domotz

New client onboarding checklist for **MSPs**

What's covered in this **guide**:

Introduction

So, you're an MSP and need to onboard a new customer? Where do you start? Read through our handy white paper, including an onboarding checklist you can print and use for new clients.

As an MSP, onboarding new clients is critical to your success.

The onboarding process sets the tone for your relationship with your new clients. If the process is efficient, it can leave a positive impression on your client.

A well-organized onboarding process can make your client feel valued and set expectations for the rest of your working relationship.

Benefits of an **Onboarding Process**

· **Sets the tone:** a well-planned onboarding process ensures that you and your client are on the same page.

· **Establishes clear expectations:** you'll clearly define your services, the implementation timeline, and costs.

· **Builds trust:** a structured onboarding process can help build trust with your client.

· **Reduces errors:** following a defined process makes it less likely for mistakes to occur and costs to pop up down the road.
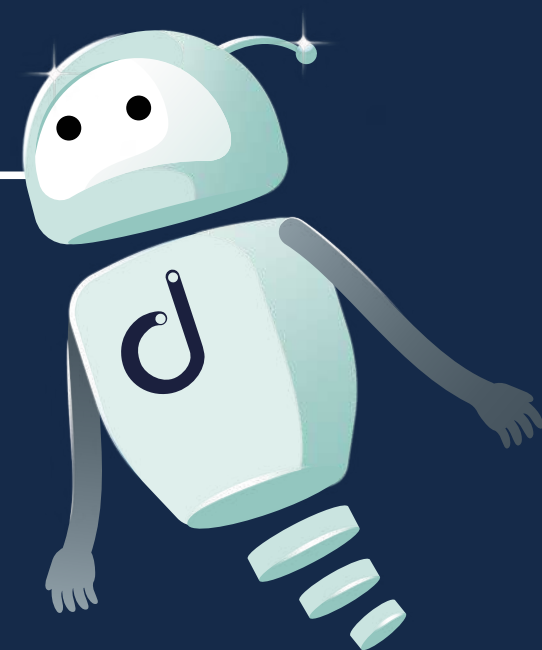
Onboarding Dos

· **Listen and understand:** avoid making assumptions about your client's needs and wants. Instead, take the time to listen and understand their unique situation.

· **Take your time:** avoid rushing through the onboarding process to secure the deal. Take the time to ensure that the client's needs are fully understood and that they are satisfied with the proposed plan.

· **Be realistic:** avoid making promises that you cannot keep. Be honest and real about what you can deliver.

MSP
Onboarding
Checklist

01.

The MSP onboarding process includes three significant areas: the pre-onboarding stage, the initial meeting, and the implementation stage.

· **Pre-Onboarding stage**

· **Initial Meeting**

· **Implementation Stage**

Pre-Onboarding
Stage

Before you start onboarding a new client, it is essential to determine whether they are a good fit for your business.

Here are some of the critical steps you should take:

Determine the client's needs: you must understand your potential client's business requirements to determine whether you have the skills and resources to meet their needs.

Audit the network and IT environment: you need to know what you're working with. You can use Domotz network monitoring software, and many of our MSP clients do. Domotz will give you a complete inventory of your client's network and show you what you're working with. Auditing the network helps you price things efficiently. You may ask clients what they have, but they probably do not know. Using Domotz ensures you know what you're dealing with. You can use this information for pricing and making hardware upgrade recommendations. Ultimately it'll help you define a service level agreement (SLA) based on what your customer has on their network.

Conduct a risk assessment: assess the client's network, systems, and security to determine risks and vulnerabilities.

IT strategy: based on the assessment, create a customized IT strategy for the client that outlines specific recommendations and solutions for improvement.

Scope of work: define the scope of work, including timelines, milestones, and deliverables, and obtain their agreement.

Onboarding plan: create an onboarding plan that outlines the steps required to get the client's systems up and running on your managed services platform.

Determine the pricing and SLA: because you have an inventory of the network (using Domotz or another software) and have conducted a risk assessment, you have all the information you need to price things efficiently. Establish pricing and payment terms that meet the client's budget and expectations. Define the SLA and corresponding options for your client. Present tiered levels of services so your clients can choose what best fits their needs.

