**[](https://www.smartsheet.com/try-it?trp=11458&utm_source=integrated+content&utm_campaign=/content/project-handover-templates&utm_medium=Sales-to-Customer-Success-Handoff+doc+11458&lpa=Sales-to-Customer-Success-Handoff+doc+11458&lx=PFpZZjisDNTS-Ddigi3MyABAgeTPLDIL8TQRu558b7w)SALES-TO-CUSTOMER-SUCCESS-HANDOFF**

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** |
|  |
| CUSTOMER 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 CUSTOMER SUCCESS SOLUTION?

|  |
| --- |
| ***Provide details as to why the customer has chosen your solution.  (For example, did they migrate from a competitor’s product or service?)*** |
|  |

CUSTOMER DEFINITION OF CUSTOMER SUCCESS   
(Enter the customer’s definition of customer success and the key metrics they will use to gauge the services you provide them with.)

|  |
| --- |
| ***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 they use to gauge the services you provide them with?*** |
|  |

OUR DEFINITION OF CUSTOMER SUCCESS   
(Enter your team’s definition of customer success for this client and the key metrics you will use to gauge the services you provide them with.)

|  |
| --- |
| ***What is your team’s definition of customer success for this customer?*** |
|  |
| ***What KPIs will you use to ensure that this customer is happy with the services you provide?*** |
|  |

KEY PERFORMANCE INDICATORS (KPIs)

(Enter details and figures for each KPI you will use to gauge customer success.)

|  |
| --- |
| ***Net Promoter Score (NPS)*** *(Enter details and figures for gauging your client’s degree of customer loyalty and willingness to promote your products and services.)* |
|  |
| ***Customer Satisfaction Score (CSAT Score)*** *(Enter details and figures for gauging your client’s degree of satisfaction with your products and services.)* |
|  |

|  |
| --- |
| ***Churn Score*** *(Enter details and figures related to the percentage of clients who have opted out of your services within a certain time period.)* |
|  |

|  |
| --- |
| ***Health Score***  *(Enter details and figures to obtain a summary score of the overall customer success-related ”health” of the client.)* |
|  |

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 your client with solid customer success.*** |
|  |

POTENTIAL RISKS

|  |
| --- |
| ***Enter details about potential risks that could jeopardize achieving customer success for your client.*** |
|  |

OPEN ISSUES

|  |
| --- |
| ***Enter any outstanding customer-related issues that you need to resolve.*** |
|  |

FOLLOW-UP ACTION

|  |
| --- |
| ***Enter details for any follow-up action you need to take on your client’s behalf.*** |
|  |

DATE OF NEXT CONTACT

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

ADDITIONAL NOTES

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

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