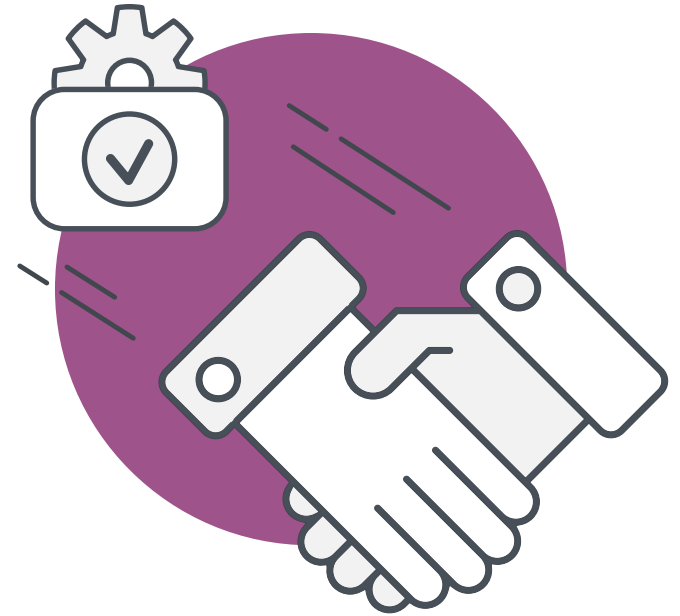




ONBOARDING & OFFBOARDING METHODOLOGY

THE WHY



They say you never get a second chance to make a first impression. But that's not entirely true. Your clients are smart enough to know that how you appear during the sales process and how you appear once the deal is sealed can be very different. That's why the onboarding process is the most important process to master.

If there's any gap between what you promised them during the sales process and how you actually treat them once you have a contract in hand, you may as well just skip straight to the offboarding part of this e-book right now.

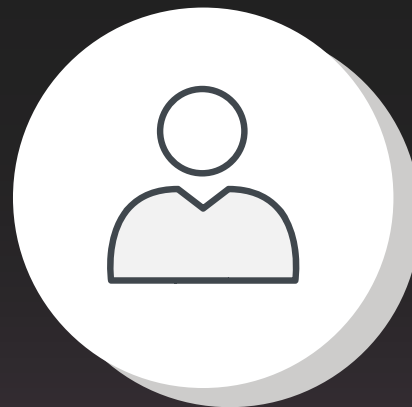
Not only is onboarding the perfect opportunity to exceed the expectations your salesperson set, but it's important for you, the MSP because it helps you avoid problems further down the road. The handoff period from when the sale is closed to the time when support begins might just be the most important time for your business.

So here's how to master it.

FOUNDATIONAL PRINCIPLES OF METHODOLOGY



PROCESSES



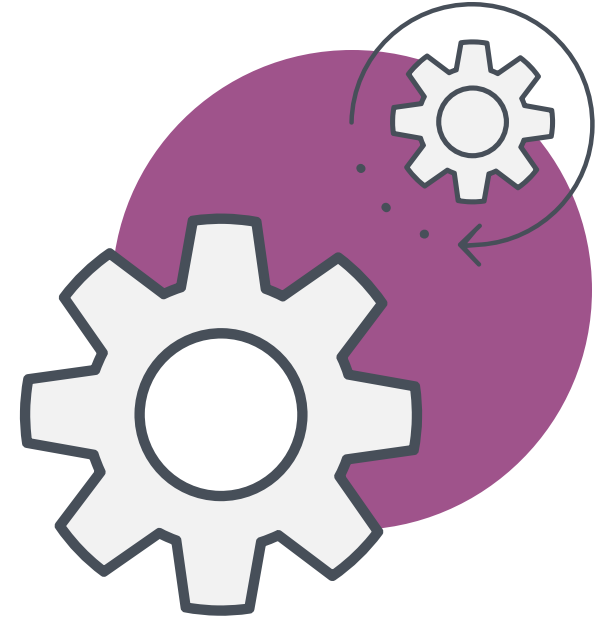
PEOPLE



TOOLS



PROCESSES



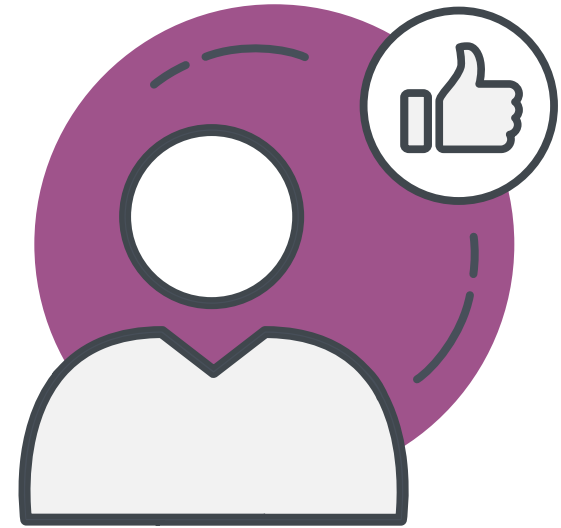
The best processes are defined, optimised, and repeatable by anyone on your team. Start with a project plan that defines how your sales team hands the new client off to the onboarding team. Make sure the onboarding team understands the context of the new client's arrival (i.e. what problems they are most keen for you to solve).

