Kaseya®

The Dos and Don'ts for Strategic New Customer Onboarding

A Guide for Managed Service Providers

Introduction

Maybe you've thought long and hard on how to optimize your onboarding practices, incorporating current best practices and expert recommendations. You've developed a robust onboarding plan, with checklists and documented timelines. You've leveraged this process both as a selling device to instill confidence with prospects, and as a client management device to streamline the first critical steps in a client engagement.

Despite all that hard work, however, you may have overlooked several critical onboarding considerations that could result in even more satisfied clients, less client churn, and, perhaps most importantly, stronger margins.

This guide outlines some dos and don'ts. Here are 5 common-sense ideas about onboarding that, while not exactly wrong, aren't totally right. Plus, we've included a checklist to make sure you get the most from your onboarding processes.

Welcome Aboard!

Onboarding starts when the contract is signed

On the face of it, this makes sense. Onboarding is by definition about how you take on new clients – working with them to implement systems and processes to facilitate a smooth transition toward your full management of contracted services.

However, a documented onboarding plan also enables you to control and manage client expectations. And, sometimes, the 'overpromising' ship has sailed well before the contract is signed.

Far better to start the onboarding process – especially the network and device discovery process (including a full inventory of software versions, patch history and configurations) – before the prospect is a client. By having discussions about the current infrastructure during the sales process, you get to more deeply understand the client's true requirements. Consequently, you can better match your services to their needs, have greater confidence in your pricing model, and maybe even identify potential additional required services.

In the past, this full discovery and inventory process would have been unthinkable for MSPs, given the time and effort that was needed. However, there are IT systems management solutions that can now transform a full network and device discovery – including devices behind VPNs or firewalls – into a quick, easy, low-cost process.

COMMON SENSE FAIL #2

Onboarding's primary goal should be the efficient ingestion of new client devices

Again, this idea makes sense. That is, until you realize that efficiency does not equal effectiveness. While efficiency refers to how well something is done, effectiveness refers to how useful something is.

You don't want to just do a good job. You want to do such a *useful* job such an essential job that the client cannot imagine life without you as a partner.

What does this mean for onboarding? Streamlining is good until it isn't.
So, don't rush over steps. Don't miss out on opportunities to educate the client.

In addition, it's important to show your client not only what you found but what you were looking for and why those things matter. For example, why does knowing every device's patch status and warranty information matter to the client? Let him know this explicitly; don't expect him to intuit it for himself. Otherwise, he may think you are just looking to make your life, and not his life, easier.

As you expand your client communications and education efforts, find efficiencies elsewhere, through technology solutions that automate and streamline the technical onboarding process.

EFFICIENCY

EFFECTIVENESS
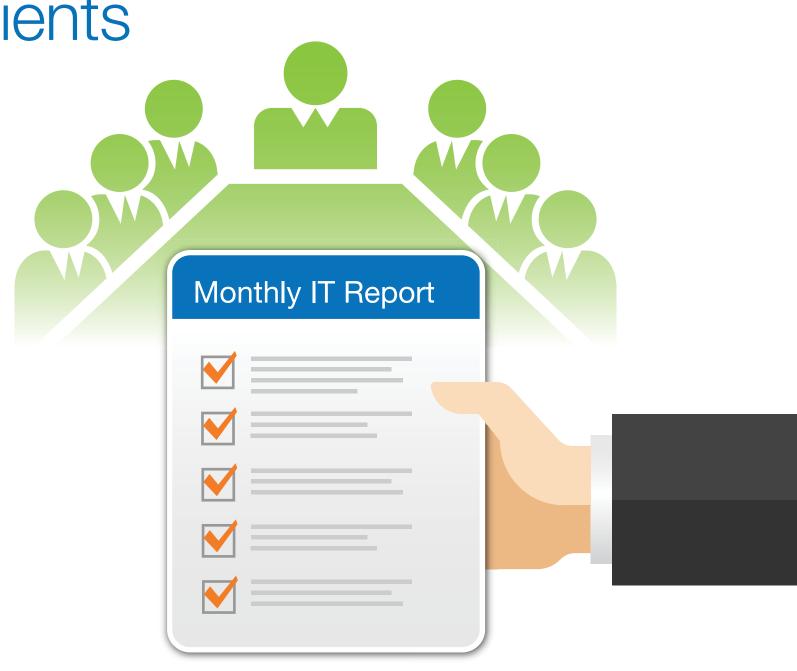
COMMON SENSE FAIL #3

Meeting 30- and 90-day onboarding plans are the best way to delight clients

Many MSPs have detailed 30-day and 90-day onboarding processes. At these pre-defined checkpoints, they meet with their client to review progress, and generally make sure the client is still happy he selected this MSP.

30- or 90-day plans are great. But there are two limitations to this tactic in terms of delighting new clients.

First, no one is really delighted when a vendor meets expectations that they themselves have set. People are pleased when this happens – but not delighted. What delights clients? Regular reports telling them how they are saving time and money, improving their IT performance, and increasing employees' satisfaction.

Second, even a 90-day timeline merely delimits the start of any client engagement. You need to have documented processes and supporting technologies that enable you to delight the client after 90 days, including regular reporting, review meetings, and strategy sessions.

