

Customer handoff SOP example

Illustrative procedure CS-001, version 1.0. Customer Success owns this process. Start when Sales marks a fictional account ready for onboarding. Finish only when the receiving owner confirms the next action. This example contains no customer results.

Document control

Example version 1.0. Confirm the owner, reviewer and effective date before use.

Owner _____ Reviewer _____
Effective date _____ Next review _____

Steps and evidence

1. Sales coordinator

Action: Check the organization, primary contact, agreed scope and open commitments.

Evidence or exception: Record the source record ID. Missing contact or scope: return to Sales before handoff.

2. Customer Success lead

Action: Choose an available receiving owner and confirm they accept the handoff.

Evidence or exception: Record the owner and acceptance. If unavailable, keep the handoff open and escalate to the lead.

3. Receiving owner

Action: Record the next action, due date and unresolved questions in the shared record.

Evidence or exception: Example: Demo Account 104; owner CS lead; next action welcome call; due September 18.

4. Sales coordinator

Action: Read back the handoff summary and confirm the receiving owner can access it.

Evidence or exception: Close only when scope, contact, owner and next action are present. A sent message alone is not acceptance.

Checks and exceptions

- Prerequisites: access to the customer record and agreed scope; use fictional data when testing.
- Change record: v1.0 establishes the acceptance check. The process owner sets the effective date and reviewer before use.
- Test the missing-contact and unavailable-owner cases as well as the ordinary path.

Record to complete

Task reference: _____

Procedure and version: _____

Person performing the task: _____

Receiving owner or reviewer: _____

Result and next action: _____

Due date: _____

Exception and resolution: _____

Review decision: _____

Change history

Date _____ Version _____ Change and reason _____

Reviewer _____ Training impact _____

Illustrative example with fictional data. Adapt and test the procedure with its owner before approving it.