

# "What Did We Sell?" to "Here's the Plan": Building a Zero-Chaos Presales-to-Delivery Hand-off Framework - *Session by Chintamani Umarani*

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## Introduction

Every agency has been there: a signed contract comes, everyone celebrates, and then the delivery team asks, "**Wait, what exactly did we promise?**" That gap between what's sold and what's delivered is a massive source of chaos, budget overruns, and team burnout. I'll share the exact, **battle-tested framework** my team and I built to bridge that gap. This isn't just theory—it's the playbook we use every day to ensure every new project kicks off with clarity, consistency, and a shared understanding of success.

## Prerequisite

This session is a must for **project managers, delivery leads, agency owners, operations managers, and presales professionals** who are tired of hand-off chaos. If you've ever had a project start with more questions than answers, this talk is for you.

## Outline

In this session, I'll guide you through the four key phases of our hand-off framework, from deal identification to project planning. I'll show you how we automated this process and what it took to get our teams actually to follow it.

- **The "HubSpot to Jira" Handshake:** See how we built a semi-automated **process** that flags high-probability deals and creates a living project epic in Jira, ensuring nothing falls through the cracks from the moment a deal looks promising.
- **The Four-Phase Playbook: Intake, Initiation, Planning, and Execution:** I'll break down the critical tasks and outputs for each phase (like the **SOW, ProjectId, and Project Charter**) and explain who owns what, from Operations to the Project Manager.
- **The 30-Minute Handoff Meeting:** We'll dive into the agenda for our mandatory 30-minute hand-off meeting. It's a quick, focused huddle between presales, operations, and the delivery team that prevents 90% of future misalignment. I'll share the meeting hand-off template

- **Real-World Automation & Tools:** I'll show you the tools we use (**HubSpot, Jira, Slack, Zapier**) and explain how we wired them together to enforce our process, track progress, and create a single source of truth.
- **Lessons Learned and FAQs:** We'll discuss the common hurdles—like dealing with discrepancies between sales and delivery, and getting buy-in from your team—and I'll answer the tough questions from our own implementation journey.

## Learning Objectives

By the end of this session, attendees will walk away with:

- **A practical, four-phase framework** to standardize their project hand-off process.
- **Templates and a clear agenda** for a critical 30-minute hand-off meeting that prevents misalignment.
- **Ideas on how to leverage automation** to enforce processes and reduce manual tracking.
- **A deeper understanding of roles and responsibilities** is needed to create a single, accountable process from sales to delivery.
- **A clear plan of action** to bring structure and predictability to their own agency's project kick-offs.