Monthly IT Report

Making the client decision-maker happy is the main goal of onboarding

While making the client decision-maker happy is necessary, it's not sufficient to long-term client success. Don't forget to carefully onboard users while you're also deploying agents and discovering devices.

Users can be your biggest advocate as well as your biggest headache. If the users are unhappy with either the initial transition or the service delivery in general, your client is at risk no matter how well you've met expectations of the decision-maker.

So, during onboarding, be open and direct with the end users. Have a documented process for reaching out and educating them as to what will change for them on a day-to-day basis.

Will there be new icons on their devices? What software will they need to install or select? Are reboots required? How will tickets be submitted and what is the expectation for resolving those tickets? Will there be remote control? If yes, how will it work?

Document and communicate again and again and again. Reach out in different ways, leveraging email announcements, documented FAQs, training webinars, etc.

COMMON SENSE FAIL #5

Onboarding ends once the new client is being actively managed

During the initial discovery phase, you may have identified devices that are no longer under warranty; servers and other infrastructure devices that are from multiple vendors or have differing configurations; and multiple antivirus and security applications running on various devices.

Clearly, you will want to streamline all clients' hardware, software, and procedures in order to better predict your staffing requirements. While some clients may be open to replacing hardware right away, many may not be able to make that change as quickly as you'd like. Developing ongoing 'sprints' (to borrow a term from Agile software development) will enable you to get the standardization you want on a timeline best suited for each client.

And what does this mean? Successive 'onboarding' projects as you prioritize and transition these new components.

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Prepare for Success
Onboarding Opportunity Checklist

This checklist is intended to make sure that you get the most out of your onboarding processes: set the right expectations, leverage automation as much as possible, and identify new project opportunities.

✔ Sales Cycle

- Your company's onboarding needs to be introduced to prospect during the sales process. It should actually be leveraged as a differentiator from your competition and be part of your value proposition.

✔ Set clients expectations on what the onboarding will mean to them

- **Entry – Start**
  - When are you planning on starting
  - How long does it normally take
  - Explain items that may be found during this process which may require both short term and long term "project" work. (This should also be explained during the sales process)
  - Required specifications for Servers and Workstations (Standardization)
    - Standardization
      - Server/Workstation manufacturer
      - Performance requirements
    - Edge Devices
      - Routers
      - Firewalls
      - Switches
      - Software
        - Antivirus
        - Operating system
- **Items needed**
  - Administrative Credentials
    - Servers
    - Edge devices
- **What downtime, if any, is expected or possible?**
- **Effect of changes**
  - User being affected if you need to touch their machines
  - Ports required to be opened both incoming and outgoing, if necessary

✔ Identify items that are repetitive and can be automated via a script of procedure

- **Shared Folders**
- **Tools downloaded and/or installed**

✔ Identify project opportunities

- **Create Project Plan**
  - Short term – first 6 months
  - Long term – 1-4 year
- **Standardization**
  - Server/Workstation manufacturer
  - Performance requirements
  - Edge Devices
    - Routers
    - Firewalls
    - Switches
  - Software
    - Antivirus
    - Operating system

Prepare for Success
The New Client "Next Steps" Letter

As part of your onboarding methodology, you need to be very clear and precise with your new client about what you need access to, and what you will be installing. Review these expectations in person, and leave behind a letter documenting your points.

Dear New Client,

We will be scheduling an Onboarding visit. This visit consists of an on-site engineer who will be installing and configuring systems in order to deliver our services. The on-site engineer will not be working on any other tasks during this time.

We will require the following information:

- Administrative Credentials to your systems
  - Servers
  - Workstations
  - Switches
  - Routers
  - Internet Service Provider
  - Firewalls

We will be installing the following software on your systems:

- Agent for Asset, Monitoring, Patch, Remote Access, and Reporting

- Software for Backup and Disaster Recovery (if applicable)

- Software for Managed Anti-Virus (if applicable)
  - This will require uninstalling any current Anti-Virus

We will require the following ports to be opened on your firewall:

- Port 5721 TCP/UDP Outgoing Only (Vendor URL)
- Port 3478 TCP/UDP Outgoing Only (stun.kaseya.net)
- Other for other tools as needed

(Example of another service, if appropriate)

If you have chosen our E-Mail Protection Service, it will allow incoming email from only xxx.xxx.xxx.xxx/xx. This is to ensure email will not be able to circumvent our protection by going directly to your server.

Please be aware that we will create administrative logins (vendoradmin) for the above services.

Please do not hesitate to contact us if you have any questions or concerns.

Summary and Next Steps

Onboarding, if done right, is an essential strategic driver - and it never really stops. Don't make the mistake of viewing onboarding as a discrete, tactical technique rather than a methodology that can drive ongoing strategic advantage.

If you take the time, and don't fall sway to the 5 common sense 'fails,' you can increase client satisfaction, reduce churn, and produce stronger margins and higher profits.

Want to learn more?

Register for Onboarding New Clients – Best Practices and Five Commons Sense Fails, an on-demand webinar.

Try it!

Take Kaseya for a spin.
Sign up for a free trial.

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