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In any customer journey, one of the most critical - yet often overlooked - elements is the 'handoff' between internal teams.

In fact, 70% of customers say connected processes — such as seamless handoffs — are very important to winning their business.

A handoff is a fancy name for the point in a customer journey where your customer is passed from one team to another, dealing with new people in your company as a result.

Some people liken a 'handoff' to the passing of a baton in a relay race - because it needs to be a smooth and seamless transition, or things can go drastically wrong.

Whether it's the transition from marketing to sales or from sales to customer success, these handoffs are pivotal moments that can make or break the experience for your customers.

The challenge is that many organizations either don't have appropriate processes in place - or choose to do everything manually.

This leads to inconsistent experiences for your customers and the potential for important information or potential additional revenue to fall through the cracks.

Luckily, many of these issues can be fixed by adopting the right technology - not least a Customer Success Platform.

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Introducing the Handoff

70%

of customers say connected processes — such as seamless handoffs — are very important to winning their business.

The Problems with Manual Handovers

❌ Lack of Standardization

❌ Communication Gaps

❌ Time Consuming

❌ Reduced Accountability

What happens when you do things manually?

To help you identify the areas you need to fix or improve with your handovers, let's explore some of the key problems you're likely to be facing by doing things manually.

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Lack of Standardization

Jeff Breunsbach - Director, Corporate Marketing @ Higher Logic / Co-Founder @ Gain Grow Retain

"Manual handoffs are like passing a baton in a relay race blindfolded – there's potential for drop-offs. I've seen miscommunication and missed opportunities. Technology with automated workflows reduces these human errors and ensures a seamless transition".

When handovers are done manually between teams, It's not uncommon for there to be no standardized procedures for anyone to follow.

Straight away, this 'freestyle' approach to transitioning your customers from one department to another becomes problematic.

Because there is no one way to perform the handover, the lack of standardization can mean you end up with incomplete or inconsistent data being passed between teams.

Not only does this cause problems for your colleagues, but - perhaps more importantly - it can cause delays, errors, and frustration for your customers, jeopardizing the quality of their experience with you.

Communication Gaps

As a customer, nothing is more frustrating than having to repeat yourself multiple times.

If you're lucky, your manual handoffs will be done via emails, meetings, and spreadsheets, and everything is flawless.

However, realistically, most people aren't that lucky. Using emails, meetings, and spreadsheets is risky as it can often lead to errors, mistakes, and a lack of attention. This can cause gaps in communication and vital information to go missing.

This can force the customer to have to repeat themselves during every handoff or remind your colleagues of previously agreed details that they have no record of.

This is not a great look - and definitely not the type of customer journey or experience that you should be providing.

Ankit Aggarwal - Lead, CS Enablement @ MoEngage

"Sometimes when an account is handed over to another team, they have no idea about the customer's requirements, and this makes things difficult for both customers and internal teams".

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Time Consuming

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When handovers are done manually, it's easy for tasks, information, and outcomes to fall through the cracks.

If you don't have a system in place to help you assign and track responsibilities across your team, then accountability can become a real issue.

What this means in practice is that if something goes wrong - and let's face it, a customer churns - you're going to have a challenge on your hands trying to pinpoint where the error came from and who was responsible.

By introducing a specialist system, you can quickly audit outstanding tasks, data, or other potential issues at a glance.

Not only does this help you to address issues with customers before they become serious, but this additional accountability tracking will help your team become more diligent as a result.

Reduced Accountability

Iram Cook-Monie - Head of Customer Success @ Mosaic Smart Data

"Information can be quickly lost for future reference by relying on handover calls alone, but people also tend to miss details or skim-read written notes".

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How a CSP Can Streamline Handovers

✓ Centralized Data

✓ Automated Workflows

✓ Enhanced Collaboration

✓ Accountability & Reporting

Use a Customer Success Platform to Help

So, now you're familiar with some of the issues that manual handovers can bring to your customer journey, let's explore how a Customer Success Platform can help you improve things:

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Centralized Data

One of the main advantages of using a Customer Success Platform is that it brings all your customer data - from first contact to ongoing support - together in one place.

