



***Sales to Implementation Transition  
Checklist***

## Using the Sales to Implementation Transition Checklist

<b>Presented by:</b>	FACTS Sales Representative
<b>Completed by:</b>	FACTS Sales Representative
<b>Purpose:</b>	To introduce Implementation Consultant to scope of project, knowledge of Customer, expectations set in the Sales Cycle, and to prepare for the Project Strategy Meeting with the Customer.
<b>How it is used:</b>	Complete each activity on the checklist. Note any problems or significant events that the Implementation Consultant should be aware of.
<b>When it is used:</b>	After Contract Signing and prior to Project Strategy Meeting with Customer.
<b>Who uses it:</b>	Local FACTS Office Project Team and Sales Representative.
<b>File under:</b>	After the Installation/First 30 Days
<b>Last revised:</b>	05/01
<b>File:</b>	<p>Transition from Sales Checklist.exe</p> <p>This is a self-extracting zipped MS Word document and must be printed/viewed through MS Word. This file is located at <a href="http://www.sofsol.com">www.sofsol.com</a>, in the Nexus, under Information Centers – Facts Technical.</p> <p>Note: The Software Solutions, Inc. Nexus is a private extranet and is available for local Facts personnel only.</p>

## Sales to Implementation Transition Checklist

- ☐ Copy of Completed Business Needs Analysis.
- ☐ Copy of Proposal.
- ☐ Copy of Contract.
- ☐ Copy of all correspondence, memos, and/or notes pertaining to this Customer and/or Project.
- ☐ Customer Information Sheet
- ☐ Data Conversion Scope Assessment Sheet
- ☐ Modification Request form(s).
- ☐ \_\_\_\_\_
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**Local FACTS Office:**

\_\_\_\_\_  
Local FACTS Office Name

\_\_\_\_\_  
Sales Representative

\_\_\_\_\_  
Implementation Consultant

\_\_\_\_\_  
Date

**Customer:**

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Main Contact Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Phone Number