Share the pricing and SLA with your client: collect feedback about your pricing, the various service levels available, and what you can offer.

"When talking to new prospects, it's essential to know how many devices they want managed or monitored, where these devices are, and details about the device (laptop, printer, network switch, etc.).

With Domotz, you can place a small Domotz Box onto a client's network during your initial visit and let it collect and present all of this information and more in your web portal. This ensures you have all the awareness of devices on a new LAN before you create a quote or formally accept the opportunity."

(Craig Sharp, MSP OWNER, Abussi LTD).

Initial Meeting

The initial meeting is the first interaction with the new client. Setting the tone for the rest of the onboarding process is critical. There are a couple of things you'll want to do during this stage.

Pro tip: *if using Domotz for auditing the network, you will already have a complete inventory of devices and systems. Thus, you can rely on something other than obtaining this information verbally, which can lead to errors and omitted information.*

Establish a relationship: the first important goal during the client onboarding process is understanding your client's needs. The more you listen, the better you know your client's needs. Building trust starts with one straightforward question – What does success look like for you?

Gather information and document it: during this meeting, you'll also need to gather specific information about your client, from warranty information to Internet Server Provider (ISP) details.

Sign the SLA: once you've collected all the required information about your client's network infrastructure, you must provide the SLA. Evaluate your SLA and ensure you get what you expect from this relationship. The SLA intends to ensure you set up your connection for success. A good SLA sets expectations. Be sure you modify your SLA to fit the requirements and needs of your client's existing IT infrastructure. In addition, it's also a good idea to go over your SLA with your legal team, who will be able to determine if any aspect of the SLA respects the law or could present potential issues.

Implementation
Stage

Once the SLA is signed and you have held your initial meeting, it is time to get to work. The implementation stage is the most demanding one of the onboarding process. You've got a lot of steps to cover. From welcoming your client, adding them to payment systems, reviewing policies, and internal team meetings, there are many things to do. In this phase, you've also got to set up every system, from network monitoring software to Professional Services Automation (PSA) tools and your RMM.

Client Welcome: once you know everything about your client and the SLA is signed, it's time to make your customer feel comfortable in the relationship with your company and your team. You'll want to send them company information and onboarding surveys. You'll also want to schedule welcome calls internally and externally with your new client.

Payment Setup: you'll also need to set up your client for billing and communicate the cycle. You'll need to add them to any accounting software and ensure you are all on the right page regarding payments.

Policy Review: after welcoming your client and setting up your payment systems, you'll need to review the existing policies in place. You'll then need to propose any changes or new drafts to your clients.

System Setup: setting up all the systems for your new client is the most time-consuming aspect of onboarding. System setup is when you must go through and configure every system for your new client. You'll need to configure every scenario, from network monitoring, RMM, backup and disaster recovery, security, documentation, and more. We've created a detailed checklist to help guide you through all of these possible tasks depending on the services you're offering.

Organize training & Go Live: once you've set up and tested every system, it is time to organize training sessions for your new client. Organizing training sessions could include scheduling cyber awareness and systems training sessions. You should host a meeting with your new client's team members to discuss how they can access support and any new systems they need to know.

Once training is complete, you're ready to go live.

Follow-up and QBRs: you will want to send your customer any reports in the agreed timeline. You'll also want to have a systematic way of checking in on them. If there are any recurring meetings, make sure you schedule them. Schedule an account health check for the first month. Once things run smoothly, you will want to schedule Quarterly Business Reviews (QBRs) with your client every three months.