This means that your CS team, and potentially your entire organization, can access the same information, updated in real-time.
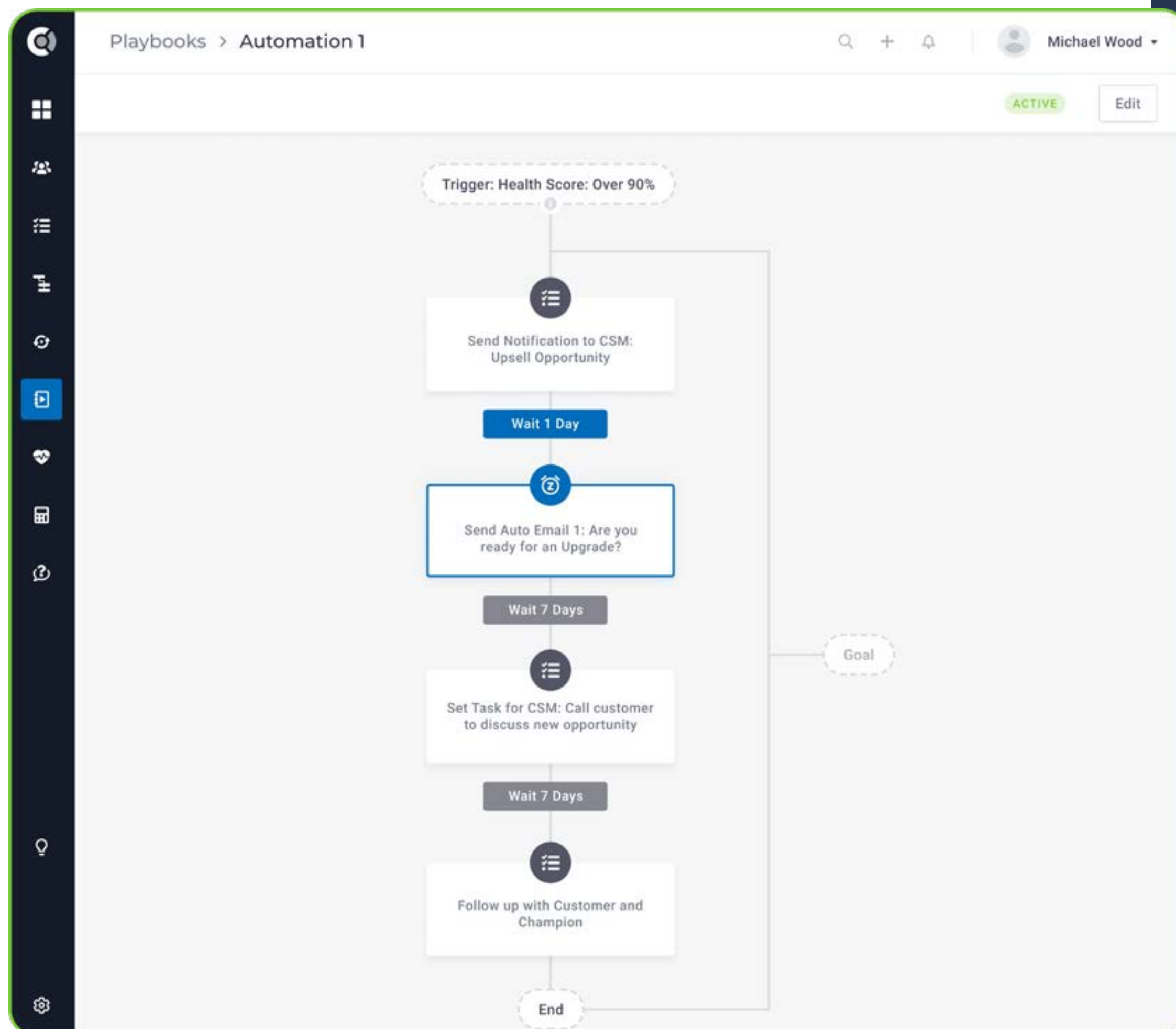
Not only does centralized data help you prevent many of the issues that come with manual handovers, but it also helps keep everyone on the same page so they can all better serve your customers.

