Sales-to-CS Role-Based Handoff Checklist

Use this checklist to confirm that each team has completed its part of the handoff before kickoff.

Account Executive

Complete before submitting the handoff.

Done	Task
☐	Complete all eight handoff sections
☐	Mark each section Confirmed, Unclear, or Not discussed
☐	Document goals, scope, commitments, stakeholders, timeline, and risks
☐	Add a source for key commitments, requirements, and dates
☐	Link relevant call recordings, transcripts, or conversation excerpts
☐	Assign an owner or next action to every open item
☐	Review the handoff against what the customer discussed and purchased
☐	Introduce the post-sales owner when needed

Onboarding or Customer Success

Complete before kickoff.

Done	Task
☐	Review the handoff for completeness and accuracy
☐	Add unresolved items to the gap and risk log
☐	Assign each gap a severity, owner, and resolution point
☐	Resolve all Blocking and High-severity gaps
☐	Validate scope, commitments, stakeholders, and timeline
☐	Build the kickoff agenda from confirmed and open items
☐	Review complex deals with Sales or Sales Engineering
☐	Accept, accept with open items, or return the handoff

Revenue Operations or CS Operations

Review across the handoff process.

Done	Task
☐	Standardize the handoff template, statuses, and acceptance rules
☐	Trigger the handoff at the correct deal stage
☐	Keep account and post-sales ownership current in the CRM
☐	Track handoff status and unresolved gaps
☐	Measure first-pass acceptance rate and time to acceptance
☐	Review recurring gaps and post-kickoff escalations
☐	Update the handoff process based on team feedback