Many of our MSP customers suggest visiting your customer in person every three months for your QBRs. You'd be surprised how many pain points and issues you can identify on-site rather than through an email call. Go and visit your customers. Walk the floor. Talk to people in the office and find out the pain points. Bring cookies and flowers, offer to buy lunch - do whatever you need to get in the door.
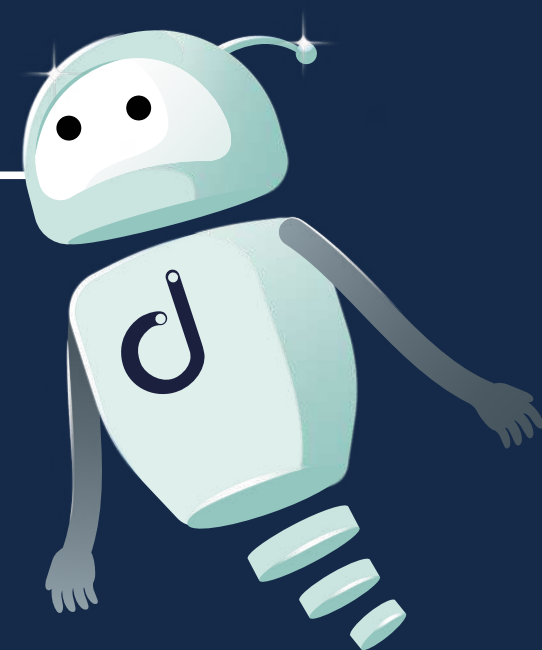
Use your QBRs to find out where to improve and make ongoing recommendations to optimize performance. You can also use these opportunities for making hardware upgrades and network performance improvements using the information you get from Domotz.

Domotz for
Onboarding

02.

Thousands of MSPs already use Domotz to onboard new clients.

Here's how Domotz can help you

Automated device inventory: a complete list of every device on the network.

Pricing and hardware upgrades: use Domotz's real-time network device list to recommend new software and hardware upgrades and to price things correctly.

Network topology mapping: automatically plots the endpoints on the network.

Security scans: scans for security risks, opened ports, UPnP port forwarding, and more.

Network monitoring: ongoing monitoring of your client's network and devices for optimal performance.

Alerts on new devices: alerts you when new mobile phones, computers, and other gadgets are connected.

Threshold alerts: get alerts in real-time on important variables through SNMP, like the printer is running out of ink or NAS is running out of storage.

Network performance: see how your client's network performs and recommend improvements.

Network configuration backup: backup network switch, firewall, and access point configurations.

Automated ticket generation for PSA tools: send tickets to your PSA tool for network and device events.
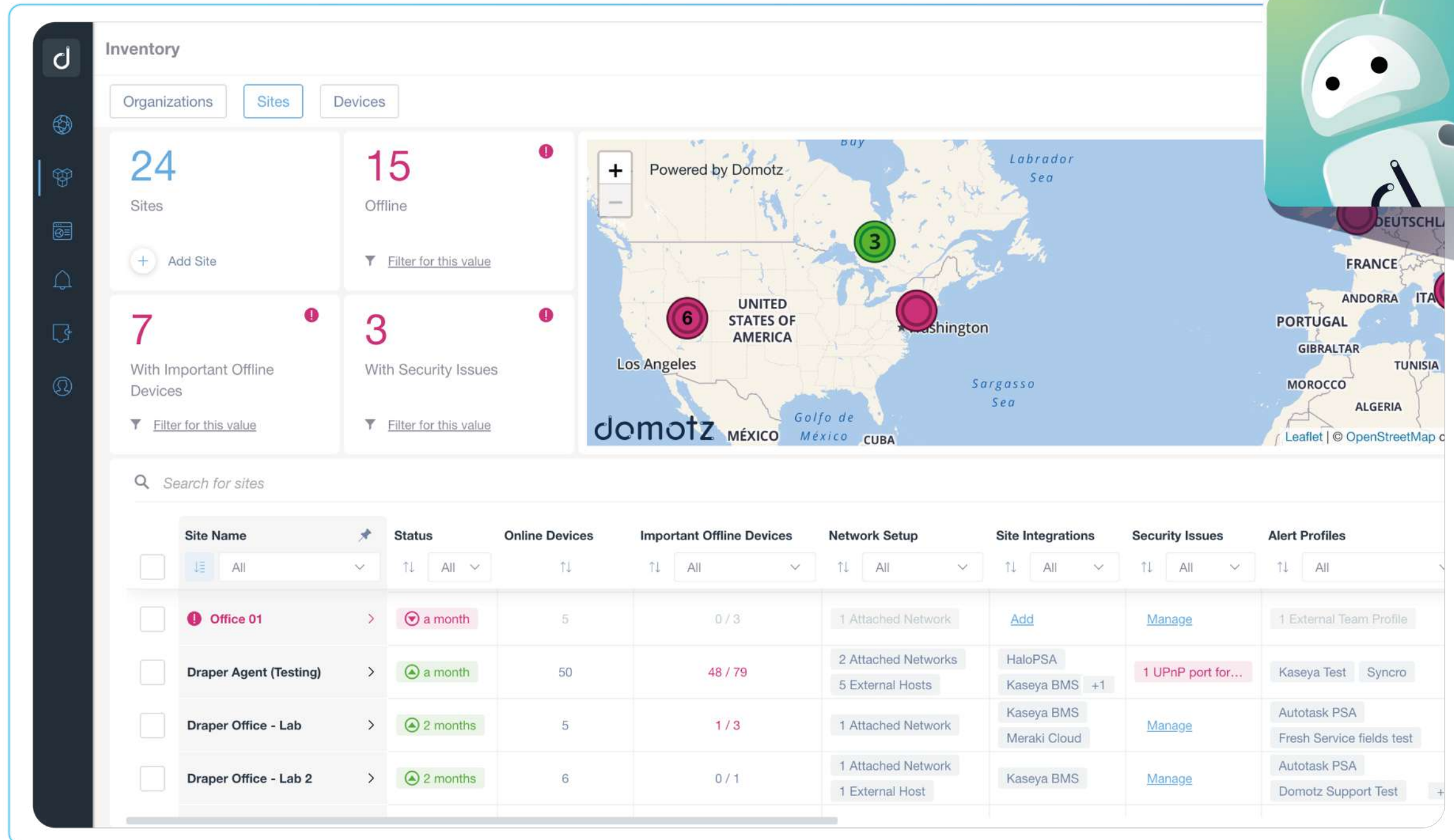
Automated network inventory for documentation tools: keeps your documentation tool updated with all the latest devices and network information.

