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Msp client onboarding checklist template example pdf

You can also schedule a meeting to cover the questionnaire over a call. Document the following: Company name Representative's name Service tier Quantities and cost of servers Quantities and cost of workstations Managed services required - Managed backup , Cloud storage , Help-desk , Hardware procurement , Systems security , Systems management , System monitoring Existing documentation Send current setup questionnaire Receive current setup questionnaire Server and workstation specifications client role definitions and permissions Business-specific details (like working hours for each location or information about computers that must not restart during working hours) Details regarding third-party support for line-of-business applications, hardware warranties, and ISP accounts 2. The questionnaire can bring multiple stakeholders together to answer specific queries. Survey Monkey, TypeForm, and Google Forms are great tools to create a survey. Identify all admin and domain admin group members and troubleshoot as needed 10. Develop a complete report for the project and analyze shortcomings that still exist. 9. Setup the RMM Remote monitoring and management (RMM) is crucial for keeping an eye on your client's infrastructure and responding proactively. An onboarding framework simplifies knowledge-sharing and sets expectations for both sides. Communication and customer experience, it's the foundation of a great client relationship. Why Should You Follow a Client Onboarding Checklist? Better communication and faster training More knowledge of your clients Consistent, positive client experience Coordinated transition (vendors and systems) Increased product and feature adoption Improved client experience and retention Reduced customer churn Lift in 'free trial to paid' conversion Below, we've outlined what the client onboarding checklist should look like. Every client is unique, however, you can use the recommendations in this blog as a baseline for creating your own checklist, or you can download ours, here. Further, running two systems in parallel also requires change-control best practices. If possible, you should carefully limit other changes on the client's existing system during the synchronization period, such as adding or changing user profiles or changing the system distribution directory. Best Practices for Syncing Client and MSP Systems 1. Make sure to include a detailed meeting agenda in your invite. Kick-off Meeting Purpose Introduce stakeholders that will be working together. Reaffirm client expectations. Go through further questions that may have come up from the Questionnaire or Welcome Packet. Discuss next steps and pressing priorities. Agenda items: Tech check - Meet with your internal team before exchanging ideas with clients. Introductions - Each stakeholder should share their names, titles, and how they will be contributing to the project. Review goals + project timeline - Walk through the agreed goals with the client's project lead. So, have the RMM setup included in your MSP onboarding checklist process, too. New Client RMM Checklist: 1. Allow some time to reiterate the tasks that both parties will explore. Keep kick-off meetings productive with the following tips: Brief your entire team on the client. Install RMM agents on the client's servers, workstations, and mobile devices. 2. Make sure your RMM tool is compatible with any applicable antivirus programs and backup routines. 3. Conduct a security assessment, and implement Multi-Factor Authentication (MFA). Share a client onboarding questionnaire Collect any information you didn't get through the sales process. It requires a smooth transition of information through different workflows. Set up the SLA agreement in your PSA tool 4. Send an announcement email introducing the new client to your company 5. Often, project management can get bottlenecked by clients, so you may want to include a list of expectations from the client or a workflow that outlines their responsibilities. Project timeline - Offer a high-level view of the milestones and phases of the client project. Give them the best onboarding experience possible. Beyond getting them familiar with software or new IT environments, you'll need to get a deeper understanding of your client's challenges. Did you know MSPs spend about 40 to 60 hours manually gathering information from existing systems and databases to onboard each client? Make onboarding your differentiator — set them up for success and then make good on the promises you pitched during the sales process. To learn more about how Zomentum's Sales Automation Platform, with powerful sales automation capabilities, can help you guide your clients through your MSP onboarding checklist steps, check out our ready-made template for a few ideas. Reach out to our sales team or request our platform demo. Review PCs for local admin and service accounts 12. It's an essential step in the onboarding process because clients will generally not see any value until they complete this step. There are a few ways you can approach data import, including: Step 1: Appoint an expert to connect accounts and oversee the data import. Step 2: Gather information automatically based on what you learned during signup. Step 3: Put in dummy data to test the import process. Importing data is complex. Sync systems Now that you have your client onboarded on paper, it's time to sync their systems. Put forward your inquiries too. Review meeting actions - Kick-off meetings often bring up many ad-hoc discussions and new steps that your team may need to address. Another new account to add to your customer base! But of course, they're more than just a number, now the relationship truly begins. The next step? After the initial kickoff call, schedule check-in after two weeks to verify everything is working smoothly. Fill in the gaps in your understanding of the client. Include dates for any upcoming meetings that are a part of your onboarding a new client process. Meeting cadence - Highlight how often you'll be meeting and how long for in your Welcome Packet. Keep up with a to-do list - Use the Welcome Packet to highlight any pending items your client is yet to complete. Import data Many tools require clients to import their data (or connect data sources) to use them. A consistent report on progress will focus on schedule and budget updates. Allow an opportunity to discuss ideas for improvements. Enter the emergency support information into your PSA 7. Synchronization requires careful planning and monitoring. You can also layout a Data import point security. Take the project live The project launch and the work leading up to it can be an exciting time for your development team. When assigning team members to the account, brief them on any client details you picked up during the sales process. 