

Post Sale Process to Kick Off Process

05/15/2026 3:07 pm EDT

Unified Operating Model for Net New and Platform Migration Customers

Purpose

This document governs the transition from Closed Won to project kickoff for:

- Net new customers
- Existing customers migrating platforms

The process is designed to:

- Eliminate post-sale communication gaps
- Protect against aged Accounts Receivable (AR)
- Enforce governance standards
- Improve customer time-to-value
- Maintain financial controls throughout onboarding and implementation

Problem Statement

A payment-before-kickoff policy was implemented to prevent:

- Aged AR balances
- Delivery of services prior to payment

While financially necessary, the absence of supporting automation and clearly defined handoff workflows created several operational challenges, including:

- Customer silence after contract signature
- Manual payment tracking
- Delayed Project Manager (PM) assignment
- Reduced visibility into onboarding status
- Extended time to kickoff

Scope

This process applies to:

- Net new customers
- Existing customers migrating platforms

- Any Opportunity marked Closed Won requiring:
 - Implementation
 - Migration
 - Onboarding services

Trigger

- **Trigger Event:** Opportunity marked **Closed Won** in Salesforce.

Tier 0 and Tier 1 Customers w/ named CSM

Prepayment is **not** required.

Post-sale kickoff and delivery activities may proceed immediately.

Tier 2 and Above Customers

Prepayment is required unless formally pre-approved.

Approval Process

- Sales Representatives must work with Sales Leadership (Brent) for pre-approval.
- Sales Enablement provides written notification to:
 - Director of Professional Services
 - Senior Manager, PMO
- Notification is delivered through Teams during the Q2C project assignment process.

Governance Rules

- There are no exceptions except those formally communicated to the PMO/CSM team by Sales Enablement through the Q2C process.
- Sales Representatives must coordinate exceptions through:
 - Sales Leadership
 - Sales Enablement
- Sales Representatives must not contact:
 - Project Managers

- CSMs
- Delivery teams directly regarding exceptions

Near Term Updated Process

1. Closed Won

- Opportunity marked Closed Won
- Customer tier confirmed
- Prepayment requirement validated

1A. Daily Opportunity Intake and Project Assignment

Customer Success and PMO leadership receive daily email notifications for all newly Closed Won opportunities from Sales that are categorized as either:

- New Implementation
- Migration

Upon receipt of the notification, PMO leadership:

- Creates the TaskRay project
- Assigns the Project Manager
- Notifies customersuccess@boldgroup.com of:
 - The new project creation
 - The assigned Project Manager
 - The request for Customer Success Manager assignment

The assigned Customer Success Manager is expected to:

- Partner with the assigned Project Manager throughout onboarding and implementation
- Begin CSM engagement activities
- Include the assigned Project Manager on customer communications related to onboarding and pre-kickoff

coordination

2. Customer Communication

The CSM:

- Emails the customer confirming sale completion
- Reviews invoice expectations
- Schedules the initial outreach call

3. Invoice Issued

Accounts Receivable (AR) issues the invoice within:

- 48 to 72 business hours

4. PM Assignment for Intro Only

A Project Manager is assigned via the Wednesday or Friday batch assignment process for introduction purposes only until payment is received.

5. CSM Led Intro and Handoff

The CSM leads the introductory call with:

- Customer
- Project Manager
- Sales Representative

Objectives of the Call

- Introduce the delivery team
- Review project scope
- Validate payment status or facilitate payment completion

Payment Decision Gate

If Payment is Confirmed

- PM schedules the full kickoff meeting

If Payment is Not Confirmed

- CSM facilitates payment follow-up and coordination

Kickoff Scheduling

Tier 2 and Above

Kickoff is scheduled only after payment confirmation.

Tier 0 and Tier 1

Kickoff activities may proceed immediately.

The CSM conducts prepayment-related activities with the PM copied on communications.

Long Term Target State

The future-state process includes automation for:

- Customer welcome communications
- Invoicing
- Payment reminders
- Payment synchronization
- PM assignment
- Kickoff scheduling

Target Outcome

- Kickoff scheduled within 7 to 10 business days
 - Improved customer visibility and onboarding experience
 - Reduced manual intervention
 - Stronger financial governance and operational efficiency
-