Thousands of Integrations: with thousands of software and hardware integrations, deeper insights and data can be extracted or pushed to the tools you use every day.
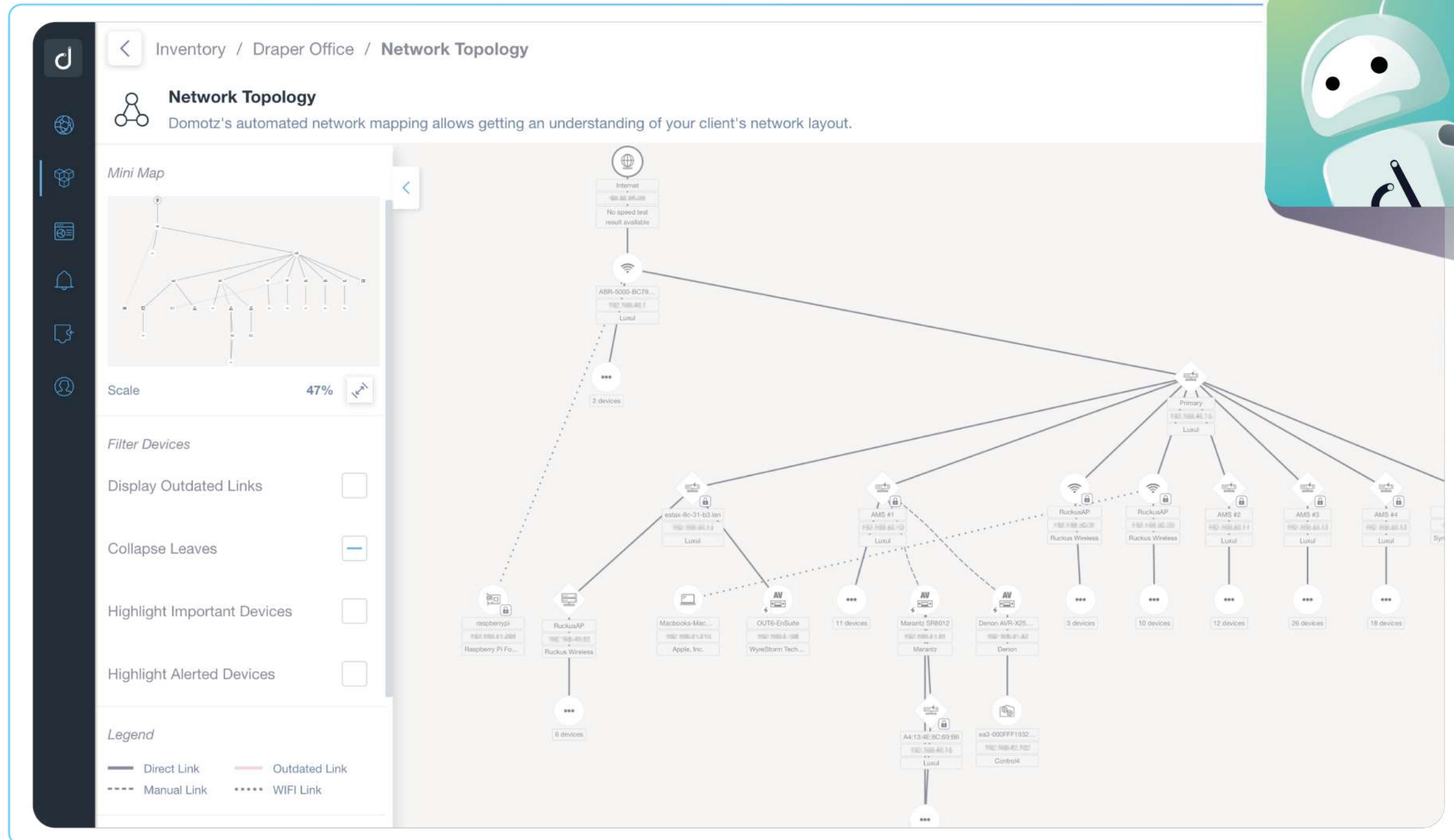
Inventory Dashboard