Estimated time saved: 3 hours per CSM per week.
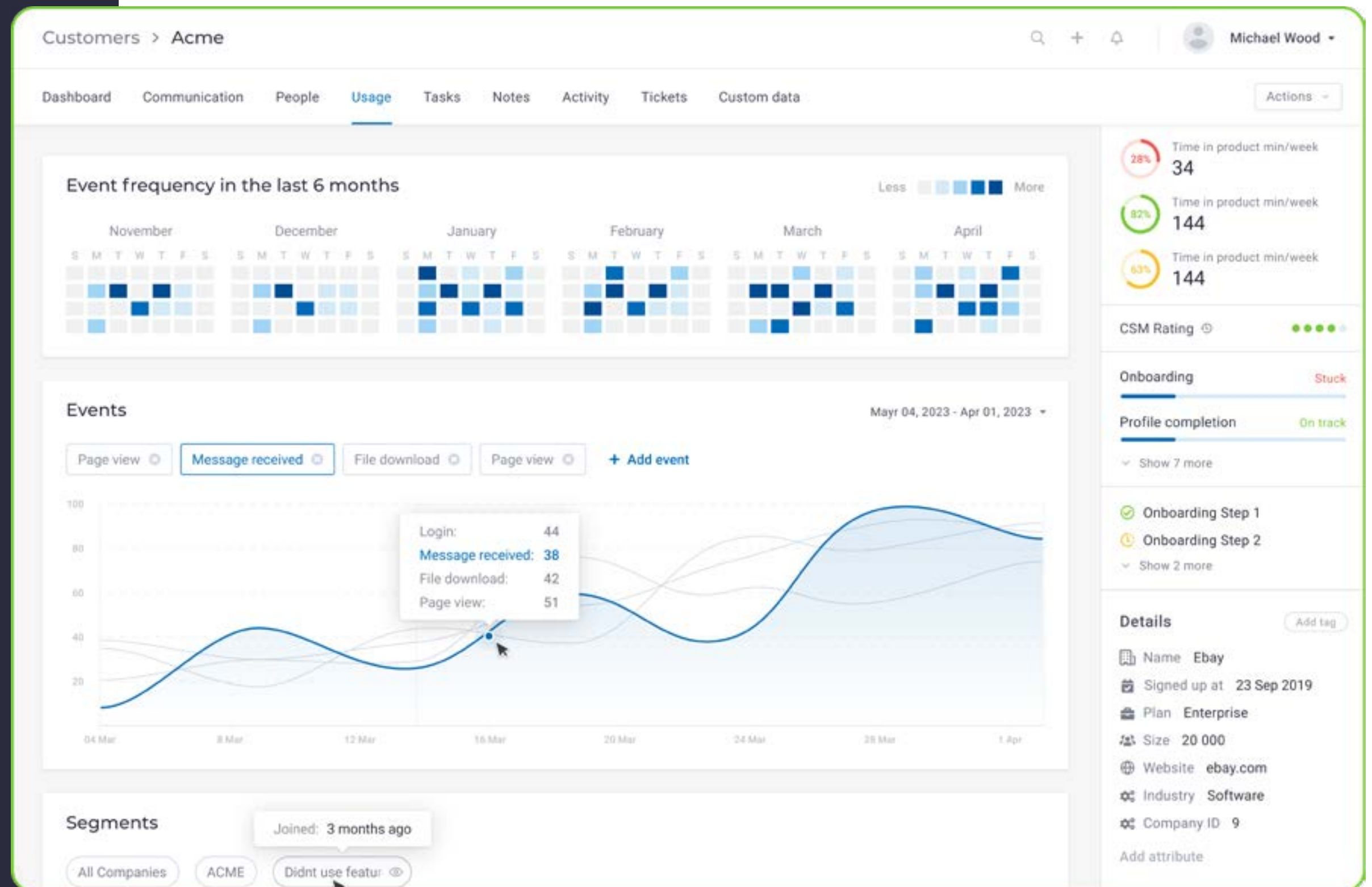
Automated Workflows

Handovers don't have to be a drawn-out or painful affair.

In fact, a CSP can automate many of the tasks involved in a handover and make it pretty painless to complete the process.

As an example, once a sale is closed, a CSP could pick up the information for that deal (via a CRM integration) and then automatically trigger a number of different actions, including:

Assigning a CSM to the account,
Sending a welcome email
Scheduling an onboarding call

By automating a lot of these repetitive handover tasks, it allows you to make sure that no steps are missed, every customer gets a smooth and repeatable experience, and your CSM is freed up to do higher-value work directly with the customers.

