Handoff note template

LoftyBiz 148 — Never Leave a Call Without the Next Step: Booking Follow-Ups and Clean Handoffs

These are examples, not promises. The people and businesses in this video are illustrative examples, and results vary. Figures are rough examples from the official script, not targets or forecasts. This is general business education, not financial, legal, HR or tax advice.

This week

- On every sales conversation this week, offer two specific times for the next step and send the invite before the call ends.
- Write a one-page handoff note with four headings: what they bought, their goal, their worries, and what was promised.
- Use that note on your very next new customer, and introduce the delivery person live.
- Put the handoff note into Systex, so the same steps are waiting when the next customer buys.

The one-page handoff note

Fill this in before the live handoff, so the client never has to repeat themselves. Like passing a baton.

- What they bought
- Their goal — what they care about most
- Their worries
- What was promised, and by when

After the live introduction, the client should leave knowing:

- Which documents to send, and by which day.
- When the first report, visit or delivery will arrive.
- The name of the person who will do the work, and why they are a good fit.

Check-in points

- Twenty-four hours after signing: a short welcome message.
- When the client gets their first report or first piece of work: a quick call to check it made sense.
- Halfway through the first quarter, or the first delivery period: a review.
- A few weeks before the contract or engagement ends: a conversation about what comes next.

Book the next step before you leave

- Offer two specific times, not “when would be good for you?”
- Give the next meeting a clear reason, not “a quick catch-up”.
- If a partner or spouse also decides, ask for them to join the next meeting.
- Send the calendar invite before you leave, and ask them to accept it in front of you.
- Send a simple reminder the day before, with the time and what you will cover.
- A clear no is better than a polite maybe. Stop chasing and spend your time on people who are still interested.

Worked example: Tamsin, solar installation, Missoula

Setting	Tamsin, solar installation company, Missoula, USA	
Visits that ended with a second meeting already booked, at the start	about one in five	
Share after two months with the visit-ending rule	well over half	
How she offered two times	Thursday at five, or Saturday morning at ten	
The rule	No visit ends without a booked next step: a date, a time and a reason	

Tamsin looked back at three months of visits. In her example, only about one in five ended with a second meeting already booked. She made one rule: no visit ends without a booked next step. She offered two specific times, gave the next meeting a clear purpose, and sent the invite from the driveway. After two months, the share went from about one in five to well over half. Your numbers will look different, but the habit is the same: book it before you go. These figures are from the official script and are examples, not promises.

Worked example: Oluwaseun, bookkeeping, Reno

Setting	Oluwaseun, bookkeeping firm, Reno, USA	
Replace the cold email	A short three-way video call before he said goodbye, introducing the bookkeeper by name	
Say the goal out loud	Example line from the official script: “Maria wants clean monthly reports before her loan meeting in March.”	
Pass a one-page note first	What they bought, their goal, their worries, and what was promised and by when	
Leave the call with next steps	Which documents to send, by which day, and when the first report would arrive	
Plan the check-ins	24 hours, first report, halfway through the first quarter, and a few weeks before the contract ended	
Stay in the picture briefly	If the client emailed him, he answered with the bookkeeper copied in and pointed them back to their new contact	
What he tracked	How many showed up to the first handoff call, how many asked for a refund in the first month, and how many later took on more services	
First-month refunds, in his example	became rare	

Oluwaseun sold the service himself, and two bookkeepers did the work. A short email to the bookkeeper left clients feeling they were starting over with a stranger, and a few asked for their money back in the first month. He replaced that with a live handoff and a one-page note. In his example, refund requests in the first month became rare. Your results will depend on your service and your clients. These figures are from the official script and are examples, not promises.

Keep the notes in one place

When you have written the handoff note and the check-in plan, keep those notes in Systex, our own product. You can find Systex at loftybiz.net, and click the link in the description.

LoftyBiz · loftybiz.net · Systex is our own product. This template sits under LoftyBiz 148. All figures are from the official script and are examples, not promises.