# NEW CLIENT ONBOARDING PROCESS

This document outlines the process for onboarding new clients to our managed services. By following this process, our teams can ensure a smooth transition for our clients and establish a strong foundation for a successful partnership.

# PRE-ONBOARDING

*Before beginning the onboarding process, it's important to gather all necessary information from the client and ensure that our teams are prepared to support their needs. This includes:*

- [ ] Gathering client information, such as company size, industry, and specific needs.
- [ ] Assigning a dedicated team to manage the onboarding process.
- [ ] Assigning a dedicated Account Manager to the Client.
- [ ] Ensuring that the team is trained on the client's specific needs and requirements.
- [ ] Finance Team to Setup Agreement and Project in PSA.
- [ ] Finance Team to call client and setup recurring and auto billing.
- [ ] Schedule and conduct internal meeting with Revenue, Finance, and Operations (Professional Services) to discuss client needs, one-offs, current pain, points of contact, etc.
- [ ] Project Management to schedule kick off with client on first day of contract.

# ONBOARDING PROCESS

## STEP 1: KICKOFF MEETING

*Before beginning the onboarding process, it's important to gather all necessary information from the client and ensure that our teams are prepared to support their needs. This includes:*

- [ ] Introduce themselves and their roles.
- [ ] Discuss the client's goals and objectives, as well as how current economic conditions may impact the business.
- [ ] Review the services we will be providing.
- [ ] Establish a communication plan & escalation pathway.
- [ ] Review onboarding project plan.
- [ ] Set expectations of possible pain during onboarding.
- [ ] Schedule technical documentation phase with client and point of contact (POC).
- [ ] Get commitment from client to attend ongoing QBR sessions (and support check-ins if necessary).
- [ ] Schedule first QBR to take place at end of project plan.
- [ ] Schedule routine onboarding project status calls (recommended 15minutes weekly).

# ONBOARDING PROCESS

## STEP 2: DISCOVERY PHASE

*During the discovery phase, our team will work closely with the client to gain a deeper understanding of their business, processes, and requirements. Complete documentation prior to implementation will insure minimal client disruption. Best practice is to have a technical write (tier 1-2) spend 4-8 hours at a client location documenting the following:*

- [ ] Retrieve active roster of employees from HR with titles, email addresses, phone numbers, and decision abilities.
- [ ] Identify and document the owner of key roles such as Primary PoC, Breach Notification PoC, Building Access PoC, Finance PoC, etc.
- [ ] Conducting a thorough review of the client's existing IT systems and infrastructure.
- [ ] Reviewing bills with POC notating any account numbers, fees, contract language, and support numbers.
- [ ] Reaching out to vendors to start process of establishing authority of account to transact changes or support needs.
- [ ] Photos of workstations, networking equipment, servers, MPOE, and relevant areas that Support needs to provide remote services.

- [ ] Documentation of serial numbers for critical hardware.
- [ ] Reach out to old IT/ MSP to request documentation, network maps, etc.
- [ ] Test passwords for admin functionality.
- [ ] Documenting the client's business processes and workflows.
- [ ] Documenting Line of Business applications.
- [ ] Review current backup infrastructure and notate backup success over the last 30/60/90 days.

# ONBOARDING PROCESS

## STEP 3: PLANNING PHASE

*Once we have a clear understanding of the client's needs, our team will develop a detailed plan for implementing our managed services. This will involve:*

- [ ] Identifying any necessary hardware or software requirements.
- [ ] Confirm Backup Success, If not, immediately communicate with Account Management and Client on risk of continuation before succesful backup.
- [ ] (If applicable) Have client sign data loss risk document.
- [ ] Developing a detailed project plan for implementation.
- [ ] Assigning responsibilities and tasks to team members.
- [ ] Identifying any gaps or areas for improvement.

# ONBOARDING PROCESS

## STEP 4: TECHNICAL DEPLOYMENT

*Our team will perform necessary technical deployment tasks which include:*

- [ ] Create system snapshots/ backups.
- [ ] Reset Administrative Passwords with documentation.
- [ ] Deploy Tools.
    - [ ] RMM Endpoints
    - [ ] Network Monitoring Tool
    - [ ] Malware Endpoints
    - [ ] Vulnerability Scanner
    - [ ] DNS Filtering
    - [ ] MDR/ Cyber Tools
    - [ ] Escalation / Privilege Access Management Tool
    - [ ] Log Monitoring / SEIM

- [ ] Active Directory Clean Up and PSA sync.
- [ ] Endpoint Sync to RMM, PSA, and Documentation Platform.
- [ ] Configuring security policies and permissions.
- [ ] Office 365/ Google Workspace.
    - [ ] PSA Sync
    - [ ] Reseller cutover
    - [ ] User Clean Up
    - [ ] License Standardization
    - [ ] License True Up
    - [ ] Security Defaults
- [ ] Configuring network infrastructure to meet client's needs.
    - [ ] vLAN Configuration
    - [ ] DHCP Utilization
    - [ ] VPN Needs
    - [ ] DNS
    - [ ] Layer 7 filtering
    - [ ] ICMP
    - [ ] Spanning Tree enabled

