**Scheduling Handoff Template**

*Stage: Sales – Dates & Logistics*

A close up of a logo

Description automatically generated

Hello CLIENT,

We are excited to book your PROGRAM NAME session(s). Our Learning Coordinator, COORDINATOR NAME (CC’d), will (reach out via email to confirm your proposed course dates of XXX or will reach to work to corrdiniate your course dates).

Once date(s) are confirmed, here are the next steps in the process:

1. COORDINATOR NAME, will provide you with a Letter of Engagement (LOE—our official contract). We will need either a signed LOE or email stating you accept the terms and conditions of the LOE to confirm the class dates. Please return the LOE by the date indicated in the document.
2. Once the LOE is signed, COORDINATOR NAME will send a confirmation email and request logistics and roster information.
   1. The logistics form will let us know the preffered start time, virtual classroom preference, and technology information. We use this information to create a one-page document with access details for you to distribute to participants.
   2. The roster allows us to track attendance and ensure participants receive post-class support for sustainability.

If you have any questions regarding the next steps, please don’t hesitate to ask. We look forward to a successful delivery.