

Handoffs & Introductions

CSM, Onboarding, CAE, and other handoff processes

- [New Customer Onboarding Kickoff](#)

New Customer Onboarding Kickoff

Onboarding Kickoff

Prior to a closed won, the AE should have identified the customer's start date for onboarding. The [mutual action plan](#) next steps tab is the best place to capture this information, especially with Net 30 terms or onboarding set outside of a typical start date schedule.

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Parameters for onboarding kickoff

A call should be held with the customer and their onboarding manager or CSM **within 30 days of close** to ensure successful implementation and customer retention.

Set expectations with the customer that their onboarding manager will prepare for a kickoff call with them on their agreed upon start date, and that onboarding sessions may get booked quickly. Recommend scheduling their onboarding kickoff call 1 week in advance, but **give at least 48 hours notice to the onboarding team.**

Handoff For Onboarding

When a start date is agreed on with the buyer company stakeholders, notify the onboarding team for routing and scheduling.

Best practice is for the AE to own sending an introduction to their customer team (Onboarding Manager & CSM) as this has the best engagement and customer experience! This is recommended especially in cases where getting the client going on implementation is needed to push timeline.

Reminder: the AE owns the customer relationship up to a closed won, at which point the CSM will own the customer relationship. Prior to a closed won, the AE should continue to own communications with the customer.

Executing A Handoff To Onboarding

1. Identify the assigned CSM and Onboarding Manager
 2. Draft an email to the customer with the Onboarding Manager introduced and the CSM Cc'd (email template WIP)
 3. Provide Onboarding & CSM with their mutual plan (attached to the email)
 4. Onboarding Manager will follow up to ensure they schedule
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