Transitioning Sales to Relationship Management

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The sales cycle has finally ended for that large, complex and highly visible project that the sales team has been working on for a long time. The proposal has been submitted to the prospective client who has signed it and is now ready for your company to deploy the system under budget, on time and with the high satisfaction levels that was promised. The project, which is due to start tomorrow, is to last many months and for which deployment efforts need to be aligned with business objectives, risk mitigation strategies need to be developed, new technologies and platforms need to be integrated with legacy systems, expensive cross-functional teams whose members come from a variety of geographic areas need to travel to and stay for extended periods at a number of different client sites, complex tasks and activities need to be assigned and coordinated, and many dependencies need to be taken into account not the least of which are some third party vendors who are responsible for key deliverables. Finally, the project needs to run on a tight budget in order to meet the profitability goals that upper management is expecting. All that remains is for the Delivery Team to be notified; perhaps an email with the proposal attached will suffice to make this project a success. Sound familiar? Maybe this is a bit extreme. However, this scenario certainly illustrates the difficult situation that many companies are faced with after that all important project has been sold.

A number of questions come to mind: Has the Delivery Team been set up for failure or has the team been prepared properly for success? Has the team been apprised of all pertinent information during the sales process? Has the Delivery Team had any input on the timing of the project, either its start time or its duration? Does the Delivery Team even know who the major players are on the customer side or what the deliverables are? Even with a well aligned sales and delivery team[1] much work remains after the sales cycle is completed to ensure that the Delivery Teams are properly prepared to implement the project successfully. The "engagement life cycle", that is the stages that encompass the whole customer experience from sales to delivery to managing the customer's needs after delivery, is much like a track and field relay race. Each athlete in the relay is responsible for a specific leg of the race. In business, the race starts with the Sales and Marketing Teams which are responsible for the "sales leg", whereas the Delivery Team is responsible for the "implementation leg", and so on. In between each leg there is a transition where, in our race analogy, the baton is passed from the team finishing one leg to the team starting the next leg. The performance of a team in a leg not only depends on the previous team's performance but also on how well the transition (passing of the baton) between the legs and between the teams is executed. Indeed, in our discussion above we stated that the proposal was accepted; therefore, it could be said that the Sales Team's performance was flawless. Now the next leg of the process needs to start and unless the "baton pass" to the Delivery Team is also flawless the project's success may be in jeopardy.

Although the initial relationships with the customer are established during the sales process long term relationship management begins in earnest with the delivery of a project. A good relationship and a satisfied customer are a result in great degree from a well executed delivery, which in turn results in

[1] See "Aligning the Sales and Professional Services Processes" by this author.

recurring revenue, returning customers, and add-on sales. So the objective of the transition process is to get the relationship management off to a successful start.

Objectives of the Transition Process

A number of objectives must be met during the Transition Process to ensure that the Delivery Team is equipped, as best as possible, to deliver the project successfully. The idea is to build a solid foundation for the Delivery Team on which the project can be successfully implemented and one that establishes the long term relationship management mechanisms between the company and its customer that will lead to profitable business relationships. A quick run down of the more important objectives are:

- **Transfer Project Information** – Ensure that all relevant information compiled during the sales cycle by the Sales Team is transferred to the Delivery Team efficiently, and that the project delivery process is started in a deliberate, structured, and controlled manner. This is also the time during which the information is reviewed and validated, gaps identified and filled in as necessary, administrative issues identified and resolved, and the project infrastructure (tools and methodologies) initiated.

- **Develop Delivery Strategies** – Develop detailed delivery strategies including execution plans, work plans, and team member assignments.

- **Review the Project's Objectives** – Review and develop an understanding of the project's objectives, what business problems the proposed solutions are addressing, how the solutions address the problems, and what business value and benefits (i.e., competitive advantage, reduced cost and risk of new or current operations, create new business opportunities, enhance the quality of decision making, etc.) the solutions provide to the customer.

- **Establish the Project Team & Expectations** – Identify and schedule project team members and their roles and responsibilities, identify skill sets and expertise required for the project, establish operating expectations (i.e., any vacation plans that need to be altered), and review the project's logistics.

- **Quality Review** – An important step is to solicit input and questions from an "outside pair of eyes". The purpose is to go through the standard of set checklists, objectively, to ensure nothing is falling through the cracks. But an important benefit of obtaining a viewpoint from an independent source, one that is not inherently tied to the project, is that unexpected issues, risks or opportunities may be uncovered.

- **Initiate Customer Contact and Project Kick-off** – Introduce key members of the project team, establish operating rapport, and initiate the project.

