CUSTOMER LIFECYCLE PLAYBOOK

Strengthen every handoff from closed deal to cash collected.

A practical guide to the five handoffs that hold the B2B customer lifecycle together: what needs to pass at each one, where it usually breaks, and what right looks like. It ends with a short self-assessment and next steps.

Why handoffs matter

Most customer problems don't start inside one team. They start between teams, when work changes hands and something gets left behind: a promise Sales made, a go-live date that moved, a credit nobody approved. The customer feels it as a rough start, a wrong invoice, or a slow answer. The business feels it as rework, churn risk, and revenue that slips away quietly.

The fix is rarely a new tool. It's being clear about what passes at each handoff, who owns it, and what triggers the next step.

How to use this playbook

- Read each handoff and compare it with how your team works today.
- Note where your process matches “Where it breaks.”
- Rate each handoff in the self-assessment, then start with the weakest one.

HANDOFF 01

Sales to Onboarding

The deal closes, and everything the customer was promised needs to reach the people who will deliver it.

WHAT NEEDS TO PASS

- Signed contract and order details
- Key contacts: decision-maker, day-to-day, billing
- Scope, timeline, and success criteria
- Promises made during the sale

WHERE IT BREAKS

- Notes live in a rep's inbox or head
- Custom terms aren't flagged
- Onboarding re-asks the customer questions Sales already answered

WHAT RIGHT LOOKS LIKE

A standard handoff record, completed before the deal is marked closed-won, with a named owner on each side and a short handoff call for complex deals.

HANDOFF 02

Onboarding to Implementation

Setup turns into delivery. Expectations need to stay the same as the work changes hands.

WHAT NEEDS TO PASS

- Agreed go-live date and milestones
- Configuration and setup decisions
- Customer responsibilities and open items
- Risks raised during onboarding

WHERE IT BREAKS

- Go-live dates slip without anyone telling Billing
- Customer tasks aren't tracked, so delays look internal
- No clear definition of “done”

WHAT RIGHT LOOKS LIKE

A shared project plan with milestones, a defined go-live criterion, and an automatic notice to Billing when the start date changes.

HANDOFF 03

Implementation to Customer Success and Support

The customer is live. Now the relationship moves to the team that will keep it healthy.

WHAT NEEDS TO PASS

- What was configured and why
- Known issues and workarounds
- Customer goals and success measures
- Who the customer trusts and talks to

WHERE IT BREAKS

- Support learns about the account from the first ticket
- Customer goals get lost after go-live
- Open issues follow the account with no owner

WHAT RIGHT LOOKS LIKE

A go-live summary in the CRM, a warm introduction to the CS owner, and open issues assigned before Implementation steps away.

HANDOFF 04

Account Changes to Billing

Upgrades, downgrades, credits, renewals, and cancellations all change what the customer should be billed.

WHAT NEEDS TO PASS

- The change, its effective date, and the new price
- Who approved it, and why
- Any credits, refunds, or prorations
- Renewal and cancellation dates

WHERE IT BREAKS

- Changes are agreed in email and never reach billing
- Credits are applied without approval
- Renewals are noticed only after they lapse

WHAT RIGHT LOOKS LIKE

One request path for every account change, an approval step for credits and discounts, and renewal dates visible to Billing in advance.

HANDOFF 05

Billing to Collections

The invoice goes out. Revenue isn't real until it's collected.

WHAT NEEDS TO PASS

- Accurate invoice and billing contact
- Payment terms and method
- Disputes and their status
- Account context from Customer Success

WHERE IT BREAKS

- Past-due accounts have no owner
- Disputes sit in Billing while CS doesn't know
- Follow-up depends on who has time this week

WHAT RIGHT LOOKS LIKE

A named owner for every past-due account, a consistent follow-up schedule, and disputes worked jointly with Customer Success.

Self-assessment

Rate each handoff as it works today. **Solid** means it happens the same way every time, with a clear owner. **Inconsistent** means it depends on who's involved. **Broken** means things are regularly missed.

HANDOFF	SOLID	INCONSISTENT	BROKEN
Sales to Onboarding	☐	☐	☐
Onboarding to Implementation	☐	☐	☐
Implementation to Customer Success and Support	☐	☐	☐
Account Changes to Billing	☐	☐	☐
Billing to Collections	☐	☐	☐

> **Mostly solid**
> Your handoffs are in good shape. Document them so they stay that way as the team grows.

> **Any “Inconsistent”**
> The process lives in people, not in a system. Write it down and name an owner.

> **Any “Broken”**
> Start here. A broken handoff affects every stage after it.

Next steps

> **Pick one handoff.** Start with the one rated Broken, or the one closest to billing.

> **Name the owner on each side.** One person sends, one person confirms receipt.

> **Define the trigger.** Decide exactly what event starts the handoff, such as closed-won, go-live, or a signed change form.

> **Write the checklist.** Use “What needs to pass” as a starting point and adjust it for your business.

> **Automate after it works.** Once the handoff runs the same way every time, automate the reminders and data transfer.

Want help with your handoffs?

Handoff problems are easier to see from the outside. A fresh review often finds the gap in an afternoon that a team has been working around for months.

Start with an Operations Assessment

A one-time review of how your customer lifecycle runs today, from sales handoff through collections. You get clear findings and prioritized recommendations. For more details, visit www.onestopsourcinggroup.com.

Book a 30-minute call at www.onestopsourcinggroup.com