

Sales to customer success handover template

Making sure you start off on the right foot with customers is a must. Each department will work towards a different stage in the customer buying cycle and will hand over the customer to the appropriate team as they progress in their journey.

Once the customer has completed their transaction, they go from being acquainted with the sales representative, to their post-buyer relationship with the customer success team. To avoid any confusion, it's imperative that you make sure the customer knows who they're dealing with.

If there isn't a seamless handover between sales and customer success, the customer isn't going to have a positive experience. You want to instill confidence in your customer; they need the reassurance that they're being transferred into capable hands.

Being passed pillar to post isn't only bad service, but the customer's less likely to recommend your company to others. If this friction goes untreated, it may cause the customer to cancel their subscription. To prevent this escalating to customer churn there needs to be the right email protocol in place between sales and customer success.

Here are a couple of options that you can use as templates:

Email template #1

Hi **[insert customer name]**,

We're so excited to have you on board with us at **[enter company name]**! While I've been your person of contact so far, I want to introduce you to your customer success manager who'll be handling your account going forward.

For any onboarding issues, please speak to **[insert CSM name]** who will happily guide you through the process and help you achieve all you want with **[insert company name]**.

Going forward, **[insert CSM name]** will talk you through the next steps and what you can expect in the coming months. If you've got any questions, feel free to fire them **[insert CSM name]**'s way.

For the time being, that's all from me, but we'd like to say one last 'congratulations' for choosing **[insert company name]** as your **[insert product function]**.

Thanks,

[insert your name]

Email template #2

Hey **[insert customer name]**,

Welcome to your **[product name]**.

Up until now, I've been your point of contact at **[enter company name]**, but I want to acquaint you with our customer success team who'll be your go-to from now on.

Going forward, you'll be working with our Customer Success Manager **[insert CSM name]**, who knows **[insert product name]** inside out and back to front.

[insert CSM name] will reach out to you to ensure everything is going smoothly and to discuss the next stages going forward as you start using **[insert product name]**. Our onboarding process is focused on making sure you're as confident and as knowledgeable about **[insert product name]** as possible.

Over the next few days, you can expect a calendar invite from me for a call. This will be between me, you, and **[insert CSM name]** to function as a handover and to begin your onboarding. I'll do the introductions to make sure everyone's on the same page, then I'll leave you in the capable hands of your new Customer Success Manager.

But for now, that's all from me for the time being.

Thanks,

[insert your name]
