How to get the most out of these templates:

Copy and paste the text below into a Dooly Note, save it as a template, share it with your team, and use it for your next Sales to OM handoff.

Need help setting up a template in Dooly? This support article can help.
What to learn more about what you can do with Dooly Templates? Check out this page.

Happy selling!

Sales to OM Handoff

Used for: Opportunity
Stage: Any

People

- Executive (name and title)
- Other Leaders (names and titles)

Onboarding criteria

- Business objectives (list at least 2)
- Pain: surface-level impact
- Pain: business-level impact
- Why did they buy [product]
- Has the [target user] experienced [product]

Context

- What does the CS team need to know about onboarding? (timelines, who, expectations)
- Is the AE in other pursuits with this account?
- Any potential risks or concerns about this account?

- Where is the budget coming from?
- Any other context

Tablestakes

- How many seats?
- Are they growing, shrinking, staying the same? (approx. growth rate)
- [Include other market/industry specific questions here]