Sales to CS Handoff Playbook
Worksheet

HubSpot Academy

A playbook is a document outlining goals, note templates, and expectations for sales reps and customer success agents. The goal of a playbook is to ensure that all parties involved know what it takes to create a seamless sales to customer success handoff process so that your company can improve retention.

In this playbook, we will cover:

- Goals
- Buddy system
- Note templates
- Feedback
- Resources

Goals

Both our sales team and customer success teams have goals they are measured on. Below you will find the goals associated with each role.

Sales Goals	Customer Success Goals

Buddies

In an effort to cross-functionally get to know one another better, we have sales-customer success buddies. Grab coffee or lunch with your buddies every _____ weeks/months. Your buddy will be your go-to person when you have questions. Below is a list of buddies.

Maybe you need a table? Add it with the insert tool!

Sales	Customer Success

Sample questions to ask your buddy:

- What's the hardest part of your job?
- How can my team better help your team?
- What are the biggest problems your team is trying to solve?
- What does your day to day look like? This is a list example:

Note templates

When a customer gets handed down from sales rep to customer success agent, the sales rep must leave notes for the customer success agent. A leading cause of customer frustration is having to repeat their story over and over again. Having descriptive notes will eliminate customer frustration.

Each rep will fill out the following in our CRM for our customer success agents to see.

Feedback

While we all try our best, no one's perfect; mistakes will happen. When mistakes happen, own up to them. Say sorry.

If you have feedback for someone, use the "situation, behavior, impact" method. This method of giving feedback cuts out any assumptions and ensures your comments are objective.

Reach out to the person who gave said feedback. We're all trying to bring our best selves to work.

Remember: feedback can be both positive and negative. Here's an example of using the SBI model for feedback:

Situation: Sales rep did not leave notes identifying correct person of contact.
Behavior: I reached out to the wrong person, had to have them tell me who the correct point of contact is.
Impact: Customer was frustrated that it took a long time to reach out. I wasted time tracking down multiple folks from the company.

Please make sure to include correct person of contact next time, as it helps both the customer and the customer success team. Please let me know if you'd like to discuss further.

Who’s who

Below is a list of all the folks on the sales and customer success teams, along with the skills they’re willing to be acknowledged for. If you’re struggling with a particular skill, or would like to know more about a topic, don’t hesitate to reach out to the corresponding person.

Sales Team	Skill

Customer Success Team	Skill