New Customer Onboarding
Understanding the Process, so You Can Manage it Effectively
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Executive Summary

As the saying goes, you only get one chance to make a first impression. For the MSP, that chance comes once the contract is signed. Once the onboarding process begins, the customer sees the MSP’s service delivery team in action for the first time. Managing this onboarding phase effectively is a must. Do this part right and you can quickly establish trust and confidence. Get it wrong, and the customer relationship may very well be problem-plagued, short lived or both. This paper offers an overview of the onboarding process, and it provides numerous insights for ensuring you manage this process most effectively, so you can set the stage for long-term success with the new customer.

Introduction: The Make-or-break Nature of Onboarding

Once a contract is signed, the MSP enters into the onboarding phase. Onboarding represents an internal project in which the MSP gets ready to deliver the services the customer signed up for. During this phase, the MSP manages the transition of the account from sales to service delivery teams.

Trust has to be earned, and the onboarding process represents the first chance the MSP gets to earn that trust from a new customer. The onboarding process can represent the most important part of the customer experience. This is the first time the customer experiences the execution of the MSP’s service delivery model. During this phase, MSP representatives are frequently in contact with customers. All teams involved need to be consistently communicating, and executing, in order for this stage to be a success.

If the sales process represents talking the talk, onboarding is when the MSP has to walk the walk. Quite simply, the claims and commitments made during the sales process have to be backed up by the service delivery teams. Fall short of the customer’s expectations, and the customer may quickly be looking for a way to get out of the contract.

Onboarding: Key Roles and Responsibilities

Establishing clear roles in the onboarding effort is critical. The customer success manager (CSM) should be assigned to the new account immediately upon contract execution, and ideally remain in this role for as long as the customer account exists. The CSM should be the ultimate owner of the onboarding project and the one most responsible for its ultimate success. The CSM will take responsibility for meeting with the customer, documenting corporate structures, identifying key employees and their roles and so on.
At this phase, the CSM should also outline in detail for the customer what will be happening during the onboarding process. During these initial meetings, it is vital that the CSM ensure everyone, both in the customer organization and within the MSP, is on the same page in terms of the work to be done. Toward that end, defining the scope of work is a fundamental requirement. This includes both internal and external activities:

- Internal efforts include the configuration of monitoring and service desk platforms, as well as any training that may be required for NOC and service desk personnel.
- External efforts include provisioning, installation/configuration and documentation.

Throughout the process, the CSM provides all customer-facing communication and status updates.

At the onset, the CSM brings in the project manager who will lead the technical aspects of the onboarding process. The project manager will be responsible for allocating engineering resources and verifying that key milestones are being met. On an ongoing basis, the project manager reports to the CSM, who will then in turn update the customer.

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**An Overview of the Onboarding Process**

The onboarding project should follow these key steps: provisioning, installation/configuration, documentation, quality assurance and acceptance. The following sections will provide more details on each of these activities.

**Provisioning**

During the provisioning phase, the MSP manages the delivery and set up of required hardware, operating system, monitoring tools and any other products required. (As a rule of thumb for partners, it is considered a best practice to install a dedicated appliance for the CA Unified Infrastructure Management hub on the customer’s premises.)
During this period, all preparation for the installation should be taking place. For example, the CSM should start developing business-oriented documentation, establishing roles and so on. During this phase, it is also important that the CSM begin to get an understanding of the customer’s longer term IT strategies. At the same time, the project manager can define and initiate the technical documentation required.

Installation/Configuration

Once the required systems are provisioned, the service delivery team can begin the installation and configuration process, according to the nature of the monitoring services delivered. For example, depending on the number of systems to be monitored, the monitoring hub will be configured to support the scale required. During this phase, the MSP handles both physical installations at the customer location and remote deployment and configuration.

In the case of monitoring, probes will be installed on systems to be monitored and thresholds will be defined. This will be followed by functional testing to ensure everything works properly. For example, this will entail sample reporting to ensure the information required is being captured.

Another important facet of this will be testing alarms. The MSP will want to simulate failures to ensure alarms are working properly. Also, this is a good time to begin developing custom dashboards for the customer, which can be a great way to deliver immediate and highly visible value. Dashboards should be tailored to the customer’s branding, and customized according to their reporting and alerting needs.