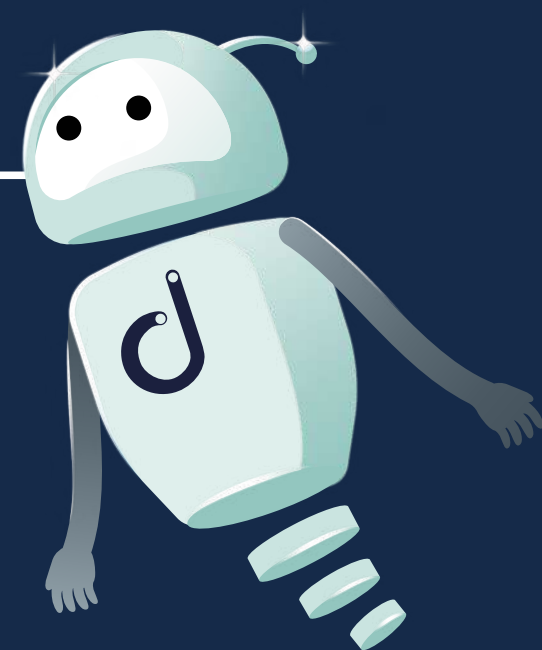# Network Topology

New client onboarding checklist for **MSPs**

Use the worksheet below to give your clients the best onboarding experience.

Appendix A

TASK	DESCRIPTION	STATUS

1 Pre-Onboarding

	TASK	DESCRIPTION	STATUS
☐	**Determine needs**	Understand your potential client's business requirements to determine whether you have the skills and resources to meet their needs.	
☐	**Audit IT environment**	You need to know what you're working with. You can use Domotz network monitoring software, and many of our MSP clients do. Domotz will give you a complete inventory of your client's network and show you what you're working with.	
☐	**Conduct risk assessment**	Assess the client's network, systems, and security to determine risks and vulnerabilities.	
☐	**Scope of work**	Define the scope of work, including timelines, milestones, and deliverables, with the client and obtain their agreement.	
☐	**Onboarding plan**	Create an onboarding plan outlining the steps required to get the client's systems up and running on your managed services platform.	
☐	**Determine pricing and SLA**	Because you have an inventory of the network (using Domotz or another software) and have conducted a risk assessment, you have all the information you need to price things efficiently. Establish pricing and payment terms that meet your client's budget and expectations. Define the SLA and corresponding options. for your client. Present tiered levels of services so your clients can choose what best fits their needs.	
☐	**Share pricing and SLA**	Collect feedback about your pricing, the various service levels available, and what you can offer.	

