Smooth Client Onboarding

Introduction

As all MSPs know, finding new managed services clients can be a challenging prospect so you want to hold on to the ones you have. Unfortunately, some MSPs risk losing their hard-won new clients by overlooking the importance of their first interactions with them.

With a systematic "onboarding" process for your new clients, you can build the foundation for a productive long-term relationship and increase client retention dramatically. A successful onboarding process must be scalable, repeatable, and measurable and be designed to "wow" your clients as you become an indispensable resource to their business.

We call it "***establishing first position***" and it is a philosophy that should drive your entire client lifecycle roadmap, including onboarding. Essentially, you should strive to ensure that any time the client is facing a technology issue or any major business decision that might affect technology, he always seeks your counsel ***first***.

To achieve this position with clients, you must lay the right groundwork. An onboarding process that focuses on the first 90 days of a client relationship can help you get there.

Importance of the First 90 Days

First impressions can make or break a relationship. Think about it from a dating perspective. When you first start dating someone, everything you do is under the microscope because they're trying to assess if they want to let the relationship go further. They pay close attention to what you say, whether you do what you say you will, what you believe, and what you prioritize. In the early stage of a relationship, one major misstep can ruin everything.

The same is true with clients.

The first 90 days often makes or breaks your relationships with clients. Be hyper-aware that clients will often be skeptical as they start your service and will be actively comparing what you deliver to what you sold them. You ***must*** deliver on your sales promises in a professional, proactive manner or they'll quickly decide that they've made a mistake in hiring you.

Trust is established or lost based on these first interactions. If you establish trust, it can carry you through years of working together and will smooth any bumps you may encounter, even mistakes you might make. On the other hand, if you don't successfully establish trust at the beginning, you probably will never fully recover with this client, no matter what you do.

We have all had those clients where in the very beginning something didn't go quite right and for the next X months you try and try to re-establish yourself as the expert but they just don't seem to listen. This is the client that second guesses everything you recommend and makes all interactions difficult. These relationships are no fun and the majority of the time they go off track in the initial courting period.

Don't make a bad initial impression. Consciously strive to make every client's first 90 days with your company a positive and productive experience.

The mindset your organization should have is to create a "wow" experience in the first 90 days of any new relationship. You must be willing to over invest in the relationship up-front knowing that your investment in time and effort will level off over time. Laying the foundation for a solid long-term relationship is vital; most MSPs need to keep a client at least 2-3 years to make them profitable over time.

Make your onboarding process clear to clients

Clearly define your onboarding process to your clients, making clear why each step is necessary. Explain how the first stages of the process are designed to assess their current situation, address major deficiencies and get them running with your support processes. Over time, you will work with them to keep their IT on track, both proactively and reactively as they need help. As you move forward together, you will work to make their IT more strategic so that it can better support their business objectives. Make it clear that all the work you're doing now to get them set up well will pay off in the future with better functioning technology on their end and smoother IT support from you.

Discussing the onboarding process upfront with clients is extremely valuable. They will be impressed with the forethought you have put into the process, and work with you more effectively through the onboarding sequence. The discussion will also lay the groundwork for future periodic conversations about their strategic IT needs and your value to them over time.

Use your onboarding process to "pace" clients

A structured onboarding process is a great way to pace the absorption of a new client. It enables you to work through the client's list of issues in a measured, successful, and prioritized way. Clients will demand more attention during the first 90 days than any other time in their relationship with you (other than emergencies). Therefore, without a clear, structured process, clients will try to push you to handle all their outstanding IT issues as soon as they sign with you and will try to dictate the flow and direction of your team's time and energy. Avoid this issue from the beginning with a clear onboarding process.

You can also use your onboarding process as a way to pace *when* you absorb new clients. We have set expectations that our sales team can only add two new clients a week so that we limit the number of new clients that need to be onboarded at a time. It actually creates respect with the client when we tell them, "We need to start you next week instead of today because we have a structured onboarding process for each client to make sure we do it well."

Always remember to be flexible, however. If a client needs something sooner than your process indicates, be able to adjust but also help them understand that by focusing your attention on that task, something else may get done more slowly.

This pacing is also a great way to create “scarcity” during the selling process. If you have a client that is almost ready to sign, you can tell them that if they want to get onboarded quickly with you, they’ll need to sign soon because you’ve almost filled the slots for onboarding in the next week or two. This can be a useful psychological selling tool for your sales team to use to close the deal more quickly.

Transitioning from Sales to Service

Usually, your sales representatives develop some level of relationship with prospects as they court them over the typically long MSP sales cycle. Though this relationship is valuable for the sales process, it’s a hindrance once the prospect becomes a client. Pay special attention to how you transition clients away from the salesperson to a new primary contact at your company. Otherwise, the client will keep contacting the salesperson to get things done. This keeps your salespeople from doing what they should (SELLING!), makes your company inefficient, and confuses the client.