Estimated time saved: 2 hours per CSM per week.

Enhanced Collaboration

A key part of an internal handover is the collaboration between teams in order to make sure the customer's needs are met at all times.

Using technology like a CSP is a fantastic way to improve the way your teams work together in the best interests of the customer.

Typically, a customer success platform will boast features like:
Shared dashboards,
Commenting,
Task assignment,
Email reminders,

All of which are designed to allow for transparent and effective communication between teams to break down communication silos and connect the dots behind the scenes to make sure that your customers always receive a consistently excellent experience - and never get unsettled by the prospect of a handover.

Estimated time saved: 1-2 hours per CSM per week.

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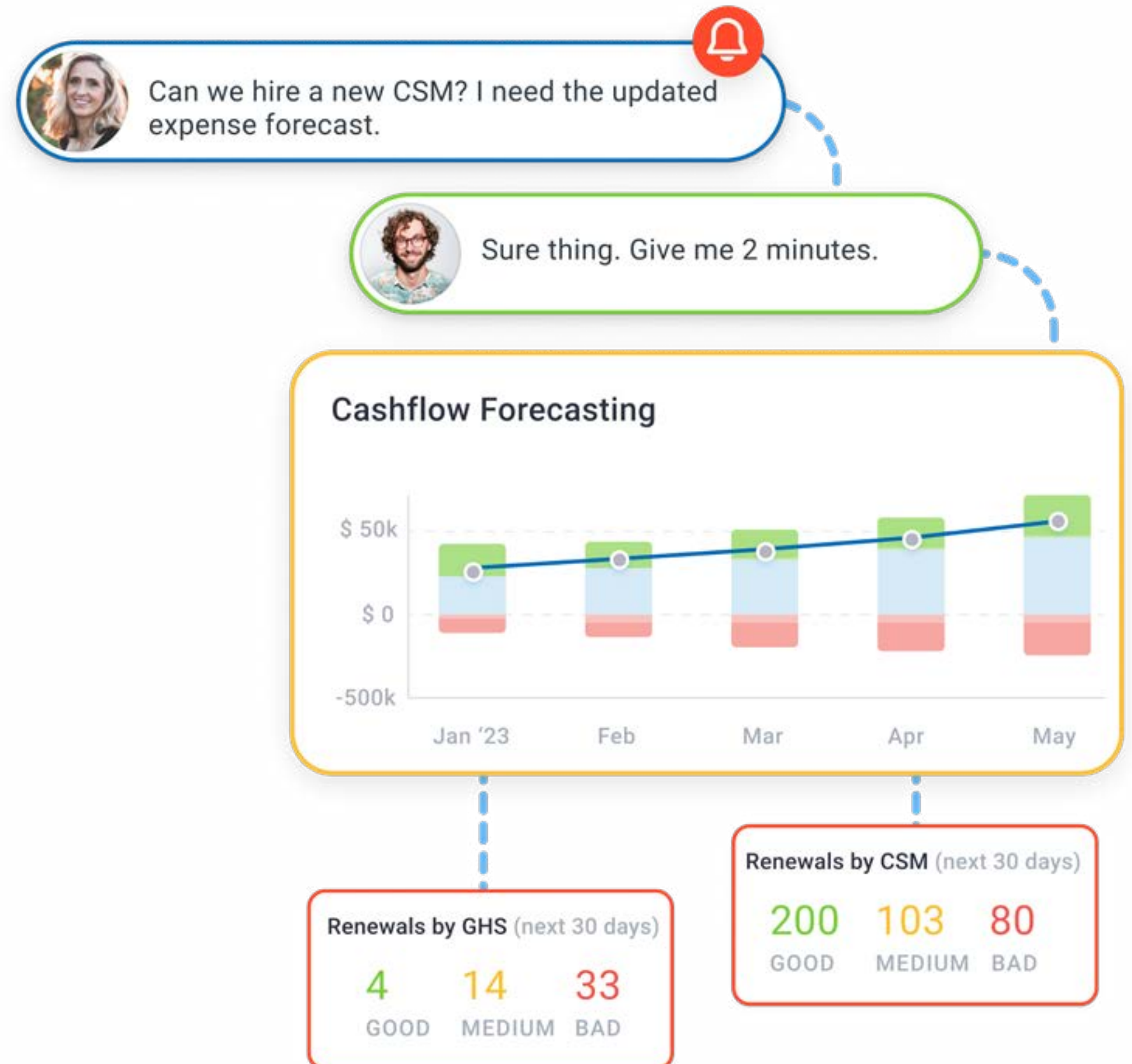
Accountability & Reporting

