



PILLAR

THE REVENUE ARCHITECTURE OPERATING SYSTEM

THE OPERATOR'S JOURNEY

6-Handoff Contract Template.

Six critical handoffs in any revenue lifecycle. One page each, with mandatory fields, leak-mode diagnosis, and the concrete test to audit each handoff in your own org. Plus the 6-metric scorecard that turns handoff health into a number.

DIAGNOSIS

Handoffs that matter are gated.

Every org has a handoff template somewhere. Template compliance almost always runs 30-50%, which means the template exists as documentation of intent, not as a governance mechanism. The leak is structural, not a discipline problem.

Three structural reasons handoffs leak across every org we've studied:

Incentives stop at the edge. The AE's comp accelerator ends at signature. The SDR's quota credit ends at meeting held. The onboarding lead's scorecard ends at go-live. Every sender is rewarded for throughput. Nobody is rewarded for the quality of what arrives on the other side.

The receiving team doesn't have a veto. If the handoff is incomplete, the receiving team discovers it mid-onboarding, not at handoff time. By then it is too late to push back. The customer is already three weeks into the wrong motion.

Context doesn't travel with the record. Slack threads, Gong clips, hallway conversations, customer objections handled verbally: none of it is attached to the account record. The sending rep's memory is the integration layer, and memory is a terrible integration layer.

If the sending team can complete the handoff without the receiving team's sign-off, you don't have governance. You have a template.

HANDOFF 01 · TOP OF FUNNEL

Marketing SDR / AE

Leak mode. MQLs arrive with a score but no context. The SDR sees 'MQL Score: 82' but has no idea which campaign touched the lead, which assets converted them, or what the buying trigger was. First outreach is generic; the lead re-enters nurture.

The fix

Marketing's job ends at 'lead is qualified.' Sales' job starts at 'why should I believe you?' The gap is campaign-level attribution plus intent narrative, not just a score.

Mandatory fields at handoff

Source campaign + asset journey

Behavioral signal narrative (pages, time on page, return visits)

Firmographic match to ICP v-current

Inferred buying trigger (hypothesis + confidence)

Assigned motion (which Tier A/B playbook)

Time-to-first-touch SLA

Concrete test. Pick a random MQL from last week. Ask the SDR who got it: 'What was their buying trigger, in your words?' If the answer is 'the score was high,' the handoff did not transfer the signal that mattered.

HANDOFF 02 · QUALIFIED TO WORKING

SDR □ AE

Leak mode. The meeting is booked, the SDR gets credit, the AE inherits a calendar invite with a one-line subject. Discovery starts from zero. The prospect has already answered BANT-shaped questions once and is annoyed to answer them again.

The fix

The SDR's qualifying conversation is a data asset. If it does not travel forward, you pay for the same discovery twice and lose velocity by half a cycle. Mandate structured discovery capture at handoff, not just meeting notes.

Mandatory fields at handoff

Confirmed pain + anti-pain (what they're not worried about)

Named stakeholders + role + reaction

Current tool stack + satisfaction

Timeline + trigger event

Budget signal + procurement pathway hint

Competitive set already in play

Concrete test. Your AE walks into an SDR-sourced first call. Without opening Gong or Slack, can they state the prospect's pain, the timeline, and the competitive frame? If not, Handoff 02 is a one-line-subject handoff.

HANDOFF 03 · CLOSED-WON TO LAUNCHING

AE ☐ Onboarding / Implementation

Leak mode. Deal closes. AE moves to the next deal. Onboarding inherits a signed contract and a CRM record. The AE's knowledge — champion, political dynamics, verbal outcomes promised, procurement workarounds — stays in the AE's head. Onboarding asks the customer to re-tell the story; NPS drops 20 points before go-live.

The fix

The fix is not a better template. Gate the commission event on handoff completeness. Deal is not Closed-Won (for comp purposes) until the handoff fields are complete and the onboarding lead has accepted the package.

Mandatory fields at handoff

Economic buyer + signing authority

Champion + sponsor map (strength + political dynamics)

Verbal vs contractual commitments (side letters live here)

Success criteria + measurable outcomes promised

Implementation risks AE is aware of

Competitive displacement notes + sticky-point playbook

Desired go-live + event-anchored deadlines

Expansion hypothesis (where does year-2 growth come from)

Concrete test. Pick your last three Closed-Won deals. Audit the handoff record. Count the percentage of fields completed. If you are under 80%, the template is not enforced, and the onboarding lead is starting from a partial picture every time.

HANDOFF 04 · LIVE TO EXPAND-MOTION

Onboarding Customer Success

Leak mode. Onboarding ends, the account enters steady-state. The implementation lead hands the CSM a 'success plan' that describes what was installed, not how it's being used. The CSM inherits an account whose usage signals, adoption milestones, and stakeholder shifts during onboarding are invisible to them.

The fix

Onboarding runs a hot instrumentation of the customer for 60-90 days. All of that behavioral data has to travel to the CSM: adoption curves, who showed up to which training, which features stuck, which sponsors went quiet. Handoff 04 is a telemetry handoff, not a status update.

Mandatory fields at handoff

Adoption curve by product / feature

Training attendance + completion by stakeholder

Support ticket patterns during onboarding

Stakeholder-sponsor map + relationship heat

Onboarding-escalated issues + resolution status

Year-1 success criteria (carried forward from Handoff 03)

Concrete test. Pull the CSM's 30-day onboarding-handoff acceptance. Can the CSM name the three features the customer uses most, the training sessions that were skipped, and the two stakeholders whose engagement dropped mid-implementation?