Develop a structured hand-off process to transition the client to their Account Manager at your company. The Account Manager is responsible for “quarterbacking” all work that your company does for the client, from remote support to projects, and serves as the client’s primary point of contact. If you are not yet large enough to have a person dedicated to the Account Manager role, determine who will serve in this capacity and present them accordingly to the client.

We have found that a structured conference call between the client, salesperson, and Account Manager is a great way to do this hand-off. Be sure to cover all of the following items in the call:

- **Introduce the Account Manager to the client and discuss the Account Manager’s role**. The Account Manager coordinates everything that your company does for the client and will serve as their main strategic point of contact. (However, the Account Manager is not the first person the client should call with a technical support issue – they should call the help line.)
- **Set the client’s expectations for the first 90 days of working together**. Explain the onboarding process and help them understand the importance of following your well-thought out process to get the best possible end-state.
  - Set expectations on what your team is able to get done and in what time period
  - Set the expectations on what you need from the client’s team in order to keep priorities moving forward – “manage up”
  - Set the expectation that the client can’t call the general help line for technical support service during their first week of onboarding because you will be int eh process of getting them set up, doing their audit, etc. If the client needs help during that period, tell them to call their Account Manager.
- **Set up regular meeting times for a weekly call (1 hour) between the Account Manager and the client for the first 90 days.** These meetings make clients feel special and helps the Account Manager really manage the new relationship well. You’ll rarely need the full hour for most meetings, especially as you progress later in the onboarding phase.
- **Provide the Account Manager’s contact info to the client**

Make it Standard

If you leave client onboarding to the discretion of your people they will do the best they can. Inevitably, however, you'll run into problems. You won't deliver a consistent and fully effective experience for each client and you may inefficiently utilize your people and systems.

The key is to create a **repeatable, measurable, scalable** client onboarding process.

- ***Repeatable*** – you need to have a onboarding process that your people will be able to implement consistently for each client
- ***Measurable*** – you need to be able to monitor if you're doing a good job onboarding
- ***Scalable*** – the onboarding process must be structured so that your team can do it for all new clients without overloading your team or systems

In the early days of our MSP, we outlined the 10 critical operational items we had to do for a new client and hung a whiteboard on the wall to check each one off as it happened – what gets measured gets done. That was a good first step but we've come a long way.

Here is the process that we recommend. Feel free to adapt it to meet your organization's needs.

Suggested Client Onboarding Process		
Task	**Owner**	**Timing**
Client signs	Sales Person	Day 0
Send out email to company about new client. Identify Account Manager	Sales Person	Day 0
Get client into your tracking and billing systems (i.e., Connectwise)	Accounting	Immediately after contract signing
Hold a knowledge transfer meeting between the Sales Person who signed the client and the client's Account Manager at your organization. Discuss the client (main contacts, type of business, etc) and their priorities (why did they sign up? What are their high priority tech issues? What are their hot buttons?) *Note: you may not yet be big enough to have Account Managers. Determine who will be playing this role internally, title or not, and have them meet with the sales person*	Sales Person	Before on-site audit is done
Enter on-site audit request into system	Sales Person enters checklist	Day 1
Complete an on-site audit of the client's technology. Utilize a standard checklist so that you make sure you assess everything required	Field tech support team	Day 2
Enter complete audit findings into system (i.e., ConnectWise)	Field tech support team	Day 2
Review audit data in system and follow-up with Field Team for missing info	Field tech support team	Day 2

Suggested Client Onboarding Process		
Task	**Owner**	**Timing**
Hold kick-off call or in-person meeting with client, Sales Person and Account Manager. Cover the following • Introduce the Account Manager to the client and discuss the Account Manager's role • Tell the client what to expect in the first 90 days of working together – explain the process and the reasons behind it. • Provide the client the contact info for the Account Manager *Note: For more details on what must be covered in this call, review the "Transitioning from Sales to Service" section above.*	Sales Person	Within **48 hours** of signing the contract
Roll out NOC tools to client • Work with the main client contact to link assets to users in the database • Provide a document that explains that the NOC tool does for clients and what software clients should not have running on their systems or networks • Send out roll-out email • Provide a doc to main client contact for them to distribute to end users about patching / DT patch schedule	Account Manager	Day 3 Link completed by Day 30
Set up and hold weekly calls with client for the first 90 days. Schedule 1 hour for each call. Many weeks, you won't need more than 15 minutes but make sure you have these on the calendar	Account Manager	Every week for the first 90 days. Hold the first one a week after the kick-off call
Complete a "Current Technology Assessment (CTA)" of the client's technology • CTA is a document that allows you to compare what the client has in place against the standards you know they should have. This is an opportunity to bring their network up to par with what they should have as a business and to help them understand the importance of investing in these upgrades • An example is if they have a Linksys for a firewall your document should recommend an enterprise firewall and move them towards your firewall of choice • The document should be standardized so that it is delivered the same every time but does not need to be complicated. Keep things at the business level because that is who you will be speaking to	Account Manager Delivers. Technical team gathers info	Day 7