One of the key features of pretty much any software system is the ability to track what actions have been taken, by whom, and when.

Using the built-in analytics and reporting features in a CSP, you can easily track the progress and performance of all your handovers and monitor metrics like:
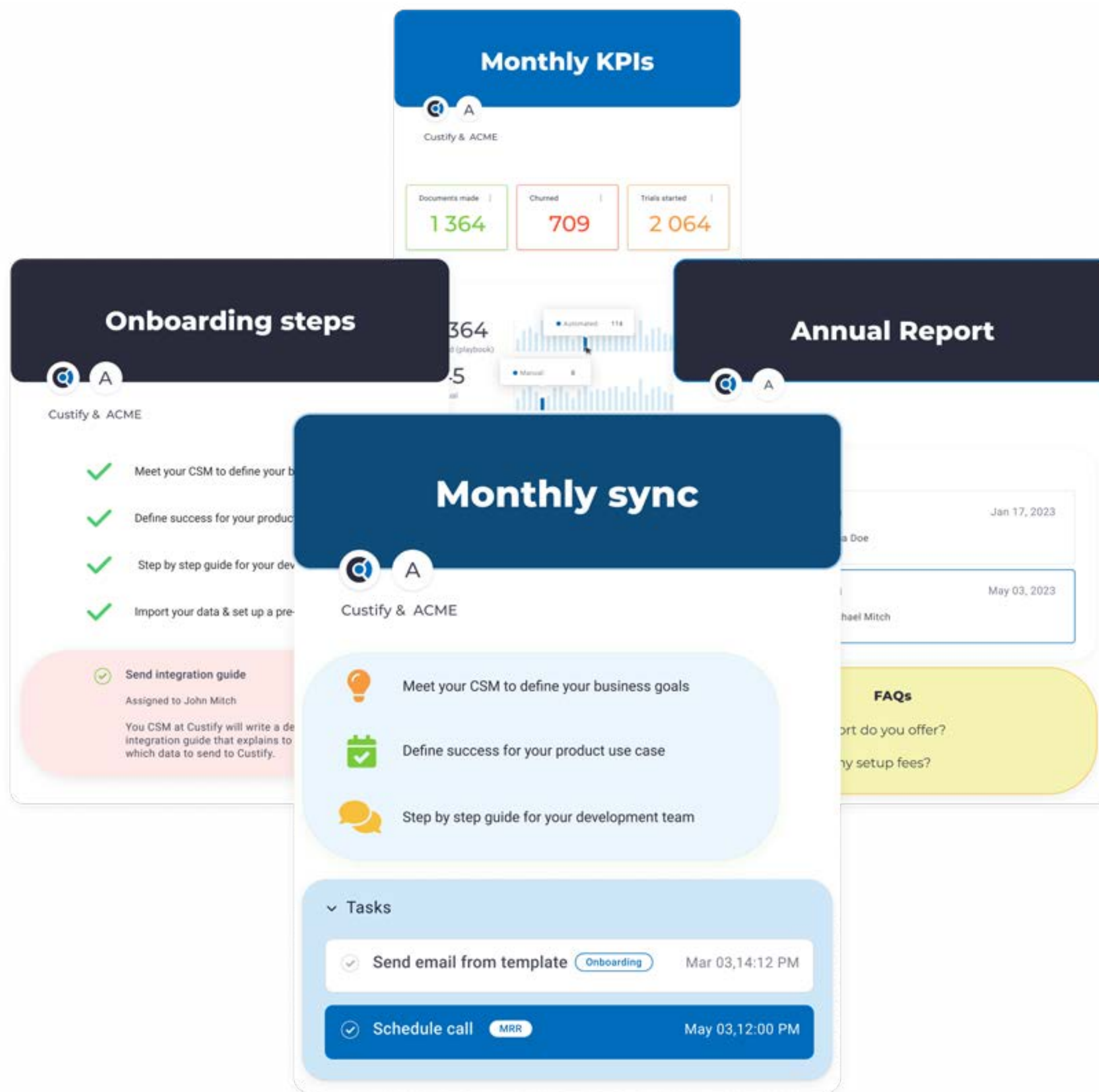Handover duration
CSAT scores,
Task completion

