

TRANSITION

CHECKLIST

Transition is where most relationships get quietly damaged. The gap opens at the kickoff, before a single ticket is created — and by the time anyone notices, the customer has already started forming an opinion. This checklist covers the whole transition: before the deal closes, the moment it does, and the first weeks after.

"The stage was on the calendar. The handoff wasn't."

ACCOUNT

Customer

Sales owner

Delivery owner (who this account is transitioning to)

Target kickoff date

BEFORE THE DEAL CLOSES

Delivery Starts Before the Sale. The people who have to deliver the promise should help shape it before it becomes one.

- ☐ Delivery reviewed or helped shape this deal before it was sold — not after the ink was dry.
- ☐ Delivery asked the uncomfortable questions while there was still time to answer them: can we staff this as written? Does it match what we can repeat every week, not just month one?
- ☐ What's being sold matches what Delivery can actually support and repeat.
- ☐ Delivery helped lead at least one customer conversation before signature — the customer heard from the people who will actually produce the outcome, not only the people proposing it.

AT SIGNATURE — THE HANDOFF ITSELF

This is the moment the book calls the birthplace of the Outcome Execution Gap. Get this stop right and the rest of the road gets easier.

- ☐ The customer's own definition of success — in their words — has been captured, not just the signed statement of work.
- ☐ That definition was handed to Delivery directly, in a conversation — not reconstructed later from a proposal deck and a few email threads.
- ☐ Sales, Delivery, and the customer were in the same room (or call) for the handoff.
- ☐ The person who inherits the account was in the room when the promise was made — she isn't reverse-engineering it from fragments.
- ☐ Kickoff is scheduled on time. A kickoff that starts two weeks late is already a warning sign, not a scheduling footnote.

FIRST 30-90 DAYS – STABILIZING THE HANDOFF

Confirm the transition actually held once the excitement of kickoff wears off.

- ☐ Ask the seller, the deliverer, and the account owner – independently – what winning looks like for this account. The answers match, in roughly the same words, and those words belong to the customer, not the contract.
- ☐ One person is named accountable for this account's alignment across the whole relationship – not a series of separate handoffs with no single owner.
- ☐ Any friction created by the handoff itself has been named and is being removed.
- ☐ A date is on the calendar to ask the signing executive the success question directly, if it hasn't been asked yet.

What Sales sold them	
What the customer expected (their words)	
What Delivery believes it's responsible for	
All three match? (Y/N + note)	

Warning signs – this transition is already leaking

- ⚠️ *The kickoff started two weeks late and nobody flagged it as a problem.*
- ⚠️ *Delivery is reconstructing what was promised from a signed SOW and a handful of email threads instead of a direct handoff conversation.*
- ⚠️ *An account manager could be blamed for a renewal that was lost in a kickoff call they weren't even invited to.*
- ⚠️ *Sales has already moved on to the next opportunity before Delivery has met the customer.*
- ⚠️ *Nobody can name, in one sentence, who owns this account's alignment from Win through Renew.*

Before you close this checklist

Is there a single owner for this account's alignment across every stage, not just this handoff?

What is the one thing, this week, that would close any gap found above?

Want to build this into how every account transitions, not just this one? Book an Outcome Execution Gap Session.

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