

YOUR EXC | STOP RENEWALS. FROM DYING IN THE HANDOVER GAP.

CLIENTS RARELY CHURN DURING DELIVERY — THEY START LEAVING THE MOMENT THEY'RE HANDED OVER BADLY.

THIS TOOLKIT SHOWS YOU HOW TO CLOSE THE GAPS BETWEEN SALES AND DELIVERY, PROTECT RENEWALS, AND KEEP CLIENTS CONFIDENT FROM DAY ONE.

WHAT'S INSIDE THE TOOLKIT?

The 5 biggest leaks in the client handover process

A 7-Day Fix Map to repair the post-sale experience

Templates for handover emails, check-ins, and client updates

A 90-Day ROI Snapshot showing the cost of weak transitions

WHO IS THIS FOR?

Consulting firms, agencies, and professional service providers who want to:

- Build smoother transitions from Sales to Delivery.
- Protect renewals by improving the first client experience.
- Increase retention, referrals, and repeat projects.

If clients feel ignored after the deal closes, this toolkit will help you rebuild trust and consistency fast.

CX LEAK FINDER — WHERE CLIENTS LOSE CONFIDENCE

THE HANDOVER STAGE IS WHERE MOST “GREAT DEALS” QUIETLY DIE.
HERE’S WHAT GOES WRONG — AND HOW TO FIX IT BEFORE IT COSTS YOU RENEWALS.

LEAK 1

The post-sale silence

The moment after signing feels like a drop-off.

Fix: Send an immediate “next steps” message within 24 hours of deal close.

LEAK 2

No single point of contact

Clients are unsure who to reach out to.

Fix: Introduce the delivery lead clearly with contact details and response expectations.

LEAK 3

Lack of context transfer

Key details get lost between Sales and Delivery.

Fix: Implement a 15-minute internal handover meeting with a client summary template.

LEAK 4

No onboarding confidence signal

Clients second-guess the partnership when they don’t see progress early.

Fix: Schedule a kick-off meeting within 72 hours of project start.

LEAK 5

Delivery misalignment

The delivery team focuses on tasks, not the client’s “why.”

Fix: Share the client’s core goals and success metrics in every internal brief.

THE 7-DAY FIX MAP

REBUILD YOUR CLIENT EXPERIENCE FROM THE MOMENT THE DEAL IS SIGNED.

Day	Focus Area	Action Step	Owner
1	Post-sale communication	Send “next steps + welcome” message	Account Manager
2	Assign ownership	Introduce client to Delivery Lead	Project Manager
3	Internal alignment	Run 15-minute context handover	Sales + Delivery
4	Kick-off meeting	Confirm agenda, responsibilities, and deliverables	CX Lead
5	Share client summary	Distribute key notes to delivery team	Operations
6	Mid-week confidence check	Quick “everything on track?” call or email	Account Manager
7	Measure trust signals	Review early feedback and engagement tone	CX Lead

QUICK-WIN MESSAGE TEMPLATES

WELCOME EMAIL (IMMEDIATELY AFTER DEAL CLOSE)

“Hi [Name], we’re thrilled to start this project with you.
Here’s what happens next:
[Task or setup step]
[Team introduction or kick-off schedule]
[Support / contact info]
You’ll be hearing from [Delivery Lead Name] who will guide you from here.”

INTERNAL HANDOVER TEMPLATE

Client: [Name / Company]
Key Objectives: [Goals / KPIs]
Deliverables: [Summary]
Notes from Sales: [Pain points / expectations]
Success Metrics: [Define measurable outcomes]

KICK-OFF FOLLOW-UP MESSAGE

“Hi [Name], great to meet with you today.
We’re excited to get started — here’s a quick recap of agreed next steps and dates.
Expect your first progress update by [Date].”

CONFIDENCE CHECK-IN MESSAGE (MID-WEEK)

“Hi [Name], checking in quickly — how are you feeling about progress so far?
Any questions or feedback before we move into next week’s milestone?”

ROI SNAPSHOT — THE COST OF WEAK HANDOVERS

Leak Area	Average Monthly Loss	Fix-It ROI (90 Days)
Post-sale silence	AED 14,000	+AED 9,000 recovered
Context loss	AED 10,000	+AED 6,000 recovered
No ownership clarity	AED 8,000	+AED 5,000 recovered
Weak early engagement	AED 12,000	+AED 8,000 recovered
Total Recovery Potential (3 months)	AED 28,000–35,000+	

YOUR NEXT STEP

FIX THE EXPERIENCE. GROW THE REVENUE.

Every clean handover compounds value — renewals rise, referrals increase, and your reputation strengthens.

Don't let your next client fall through the cracks between Sales and Delivery.

👉 Book your Finance Fix-It Call:

<https://calendly.com/gareth-cummings-yourcxc/30min>

In 30 minutes, we'll:

- Map your client handover process.
- Expose communication gaps and trust leaks.
- Build a 3-step Fix-It plan that strengthens renewals.

YOURCXC |

**FIX THE EXPERIENCE.
GROW THE REVENUE.**

**YOURCXC.COM
EXPERIENCE@YOURCXC.COM**