These objectives are the same regardless of the size or complexity of the project. For small projects (i.e., very short duration projects, projects requiring just a few resources, etc.) these objectives may be accomplished with relative ease and with minimal effort. For example, if the project is one that has been implemented many times before for existing customers, the risks, issues, and implementation details are well known then all of the points above may be covered in a single meeting. This is especially true if the execution plans and other documents are in well organized template form. However, for large projects with high dollar values, requiring large and diverse staffs implementing new technologies over extended periods of time for new customers (whereby the working relationship with the customer has not yet been established) the transition phase will most likely extend over a longer period of time encompassing many meetings. In such a case several drafts of operational documents may be created each requiring a review by various team members. Indeed, the transition may need to be treated as a project unto itself – requiring its own execution plan.

Critical Success Factors

What are the critical success factors for the transition process? Certainly, the transition process can not take too long, or be too costly. So, what are the characteristics of a well executed transition? The following is a short list:

- **Professional Approach** – One of the key objectives mentioned above is to establish the foundation for long-term relationship that results in further business opportunities with the customer. A well defined, structured, knowledgeable, confident, and deliberate approach to the project implementation process is perceived by the customer as professionalism on the part of the company. This is the basis for creating trust which is at the core of relationship management.

- **Timely** – The transition process should not create unwarranted delays in the start of the project. The transition process needs to be efficient and effective.

- **Accurate** – One of the main objectives of the process is to transfer information from the Sales Team to the Delivery Team. No assumptions should be made about the nature of the information. A false assumption may mean faulty information which in turn may lead to faulty decision making. All information transferred to the Delivery Team or distributed to team member s needs to be as accurate as possible. Any unknowns need to be identified and resolved in a timely way.

- **Comprehensive & Complete** – The transition team should endeavor to identify all relevant information and requirements for the successful delivery of the project. A by-product of a good process will identify things that are not relevant or required for the project. These need to be recorded and set aside for future reference.

- **Cost Effective** – Typically, the transition process, from a financial perspective, is part of the cost of the implementation of the project. The same budgetary controls need to be applied as for the project implementation itself.

- **Seamless** – The customer should see the transition as a natural part of the project implementation process that flows smoothly and not perceive it as delaying the implementation, be unplanned or ad hoc, or disorganized in its execution. A disorganized approach to the transition process exudes less than a professional approach and may also impact the customer's level of confidence in the company's ability to implement the project successfully.

What to Transition?

Information about the project has already been mentioned as one of the items that need to be transferred to the Delivery Team. Many other factors impact the ability of the Delivery Team to implement the project. Factors dealing with resources and their management, the processes and tools that are appropriate for this phase of the project, and so on, also need to be part of the transition process.

- **Information**

    - **Project Budget and Financials** – Appropriate information regarding the budget and financials of the project need to be shared with the team members. Appropriate means the financial information that is necessary for the team members to make informed decisions that impact the profitability of the project. For example, the contract may put a cap on daily hotel and meal costs or other expenses that the customer is willing to pay. These per diem allowances need to be known, and adhered to, by the Delivery Team members.

    - **Timelines, Timeframes & Deliverables** – At the very least all Delivery Team members need to know the scheduled start and end dates of the project. Other important dates must also be shared. The team members need to know the dates of not only their deliverables but the dates of dependencies (i.e., the dates of other members' deliverables that must be completed before their own deliverables can be completed – and vice a versa).

    - **Technical Details** – The complete technical details of the project need to be documented and shared with appropriate technical and lead staff. This is the basis for which resources, special skill sets, tools, processes, and logistic requirements are identified and allocated. Typically, the detailed solution is designed and the execution plan developed based on the technical details of the project. The proposal usually contains only high level technical information that does not have the necessary details to develop an execution plan on which to implement the project.

    - **Risks & Issues** – Key information relating to any special circumstances that impact the project either adversely or positively need to be transferred during the transition, as well as any mitigating strategies to deal with these circumstances and what is expected from each member in implementing the strategies.

    - **Stakeholders** – A good understanding of all the key customer and company players needs to be shared among team members. Each member should have an understanding of the roles and responsibilities of all involved in the project, who the key decision makers are and what sorts of decisions they are responsible for.

    - **Business Objectives** – One of the most important pieces of information that team members should be familiar with is the business objectives of the project. That is, what problems is the project trying to solve, how does the solution that has been proposed solve them, and how the team's participation contributes directly to the successful implementation of the project – therefore to solving the business problems. Knowing the business objectives and their contribution to attaining them creates a sense of buy-in, empowerment, engagement, and accountability for each team member.

- **Logistics** – Project team members should be made aware of any special logistics issues that adversely impact the project. For example, what are the available routes inside a building for delivering large pieces of equipment? What is the availability of freight elevators (hours of operation)? Are there any union rules that impact the loading, unloading, or installation of equipment? Are there any special procedures (ID cards, passwords, etc.) required to access secure areas? And what provisions are planned for addressing logistics issues.

