



SALES + REVOPS / PRACTICAL GUIDE

Your Sales Promise Is Someone Else's Implementation Problem

Use a simple promise check before signature on implementation-heavy deals, and keep CS out of straightforward self-serve purchases.

For SaaS sales leaders and customer success leaders selling implementation-dependent products

The decision is not whether CS should be helpful

When should customer success join a live sale? GTMA recommends bringing in the delivery team before signature when the buyer relies on a specific commitment about timing, integrations, migration or rollout support. Ask whoever can validate delivery; that may be CS, implementation or a solutions engineer.

Why involve CS before signature at all

GitLab recommends introducing the CSM while business value discussions are still happening in the account, so the CSM can build relationships with key strategic decision-makers and help the customer visualize the implementation journey. That is attributed practitioner guidance with an unknown publication date, and it is not survey evidence or a universal rule. [1]

GTMA's proposal goes beyond that source guidance: use a specific implementation promise as the trigger for a pre-signature check. This is our operating recommendation, not a finding that GitLab tested or a proven way to improve sales results. If your buyer is relying on promised setup help, ask the person responsible for delivery to confirm what is possible and what depends on the buyer.



Use a promise check, not a generic handoff meeting

A promise check answers four questions: what did sales say, what has delivery confirmed, who resolves the remaining gap, and what must the buyer be told? Start with the actual wording in the proposal or email.

Record the timing, migration, integrations and support that the buyer expects. A friendly introduction is not confirmation that those commitments can be delivered.

This is also where the main alternative deserves respect. If the purchase is simple, self-serve, or operationally light, bringing CS into the live sale may add more ceremony than clarity. In those cases, introduce CS after signature or not at all. The trigger is not company preference. It is whether implementation promises materially affect the buying decision.

A hypothetical completed example

Hypothetical example: a salesperson tells a buyer, “We can have your team live in two weeks, including data migration and SSO.” The product is not self-serve for this account because the buyer expects setup help and cross-functional coordination. Before signature, the account executive brings in the CSM for a promise check with a solutions lead on standby.

In this fictional example, the delivery lead separates the promise into go-live timing, record migration and SSO setup. The buyer has not yet supplied a sample data file or confirmed an identity administrator. The solutions lead can confirm that the product supports the required SSO method, but cannot validate this customer’s setup yet. Sales owns correcting the buyer-facing wording. Delivery owns assessing the migration and schedule. The buyer owns supplying the file and administrator contact. Nobody marks the two-week date as confirmed.

The fictional buyer update is explicit: “We support the SSO method you need. Your migration scope and launch date remain conditional on reviewing a sample file, confirming administrator availability and reserving delivery capacity. We will send the implementation scope and dated plan after those checks.” If the launch date is essential to the purchase, resolve it before asking the buyer to rely on it. This example illustrates a proposed process, not a tested delivery timeline.



Try it on the next deal

Take the next deal that depends on an implementation commitment. Ask the person responsible for delivery to mark each promise confirmed, conditional or unsupported, with a reason and an owner for the next action. Update the buyer before signature. After kickoff, check which assumptions changed and whether the customer heard about them before committing. That is a useful check; adding another meeting to every sale is not.

The source - and what it does not prove

[1] How to Engage a CSM/CSE

GitLab | Publication date not supplied

[Read the original handbook guidance](#)

GitLab's handbook recommends introducing the CSM during business-value discussions to build relationships and explain the implementation journey. Its publication date is not supplied, so freshness is uncertain. The promise-based trigger and worksheet are GTMA proposals, not a method GitLab tested or a proven sales outcome. The example is fictional. This guide addresses delivery validation; the earlier bespoke-deal guide addresses the economics of custom work.



Put it to work

Check one buyer-facing commitment before signature.

Write the buyer-facing promise

List the exact implementation promise sales has made or is about to make. Include timeline, setup tasks, integrations, migration help, training, and any buyer outcome language that depends on delivery.

Mark what delivery must verify

Ask the responsible delivery owner, not automatically the CSM, to check capacity, customer resources, access, scope and sequencing. Mark each promise confirmed, conditional or unsupported.

Assign the gap owner

If a promise is unclear or risky, assign one owner to resolve it before the next buyer call: sales, CS, solutions, product, or the buyer. Do not leave shared ownership unnamed.

Draft the buyer update

Write the exact message the buyer will hear: what is confirmed, what is conditional, what the buyer must provide, and what is out of scope before implementation begins.

Decide whether CS joins live

Bring in the person who can validate a material delivery commitment: CS, implementation, solutions or another owner. A straightforward self-serve deal may need no live meeting. Do not ask an account owner to sign off work they cannot assess.