- [ ] Configuring hardware infrastructure to meet client’s needs.
  - [ ] IPMI Configured
  - [ ] Shadow Copies
  - [ ] Firmware Updates
  - [ ] Snapshots
  - [ ] Backups
  - [ ] SQL cache
  - [ ] RAID/ Disk Health
  - [ ] Static IPs
  - [ ] Hypervisor configurations
- [ ] Standardizing the client's systems and processes according to our best practices.
  - [ ] Best Practice 1
  - [ ] Best Practice 2
  - [ ] Best Practice 3

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# ONBOARDING PROCESS

## STEP 5: TESTING AND VALIDATION

*Before going live, our team will thoroughly test the new systems and processes to ensure that they are working as expected. This will involve:*

- [ ] Review and Configure Lifecycle Management System.
- [ ] Conducting comprehensive testing and validation of all systems and processes.
  - [ ] Backups
  - [ ] Password policies
  - [ ] Hardware Health
  - [ ] Warranties
  - [ ] 365 Health Score
  - [ ] Email Security
  - [ ] Network Congestion
  - [ ] End User Hardware Performance
- [ ] Addressing any issues or concerns that arise during testing.

# ONBOARDING PROCESS

## STEP 6: CUSTOMER NEEDS

*In many new client onboardings, it is common for the client to have immediate needs that are discussed during the sales process. These needs may have been how the new client found you due to poor performance of the old provider. It is imperative to resolve these needs and verify that the needs are satisfied; and don't forget to tell the client you resolved the problem quickly!*

- [ ] Customer need 1

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- [ ] Customer need 2

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- [ ] Customer need 3

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# ONBOARDING PROCESS

## STEP 7: CUSTOM NEEDS

*In addition to the above steps, every MSP may have unique needs or best practices that they want to incorporate into their onboarding process. Please use this section to add any additional steps or tasks that are specific to your business.*

- [ ] Customer need 1

- [ ] Customer need 2

- [ ] Customer need 3

# ONBOARDING PROCESS

## STEP 8: ACCOUNT MANAGEMENT

*Once the system is up and running, our account management team will take over. This will involve:*

- [ ] Touch base with the client weekly (at a scheduled time) reviewing onboarding satisfaction.
- [ ] Addressing any issues or concerns that arise during the ongoing maintenance period.
- [ ] Prepare documentation to present in first QBR.
- [ ] Utilize life cycle management tool to build out budget and needed upgrades to present to client.
- [ ] Construct technical changes that may effect business processes to present to the client.
- [ ] Work with technical writer to build out any custom documents or reports for Client.

# ONBOARDING PROCESS

## STEP 9: FINANCE

*Our finance team will work closely with the client to ensure that all billing and invoicing is handled smoothly. This will involve:*

- [ ] Setting up the client's billing and invoicing systems.
- [ ] Ensuring that all billing and invoicing is accurate and up-to-date.
- [ ] Review Quoted price and reconciled price post implementation with account manager.
- [ ] Addressing any issues or concerns that arise during the billing and invoicing process.

# ONBOARDING PROCESS

## STEP 10: PROJECT RECAP MEETING AND FIRST QBR WITH CLIENT

*To demonstrate value, organization, and quality of your onboarding process it is imperative for you to have a world class QBR in the first 60-90 days of your clients service. This will involve:*

- [ ] Providing training to the client's team on new systems and processes.
- [ ] Show the documentation that has been created on their environment.
- [ ] Outline critical needs that could result in decreased performance, loss of data, security breaches, or outages.
- [ ] Show budget and purchasing needs timeline that includes critical needs as well as non-critical needs.
- [ ] Review technical changes that onboarding identified as critical that could result in business process changes for the client.
- [ ] For client changes approved, create change order tickets with the project manager to finish promptly.
- [ ] Addressing any issues or concerns that arise during the initial rollout.
- [ ] Set expectations on how support will work during business hours and outside of business hours.
- [ ] Reset expectations on how to get support going forward (from Professional Services Team to Managed Services Team).

# ONBOARDING PROCESS

## STEP 11: GO-LIVE AND SUPPORT

*Once testing and validation are complete, we will officially launch the new systems and processes and provide ongoing support to the client. This will involve:*

- Monitoring the systems and processes to ensure they are functioning as expected.
- Addressing any issues or concerns that arise during the initial rollout.
- Project Management to true up any service needs with help desk team.
- Project Management to review project with Finance team and Management.
- Project Management to work with Service Management to QC quality of work.
- Postmortem with Account Management, Professional Services, and Project Management to improve any processes for future clients.

# CONCLUSION

*By following this process, our teams can ensure a successful onboarding experience for our clients and establish a strong foundation for an ongoing partnership.*