EOS Core Process: Deal Closing and Handoff

Process Owner: [Person from EOS Accountability Chart]
Last Updated: [Date]
Review Date: [Next quarterly review date]

EOS Integration

Connected EOS Tools:
Related EOS Rocks: [Current quarter Rocks that improve this process]
EOS Scorecard Metrics: [Weekly numbers tracked for this process]
Accountability Chart Connection: [Which seat owns this process]

Process Overview

To systematically guide qualified prospects through final decision-making and contract execution, then seamlessly transition them to customer success for optimal implementation and long-term satisfaction.

High-Level Steps

1. Closing readiness assessment
2. Final stakeholder alignment
3. Closing conversation and agreement
4. Contract finalization and signatures
5. Payment processing and setup
6. Customer success team introduction
7. Implementation planning and kickoff
8. Deal analysis and lessons learned

Core Process Detailed Steps

Step 1: Closing Readiness Assessment (15 minutes)
- Confirm all decision-makers are aligned
- Verify budget approval is secured
- Review timeline and implementation readiness
- Ensure all objections have been addressed
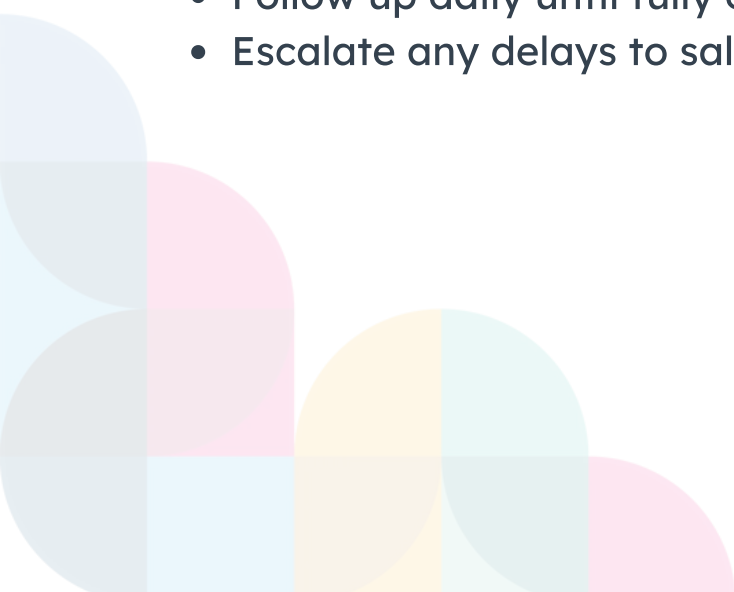- Check that legal/procurement requirements are met

Step 2: Final Stakeholder Alignment (30 minutes)
- Schedule final decision-maker meeting if needed
- Present summary of agreed solution and terms
- Confirm implementation timeline and expectations
- Address any last-minute concerns or changes
- Get verbal commitment to move forward

Step 3: Closing Conversation (20 minutes)
- Assume the sale and discuss next steps
- "When would you like to get started?"
- Present contract terms clearly and confidently
- Handle any final negotiation points
- Set expectation for signature timeline

Step 4: Contract Finalization (24-48 hours)
- Send contract via DocuSign or preferred method
- Include implementation timeline and key contacts
- Provide clear instructions for signature process
- Follow up daily until fully executed
- Escalate any delays to sales manager

Core Process Detailed Steps (cont.)

Step 5: Payment Processing (24 hours post-signature)

