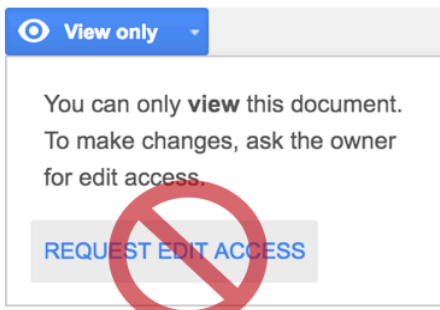


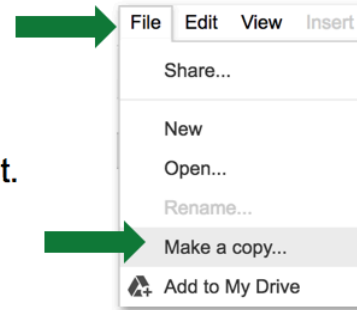


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SALES-TO-CUSTOMER-SUCCESS-HANDOFF TEMPLATE

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Template begins on page 2.



SALES-TO-CUSTOMER-SUCCESS-HANDOFF TEMPLATE

CUSTOMER INFORMATION

(Enter the client's account information)

COMPANY NAME	
INDUSTRY/SECTOR	
COMPANY SIZE	
CONTRACT SIGN DATE	
CONTRACT DURATION	

CUSTOMER TEAM INFORMATION

(Enter the names and roles of the client's team members who will be points of contact, and who will be monitoring the Customer Success that you provide.)

PRIMARY CONTACT	
PROJECT MANAGER	
PRIMARY INDIVIDUAL, TEAM, OR DEPT. THAT WILL BE USING THE PRODUCT	
OTHER PERSON OF CONTACT	
PERSON OF CONTACT ROLE	

INTERNAL TEAM INFORMATION

(Enter the names and roles of the client's team members who will be points of contact, and who will be monitoring the Customer Success that you provide.)

CUSTOMER SUCCESS MANAGER (CSM)	
SALES-TO-CUSTOMER-SUCCESS PROJECT MANAGER (OR COORDINATOR)	
SALES TEAM REPRESENTATIVE	
SALES-TO-CUSTOMER-SUCCESS TRANSITION SPONSOR	
OTHER KEY STAKEHOLDERS AND ROLES	

CUSTOMER HIGH LEVEL-GOALS

(Enter the customer's high-level goals, and what they're looking for from your customer success solution.)

What is the customer's main objective?

How does the customer generate revenue?

What is the customer's definition of success?

WHY OUR CUSTOMERS SUCCESS SOLUTION

Provide details as to why the customer has chosen your solution.

(E.g., Did they migrate from a competitor's product or service?)

DEFINING CUSTOMER SUCCESS (CUSTOMER)

(Enter the customer's definition of "Customer Success," and what key metrics they will (or might) use to gauge the services you provide to them)

What is the customer's definition of "customer success"?

What are they looking for from our solution? What are their expectations?

What key performance indicators (KPIs) will/might they use to gauge the services you provide them with?

DEFINING SUCCESS

(Enter your team's definition of customer success for this client, and what key metrics you will use to gauge services you provide to the customer)

What is your team's definition of "customer success" for this customer?

What key performance indicators (KPIs) will you use to ensure that the customer is happy with the services you provide, and that the services you provide them help them be successful?

KEY PERFORMANCE INDICATORS (KPIs)

(Enter details and figures for each KPI you will use to gauge customer success, such as:)

Net Promoter Score (NPS)

(Enter details and figures for gauging you client's degree of customer loyalty, and how willing they will be to promote your products and services)

Customer Satisfaction Score (CSAT Score)

(Enter details and figures for gauging how satisfied your client is with your products and services.)

Churn Score

(Enter details and figures related to the proportion of clients who have opted out of your services within a certain time period.)

Health Score

(Enter details and figures for a summary score of the overall "health" of the customer in terms of Customer Success.)

WORK AND COMMUNICATION STYLE

What is the customer's communication style?

How does the customer prefer to be contacted?

GROWTH OPPORTUNITIES

Enter details for growth opportunities related to providing your client with excellent customer success.

CUSTOMER BUDGET

Enter budget details related to providing solid customer success for the client.

POTENTIAL RISKS

Enter details of potential risks that might arise to jeopardize achieving customer success for the client.

OPEN ISSUES

Enter any "outstanding" customer-related issues that need to be resolved.

FOLLOW-UP ACTION

Enter details for any follow-up action to take on the client's behalf.

DATE OF NEXT CONTACT

Enter the date when your team member follows up with the client.

ADDITIONAL NOTES

Enter any additional notes that can help you, your customer and your team achieve customer success.

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