

1) Handover from Sales

Steps to ensure a proper and secure handover from Sales to Delivery:

1. **Salesperson** signs agreement/accepted quotation with clients. In those cases where a Project Manager (PM) has had initial contact with the client, the request is left to the salesperson who handles the quotation and agreement.

2. **The PM Team Leader** appoints one or more PM. A choice is made from the experience of similar projects, grade of competence and availability.

3. **Salesperson** communicates **project directive** and any other documentation to project managers. A project directive shall consist of the following:

- Quotation/Agreement
- Short project description
- Possible risk management/information security
- Budget
- Expected schedule
- Resources with Awake and client

If there is any project content that should not pass on to others in the project, it shall be documented by the **salesperson** and placed in the document folder for project managers in appropriate OneDrive/Microsoft Teams channel.

All other project documentation shall be [saved accordingly](#).