

 **LEVEL 2**

Service Essentials

New Client On-Boarding by the Numbers

Presented by :













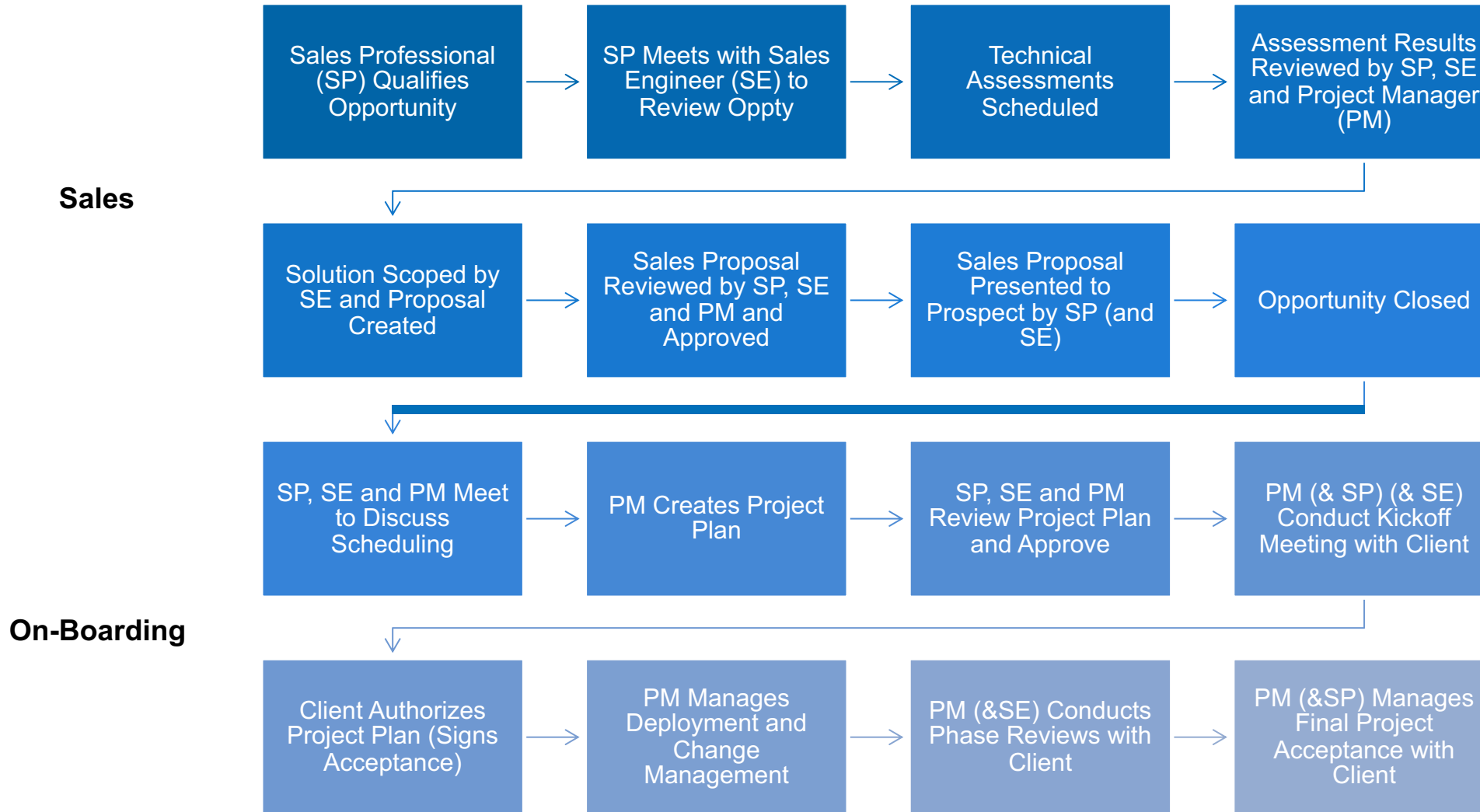


When Does On-Boarding Begin?

