Onboarding Process

3 Steps

STEP 1 – Administrative Tasks

- ☐ Send welcome email and package in the post
- ☐ **Send new client intake survey** – used to grab all new clients company details so our admin team can set up new client in our systems correctly. Will take the client about 5-10 minutes to complete.

  Info gathered: primary contact (the person we will talk to about things like approving new user accounts, billing changes, authorised contact changes, security issues and anything business related) etc

- ☐ **Send accounts payable** – send new client's accounts payable person a note/overview with any details that will help make their job easier.

  Info gathered: How often we bill, how to find invoice history, payment terms, when late fees apply, the process for billing queries

- ☐ **Create/setup:**
  - **New client in ticketing system** along with extra office site/location details, emergency contact details, primary contact details, special notes etc
  - **New clients users in ticketing system** a form is sent to find out all users and their contact details, VIP contacts etc
  - **Agreements in ticketing system** ready for billing, including managed service agreement, cloud services agreements, hosting agreements and backup agreements

- ☐ **Add:**
  - **All employees to be added to 5-day email onboarding series –** a small series of emails so everyone knows how best to contact the helpdesk for example
  - **Add all employees to weekly "3-minute Thursday" weekly email –** a weekly email written by Mark.
  - **Add client to monthly physical newsletter –** a newsletter sent monthly.

- ☐ **Add all clients vendor info into system –** record details of new clients vendors that we may need to contact
- ☐ **Migrate 3rd party billing to Compex (if needed) –** move billing for 3rd party vendor (e.g Office 365) to Compex

- ☐ **Setup security/approval levels -** Gather an approved list of contacts that will have security cleared /approval authority so we know who to take instructions from for sensitive requests (such as password resets, new users, delete users, permission changes etc)

STEP 2 – Account Manager Tasks

- ☐ **Schedule new client kick off meeting** - around 60 minutes in length. We sit down with the client and run through an agenda including response times, expectations, how to get support, security vs usability, introduce team members, in-scope/out of scope, quoting/ordering process, payment terms, primary IT contact info, account management role, initial technology roadmap plan if needed.

  Will also cover next steps – cutover/ go-live date, when an engineer will be on site, any technical changes to expect. Notification that we'll be sending over the IT takeover pack to new client's old IT company

- ☐ **New client manual –** a physical printed 10-page manual given to all employees which will take 5-10 minutes to read through. Manual includes how to get support, escalation procedure, how fast we respond, what we can help with, how to order hardware/software etc

- ☐ **Send client vendor management letter -** for vendor management (Line of Business Apps, telecoms, print company, ISP etc)

- ☐ **Send IT takeover pack** – this is sent to the incumbent IT company and will help gather the right information for a seamless transition (the pack asks for technical IT info such as passwords, networking/devices info, internet, server info etc)

- ☐ **Schedule 30/60/90-day onboarding reviews** – regular check-ins to make sure things are going well.

- ☐ **Send client sample policies** – policies to be sent to new client including password/computer/email/internet usage/security/remote working/external drive policies

STEP 3a – Technical Tasks

- ☐ **Install remote agents on all computers, servers etc**
- ☐ **Remove previous IT company software/agents**

- ☐ **Take photos of environment –** photos of all-important areas – racks, patch panels, internet, servers etc to help with faster troubleshooting. Upload all to Compex client documentation tool
- ☐ **Gather software licences** into documentation tool
- ☐ **Audit backup services -** discover and document all backup services used including on-premise and cloud. Audit to ensure that ALL clients data is being safely backed up OR switch across to recommended backup solution
- ☐ **Review and document network** – including firewall configuration. Document in documentation tool
- ☐ **Remove old Antivirus and install new antivirus** – this will usually done out of hours to avoid disruption. Notify client to NOT renew existing AV licence if needed
- ☐ **Add asset tags/labels** and document where needed

- ☐ **Implement security best practices** – Implement our security best practice onto all network devices that establishes a secure base-line.

    - Arrange with client for Implementing 2 Factor authentication on all Office 365 accounts
    - Setup Advanced Office 365 protection into clients Office 365 tenant
    - Setup Office 365 automated backups
    - Configure advanced email protection into Office 365
    - Implement web protection software

STEP 3b – Password/Credential changes

- ☐ **All password changes are documented in our systems and securely sent to the client for their records**
- ☐ **Setup new clientadmin and compexadmin accounts**
- ☐ **Disable/delete and document:**
    - All unnecessary admin accounts on all client assets – cloud, firewalls, switches, servers etc
    - Reset all "at-risk" user passwords – identify end-user passwords that the incumbent IT company might know and reset them
    - Remote access/remote power equipment
    - Firewalls/routers/switches/modems/Wireless/SSID's
    - Administrative VPN accounts
    - Windows service accounts
    - Create local admin account
    - Cloud platform accounts (Office 365, Azure, AWS)
    - All backup systems
    - Doman registrar/DNS hosting accounts/website hosting