Onboarding Kickoff Process: Internal Sales to PM Handover

06/25/2026 10:24 am EDT

This process is designed to create consistency between Sales, Customer Success, and the Project Managers before a customer-facing introduction or kickoff occurs. The goal is to ensure scope alignment, expectation management, payment confirmation, and project readiness before execution begins.

Purpose of the Internal Handover Call

The Internal Sales → PM Handover Meeting is intended to:

- Transfer customer and project knowledge from Sales to PMO
- Align internal teams on scope, assumptions, risks, and expectations
- Review contractual deliverables and implementation requirements
- Identify any customer sensitivities, timeline concerns, or outstanding questions
- Confirm operational readiness prior to customer kickoff
- Establish ownership and communication paths moving forward

This meeting should occur before the external customer kickoff meeting whenever possible.

Recommended Attendees

Required

- Account Executive
- Project Manager
- Customer Success Manager

Meeting Ownership

Role	**Responsibility**
Customer Success Manager	Facilitates meeting and drives agenda
Account Executive	Reviews customer background, scope, and expectations
Project Manager	Reviews implementation considerations and asks clarifying questions
Customer Success Manager	Confirms payment status, communication plan, and next steps

Standard Internal Handover Agenda

1. Project Overview (Sales)

- Overview of signed order form / agreement
- What the customer purchased
- Why the customer moved forward
- Business drivers behind the project
- Key dates or timelines discussed during sales cycle

2. Scope Review (Sales)

- Included products/modules/services
- Consulting hours
- PM services
- Integrations
- Exclusions or limitations
- Special contractual considerations

Examples:

- No data conversion included
- Customer responsible for hardware
- Third-party coordination required
- Limited after-hours work included

3. Customer Snapshot (Sales + CSM)

- Customer temperament and communication style
- Key stakeholders and decision makers
- Internal politics or sensitivities
- Historical concerns or escalations
- Previous product usage or migration background
- Preferred communication methods

4. Project Readiness Review (CSM)

- Payment status confirmed
- Contract/order form executed
- Any outstanding documentation needed
- Customer readiness concerns
- Internal resource alignment

5. PM Discovery / Clarifying Questions (PM)

- Technical dependencies

- Infrastructure requirements
- Timeline feasibility
- Resource requirements
- Risks, assumptions, and blockers
- Customer responsibilities

6. Communication & Next Steps (CSM)

- Confirm primary customer contacts
- Establish communication cadence
- Confirm ownership moving forward
- Discuss external kickoff timing
- Identify immediate action items

Suggested Teams Invite Format

Meeting Title

[Customer Name] – [Project Name] – Internal Sales/PM Handover

Meeting Purpose

Transfer project knowledge from Sales to Professional Services prior to customer kickoff. Internal teams will review scope, expectations, assumptions, project readiness, risks, and next steps to ensure alignment before implementation begins.

Please be prepared to speak to your applicable sections below.

Agenda

Sales

- Scope of work review
- Products/services sold
- Customer goals and business drivers
- Timelines discussed during sales cycle
- Customer expectations and sensitivities

Project Management

- Clarifying questions
- Technical considerations
- Resource planning
- Risk/dependency review

Customer Success

- Payment confirmation
- Communication paths

- Customer readiness review
- Next steps and kickoff coordination

Example Customer Section Template

Customer Snapshot

Company: Innsbrook Resort
Primary Contact: Chris Teepe (IT Director / AP)
Website: https://innsbrook-resort.com/

Project Background

- Formalized through Order Form Q-05107 (signed March 31, 2026)
- Migration from SIS → Manitou (On-Prem)
- Includes BoldNet module, consulting, PM services, and system consulting

Scope Notes

- No data conversion included
- Small operation (~500 accounts / 2 concurrent users)

Additional Notes

- Customer appears collaborative and responsive
- No major escalation history identified
- PM to validate migration assumptions during kickoff