

◆ OPEN-SOURCE AI PLAYBOOK · FOR OPS, FINANCE AND HR

Sales-to-Delivery Handoff

New clients repeat everything to a new team the week after they sign.

THE SYSTEM

Writes the handoff brief from every call and email: goals, promises, risks and contacts.

🕒 BUILD TIME

2-3 days

🛠️ HOW IT'S BUILT

No-code

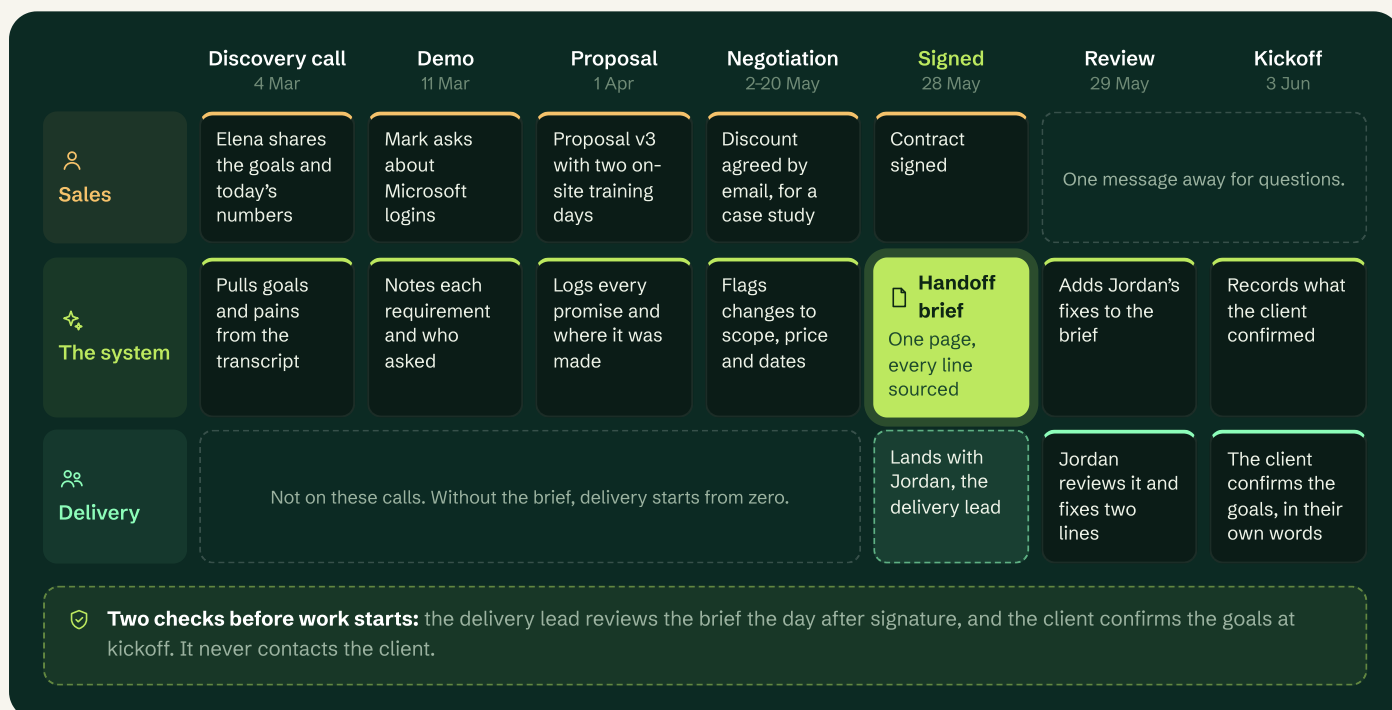
🔌 WORKS WITH

HubSpot or Salesforce

👤 OWNER

Head of delivery, with sales ops

How it works: three lanes, one baton passed at signature



The baton: a one-page brief, every line with a source

Handoff brief • Halden Clinics Signed 28 May • sold by Chris Novak • delivery lead Jordan Lee ✓ Reviewed by Jordan		
GOALS	Cut new-patient intake from 25 minutes to under 10.	Discovery call • 4 Mar, 14:12
	Live in all six clinics before 1 September.	Pricing call • 14 May, 08:40
PROMISED	Sign-in with their Microsoft 365 accounts before go-live.	Email from Chris (sales) • 2 May
	Two on-site training days, in Denver and Boulder.	Proposal v3 • section 5
	A named support contact for the first 90 days.	Pricing call • 14 May, 22:15
RISKS	Sam, the IT lead, wasn't on any call, and sign-in depends on him.	CRM • no meetings with Sam
	They asked about the 1 September date twice. The timeline is tight.	Calls on 11 Mar and 14 May
	The 8% discount depends on a case study that isn't in the contract.	Email from Elena • 20 May
OPEN QUESTIONS	Move patient records from the old system, or start fresh?	Not discussed on any call

Sample brief, fictional client and people. Contacts and one open question are left out of this excerpt.

Can we build it? FOR YOUR TECH LEAD

🛠️ Tools you'll use		
Starting at signature	A deal moved to “won” in HubSpot or Salesforce	or DocuSign or PandaDoc “completed” event
Call transcripts	Your call recorder (Gong, Fathom or Zoom)	or Fireflies, Google Meet transcripts
Emails and notes	The emails and notes logged on the deal	or Gmail or Outlook search
Running the steps	n8n	or Make, Zapier
Writing the brief	Claude (API)	or ChatGPT, Gemini
Where the brief lives	A note on the deal, plus a Google Doc	or Notion, a Word doc in SharePoint