A successful on-boarding process begins during the sales process



Sales and On-Boarding Project Flow



On-Boarding Meeting: SP and PM

- Presentation to client during Kick-Off Meeting
- Receive approval of On-Boarding project plan, phases and timelines
- Verify project schedule against customer's calendar
- Identify and allocate any client resources required for On-Boarding
- Agree to roles, responsibilities, task assignment and phases between all parties
- Set appropriate expectations in terms of service expectations (best effort until Go-Live) and requesting service during On-Boarding

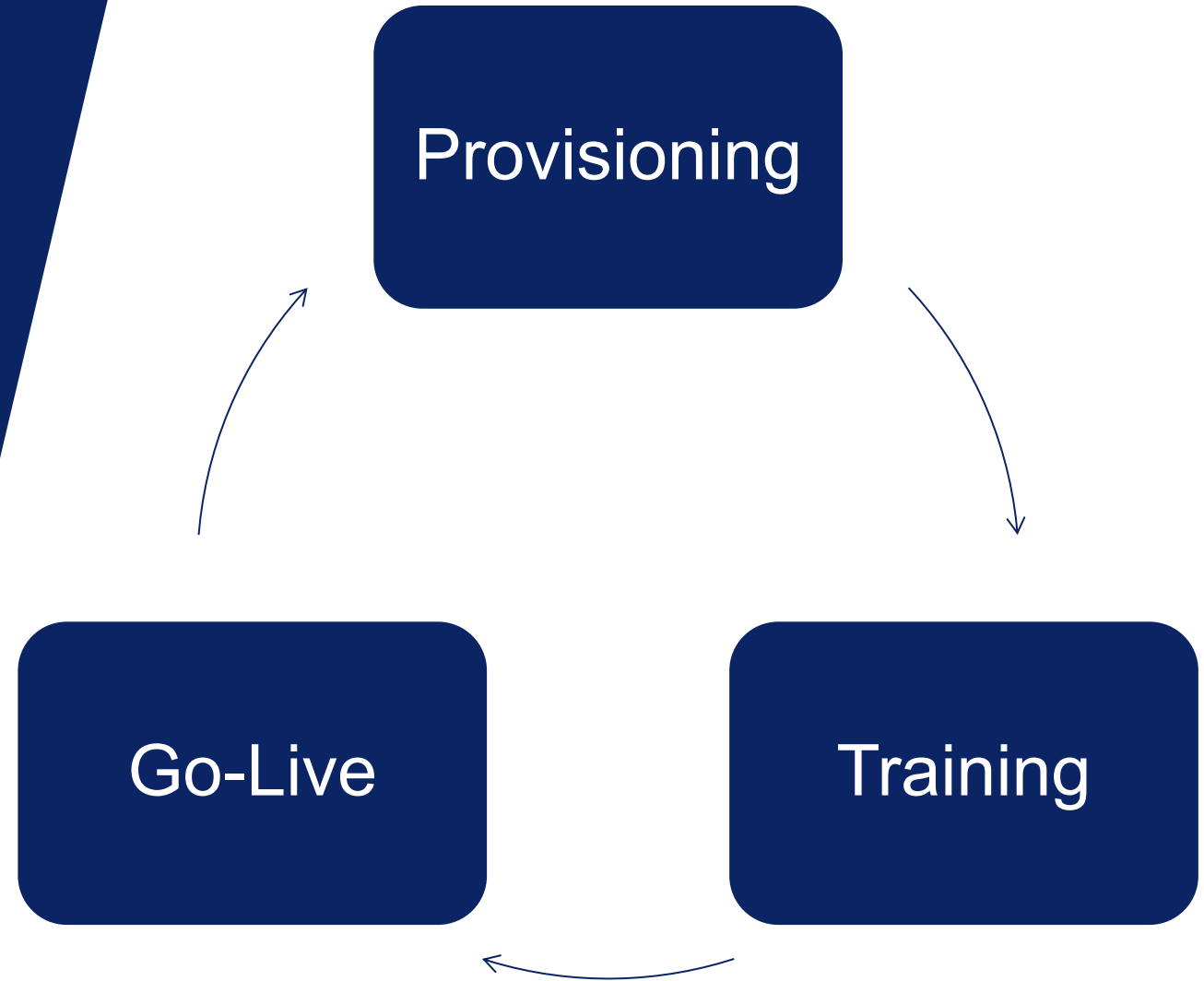


During On-Boarding Kick-Off Meeting

- Agree to the Risk Management plan
- Agree to the Change Control process
- Agree to the Communication and Status Reporting processes
- Agree to Success/Acceptance criteria

*Project Manager does not meet with client without Sales Professional

3 Phases of On-Boarding

















Provisioning

Those processes and procedures required to prepare the client, their end users, vendors and infrastructure to receive and participate in your services



