

Getting Started with Ntiva



Welcome to Ntiva!

Thank you for choosing Ntiva as your managed services provider (MSP). We're excited to work with you and use our technology expertise to support the growth and success of your business.

Here at Ntiva, we understand that IT services are about more than just technology.

Sure, being tech-savvy is crucial, but what really makes a difference is the experience we provide to our clients. Our focus is on creating an open, honest, and transparent relationship that helps drive all of us to collective success.

Our team is made up of some of the best in the business—they're not only smart and skilled but also great at making sure your experience with us is top-notch. They're the heart of what we do and are always here to help.

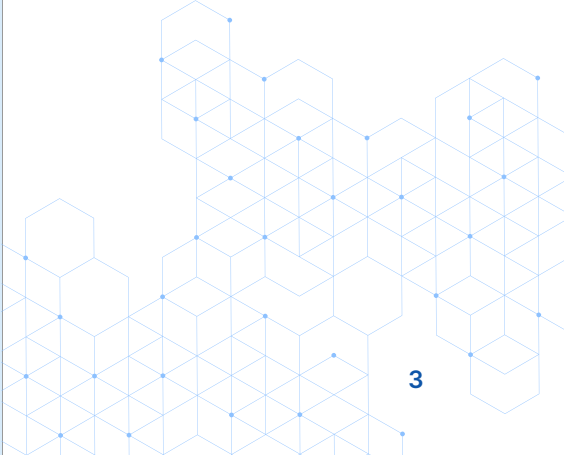
This client services guide will give you a clear picture of who we are, what we do, and how we do it. It's all about working together effectively to get great results.

We're glad you're here, and we can't wait to get started.



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Message from Our CEO

Thank you for choosing Ntiva as your technology partner.

I am honored to share our comprehensive guide to Ntiva service offerings. This document is designed to reflect our unwavering commitment to excellence and our core belief in mutual growth. At Ntiva, we operate under a guiding principle: “We exist to grow each other.” This ethos is not just a motto—it’s the cornerstone of our business model and our approach to service.

Our journey began with a vision to create a company that does more than just offer technology solutions. We aimed to build a community where the success of our clients and our team go hand in hand. Every service we provide and every decision we make is aimed at fostering this symbiotic relationship. When we grow, it directly contributes to the growth of your business, and each success story for our clients propels us forward.

In the following pages, you will find a detailed outline of our services and our approach to technology management. This is a testament to our commitment to providing highly effective tailored solutions that support your unique business needs.

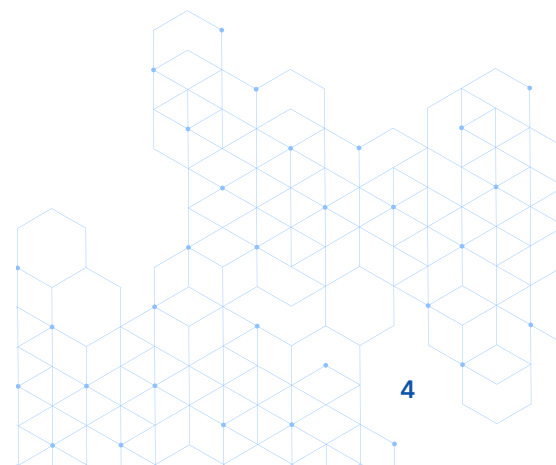
Our team of dedicated professionals is here to help you succeed, allowing you to reliably leverage technology as a competitive advantage. When you trust us with your technology needs, you are not just outsourcing a function; you are partnering with a team that is invested in your growth.

We recognize you have many choices and, once again, thank you for choosing Ntiva. We look forward to exceeding your expectations and growing together.