Having the ability to review exactly how each handover has gone gives you the opportunity to drill down into the data and identify further areas for improvement.

It also means you can have a data-driven approach to understanding the performance of your team members, which will boost accountability as a result.

Estimated time saved: 2-3 hours for a CS leader per week.

Summary Sheet

Your 'At a Glance' Guide to Transforming Internal Handoffs

Manual Process

❌ Lack of Standardization

❌ Time Consuming

❌ Communication Gaps

❌ Reduced Accountability

Using a CSP

✅ Centralized Data

✅ Automated Workflows

✅ Enhanced Collaboration

✅ Accountability & Reporting

Time Saved

3 hours a week

2 hours a week

1-2 hours a week

2-3 hours a week

Conclusion

Handoffs, or handovers, between internal teams, are a vital part of the customer journey. They're often associated with relay races - but if you drop the baton during a handoff, you run the risk of being out of the race with your customer and staring down the barrel of avoidable churn.

We outlined the pitfalls of performing manual handoffs between teams and highlighted several preventable issues, including:

- Lack of standardized approaches and data collection.

- Communication gaps due to misalignment between teams.

- Significant time wasted (estimated at 10+ hours weekly).

- Reduced accountability from manual processes.

For businesses recognizing handoffs as a bottleneck in customer experience, embracing a CSP like **Custify** can be a transformative step.
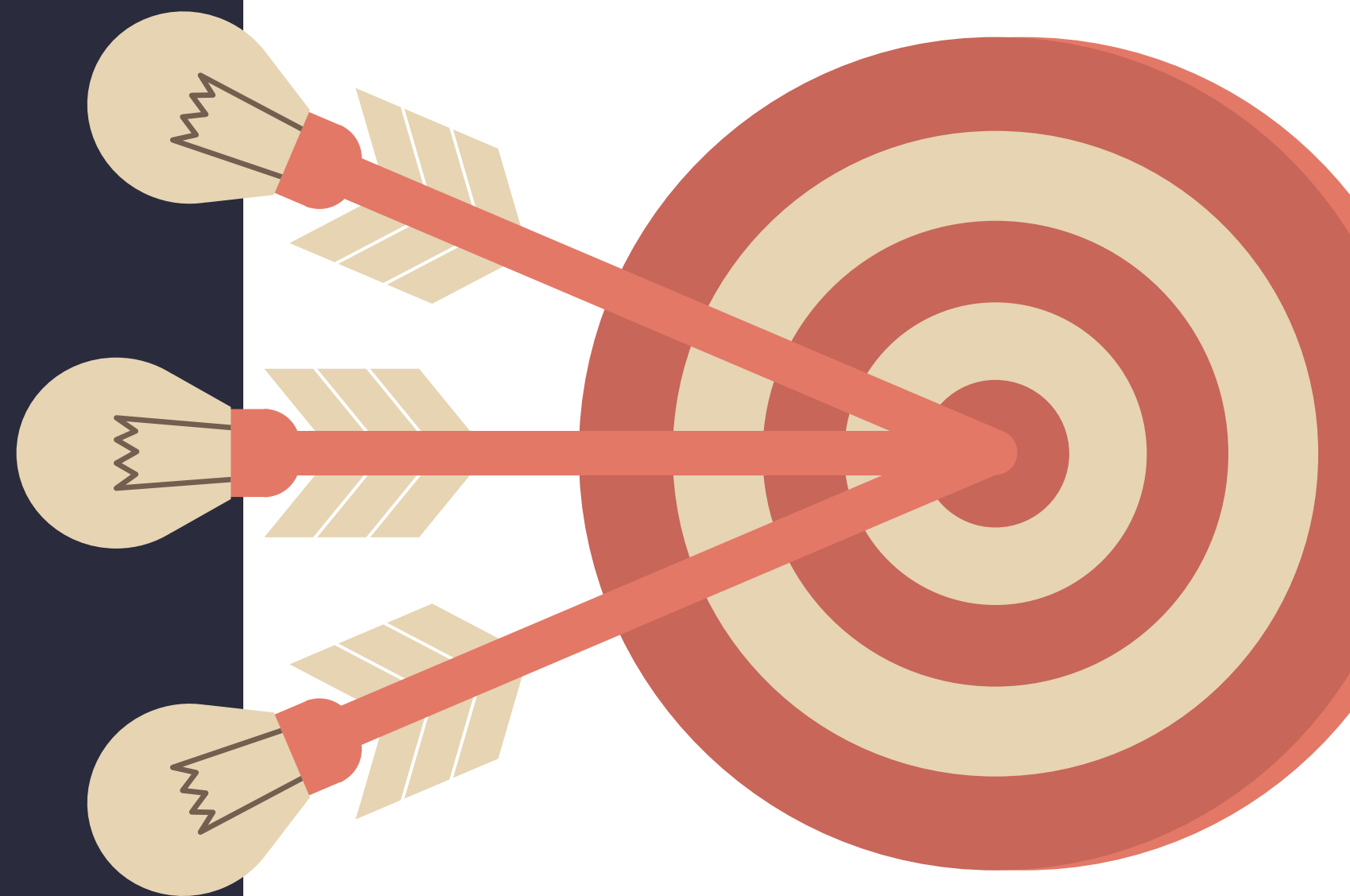
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Philipp Wolf,