HANDOFF 05 · RETURN PATH

CSM □ Support / Product

Leak mode. A high-severity ticket or a product-feedback escalation leaves the CS team and disappears into Support or Product's queue. The CSM loses visibility, the customer escalates to their AE, and the AE has to triangulate between three teams to find out what's happening. Customer trust compounds negatively.

The fix

The governance is bidirectional SLA + status echo. The CSM does not just send the ticket. They subscribe to the resolution, and the customer gets updates from the account-owning voice, not from a ticketing system.

Mandatory fields at handoff

Originating signal (what fired the escalation)

Customer-facing impact statement (CSM-authored, not auto-generated)

Receiving team acknowledgment + ETA

Status-echo cadence agreement (daily / weekly)

Customer communication owner (always the CSM, not the receiving team)

Resolution-to-customer close-the-loop window

Concrete test. Look at your last 10 Support or Product escalations from CS. How many did the CSM personally close with the customer, versus disappearing into a ticket queue? If under 70%, Handoff 05 has no return path.

HANDOFF 06 · CROSS-MOTION

Motion A \square Motion B (cross-sell)

Leak mode. Dual-ICP org. The CSM on Motion A spots a cross-sell opportunity for Motion B and throws it over to the Motion B AE with a Slack message. No structured hand-over, no agreed discovery state, no clarity on who owns the relationship while the cross-sell is in play. Customer gets confused about which team is theirs.

The fix

Cross-motion handoffs need explicit rules about relationship ownership during the cross-sell motion. Does the Motion A CSM stay primary (warm transfer)? Does the Motion B AE take point (cold transfer)? Is it a tandem motion with a defined re-unification point? This decision is almost never documented.

Mandatory fields at handoff

Primary relationship owner during cross-sell (named)

Re-unification trigger (explicit — e.g., 'Motion B closed-won' or '90 days')

Cross-motion qualification signal (what fired the opportunity)

Customer-facing communication plan (one voice, not two)

Motion A health during the cross-sell (must stay stable)

Closed-won paperwork routing (which entity signs)

Concrete test. Ask your Motion A CSM and Motion B AE independently: 'Who owns the relationship while the cross-sell is active?' If they give different answers, Handoff 06 is not documented.

MEASUREMENT

The handoff scorecard.

Most orgs don't measure handoff health. They only notice when it breaks. Six metrics, tracked monthly by handoff type, turn handoff governance from a vibe into a number.

Metric	Target	Why it matters
Completion Rate	≥ 90%	Percentage of handoffs where all mandatory fields were filled before the transition was accepted. Below 70% means the template is aspirational.
Receiver Acceptance	≥ 85%	Percentage of handoffs the receiving team accepted without rework or re-discovery. If receiver rejects more than 15%, the sender's definition of 'qualified' is wrong.
Time to Acceptance	< 48h	Median hours from sender completion to receiver acceptance. Long acceptance windows mean the receiving team doesn't trust the handoff and is re-discovering first.
Re-Discovery Incidence	< 10%	Percentage of accounts where the customer was asked a question the previous team already answered. Leading indicator of lost context.
Post-Handoff NPS Delta	≥ 0	Change in customer NPS from 14 days before handoff to 14 days after. Negative means the handoff felt jarring to the customer.
Leak-to-Churn Correlation	measured	Percentage of churned accounts whose handoff scored below 70%. Usually 60-80%. Moves the conversation from 'CS should've caught it' to 'Sales didn't hand it off.'

PHASED PLAN

A 90-day handoff-governance rollout.

Don't try to govern all six handoffs at once. You will lose the political capital before Handoff 03 ships. Sequence by leak size: fix your worst-leaking handoff first, prove the metric, then expand.

WEEKS 1-2	Leak Audit	Score all six handoffs on completion rate + acceptance rate + re-discovery. Rank by ARR leaked. Pick the top one.
WEEKS 3-4	Field Spec	Define the mandatory fields for the chosen handoff with the receiving team holding the pen. Sender's role is negotiation, not authorship.
WEEKS 5-6	Gating Mechanism	Wire the gate: commission event, pipeline stage progression, or task-queue entry. Handoff cannot complete without receiver acceptance.
WEEKS 7-8	Scorecard Live	Six metrics tracked weekly. Completion rate + acceptance rate + time-to-acceptance visible to sender and receiver in real time.
WEEKS 9-10	Expand	Apply the pattern to the second-worst-leaking handoff. Sequence matters. Don't launch in parallel.
WEEKS 11-12	Incentive Tune	Adjust comp or credit to include handoff-quality weighting. Small weight (5-10%), clear signal, visible scoreboard.

Anti-pattern to avoid. Governance-by-training. 'We'll train the AEs to fill out the handoff better' is a recurring Phase 2 failure. The fix is structural (the gate) plus the metric (the scoreboard), not cultural. Training without gating decays within two quarters.

WHAT NEXT

Ready to take the Blueprint, or trade notes directly?

The Blueprint Assessment is free and takes 20 minutes. It scores your GTM operation across 5 pillars, 27 categories, and 142 questions, then maps your results to the relevant operator frameworks at pillargtm.com/insights.

[Take the free Blueprint Assessment](https://pillargtm.com/blueprint) pillargtm.com/blueprint

[Trade notes with Eli](#) [15-minute conversation](#)

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Eli Jameson, Founder, PILLAR. Operator-turned-founder with deep GTM and product experience in EdTech. Built PILLAR because the revenue-architecture gap between strategy and CRM-daily-motion was the problem I watched kill growth plans at vertical-SaaS companies for years.