



ACCOUNT HANDOVER

Handover Objectives

Seamless transition (nothing "falls between the cracks")

Zero impact on the customer ("Show MUST GO ON")

Minimize up-to-speed time

Internal Preparation

The reason for the change

Background: Use case, meeting notes, account plans, QBRs, etc.

Future priorities and commitments

Stakeholders

Transition plan

Ongoing- Open tickets, feature requests, etc.

Customer communication plan

Customer Activities

Introduce yourself to the account (explain the reason for the change)

Review the timelines and handover process

Assess customer sentiment and address any issues promptly

Allow some time for internal overlap

Follow up after transition

This infographic was provided to you by Guy Galon, VP of Customer Success at Hysolate.



CSM PRACTICE
THE CUSTOMER SUCCESS STRATEGY CONSULTING FIRM