverage Sales Handoff document as basis
- Align on goals
- Define steps to achieve goals
- Track ongoing achievement of success

### BUSINESS REVIEW

- External Document
- Top tier customers
- Team Updates
- Customer Update
- Goals & Achievement
- Metrics, Product Adoption, benchmarks
- Recommendations
- Sentiment - would you renew today?

# Implementation to CS Handoff

1- **Automate**. CSM is getting status from impl tool (blocked at stages, getting ready for live, getting ready for transitions and handoff to CSM and support).

2- **Meet.** As a customer is going live, the teams that will be supporting the customer moving forward.  This is the transition point where the CSM will introduce the customer to their support team and ensure a smooth handoff.

3- **Burn in**. Depending on the complexity of your software, you may need to be available during a 2 week “burn in” period.  This is where the customer will be using the software actively and may have questions or issues that need to be addressed.

4- **Documentation**. It's crucial to have clear and concise documentation for both internal use and for customers. This includes step-by-step guides on how to use the software, troubleshooting tips, and best practices. Internally, you are listing configuration details, and decisions that were made.

5- **Value-** Making sure the customer understands the value from the software. Outcomes not features.

## Q&A from the registration.

- How can you get leadership to understand the importance of collaboration and information sharing across teams? I cannot get my manager to understand he unnecessarily creates bureaucracy and siloes where there should be none.We all need to partner.

- Focus on how to do this at scale for both mid-market and enterprise customers

- How to handle clients who will not respond to reachouts

- I am interested in seeing and hearing about best practices for the Sales to CS handoff of new customers.

# THANK **YOU**

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# APPENDIX

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