But balance this with a defined process to capture and document their critical documentation. Use checklists to ensure process consistency. Communicate with the client your expected time frames, but keep the communication flowing if those time frames change for any reason.

Have metrics that you'll work to, such as time frames, support tickets per endpoint per month for those early months, time to TAR, and user count. Be transparent so that both your client and your onboarding team are working with the same set of expectations. By building in these feedback loops, you can adjust in accordance with situational needs.

We asked process expert Malcolm Diack from London-based Netstar for his thoughts, and have included some of his quotes to help illustrate how these concepts are applied in practice.

PEOPLE



If you're doing process right, you don't need superstars to master onboarding. You just need a dedicated team with defined roles, clear responsibilities. If the same people are performing the same tasks each time, they'll perform like superstars in no time.

Your team should include representatives from sales, onboarding, service and finance. The client is going to see you as a singular team, so you may as well operate like one, with communication flowing freely between these disparate departments. Make sure it works the same with the new client, too. Get all the right contacts documented up front so the right person on your side is talking to the right person on their side, every time.

“Have dedicated engineers for onboarding. Having clear lines of responsibility within the methodology is super important.”



Malcolm Diack
Netstar

TOOLS



Your clients have no idea what tools you use, and they don't care. But if you seem to be a disorganised mess that takes way too long to onboard, and can't handle the first few support calls, they will definitely notice that.

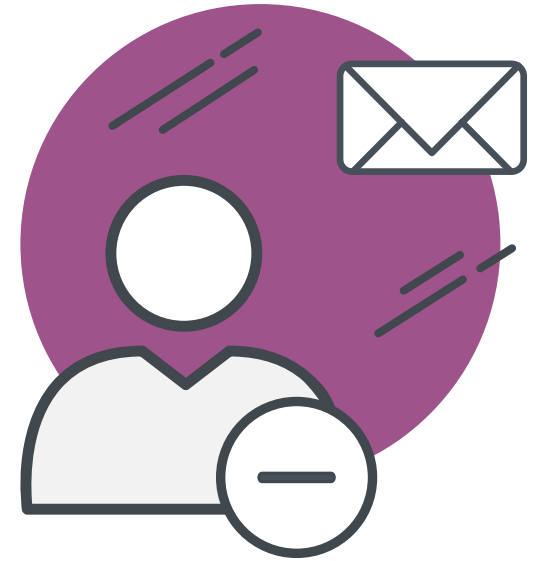
Invest in an RMM. Get IT Glue and Network Glue and document everything - all the contacts, endpoints, network information, passwords. Everything. Invest in tools with deep integrations to make it look easy. Then, make sure you relate all the items in IT Glue, and write copious training notes so that your team can handle those crucial first few support calls with ease.

“On the process side, your PSA should have a project plan, which is a template. We have around 20 tickets that are spread across 5 or 6 phases, and use the template to improve our processes thereafter. This is supported by checklists.”



Malcolm Diack
Netstar

OFFBOARDING



The only difference between an onboarding client and an offboarding one is that the onboarding client is present revenue and the offboarding client is future revenue. The grass isn't always greener on the other side, and at least some of your offboarding clients will see that and return. So treat them with the same professionalism through the entire offboarding process.

That means having a dedicated team, specific processes, and communicating clearly with the future returning client as to timeframes and expectations. Nothing more and nothing less than your best will do, because that's who you are.

“You want to be as professional as possible when offboarding. Don't compromise your standards just because they are leaving.”



Malcolm Diack
Netstar

8 BENEFITS OF MASTERING ONBOARDING & OFFBOARDING



Greater trust



Enhanced professionalism



Single point of entry,
Single source of truth



Team integration



Increased security



Improved speed & accuracy



Thorough account
management



Reduced labour requirement



HOW IT GLUE HELPS

At the heart of any great process is IT Glue. With IT Glue you can automate a lot of the onboarding process, especially if you include Network Glue to automate the discovery, documentation and diagramming of network devices. Create relationships between items to reduce support ticket resolution time dramatically. Use checklists to ensure process consistency.

With offboarding, you can deliver professional runbooks to your clients with the click of a button, giving them great service with little effort on your part.

This is really just the tip of the iceberg. IT Glue has the power to transform almost every aspect of your business. Book a chat with a member of the GlueCrew and we'll show you all the ways for IT Glue to amaze.

To learn more about how IT Glue can help you track and improve both assets and processes, sign up for a demo today.

itglue.com/demo