

Client Onboarding Checklist

Phase	Task	Department Owner
	Accounting team creates agreement	Accounting
	ITBD project manager schedules call via WebEx with customer for onboarding and collects the following information: IP scheme, username and password, AD or workgroup, customer contact information, emergency contact info, email information)	Implementation Team
	Request existing documentation	Implementation Team
	Create Labtech agents and groups	Implementation Team
	Ensure contract is documented with a softcopy and a hardcopy	Implementation Team
	Announce new customer to ITBD Team	Implementation Team
	Set up the client's account in your RMM and professional services automation (PSA) solutions, and communication and billing solutions, including all required supported user information	Implementation Team
	Introduce account team	Implementation Team
	Install Labtech on all PCs via probe, group policy, or manual install	Implementation Team
	Install Labtech on all servers via probe, group policy, or manual install	Implementation Team
	Run network discovery to identify all devices for gap analysis	Implementation Team
	confirm patch schedule and create service template in Connectwise	Implementation Team
	Configure Labtech auditing, patching, and alerts and obtain sign off from client on monitoring sets	Implementation Team
	Configure, test and confirm the client's ability to generate properly formatted service requests with all required information via email and the ConnectWise service desk portal	Implementation Team
	Test and confirm proper two-way communication and alerting to and from managed devices, operating systems, software applications and services at the client location and your help desk or service desk	Implementation Team
	Configure, test and confirm proper operation of the RMM tool's remote access and control function for managed devices and operating systems	Implementation Team
	Configure, test and confirm proper scripting and deployment of unattended operating system and supported software application patches and updates by LabTech	Implementation Team
	Configure, test and confirm proper scripting and execution of unattended device and operating system optimization activities, such as deletion of temporary files and disk defragmentation by the RMM tool	Implementation Team
	Customize and test client reports in ConnectWise	Implementation Team
	Configure, test and confirm proper report generation and automated report delivery by ConnectWise	Implementation Team
	Add customer domain to approved senders in ITBD spam filters	Implementation Team
	Import contacts into Connectwise	Implementation Team
	Assign Points of Contacts and ensure alternate contact information is in Connectwise	Implementation Team
	Server application information (type, role, warranty, support, version, configuration, licensing)	Implementation Team
	Server services configuration information (IIS, DNS, DHCP, file and print, line of business)	Implementation Team

Phase	Task	Department Owner
Implementer	Internal Active Directory information (AD Domain, administrator account, users and computers)	Implementation Team
	Network shares, security and distribution groups	Implementation Team
	Line of business application information (type, role, warranty, support, version, configuration, licensing)	Implementation Team
	LAN and WAN information (devices, configuration, addressing, protocols, security)	Implementation Team
	ISP information (provider, account, configuration, expiration) (This will Brighthouse ISP 100% of the time)	Implementation Team
	Web and email hosting information (provider, account, configuration, expiration)	Implementation Team
	Router, switch and firewall information (type, make/ model, configuration, addressing, support, warranty)	Implementation Team
	Anti-virus, anti-spam and anti-spyware information (type, vendor, role, warranty, support, version, configuration, licensing)	Implementation Team
	Backup, disaster recovery and business continuity information (configuration, processes)	Implementation Team
	Workstation, laptop, smartphone and tablet information (type, role, warranty, support, version, configuration)	Implementation Team
	Create "machine setup standard" KB article and get approval from POC	Implementation Team
	Application and productivity software information (type, role, warranty, support, version, configuration)	Implementation Team
	Printer, POS and peripheral information (network scanners, faxes, document imaging solutions, credit card terminals)	Implementation Team
	Other network-attached device information (type, product, service, role, account, warranty, support)	Implementation Team
	Vendor information (type, product, service, role, account, warranty, support)	Implementation Team
	Document existing passwords for servers, network devices, and vendor accounts	Implementation Team
	Test account access	Implementation Team
	Create network diagram (WAN and LAN) and upload to Engineering drive	Implementation Team
	Establish Monthly reporting requirements and recipients	Implementation Team
	Review inventory with accounting team	Implementation Team
Schedule follow up meeting for recap and go-live	Implementation Team	
Training and Go-live	Helpdesk and Service Desk Client Support Training	Implementation Team
	Client and end-user support training	Implementation Team
	Share support reference cards	Implementation Team
	Review client SLA's with team and client	Implementation Team
	Communicate Maintenance windows to the team and client	Implementation Team
	Discuss expectations and ensure they are on the same page	Implementation Team
	Review documentation with client and obtain sign off	Implementation Team
	Perform security audit to ensure no external access or non-authorized administrator accounts	Implementation Team
	Ensure all machines are protected with antivirus	Implementation Team
	Confirm backup schedule and retention with client and configure alerts to go to backupreports@itbd.net	Implementation Team
	Enable reporting	Implementation Team
	Change admin passwords and review for backdoors	Implementation Team
	Go-Live	Implementation Team
	Review list of open issues and needs and wants and create tickets in Connectwise	Implementation Team
Perform initial monthly maintenance tasks (AV scan, defrag, disk cleanup)	Implementation Team	

Phase	Task	Department Owner
	Schedule 30 day review	Implementation Team