



Sales and Internal Operations – Setting the Stage for Client Success

SOEE what's new...

The alignment and communication between the **sales organization** and **internal operations** is critical to **customer success**. Contacts, relationships, and trust have been forged throughout the sales cycle and expectations have inevitably been established.

One of the most significant and final events, within the **sales process**, is the transition of a closed-sale to internal operations. The outcome of this transition is greatly enhanced by a **seamless sales "hand-off"** to start the client onboarding journey.

Significant details and data are gathered during the initial sale.

Establishing an organized process to transfer sales information, ensures critical facts are shared with operations. Consistent internal communication improves the initial client interaction and demonstrates **operational excellence**.

SOEE what's the solution...

Alignment of the **Customer Experience** from lead generation to revenue recognition reaches a pivotal moment as clients enter the onboarding phase. The operations goal of "Go Live" or "Start Date" and success of this process, will set the stage for long-term relationships and ultimately **customer confidence**.

SALES AND ONBOARDING CONSIDERATIONS



Technology – Data – Process Design:

Evaluation, integration, and configuration of **enabling technology** will assist with the transition of critical sales data to the operations team.



Pricing – Contracts – Products or Services:

Ensuring sales and operations are fully aligned with pricing and contractual relationships will minimize miscommunication with client expectations.



Sales Documentation – Defined Operational Guidelines: Creating a documented, defined, and repeatable process ensures consistent sharing of sales details for effective operational boarding.

Internal operations can be complex. Time and energy are required from both Centers of Excellence to "perfect" the customer onboarding experience. Open lines of communication and ongoing evaluation of technology and client feedback (pre and post-sale) assist with best practice design.

SOEE what's the value...

The marketplace is very competitive and new clients are difficult to secure. Working in unity, sales and operations can make a significant impact and develop an incredible "second impression" with an exceptional onboarding experience (the first impression being the original sales experience).

Operations is an extraordinary asset to every organization.

The skill set of operations versus sales can be quite distinct and complimentary to the sales team. Very diverse skills and personalities can also cause friction and frustration if not properly managed. Visionary planning and continued process improvement will create further synergies between the teams. Sales and operations, working as one team, will significantly **enhance revenue growth, customer success, and client retention.**

