

Post-Sale Handoff & Customer Success Strategy

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Department: Sales, Customer Success

1. Objective

To ensure a seamless, high-touch transition from the Sales close to the Customer Success (CS) onboarding, thereby minimizing churn and maximizing long-term account value.

2. Mandatory Handoff Protocol (The 72-Hour Rule)

The AE must complete the following steps within **72 business hours** of the contract signing (Closed Won status in CRM).

Step	Responsible Party	Description	CRM Requirement
1. Handoff Meeting	AE & CS Manager	Mandatory internal meeting to brief CS on the client's history, pain points, and agreed-upon ROI metrics.	Meeting logged on Opportunity and Account.
2. Client Introduction	AE (Lead)	AE introduces the dedicated CS Manager via email or introductory call, setting expectations for onboarding.	Handoff Email Template used; stored in CRM.
3. Documentation Transfer	AE	Upload the final signed contract, SOW, and the Value Projection Template to the Account file.	All files tagged with 'Closed Won Assets'.

4. Account Setup	CS Manager	Provision the client environment and schedule the official Kick-Off Meeting.	Project Plan created in CS platform.
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3. Customer Success Focus: Maximize Adoption and Expansion

The CS team is responsible for driving the following post-sale revenue pillars:

- **Adoption:** Ensure initial users are actively utilizing the platform to achieve the promised ROI metrics established in the initial proposal.
- **Expansion (Upsell/Cross-sell):** Identify new departments or workflows within the client's organization that could benefit from NexaCore (documented via the **Upsell & Cross-sell Playbook**).
- **Advocacy:** Convert successful clients into references, case studies, and testimonial providers (per Marketing's **Case Study Process**).

4. AE Compensation on Expansion Deals

The original AE retains a **[X]%** **commission rate** (vs. standard renewal commission) for any expansion revenue (upsell/cross-sell) generated in the first **[18] months** post-initial contract signing, provided they remain the assigned AE.