Founder & CEO - Custify

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As the CEO of a company in the customer success space, I can't emphasize enough the transformative power of a Customer Success Platform (CSP) in redefining handoffs.

By centralizing data, we provide teams with real-time, 360-degree customer views. Our automated workflows strip away the monotony, saving CSMs over 10 hours a week. Enhanced collaboration tools and robust analytics inject new levels of accountability and efficiency.

If handoffs are your Achilles' heel, a CSP isn't just an option; it's a strategic imperative to revolutionize your customer journey.

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Transform Your Internal Handoffs With Custify

Maximize efficiency and customer engagement with Custify's innovative features:

✓ **Streamlined Handoffs:**
Enhance CSM efficiency with simplified processes.

✓ **Proactive Management:**
Stay ahead with real-time customer insights.

✓ **Unified Data Hub:**
Centralize all customer data for easy access.

✓ **Guided Actions:**
Receive concise, actionable steps for customer progression.

✓ **Health At-a-Glance:**
Swiftly evaluate and respond to customer health.

✓ **Insightful Analytics:**
Leverage predictive analytics for strategic decisions.

✓ **Easy Integration:**
Seamlessly connect Custify with your favorite tools.

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See how we can help improve your customer journey:

Request a Demo

FAQs

Q: **What does the term 'handoff' refer to in a customer journey?**

A: A handoff is the point in a customer journey where a customer is transferred from one internal team to another, encountering new personnel in the process. It's like the passing of a baton in a relay race and so it needs to be smooth and seamless to prevent issues and ensure a consistent customer experience.

Q: **What are some common problems with manual handovers between internal teams?**

A: Manual handovers often lead to issues like a lack of standardization, communication gaps, time-consuming processes, and reduced accountability. These can result in inconsistent data being passed between teams, miscommunications, delays, errors, and a loss of important information - negatively impacting the customer experience.experience.

Q: **Why are handoffs considered pivotal in a customer journey?**

A: Handoffs are crucial because they can significantly impact the customer's experience, either positively or negatively. Smooth transitions between teams, such as from marketing to sales or sales to customer success, can enhance customer satisfaction, while disjointed handoffs can lead to miscommunications, missed opportunities, and potentially jeopardize customer relationships.

Q: **How can adopting technology, like a Customer Success Platform (CSP), enhance handovers?**

A: A CSP can help streamline handovers by centralizing customer data, automating workflows, enhancing collaboration between teams, and providing accountability and reporting mechanisms. This ensures that all customer data is consistent, accessible, and updated in real-time, helping you to create smooth handoff transitions and a cohesive customer experience.