

# Customer Handoff CS Response



Hey {Customer Name},

Great to connect with you! I'll be {Company Name}'s designated Success Coach and point of contact moving forward. I couldn't be more excited to work with you!

[Insert rapport building and the "why" behind your excitement to work with them].

For our kickoff call, we like to block off a full hour and on that call we like to include the executive sponsor and our point of contact from your side. **Please click the following link to select a time that works best for you: {insert calendar link}.**

From our side, we'll be joined by {Onboarding Specialist's Name}. She'll join us during the onboarding process to help us get your account setup as fast and efficient as possible.

Also, you should have just received an email to Onboard.io, a tool we use to give you full visibility into the onboarding process. There are a few tasks that you can get started on before our call.

Welcome to the family! Chat soon!

## Highlights:

- Let the client know that you'll be their "designated" point of contact. Try to refrain from using dedicated, which can imply you're only working with that customer. Also, help set expectations by letting them know you're their point of contact moving forward.
- Get started off on the right foot by letting them know that you've chatted with their salesperson and already understand their use case.
- Help them understand the next step and who should be on the kickoff call, then make it easy for them to schedule.
- Lightly introduce their Onboarding Specialist and let the customer know they will only be involved for a short time, but you're still the primary point of contact.
- Last, but not least, give them access to their launch plan, so they can get started before the kickoff call.