Msp Onboarding Checklist

Free Msp Onboarding Checklist with AI customization. Industry-specific guidance for msp onboarding checklist. Build your checklist now.

Initial Assessment

- [ ] Conduct network discovery
- [ ] Document infrastructure
- [ ] Inventory hardware assets
- [ ] List software applications
- [ ] Review licensing compliance
- [ ] Assess security posture
- [ ] Evaluate backup systems
- [ ] Review disaster recovery
- [ ] Check compliance requirements
- [ ] Document pain points
- [ ] Identify critical systems
- [ ] Prioritize improvements

Contract & Agreements

- [ ] Review service agreement
- [ ] Define SLA terms
- [ ] Set response times
- [ ] Establish escalation procedures
- [ ] Define service hours
- [ ] Set maintenance windows
- [ ] Agree on pricing model
- [ ] Document exclusions
- [ ] Sign contracts
- [ ] Process initial payment
- [ ] Set billing cycle
- [ ] Exchange insurance documents

Documentation Collection

- [ ] Network diagrams
- [ ] IP addressing schemes
- [ ] Password documentation
- [ ] Vendor contracts
- [ ] Warranty information
- [ ] License keys
- [ ] Configuration backups
- [ ] Disaster recovery plans

- ☐ Compliance certificates
- ☐ Insurance policies
- ☐ Contact lists
- ☐ Process documentation

Technical Migration

- ☐ Deploy RMM agents
- ☐ Install antivirus software
- ☐ Configure patch management
- ☐ Set up monitoring
- ☐ Enable alerting
- ☐ Configure backups
- ☐ Test restore procedures
- ☐ Document configurations
- ☐ Standardize settings
- ☐ Update firmware
- ☐ Replace outdated equipment
- ☐ Optimize performance

Security Implementation

- ☐ Security assessment
- ☐ Vulnerability scanning
- ☐ Firewall configuration
- ☐ Update security policies
- ☐ Enable MFA
- ☐ Configure email security
- ☐ Deploy EDR solution
- ☐ Set up SIEM
- ☐ Implement DLP
- ☐ Security awareness training
- ☐ Incident response plan
- ☐ Penetration testing

Service Desk Setup

- ☐ Configure ticketing system
- ☐ Create user accounts
- ☐ Set up self-service portal
- ☐ Define ticket categories
- ☐ Establish priorities
- ☐ Create knowledge base
- ☐ Set up remote access
- ☐ Configure automation
- ☐ Create escalation rules
- ☐ Define workflows
- ☐ Test ticket flow

- ☐ Train end users

Network Standardization

- ☐ Standardize configurations
- ☐ Update firmware
- ☐ Configure VLANs
- ☐ Optimize routing
- ☐ Set up QoS
- ☐ Configure wireless
- ☐ Implement NAC
- ☐ Set up VPN
- ☐ Configure DNS
- ☐ Update DHCP
- ☐ Document changes
- ☐ Test connectivity

Backup & Recovery

- ☐ Assess current backups
- ☐ Implement backup solution
- ☐ Configure backup jobs
- ☐ Set retention policies
- ☐ Test restores
- ☐ Document procedures
- ☐ Set up monitoring
- ☐ Configure alerts
- ☐ Establish DR site
- ☐ Create recovery plans
- ☐ Schedule DR tests
- ☐ Train staff

Vendor Management

- ☐ Document vendor contacts
- ☐ Review vendor contracts
- ☐ Consolidate vendors
- ☐ Negotiate better terms
- ☐ Set up vendor portal access
- ☐ Document support procedures
- ☐ Create escalation paths
- ☐ Schedule vendor reviews
- ☐ Manage warranties
- ☐ Track licenses
- ☐ Plan renewals
- ☐ Budget planning

Monitoring Setup

- ☐ Deploy monitoring tools
- ☐ Configure thresholds
- ☐ Set up dashboards
- ☐ Create alert rules
- ☐ Define recipients
- ☐ Test notifications
- ☐ Monitor performance
- ☐ Track availability
- ☐ Log management
- ☐ Capacity planning
- ☐ Trend analysis
- ☐ Report creation

Training & Documentation

- ☐ Create client runbook
- ☐ Document procedures
- ☐ Train key contacts
- ☐ Provide user guides
- ☐ Schedule reviews
- ☐ Create FAQ
- ☐ Set up knowledge transfer
- ☐ Document passwords
- ☐ Create network maps
- ☐ Update asset lists
- ☐ Emergency procedures
- ☐ Contact matrices

Go-Live Preparation

- ☐ Complete all migrations
- ☐ Test all systems
- ☐ Verify monitoring
- ☐ Confirm backups
- ☐ validate security
- ☐ Train users
- ☐ Schedule go-live
- ☐ Communication plan
- ☐ Cutover checklist
- ☐ Rollback plan
- ☐ Support scheduling
- ☐ Post-implementation review