3. Send your client a Welcome Packet Share helpful product guides, in-depth case studies, and comprehensive knowledge base articles to highlight the several use cases of your offering. What will working with you look like? The reviews will: Ensure the smooth functioning of various workflows and hold the project integrity. Reduce the temptation to delay key initiatives on that project. Scan the network's internal LAN for IP-enabled devices and review 13. Also, discover how you can achieve their goals. If you're using a customer relationship management platform, you can use a built-in form to build the survey. Reiterate the terms of your contract in the Welcome Packet and highlight the working process. You may choose to share your welcome packet via email or jazz things up by creating a branded PDF. Key elements to include in your client welcome packet Team details - Introduce team members to your client who will be working with them directly. You did it. To enhance the security model, ensure a separate security configuration for each data integration and entry mode. Automating the entire process can reduce manual errors and avoid any unnecessary hiccups. 6. Set up the client in your accounting and billing systems 3. Set up the client in your Professional Services Automation (PSA) tool 2. Nevertheless, don't take your eye off the ball now. Cover aspects of the project management, ranging from implementation to security. Include each member's function and contact info. Summary of goals - Include a brief overview of the plans. Perform activities to synchronize the client's new system with the data on their existing system. It involves a degree of complexity, so create dedicated tasks for finer details. Allow some time for any clarification questions. Discuss the technology stack - Emphasize the different tools you'll use and answer client queries. Highlight upcoming tasks and milestones - Discuss next steps after the meeting and ensure that everyone is on the same page about these tasks. Q&A - Your client's team will likely have some questions by the end of your session. Any issues raised during this phase should be broken into tasks. Discuss the project management, response(s) to the client questionnaire, and any questions that may have come up during onboarding a new client process. Define account roles and responsibilities clearly. Brainstorm strategies that might add more value to the client. Prepare presentation slides or documents for the kick-off meeting. Review the kick-off meeting agenda. Ensure a kick-off meeting plan - who speaks when and what. Notify relevant points of contact from cross-functional teams before the scheduled meetings so you can address any client query in real-time. 5. In some cases, tests may involve external stakeholders such as consultants and system penetration testers, equipped with ethical hacking capabilities. Also, specific targets you may have discussed during the sales process. Points of contact - Reiterate the several services the client can use from cross-functional teams. Set expectations - An essential part of starting a new or building a relationship is to set expectations clearly from both parties. Save at least 15 minutes for Q&A. This may include: Gateway routers Firewall Wireless access devices Printers Switches (ethernet, fiber) NAS/SAN Virtual machines VOIP devices Windows service accounts (administrator, SQL, SA, Sharepoint) Workstations admin passwords Other network appliances Anti-virus console VPN access Web portals Remote assistance programs 8. Assign them to team members who can resolve them. With all final issues ironed out, transfer control of the project management to relevant teams. Further, include items that your team is currently working on 4. Schedule a kick-off meeting with your client After getting through the initial steps, your account manager can reach out to the client and schedule a kick-off meeting. Assign team members to the account Depending on the company size and the nature of the services you'll provide, assign the appropriate team members to your client. The account manager will play a significant role and be responsible for most of your client onboarding process steps. It also requires a good understanding of client's applications and the library structure of their system. Sync the answers directly to your client's account in the CRM. Obtain all contracts and warranties for hardware and software, including: IT hardware manufacturer and all warranty contracts IT software license contracts (operating system, anti-virus, proprietary applications, backup, etc.) IT communication and service contracts for the client 6. Discover all client, service, and backdoor accounts and troubleshoot as needed 9. Underline the project management timeline mentioned in your Welcome Packet. Test the monitoring and alerts to ensure they work 4. Install antivirus on the systems, servers, and mobile devices. 8. Review firewall rules and modify as needed 7. Chase down any prior permissions or other essentials needed and then proceed with the regular monthly and quarterly reviews. Change administrative passwords wherever relevant. Identify all groups and membership for remote access 11. Maintain momentum and show value Set up a monthly and quarterly progress review after the project launch. Decision-making at regular intervals will augment value. Encourage building a relationship with the client, making enhancements easier for both sides. Wrapping up! Never assume your client knows what to expect, bring them through a brief summary after making the sale and keep re-stating what will happen next. This is also one of the most important steps while onboarding your client. Make sure to tailor the components to meet the specific needs of your client. 1. Register for web properties and DNS 14.

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