

The handover map

Revenue rarely leaks inside a team. It leaks in the handovers between them, where a customer passes from marketing to sales, sales to finance, and on to service. This map shows the five handovers to check.

1. Pick one real customer

Someone who bought in the last six months. A real one, not the process as it's written down.

2. Follow them left to right

At each numbered handover, write on page 2 what was passed on, how, and what went missing.

3. Circle the costliest one

The handover where the most revenue leaks is where to start.

	STAGE 1 First contact	STAGE 2 Enquiry	STAGE 3 Quote	STAGE 4 Order	STAGE 5 Delivery and service	STAGE 6 Repeat order
Marketing	 Campaigns, ads, events ----- -----	 Forms, scans, lists ----- -----	----- ----- -----	----- ----- -----	----- ----- -----	 Which spend won them 5 ----- -----
Sales	----- ----- -----	 The lead 1 ----- -----	 The quote ----- ----- -----	----- ----- -----	----- ----- -----	 The account 4 ----- -----
Finance	----- ----- -----	----- ----- -----	----- ----- -----	 The order and invoice 2 ----- -----	----- ----- -----	----- ----- -----
Service	----- ----- -----	----- ----- -----	----- ----- -----	----- ----- -----	 What was promised 3 ----- -----	----- ----- -----

The teal dot shows which team holds the customer at each stage. Every numbered circle is a handover: the customer moves to another team, and something has to travel with them. Use the dashed lines to note which system each team works in.

The five handovers

HANDOVER	WHAT'S PASSED ON TODAY, AND HOW	WHAT GOES MISSING	WHO OWNS IT	COST (H/M/L)
1 Marketing to sales: the lead Who they are, their company, where they came from, what they asked. Watch: leads that turn into customers				
2 Sales to finance: the order What was sold, at what price and terms, and the quote it came from. Watch: enquiry to order, and the forecast				
3 Sales to service: what was promised Delivery dates, special terms, and who the customer deals with. Watch: the right message at the right time				
4 Service back to sales: the warning signs Fewer orders, late payments, a run of support tickets, a change of contact: the signs a customer is drifting. Watch: customers who buy again and stay				
5 Finance back to marketing: the result Which sales came from which spend, so the next budget follows the money. Watch: know what's actually working				

Found the leak? Talk it through.

Half an hour, at no cost, to talk through where revenue might be leaking between your teams, and whether we're the right people to help. Every handover here gets easier when there's one customer record that every team trusts.
[Watch why.](#)

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