🔗 Three ways to build it Start simple 1 day Paste the transcripts and emails into a Claude or ChatGPT project with your brief template, and ask for a source on every line. Production 2-3 days n8n starts when the deal is won, gathers the transcripts and emails, writes the brief, adds it to the deal and tells the delivery lead. Custom 1-2 weeks Adds a kickoff deck built from the brief, and a check at 30 days on whether each promise has been kept.	🔒 Access it needs ◆ Read access to the deal's contacts, emails and notes in the CRM ◆ Read access to its call transcripts ◆ Permission to add a note to the deal and create a doc 🛡️ Guardrails ◆ Every line cites its call or email; nothing without a source goes in ◆ It says “not discussed” instead of guessing ◆ It never contacts the client; the delivery lead decides what's shared ◆ The delivery lead approves it, and the client confirms the goals	🎯 What to measure ◆ Kickoff questions the client had already answered in sales ◆ Days from signature to kickoff ◆ Promises missed in the first 90 days ◆ Lines the delivery lead fixes in each brief 👤 Who builds and runs it A sales ops or RevOps person can build it in two to three days with n8n. After that, delivery owns the brief template, and sales keeps calls and emails logged on the deal.
--	--	---

◆ **FREE, OPEN SOURCE, NO SIGN-UP**

20 AI systems every company should *build first.*

This playbook is one of 20. Each one solves a problem almost every company has, and shows how the system works, the tools it runs on, how long it takes to build and where a person signs off. Read them all, download any of them, and send them to your team.

[See all 20 playbooks →](#)

START HERE

01 Company Brain

FOR EVERY TEAM

02 Meeting-to-Action
03 Instant Customer Answers

FOR MARKETING

04 Static Ad Creative System
05 Content Engine
06 Competitor Watch
07 Campaign Performance Report

FOR SALES

08 Speed-to-Lead Responder
09 Account Research & Outreach
10 CRM Autopilot
11 Proposal Builder
12 Pipeline Review Prep

FOR LEADERS

13 Automated Morning Brief
14 Weekly Business Review
15 Board & Investor Update

FOR OPS, FINANCE AND HR

16 Sales-to-Delivery Handoff
17 Invoice & Collections Chaser
18 Candidate Shortlist System
19 Contract Risk Review
20 New-Hire Onboarding

WANT HELP BUILDING IT?

We'll build your first AI systems with your team.

In a free 30-minute call with our founder, we'll look at your tools and your week, and pick the playbooks that would save you the most time first.



Pallav Kaushish

Co-Founder, AIXGrowth

Free 30-minute call · No commitment

[Book a Strategy Call →](#)