NEW CLIENT HANDOFF CHECKLIST

1. **SALES** sends client notes to **PM**
2. **SALES** sends quotes / proposal / Annual Plan to **PM**
3. **SALES** forwards relevant sales/client emails to **PM** if necessary
4. **PM** fills out Planning Questionnaire
    a. What information is still needed?
5. Phone call/meeting between **PM** & **SALES**
6. **SALES** introduces **PM** to Client via email
7. **PM** sends follow up email
    a. Requests missing information
    b. Sets up Launch Call
    c. Establishes timeline
8. Post-project: **SALES** and **PM** discuss next steps