TASK	DESCRIPTION	STATUS
2	**Initial Meeting**	

Schedule initial meeting	Use the initial appointment to start building a relationship with your customer.	
Collect information	· Company name · Business information · Hours of operation · Emergency phone numbers · The main point of contact	· SLA agreement signed · Existing managed services setup · Any existing processes, diagrams, and setup information · ISP account information · Warranties and receipt information
Sign the SLA	Ensure the SLA and service agreement is signed.	

TASK	DESCRIPTION	STATUS
3	**Implementation Stage**	
☐ **Send welcome emails**	Send your new client brand information such as company story, leadership team, blog, webinars, company features, integrations, case studies, and customer testimonials.	
☐ **Complete welcome actions**	Complete all the relevant welcome actions: · Send new client survey · Send welcome gift to your client · Send any referrer a gift · Add the client anniversary date to calendars as a reminder · Announce new client to your team internally	
☐ **Add to payment systems**	· Send payment and billing cycle information · Add client to accounting systems · Define primary and secondary technical contacts · Set up recurring billing	
☐ **Add to systems**	· Add client to your newsletter · Add clients to your onboarding sequence · Add client to your CSAT software	

TASK	DESCRIPTION	STATUS
☐ **Review policies**	· Review data retention policies · Review security policies and suggest changes · Gather all plans and policies	
☐ **Client kick-off meeting**	· Discuss technology needs and aims · Review any outstanding information · Explain the onboarding process · Discuss and set up a recurring meeting for the client · Show the reporting you'll provide · Discuss existing processes for internal use, BYOD policies, website hosting, spam, anti-virus, firewall, and security policies	
☐ **Internal kick-off meeting**	Schedule a meeting with your internal team to discuss primary and secondary contacts and client management.	
☐ **Basic setup**	· Add domains to your allowlist · Add applications to your allowlist · Set up password manager · Set up reporting tool	
☐ **Document the network**	· Take pictures of setup · Create automated network topology · Document everything on the network	

TASK	DESCRIPTION	STATUS
☐ **Set up network monitoring software (using Domotz or other)**	· Scan the network and discover all devices. · Set up alerts for new devices. · Set up alerts for critical network infrastructure devices. · Configure automated ticketing generation and remediations for your PSA tool. · Configure automated network documentation from Domotz to your documentation tool. · Create the automated network topology. · Configure automated reports to send to your customer every month. · Create all threshold alerts based on SNMP variables (i. e., the printer is running low on ink or the NAS is running out of disk storage).	
☐ **Set up PSA tool**	· Add details about vendors to your PSA · Add SLAs · Add emergency support details · Test connectivity with your network monitoring system	
☐ **Warranties and licenses**	· Retrieve warranties for all hardware and software · Retrieve existing software licenses and contracts	
☐ **Backup & disaster recovery**	· Review the existing backup and disaster recovery tool and processes · Audit backups · Schedule backups · Schedule manual backups	

TASK	DESCRIPTION	STATUS
☐ **Security**	· Implement security solutions such as firewalls, antivirus, and intrusion detection to protect the client's network from cyber threats · Review firewall rules and strategy. Implement new ones if necessary · Review antivirus software and policies. Implement new ones if necessary	
☐ **Access and passwords**	· Ensure access to all required systems and hardware · Change admin passwords for hardware, software, and systems · Share new passwords with the client	
☐ **Users & Access**	· Document all user accounts · Review who has remote network access and apply rules as needed	
☐ **DNS & Web Properties**	Ensure registration for DNS and any web properties (proprietary client software, CRM, websites, blogs, etc.)	
☐ **RMM**	· Configure remote access · Install RMM agents	
☐ **Documentation tool**	· Test connectivity and functioning with your network monitoring system	

TASK	DESCRIPTION	STATUS
☐ **Final testing and Go Live**	· Ensure all information is complete · Ensure access to all required systems and hardware · Test all connectivity and existing connections · Ensure monthly reporting will be sent	
☐ **Schedule training**	· Training sessions · Cyber awareness training · Systems training	
☐ **Follow-up and QBRs**	· Schedule any recurring weekly or monthly meetings · Schedule in-person QBRs · Schedule reports to be sent internally by your team	

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