- **Tools** – Any special tools that will be required to implement the project needs to be shared with all team members. For example, the Delivery Team may ordinarily use a certain project management or application development tool. But for this project the customer's tools will be used that require special training that needs to be scheduled.

- **Processes & Procedures**– Over the course of the project any number of various issues may surface and need to be addressed. From conflict resolution, to vacations, decisions regarding budgets and scope creep the processes to deal with each needs to be understood by all team members. These processes should be fully described in the company's project management handbook which is a template on how the company implements projects. Dissemination of timely, accurate and complete information is a major component to making informed decisions and if not executed properly a key reason projects fail. The communications strategy – or the method and manner of keeping all members (including stakeholders) informed - should be well understood and practiced by all consistently throughout the implementation.

- **Staff & Resources** – A key requirement for successful implementations is that the team members have the right skill sets for the project. The transition process provides the opportunity to review the technical requirements of the project in detail and map very deliberately the skill sets of team members to the requirements. Equally important is that team members (including customer personnel) understand their roles and responsibilities. This not only means understanding the tasks that's been assigned to them (along with expected completion timeframes) but how they fit into the overall project's hierarchy, what decisions they are expected to be responsible for, what is their accountability, and to whom and how they escalate issues and conflicts.

Key Deliverables

There are a set of important deliverables that must be produced during the transition. As you see by the list below, these deliverables are not the actual solutions described in the proposal but rather they are the underlying supporting documents and processes that make the implementation of the solution to be on time, within budget and of the highest possible quality.

- **Detailed Project (Execution) Plan** – The execution plan is the major work product that is produced during the transition. However, this is a topic onto itself and there simply is not enough time and space in this document to explain all of its components in detail. So, only some of the more important components of an execution plan are listed here accompanied by a brief description.

    - Executive Summary – a brief summary of the business problem, the solution and the benefits to be derived, by the customer, from implementing the solution
    - Project Deliverables & Milestones with dates – and sign-offs
    - Project Scope – what is and not in scope for the project
    - Project Dependencies & Risks – what are the dependencies and risks and any mitigating strategies

- Implementation Strategy – detailed description of the implementation strategy and plan of action
    - Technical Details – workflows, diagrams, schematics, technical discussions & descriptions
    - Project Team – organization, roles & responsibilities
    - Communications Strategy – how, when, who and what information will be distributed to the various team members (including stakeholders)
    - Scope & Change Management Process – the process to be used for documenting changes in scope and how go/nogo decisions are to be made

- **Project Budget & Financials** – Detail breakdown of the project's financials and budget. These are used as benchmarks against which to track the project's financial progress. The budget may be broken down, as appropriate, into daily, weekly, monthly or quarterly reports. Budget tracking and details is important for all projects but particularly those sold on a fixed price basis.

- **Delivery Team** – Establish and assemble the project team. Determine the skill sets required for implementing the project, assemble the team and integrate the team into the transition process. Depending on the nature of the project the team may consist of some interim members (such as subject matter specialist called on only during the transition process) so the team's composition may need to be finalized as the transition process progresses.

- **Project Management Documents** – Throughout the implementation a number of documents will be used to keep track of various aspects of the project. Among these are the project status, change management, issues management, and meeting agendas and minutes. These documents should already be in template form, the Delivery Team members briefed on their use, and compiled and prepared for use during the implementation.

- **Project Transition Checklist** – Create or modify the project transition checklist and review with all team members.

Key Tools

Any tools, hardware or software, documentation, and the like that are required for the transition or project to be implemented successfully should be allocated during this time. For example, software applications development may need version control tools, or equipment may need special tools for its installation, and so on. These may need to be purchased or installed from existing stocks. A software tool may need to have additional licenses purchased.

Key Activities & Processes

The activities performed during the transition are performed in support of laying the foundation for the Delivery Team that enables it to implementation of the project – as mentioned before in time, within budget.

- Sales Team to Delivery Team kick-off meeting.

- Review all documentation including proposal, proposed solution, timeframes, business need.

- Review Risks and Mitigating Strategies.
- Create & Assemble the Project Delivery Team.
- Create the Project Execution Plan.
- Execute on Transition Deliverables (objectives, information, etc.).
- Prepare/Contact Customer – Make initial contact with customer, establish rapport, provide team member introductions, and present the execution plan.
- Transition to Delivery phase (implementation) – project kick-off meeting with customer.

Summary

A well executed project transition, from the Sales Team to the Delivery Team, may make all the difference whether the Delivery Team has the information, resources and processes to implement the project successfully: on time, within budget, and with high customer satisfaction. The transition process is also the first major step in the relationship management domain that will yield additional business opportunities on a long term basis.