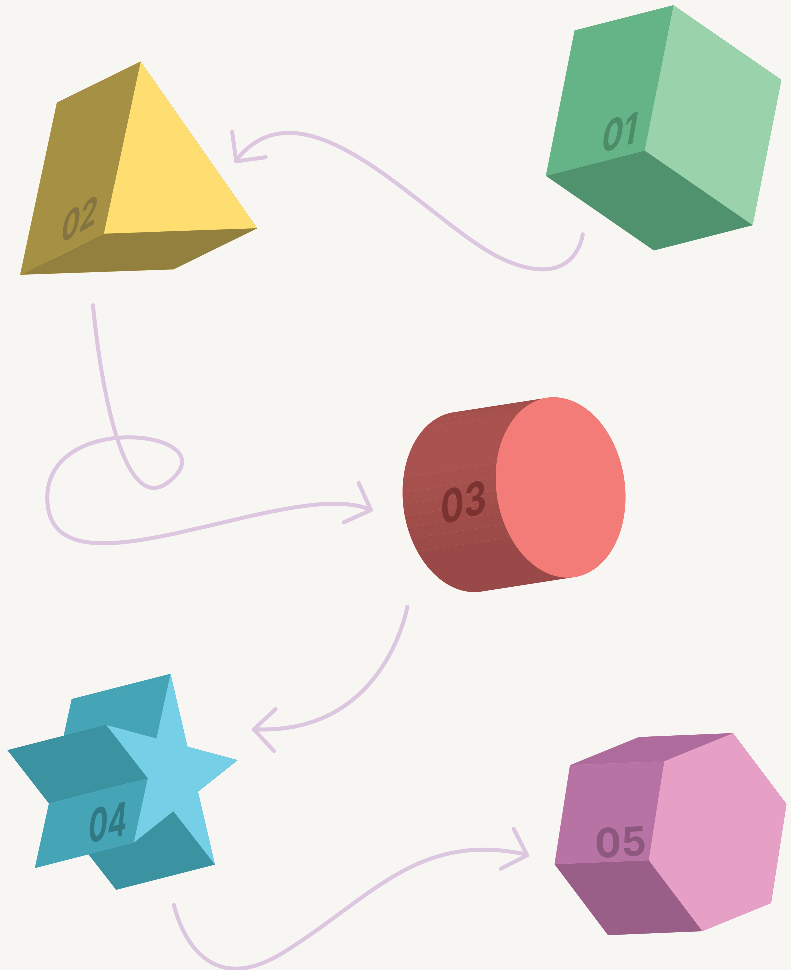
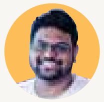
SuperOps

e-book

The definitive 5-step playbook to great client onboarding





author
Nithish Kumar

designer
Karthikeyan Ganesh

First impressions matter!

A great client onboarding experience helps you start off on the right foot with your client. This builds your reputation in the eyes of the client and sets the tone for future interactions.

In many ways, great customer onboarding has a powerful influence on customer retention and advocacy. Do a great job at it and you set a positive tone to inspire trust and confidence that can pay dividends for your MSP in the long run. Conversely, an unimpressive onboarding experience can leave clients lost and confused, who may eventually lose interest in whatever you have to offer.

In this ebook, we'll be talking about all the things that come together to create a great client onboarding experience, with an actionable checklist to help you build a solid onboarding process.

01/05

step 1

Learn about your client's requirements in depth

Client requirements in the MSP space are unique—depending on their industry and the type of service they provide, their requirements are usually one of a kind.

While the sales process uncovers basic information about their requirements, you'll need a lot more information about the client to onboard them seamlessly. It's imperative that you take the time to understand the client's business functions and their technical requirements in depth at the very first step before moving forward with your services.

Here's how you can go about this:

- **Record** the sale and **communicate** with your staff about the new client
- **Sales** should create tickets or other documentation to assist in **company-wide communication** about the solutions that were purchased by the client
- Set up a brief **internal meeting** with key stakeholders that will handle the onboarding process
- Relay **client expectations** and specific solutions that were sold to your staff, so they know what to implement
- Have a **transition call** with your designated onboarding engineer and account manager to make an introduction to the client and set a basic plan of action

There is more than one way to go about understanding your clients. A lot of MSPs simply use a customer onboarding excel sheet to collect all relevant data and upload it in CSV format to any MSP tool that leverages automation. Just make sure your strategy has processes in place to gather the finer details, and you should be fine.

