Fictional example · AI draft

Handover sheet from sales to project start

Your input

Which customer and project is it?	Example Wholesale, a new customer portal
What was promised to the customer?	Go-live before 1 March, login with the existing customer number, and training for the sales office.
What is still unclear or not recorded?	The customer mentioned an integration with its accounting system. It isn't in the quote.
When does the project need to start?	Mid-January.
Who is taking over the project?	A project manager and two developers from the project team.

Handover proposal

> The handover in brief
>
> A new customer portal for Example Wholesale, live before 1 March. The accounting system integration was discussed but not agreed.

Commitments

Go-live before 1 March, login with the existing customer number and training for the sales office.

Uncertainties

Whether the accounting system integration is part of the project, and whether 1 March is still achievable if it is.

Decisions before the start

The account manager and project manager decide together how to put the integration to the customer: as extra work or a later phase.

Agenda for the handover meeting

Go through the commitments, discuss the integration, and agree who confirms to the customer what is and isn't included.

Check first

Reread the quote and the sales meeting notes for other commitments before the handover meeting.

This is an AI draft based on your input. AI hasn't looked anything up or checked anything. Review it before you use it.