Provisioning

	Step	Staff Role	Description	
	1	Project Manager	Create New Client On-Boarding Project Plan	RESOURCES
	2	Admin	Set up Client in PSA Solution	
	3	Admin	Set up Client in Accounting and Billing Systems	
	4	Admin	Add Client to Newsletter Marketing List	
	5	Admin	Add client Email Domain to Internal Global White List	
	6	Admin	Create Client Welcome Package and Send	
	7	Admin	Set up Agreement in PSA and Link to Signed Managed Services Agreement	
	8	Sales Professional	Send Thank You Email to Client Describing the Provisioning Process	
	9	Admin	Send Thank you Gift to client	
	10	Sales Professional	Send Thank You Cards to the Client and Other Resources That Assisted in Influencing/Referring Client	
	11	Admin	Create and Send Internal Announcement Email Introducing New Client to Company	
	12	Admin	Schedule Call to Introduce Project Manager & Schedule On-Boarding Conference Call or Meeting	
	13	Admin	Email Vendor Letter of Agency to Client to Authorize and Return	
	14	Admin	Prepare Agenda & Documents for On-Boarding Conference Call or Meeting	

Provisioning

<input type="checkbox"/>	15	Project Manager and Client	Conduct On-Boarding Conference Call or Meeting and Review On-Boarding Process and Project Plan Acceptance Agreement and Obtain Sign-Off	RESOURCES
<input type="checkbox"/>	16	Admin	Send Meeting Follow Up Email to Client, Including Contact (User) Import Spreadsheet, Vendor Information Spreadsheet with URLs and Passwords to Vendor Portals and Asset Information Spreadsheet with Administrative Credentials to all Other internal and External Devices, Systems and Services	
<input type="checkbox"/>	17	NOC	Configure and Deploy RMM Agents to Covered Internal and External Devices, Systems and Services with Appropriate AV/Patch/Backup and Other Alerts, Scripts and Monitors	
<input type="checkbox"/>	18	NOC	Integrate RMM and PSA Solution and Configure "Round-Robin" or "Closed-Loop" Ticketing Functionality if Supported	
<input type="checkbox"/>	19	NOC	Test PSA Ticket Creation from RMM Alert and "Round Robin" or "Closed Loop" Functionality if Supported	
<input type="checkbox"/>	20	NOC	Conduct RMM Device Discovery and Reconcile Monitored Assets against Agreement	
<input type="checkbox"/>	21	Project Manager	Resolve all Asset Reconciliation Issues against Agreement	
<input type="checkbox"/>	22	Client	Complete and Return Company Contact (User) Import Spreadsheet	
<input type="checkbox"/>	23	Client	Complete and Return Vendor Information Spreadsheet	
<input type="checkbox"/>	24	Client	Complete and Return Asset Information Spreadsheet	
<input type="checkbox"/>	25	Client	Complete and Return all Vendor Letters of Agency	
<input type="checkbox"/>	26	Client	Obtain and Forward all Contracts and Warranties for all Services, Infrastructure Hardware, Devices, Operating Systems, Applications Software, Phone Systems, etc.	
<input type="checkbox"/>	27	Service Manager	Service Manager Sends Welcome/Introduction Email to Client	
<input type="checkbox"/>	28	Admin	Letters of Agency Sent to All Client Vendors	
<input type="checkbox"/>	29	NOC	Enter Client Emergency Support Information into PSA	
<input type="checkbox"/>	30	NOC	Enter Client Primary Contact Information into PSA	
<input type="checkbox"/>	31	NOC	Enter All Client Location Information into PSA	

