

HANDOFF

SDR -> AE | AE -> CSM

REVENUE HANDOFFS

Coaching Guide

SDR / AE / CSM Handoff Standards

Manager reference for coaching teams on structured revenue handoffs

Q

Qualify

D

Document

T

Transfer

C

Confirm

O

Onboard

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How to Use This Guide

This coaching guide is designed for SDR, AE, and CS managers running 1:1s, handoff reviews, or cross-functional training sessions. Use it to coach teams on executing clean handoffs that protect buyer relationships, eliminate re-qualification, and close the 'what was promised' gap.

Coaching Questions

Use these in 1:1s or handoff reviews. They are designed to reveal whether reps are documenting full context or cutting corners on handoff quality.

Red Flags

Warning signals that indicate handoffs are incomplete or creating downstream problems. Surface these early before they become customer-facing issues.

Coaching Scenario

A real-world situation to walk through with your rep. Compare their response to "What Good Looks Like" to identify coaching moments.

Mastery Indicators

Use these to assess rep readiness and set development goals. A rep demonstrating all five executes handoffs that protect the customer relationship.

HANDOFF

Revenue Handoff Standards -- SDR / AE / CSM

Qualify | Document | Transfer | Confirm | Onboard

PURPOSE

Help SDR, AE, and CS managers coach their teams to execute structured handoffs that protect buyer relationships, document all commitments, and eliminate re-qualification across the revenue funnel.

MANAGER COACHING QUESTIONS

- Walk me through the last handoff you completed. What buyer pain did you capture -- in their words?
- Show me the CRM record for a recent handoff. Are all required fields complete? What's missing?
- What promises did you document in your last Closed-Won handoff? Is anything missing?
- Show me the stakeholder map. Does the receiving team know who the champion and skeptics are?
- How did the warm intro call go? Did the customer feel continuity was maintained?

RED FLAGS TO WATCH

- Pain statements are generic summaries instead of direct buyer quotes
- Required CRM fields left blank or filled with placeholder text
- Promises Made field is empty or says 'standard implementation'
- No stakeholder map -- receiving team only has one contact name
- CSM discovers undocumented commitments or scope exclusions during onboarding

COACHING SCENARIO

SETUP

An AE closes a \$150K deal. The handoff has contract details but Promises Made is empty, success criteria say 'improve efficiency,' and the stakeholder map has one name. The CSM discovers an undocumented integration promise in week 2.

WHAT GOOD LOOKS LIKE

The manager has the AE document all promises from email threads and recordings. They rewrite success criteria with the customer and implement a pre-close handoff review for all future deals.

MASTERY INDICATORS

- 1 Every handoff includes buyer pain in direct quotes from the prospect
- 1 All required qualification fields are complete before handoff is submitted
- 1 Every Closed-Won handoff includes specific, documented promises -- no blank fields
- 1 Stakeholder map includes 3+ contacts with relationship notes
- 1 Monthly handoff audit scores average 90%+ completeness with zero surprise escalations