**Flashbay Global Procedure for Leavers**

**Name:**

**Leaver date:**

**Team:**

To ensure there is a smooth transition for both your customers and colleagues please fill in and return the form below to your line manager prior to your last day of employment.

*Please ensure to reference the ‘customer number’ (and where relevant the ‘sales order number’) when filling in the ‘comments’ box*

|  |  |
| --- | --- |
| **What** | **Comments** |
| **Open aftersales cases**  Please provide a short summary of any open aftersales case you currently have.  This information can be found in Employee Portal 🡪 After Sales Management |  |
| **Overdue invoices**  Please provide a short summary of where you are in chasing your overdue invoices. |  |
| **Orders awaiting Data**  Please provide a short summary of any orders you have awaiting Data. Remember to include any deadline or special requirements. |  |
| **Special customers**  Please provide information on customers you have with special requirements. E. g special controller, must have 2GB memory etc. |  |
| **Pipeline Leads**  Please provide information on leads in your pipeline ready to order or other specific information. |  |
| **Pipeline Active customers**  Please provide a summary for active customers. E.g Scheduled follow up date, special request or deadline. |  |
| **Most valuable customers**  Please provide a list (Excel) of the most valuable customers you have and those that need special attention. E.g High valued orders or has had a bad aftersales case with us in the past and need extra attention. |  |
| **Other notes**  Any additional information you think can be of value to the SAM inheriting your account. |  |