Provisioning

<input type="checkbox"/>	32	NOC	Import all Contacts (Users) into PSA	
<input type="checkbox"/>	33	NOC	Enter all Vendor Information into PSA	
<input type="checkbox"/>	34	NOC	Enter all Vendor Information into PSA	
<input type="checkbox"/>	35	NOC	Enter all Contracts and Warranties for all Services, Infrastructure Hardware, Devices, Operating Systems, Applications Software, Phone Systems, etc. into PSA	
<input type="checkbox"/>	36	NOC	Change Administrative Passwords to all Routers	
<input type="checkbox"/>	37	NOC	Change Administrative Passwords to all Firewalls	
<input type="checkbox"/>	38	NOC	Change Administrative Passwords to all Printers and JetDirects	
<input type="checkbox"/>	39	NOC	Change Administrative Passwords to all Switches	
<input type="checkbox"/>	40	NOC	Change Administrative Passwords to all NAS/SAN Devices	
<input type="checkbox"/>	41	NOC	Change Administrative Passwords to all Servers, Virtual Machine Hosts and VMs	
<input type="checkbox"/>	42	NOC	Change Administrative Passwords to all UPS's	
<input type="checkbox"/>	43	NOC	Change Administrative Passwords to all VoIP Phones, Systems and Services	
<input type="checkbox"/>	44	NOC	Change Administrative Passwords to all Server-Based On-Premise and Hosted Service Accounts (File/Print, SQL, Exchange, SharePoint, VPN, RRAS, RDP, etc.)	
<input type="checkbox"/>	45	NOC	Change Administrative Passwords to all Other Network Appliances (BDRs, etc.)	
<input type="checkbox"/>	46	NOC	Change Administrative Passwords to all Antivirus/Antispam/Antimalware Systems and Services	
<input type="checkbox"/>	47	NOC	Change Administrative Passwords to all Remote Desktop Sharing Programs or Services (LogMeIn, GoToMyPC, etc.)	
<input type="checkbox"/>	48	NOC	Change Local Administrative Passwords to all Devices (PCs, Laptops, Member Servers, etc.)	
<input type="checkbox"/>	49	NOC	Discover all User, Service or Backdoor Accounts on all Devices and Remediate as Needed	

Provisioning

<input type="checkbox"/>	50	NOC	Identify all Administrator and Domain Administrator Group Members and Remediate as Needed	
<input type="checkbox"/>	51	NOC	Identify all RRAS Group Members and Remediate as Needed	
<input type="checkbox"/>	52	NOC	Identify Registrar and Administrative and Technical Contact for all Hosted Sites and DNS and Remediate as Needed	
<input type="checkbox"/>	53	NOC	Identify all VPN Access Rights, Tunnels and Routes to or Between all Other Devices or Appliances and Remediate as Needed	
<input type="checkbox"/>	54	NOC	Review all Firewall Rules and Remediate as Needed	
<input type="checkbox"/>	55	NOC	Identify Any and All Service Alerts from Systems and Services to Old IT Provider and Remediate as Needed	
<input type="checkbox"/>	56	Onsite Team	Asset Tag all Equipment	
<input type="checkbox"/>	57	Project Manager	Verify Provisioning is Complete	

After Project Plan Acceptance: Procurement – Project Manager insures that

1

Necessary hardware is sourced and ordered

2

Necessary software is sourced and ordered

3

Necessary services are sourced and ordered

*Project Manager works with internal or external procurement sources to order and confirm delivery of correct hardware, software and services

Project Management

- Project Manager manages all resources
- Internal resources
- Client resources
- Vendors

