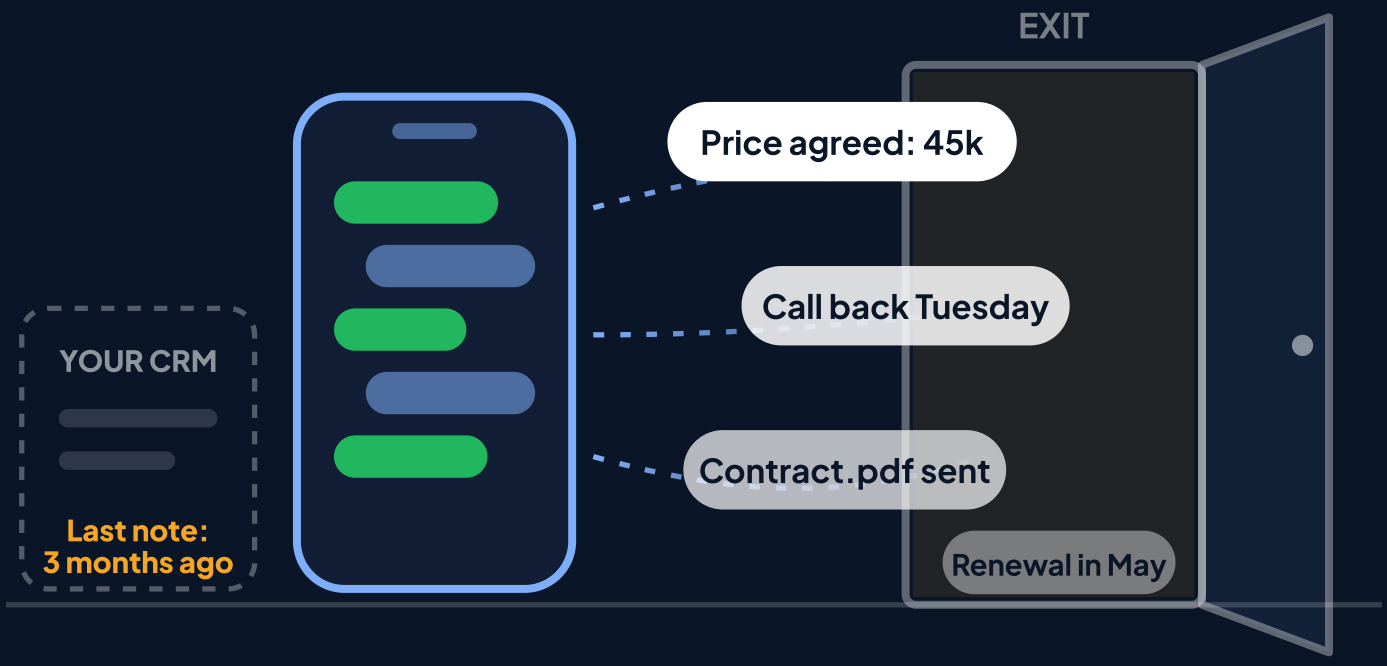
FOR SALES, RECRUITMENT AND ACCOUNT MANAGEMENT LEADERS

The WhatsApp Handover Checklist

What to capture before a salesperson, recruiter or account manager leaves, so their client chats don't leave with them.

A salesperson resigns on Friday. What do you lose on Monday?



1 · What walks out the door
The six things that leave with a person's WhatsApp, and how to put a number on it.

2 · The 20-point checklist
Four stages, from the day you hear they're leaving to 30 days after.

3 · Never need it again
How to keep client chats on the CRM all year, not just at exit.

WHAT'S AT STAKE

What walks out the door

When client conversations happen on someone's own WhatsApp, the CRM only knows what they chose to type in. On their last day, the rest goes home with them.

1 Active client chats

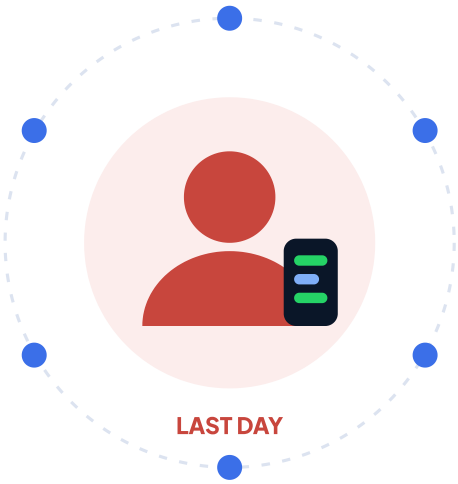
Every live conversation, and the context nobody wrote down.

