

Customer Onboarding Handoff

A process documentation example for a customer success lead taking a signed account from sales into implementation.

Document Control

Process ID	CS-001
Owner	Customer Success Lead
Version	2.1
Last reviewed	12 Aug 2026
Next review	12 Feb 2027

Scope

TRIGGER

Contract countersigned in the CRM.

FINISH CONDITION

Customer completes first successful workflow in production.

Procedure

☐ 1. Sales rep files the handoff note in the CRM within 24 hours of countersignature

Owner: Sales rep · Input: signed contract · Output: completed handoff note with goals, stakeholders and known risks

☐ 2. CS lead reviews the note and books the kickoff call within 2 business days

Owner: CS lead · Output: calendar invite with agenda attached

- ☐ **3. CS lead runs the 45-minute kickoff and confirms the success metric in writing**

Owner: CS lead · Output: success metric recorded on the account record

- ☐ **4. Solutions engineer configures the workspace and invites named users**

Owner: Solutions engineer · Input: user list from the handoff note · Output: workspace live with users invited

- ☐ **5. CS lead runs the 30-minute training session and shares the recording**

Owner: CS lead · Output: recording link on the account record

- ☐ **6. CS lead confirms first production workflow completed and marks onboarding closed**

Owner: CS lead · Output: account status set to Active

EXCEPTION

If the success metric is not agreed by day 10, escalate to the CS manager.