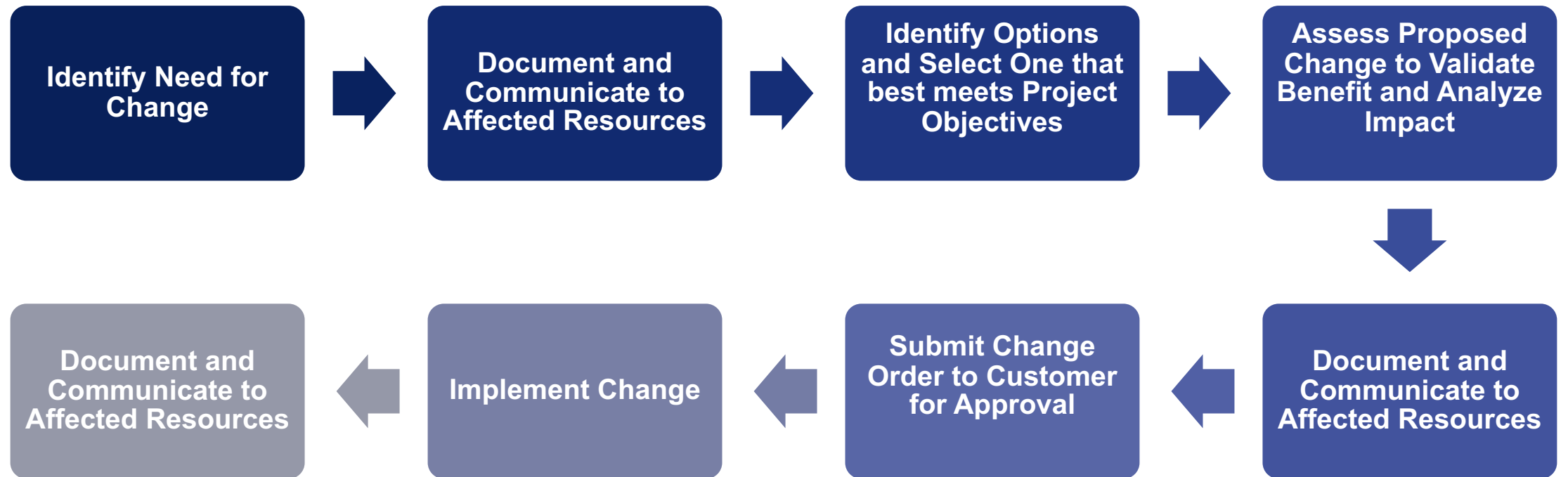




Project Implementation

- Phases of project may be conducted at
- Solution Provider's location
- Client's location(s)
- Vendors' location(s)
- The Cloud!

Implement Change Control During On-Boarding!



Provisioning – Internal Systems

Helpdesk PSA

- Setup Client
 - Contact Info (Primary/Secondary)
 - Location(s) Info
 - Network Documentation
 - Assets, Warranties and Licensing
 - Vendor Information
 - Billing Rates/Frequency
 - SLA and Escalation Process
 - Helpdesk Access and Contact Process
 - Configure Reporting

NOC RMM

- Setup Client
 - Location information
 - Conduct Discovery
 - Align agent profiles/templates/scripts to identified devices, applications and services
 - Configure alerting and integration with PSA for ticket creation
 - Configure reporting

Provisioning – Monitoring/Healing/Patching

- Monitoring:
 - Critical Devices, LOBs, Services, Connections
 - Servers/Critical Workstations/Laptops/Mobile Devices
 - Services/Processes (DNS, DHCP, DFS/Print Spooler, Email, Info Stores, IIS, SQL, etc.)
 - Firewalls/Routers/Switches/BDRs
 - Security/Anti Virus/Malware/Spyware/Web Filtering
 - Connectivity/VPNs
 - Cloud Services/Solutions
 - Hosting/Sites/Platforms
 - Backup Systems
 - Set appropriate thresholds
 - Start with Vendor-specific recommendations
 - Use experience and common sense to modify to suit environment
 - Self-Healing Policies
 - Patch Policies/Deployment

During On-Boarding: Verify Minimum Certified Network Standards

For client's existing environment to qualify for Managed Services, the following requirements must be met:

- All Servers with Microsoft Windows Operating Systems must not be in an End-of-Life state and have all of the latest Microsoft Service Packs and Critical Updates installed.
- All Desktop PC's and Notebooks/Laptops with Microsoft Windows Operating Systems must not be in an End of Life and have all of the latest Microsoft Service Packs and Critical Updates installed.
- All Server and Desktop Software must be Genuine, Licensed and Vendor-Supported.
- The environment must have a currently licensed, up-to-date and Vendor-Supported Antivirus Solution protecting all Servers, Desktops, Notebooks/Laptops, and Email.
- The environment must have a currently licensed, Vendor-Supported Backup Solution.
- The environment must have a currently licensed, Vendor-Supported Hardware Firewall between the Internal Network and the Internet.
- Any Wireless data traffic in the environment must be secured with a minimum of 128bit data encryption

**Costs required to bring Client's environment to Minimum Standards will be quoted and billed separately.*

Training

After Provisioning

- Training dates are set prior to Service Go-Live
- Multiple groups will need to be trained

NOC and Service Desk Client Support Training

- Learn new client's infrastructure and specific support requirements, and modifications to established support processes

End-user training

- Service requests, processes, SLAs, support tiers, customer service, reporting





Service Go-Live

- After provisioning and training
 - Go-live date set
- First 30 days most critical
 - Client and end-user perception is built
 - Tweaking and tuning occurs
 - Monthly client meetings

During On-Boarding – Dispatch and Service Desk

- Provides service on a “best effort” basis until a Go-Live date is determined
- Once Go-Live is reached, service is delivered against SLA





On-Boarding Project Completion Sign-Off Requires

- Success of each phase of On-Boarding project measured satisfactorily
- Management of timeline, budget and resources measured satisfactorily
- Communication management process measured satisfactorily
- Change management process measured satisfactorily
- Client, stakeholder and other resources' expectations managed satisfactorily

The Reality...

Proper On-Boarding is essential for proactive service success

- Allows you to:
 - Efficiently begin delivering services quickly
 - Shorten time to profitability
 - Identify potential issues before they become problems
 - Reveal opportunities for selling solutions early on
 - Validate Client's decision to partner with you



Thanks for Attending!