Documentation

Effective documentation is paramount for great service. Documentation plays a critical role in providing clarity as to how service offerings will be delivered, and, as such, it is instrumental in providing a foundation for managing expectations.

From the onset of onboarding, the CSM, project manager and other team members should begin gathering information that will be fed into documentation. This will include creating or updating physical maps, network diagrams, organizational charts and so on. This will also encompass detailed logical information on the customer’s IT environment, such as the operating system and patch level of specific systems. In addition, customer-specific modifications may need to be made to the MSP’s run book during this phase, if necessitated by specific customer requirements.
Documentation should be managed across three key phases:

• First, the team will need to collect enough information to facilitate the move from onboarding to service delivery.

• Second, the service delivery team should continue to collect information on all components that have a material impact on the MSP's ability to deliver quality services.

• Third, the MSP should continue to develop richer documentation, which can help to expose new sales opportunities.

Quality Assurance

Once the team has completed all functional process steps, they can move on to quality assurance. This includes validating that the scope of work is complete, verifying that all systems are working and ensuring that all processes are completely and accurately documented. Given the customer-facing nature of the onboarding process, it is essential to involve the customer in the quality assurance phase to ensure they are satisfied with the process.

Acceptance

During this phase, the MSP will demonstrate contracted service offerings to the customer. The team will also generate initial reports and explain the usefulness of each. If a portal is being delivered, the MSP will also demonstrate this functionality, and outline how new requests can be submitted through the portal.

Next, the MSP should have the customer sign off on an acceptance document, stating that they are satisfied with the services as delivered at that point in time. This is critical: an MSP can’t in good faith start billing the customer unless this sign off is received. Further, formalizing this sign off is instrumental in verifying that the customer is satisfied, which sets the foundation for expectation setting moving forward.

Next Steps: Tuning

Once service delivery kicks off, the MSP needs to immediately move into tuning. This is the first time to start working toward operational efficiency, enabling the MSP to start making adjustments to systems and processes, adjustments that can benefit both the MSP and the customer. There are several key areas in which to focus tuning efforts:

• Increase report accuracy. This includes refining reports so they better demonstrate the value of services being delivered to the customer. MSPs can improve their ability to demonstrate that they are meeting customer requirements and exceeding expectations.

• Analyze SLA performance. It is important to review SLA successes and failures. Through this review, the team can identify areas that are working well and that should continue and to ensure that the same mistakes aren’t repeated if problems have been encountered.

• Reduce false positives. MSPs need to continue to refine thresholds to ensure team members are only receiving notifications of actual incidents. As part of this investigation, service delivery teams can identify whether specific systems or applications are causing false positives, and, if so, take steps to remediate.
• **Ensure reliable notifications.** Similarly, the service delivery team must do manual checks to ensure alerts are being generated when they should be.

• **Track incidents.** The team should review service desk tickets, including both those that are generated by monitoring systems and those coming directly from customers. This analysis should occur on a daily, weekly and monthly basis. Daily, managers should be looking for anomalies. On a weekly and monthly basis, managers should be looking for any trends.

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**Conclusion**

When the customer signs on with a new MSP, they’re ultimately making a big leap of faith—placing great reliance on the MSP team to honor their commitments and deliver the services required. That’s why the onboarding process represents such a critical juncture, a time during which the customer’s decision makers will either gain the affirmation that they made the right decision, or the sinking feeling that a mistake was made. By following the processes and guidance outlined in this paper, MSPs can improve their onboarding processes, setting the stage for optimal service delivery and for long-term success, both for the client and the MSP.

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**About This Document: Developed by the CA Service Provider Center of Excellence**

This document has been written by the CA Service Provider Center of Excellence team and is intended to provide our service provider partners with the guidance they need to address some of their most pressing challenges. Our team has rich expertise in service provider businesses, strategic consulting, technical deployments, sales and marketing. Our documents are informed by the Center of Excellence team’s extensive experience over the past ten years in helping build successful service provider businesses and by interviews with some of our most successful service provider partners. This document is provided for informational purposes only and on an as-is basis. The guidance and results described herein are based on the unique experiences of our staff and partners, and may not be applicable to all organizations.

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