- Submit signed contract to accounting
- Set up customer in billing system
- Process initial payment or set up payment terms
- Confirm payment method and billing contact
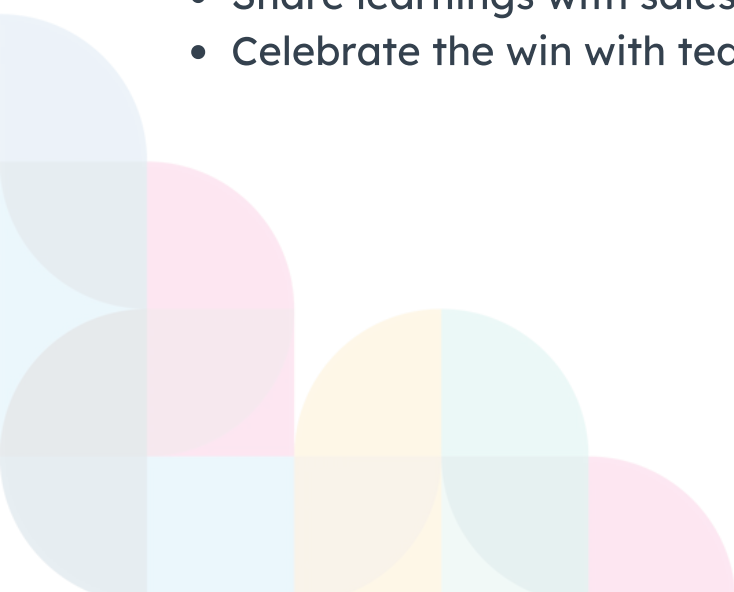- Send payment confirmation to customer

Step 6: Customer Success Introduction (48 hours)

- Schedule handoff call with customer success team
- Provide detailed account background and context
- Transfer all relevant documentation and history
- Ensure smooth transition of relationship
- Remain available for transition questions

Step 7: Implementation Planning (1 week)

- Schedule implementation kickoff meeting
- Confirm project timeline and milestones
- Identify customer team members and roles
- Set up project management tools and communication
- Establish regular check-in schedule

Step 8: Deal Analysis (1 week post-close)

- Document what worked well in the sales process
- Identify areas for improvement
- Update ideal customer profile if needed
- Share learnings with sales team
- Celebrate the win with team

Quality Standards & Success Metrics

Must-Have Standards:
[ ] Standard 1 (measurable)
[ ] Standard 2 (measurable)
[ ] Standard 3 (measurable)

EOS Scorecard Metrics:
Weekly Metric 1: [Target number]
Weekly Metric 2: [Target number]
Monthly Metric: [Target number]

Accountability:
- Account Executive: Owns closing process and initial handoff
- Sales Manager: Supports complex negotiations and contract issues
- Customer Success: Takes ownership post-signature
- Implementation Team: Manages technical setup and onboarding

Frequency:
- Closing assessment when deal reaches 90% probability
- Contract process initiated within 24 hours of verbal commitment
- Handoff completed within 72 hours of signed contract

Sample Success Metrics (adjust for your team + create Scorecards):
- Close rate from qualified opportunities (target: >25%)
- Time from verbal commitment to signed contract (target: <5 days)
- Customer satisfaction score during handoff process (target: >4.5/5)
- Time to first value delivery post-close (target: <30 days)
- Percentage of deals with smooth handoff (target: >95%)

Process Connections

Receives From: [Which EOS core process feeds into this one]
Hands Off To: [Which EOS core process this feeds into]
Dependencies: [Other processes or resources needed]

Tools & Resources

Required Systems/Tools:

Tool 1

Tool 2

Template/Document links

Training Materials:

Link to training video

Link to detailed SOPs (if needed)

Onboarding checklist

Troubleshooting & Common Issues

If [Problem], Then [Solution]:

Problem 1 → Solution 1

Problem 2 → Solution 2

Problem 3 → Solution 3

Escalation: [When to involve process owner or leadership team]

Process Improvement

Last Quarter's Improvements: [What was changed and why]
Current Issues to Address: [Items for next EOS Rock or Level 10 discussion]
Issue 1
Issue 2

Ideas for Next Quarter: [Potential improvements to consider]

Approval & Sign-Off

Process Owner Approval: [Name + Date]
Leadership Team Review: [Date reviewed in Level 10 or quarterly]
Next Review Date: [Align with EOS quarterly cycle]

Quick Reference Card

[One-page summary of key steps for daily use]

The 5 Key Steps:

[Step 1 summary]
[Step 2 summary]
[Step 3 summary]
[Step 4 summary]
[Step 5 summary]

Key Metrics: [2-3 most important numbers to track]

Emergency Contacts: [Who to call if process breaks down]