02/05

step 2

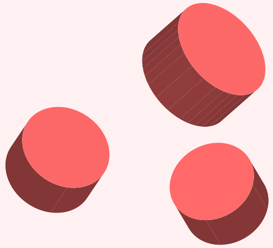
Understand the client environment

Now that all the requirements have been relayed to all the stakeholders involved, the next step is to identify the key challenges involved in setting up the service. This includes third-party integrations, software version compatibilities, security configurations, firewalls, etc.,

A simple checklist to sort through the tech stack can help you cut through the chaos and create a plan to start strategically implementing them. After all, you wouldn't want to replace a core router, update its IP, reconfigure the DHCP and all servers with new IP just because you ran into a missing password case.

- Discover and **sort** out all relevant **admin credentials**
- Identify all the admin and **backdoor accounts**
- Scout for client-specific **security measures** and ensure the rules are modified for setup
- Analyze software **version compatibility** between the product and the **third party** applications
- Download and install all relevant **support applications**
- Collect all **contracts** and **warranties** of the existing software and hardware
- Document the **challenges** and key pointers for the onboarding engineer to set up the **PSA**

03/05



step 3

Bring them into your PSA

Now that the network is set up, you'll need to set up the client's information on your PSA tool. This is a very crucial step, since your PSA will be the point of all your interactions with the client henceforth. If you miss adding any client information like their email subdomain, the tickets they send may not even get recognized by your PSA tool, which can potentially lead to escalations and unhappy clients.

Setting up their information within the PSA and ensuring that their interactions with your MSP go smoothly primes them for positive initial impressions and a great onboarding experience.

Here's how you can start synchronizing the product :

- Ensure that the client information in the **PSA** is accurate
- Define the primary contact and requesters under the client
- Add information about all the sites that the client is based out of
- Complete the client profile and setup **subdomain** and **email**
- Create and edit technician **groups** as per requirements
- Set up **client billing** in your accounting systems
- Configure the **client's SLA** based on their needs
- Create any necessary **custom fields** to accommodate their unique needs
- Enable security configurations - single sign-on, session timeouts, requester logins
- Test the **ticketing module** to make sure you receive their tickets without any issues

04/05

step 4

Set up the RMM

Setting up the Remote Monitoring and Management (RMM) is arguably the most important step of the onboarding process. In the existing remote work culture, being able to monitor assets in the network and keep the network running securely and smoothly is paramount. Thoroughly installing and testing your RMM in the client's network can ensure that you are hands-on with all the endpoints in the network from Day 1.

Proactively spotting issues in assets, and keeping them healthy and up to date with patches and scripts can help you establish the value you bring to the table as an MSP from the get-go. By consistently doing this over time, you build confidence in your clients who will start advocating for your MSP's reliability.

Here's a checklist you can use to ensure that you've properly gone through the RMM installation process:

- Download the RMM agents for the specific client
- Install the right device-specific agent on the client's assets
- Verify RMM **compatibility** with existing third-party applications
- Create and define alerts to get notified of any issues in the assets
- Add all the relevant scripts needed for the client's network
- Create patches for Windows and Mac devices to keep the client network up to date
- Create automation rules to run scripts and patches once specific conditions have been met
- Choose the type of policy that will be applied to the client's network
- Verify the policy set that applies to the client's network to check for any issues in alerts, patches, or scripts

Once you've set up the RMM in the client network, create contingency plans to prepare for emergencies. Install a client-preferred backup solution, and create a standard image for new machine deployment and save it for future use.

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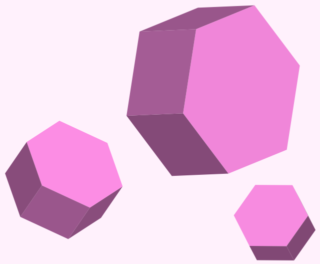

step 5

Review the onboarding process from end to end

You've worked on all the segments in the process with care, so take some time at the end to review everything carefully to ensure that all the client's requirements are met and check for any disconnects in the onboarding process.

From here on, all that's left is to over-communicate and keep the client informed of progress and updates to seal the deal:

- Create any custom dashboards or reporting as per client requirements
- Document the onboarding process end to end
- Schedule a client-training meet when onboarding nears completion
- Hand-off the system to the service desk with a status report all implemented solutions
- Oh and present them a cookie box if you wish to be classy!

Remember, the primary success metric of any onboarding process is how easy the client finds it to take over as soon as the setup is complete. If you impress them at the very beginning and keep delivering on your promises, they're going to stick with you for years to come.

SuperOps

Powered by intelligent automation, jump into the new age of IT service delivery with SuperOps.ai—a truly unified PSA-RMM platform for MSPs.

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