Suggested Client Onboarding Process		
Task	**Owner**	**Timing**
Complete a "Network Personality Assessment" for the client • This documents the critical info you would want to know about the network if it were 2am, it just blew up and you had to piece it back together. • This document captures things that are not standard, such as client temperament, and other items that may not be conveyed well in the technical configuration tabs that are in your CRM system.	Account Manager Senior engineer	Day 10
Hold business objectives conversation with client to discuss: • The client's business objectives and how they need technology to support those objectives • The company's major strengths, weaknesses, opportunities and threats and how technology relates to them • The client's budget for technology and how that is expected to change over time • The company's growth plans and how that will impact technology needs This meeting will give you vital insight into their business and will enable you to develop technology recommendations that fit their budget, business objectives and priorities. It makes you look brilliant and helps you establish "first position" with clients for all technology issues.	Account Manager	Day 14 - 21
Create one page annual plan Based on the on-site audit and the business objectives conversation, **develop a document for the client** that outlines: • Their current state of technology (based on the audit) • Your recommendations for technology changes (including timing and budget) • Your proposed plan for implementing these recommendations (including estimated budget) • Focus on one or two key areas each quarter. Don't try to do everything at once Your plan should address infrastructure changes first, then maintenance processes and then strategic initiatives. You can't address strategy until the right infrastructure is in place. Talk with the client about why you address them in this order – they typically want to get rolling with strategic initiatives first so you need to help them understand that they need solid infrastructure and maintenance processes in place first.	Account Manager (with input from tech team)	Day 21 - 28
Meet with the client to discuss your plan and adjust it as necessary based on their input. Get proposals signed for new work	Account Manager	Day 35

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<tr><th colspan="3">Suggested Client Onboarding Process</th></tr>
<tr><th>Task</th><th>Owner</th><th>Timing</th></tr>
<tr><td>Communicate technology plan for the client to the relevant people in your company to get things rolling:
• Remote support Team Lead
• Field Team Lead
• Purchasing
• Project Management
• Other?

For the first priority items in the plan, quickly marshall your company’s internal resources to get them completed. You want to get quick wins and show progress immediately!</td><td>Account Manager</td><td>Immediately after client approves plan</td></tr>
<tr><td>Meet with client to get feedback on your service to date and ascertain their level of satisfaction</td><td>Someone other than the Account Manager</td><td>Day 30-35</td></tr>
<tr><td>Discuss PC life cycle with clients
• You should have a clear plan of what PCs need to be replaced, what PCs will need to be replaced after that, and what PCs are the best and will not be replaced for a longer period of time.
• Ultimately all PCs get replaced (hopefully every three years) so you should bucket your clients PCs into time frames for replacement to help them budget and so that it is not a surprise when you tell them it is time for a PC to go.
• We do this later than the annual technology plan as it can often take more time to sort out the details. This should be discussed at a high level and planed into the annual plan even if not complete.</td><td>Account Manager</td><td>Day 42 (or closest regular weekly call)</td></tr>
<tr><td>Monthly or quarterly check-ins with client</td><td>Account Manager</td><td>Monthly or quarterly after initial 90 day period</td></tr>
<tr><td>Annual check-in on client’s business state and technology needs and necessary changes to the annual technology strategic plan</td><td>Account Manager</td><td>Day 365 (or closest regular call)</td></tr>
<tr><td>Meet with client to get feedback on your service to date and ascertain their level of satisfaction</td><td>Someone other than the Account Manager</td><td>Day 90,
End of Q2,
End of Q3,
End of Q4</td></tr>
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How to establish an onboarding process at your company

So, how do you develop ***your own*** successful onboarding process?

1. **Review what you do now to onboard clients**
    - Talk as a team to assess what has worked well with your current onboarding processes and what has not.
    - Ask current clients what they appreciated and what they found challenging about how you onboarded their business. Tell them you really do want to hear constructive feedback to improve for future clients!

2. **Develop a new, structured process that incorporates your learnings and the key steps shown above**
    - Your onboarding process does not have to be complicated, it just needs to be documented and followed.
    - Start with the items you know you need to do to bring every client on as a new client. Review the tips in this document and the feedback you received from your team and clients. Develop a list of all required steps for an optimal onboarding process.
    - Determine the time required to complete each task and develop a timeline for the list of tasks.
    - Automate as much of the process as possible (i.e., recurring tickets in CW or PSA system)
    - Document the process in a format that you can share with both your internal team and your clients

3. **Develop checklists and templates to support the onboarding process (as necessary)**
    - Identify the checklists, forms and templates that you need to have in place to support the onboarding process and develop these so that they're ready to go

4. **Train your sales people, Account Managers, field team and remote team on how to implement the new onboarding process**
    - Explain the process to your entire team, making sure they understand why each step is necessary
    - Make it clear that the process must be followed and put in place a way to track completion of each step for each client

It does take time and effort to design a structured onboarding process but we've found that it pays off in multiples with satisfied, long-term clients. Take the time to lay the foundation for your hard-won new clients!

Good luck!

Josh Clifford and Mike Cooch
MSP Coach