2 Prices and promises

Discounts, deadlines and "I'll sort it" agreed in chat.

3 Follow-up dates

"Call me after Diwali." "Check back in March."



4 Documents sent

Quotes, contracts, CVs and IDs that only exist in the chat.

5 Groups they run

Client and partner groups where they're the only admin.

6 The relationship

Clients who message a person, not a company, and may follow them.

Why the CRM doesn't save you

People update the CRM after calls and meetings, but WhatsApp feels informal, so it rarely gets logged. The record says "Follow up", while the real story is a 300-message chat on a phone that's about to be handed back, wiped or taken home.

Put a number on it

Open conversations on their phone: .....

× Average deal or placement value: .....

= Revenue that depends on one phone: .....

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The 20-point handover checklist

Leaving: Taking over: Last day:

DAY -30 — As soon as you know

- [ ] **List every client on their WhatsApp** Clients, candidates and partners, not just the ones in the CRM.
- [ ] **Flag what's open** Deals, offers, complaints and renewals still in progress.
- [ ] **Note every promise** Prices, discounts and dates agreed in chat.
- [ ] **Add a second admin** To every client or partner group they run.
- [ ] **Check whose number it is** Company SIM or their own? It changes the plan.

EXIT WEEK — Capture

- [ ] **Save key chats to the record** Every open deal, in the CRM or ATS, not a shared drive.
- [ ] **Save the documents** Quotes, contracts and CVs, following your data policy.
- [ ] **Write a one-line status** For each open chat: where it stands, what's next.
- [ ] **Assign a new owner** One named person for every client.
- [ ] **Draft the introduction** A short message the new owner can send.

DAY 0 — Last day

- [ ] **Hand back the company number** SIM, phone and WhatsApp Business account, if they're yours.
- [ ] **Swap group admins** New owner in, leaver out, in every client group.
- [ ] **Log out of WhatsApp Web** On every company laptop they used.
- [ ] **Walk the open list together** Nothing open should live only on their phone.
- [ ] **Agree how clients will be told** Who messages whom, and when.

DAY +30 — After they've gone

- [ ] **Introduce the new owner** To every active client, within the first week.
- [ ] **Chase quiet chats** Anyone silent for 7+ days gets a follow-up.
- [ ] **Honour what was promised** Prices and dates from the chats, not from memory.
- [ ] **Call your top clients** Check nothing fell through the gap.
- [ ] **Fix it for next time** Note what was missing, and stop it happening again.

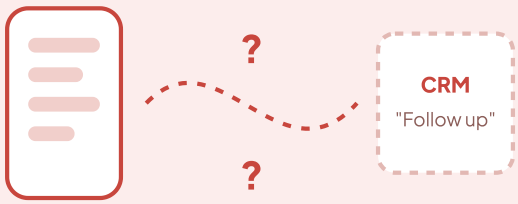
Saving client chats from a personal phone? Agree it with the employee first, and follow your data protection policy and local law.

THE BETTER WAY

How to never need this checklist again

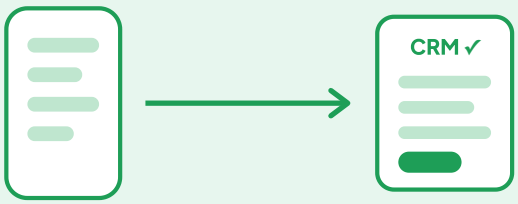
This checklist is damage control. The real fix is for client chats to reach the CRM every day, not only when someone hands in their notice.

HANDOVER TODAY



- ✕ Days of scrolling through chats in exit week
- ✕ Depends on what the leaver remembers
- ✕ Clients repeat themselves to the new owner

HANDOVER WITH CONVOSYNC



- ✓ Every client chat already on the CRM record
- ✓ An AI summary the new owner reads in a minute
- ✓ The client never notices the change

1

Chats saved in one click

A Chrome extension next to WhatsApp Web matches each chat to the right CRM or ATS record by phone number.

2

An AI summary on the record

Budgets, promises, next steps and risks, plus the full conversation, on the record your team already uses.

3

Private by design

Personal chats are skipped, every save is reviewed first, and admins see who syncs, not what was said.

How exposed is your team right now?

Take the 2-minute WhatsApp Blind Spot Check for a score and a short report, or book a 20-minute demo using sample data.

Take the Blind Spot Check →

Book a 20-minute demo

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