Sincerely,

Steven Freidkin
Founder and CEO, Ntiva



Meet Our Executive Leadership Team



Steven Freidkin
Chief Executive Officer



Jim Wilson
President



Kelly Wolkomir
Chief People Officer



Mark Gilbreth
Chief Financial Officer



Kevin Doyle
Chief Client Officer



Tom Tighe
Chief Revenue Officer



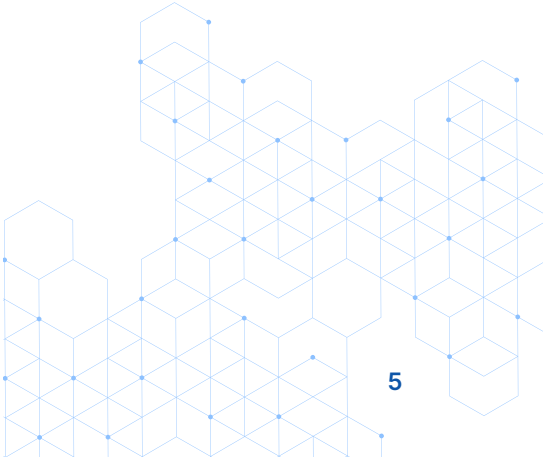
Steve Banke
Chief Technology Officer



Holly Lawrence
Chief Experience Officer



Kevin Cook
Chief M&A Officer



Meet Our Client Services Leadership Team



Sean Blair

VP AI & Digital Transformation



Kyle Jackson

VP of Sales, AI & Digital Transformation



Joe Cicirelli

VP Managed Services



Jason Portillo

*VP Client Success
D.C., Chicago, KC, NYC, Indiana*



Sean Killham

*VP Client Success
National Accounts, LA, TX,
Dental*



Michael Paris

Director, Professional Services



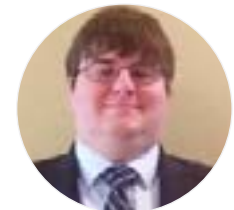
Scott Lowell

Director, Client Strategy



Michael Diab

Director of Regulatory & Compliance



Robert Wadowski

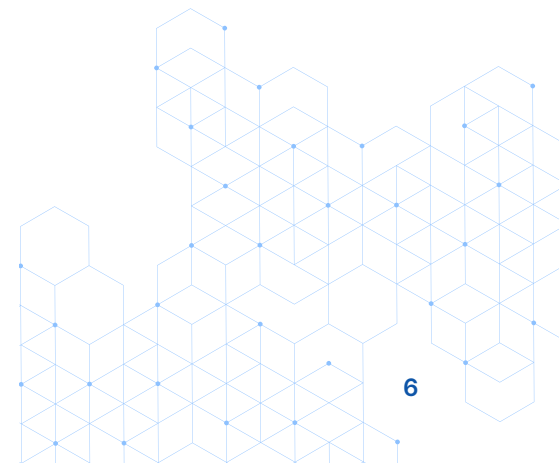
Director of Network & Security Operations



Erik Simon

Director, Client Transitions

Client Services Guide: Getting Started with Ntiva



Your Ntiva Signature Support Plans: Complete and Compliance

As a valued Ntiva client, you've carefully selected a service package that aligns with your business needs.

Ntiva Signature Support Plans come in two levels—Complete and Compliance. Both plans include a dedicated account manager and an IT advisor, two important resources that will assist you with both day-to-day issues and strategic IT planning.

Let's take a look at each support plan below, and the services included within each plan.

SSP-Complete includes:

[Unlimited remote support](#) (Ntiva service desk)

[Network monitoring and management](#)

[Managed workstation](#) (PCs and Macs)

[Managed endpoint detection and response](#)

[Microsoft 365](#)

[Premium Apple support](#)

[Employee onboarding and offboarding](#)

[Hardware and software procurement services](#)

[Training as a service](#)

[Enhanced email security/spam filtering](#)

[SaaS alerts](#)

[Dedicated account manager](#)

[IT advisory services](#)

Our SSP Compliance includes everything you get in our Complete plan plus enhanced security services for industries with advanced compliance requirements:

SSP-Compliance additions:

[Web filtering](#)

[Recurring phishing prevention training](#)

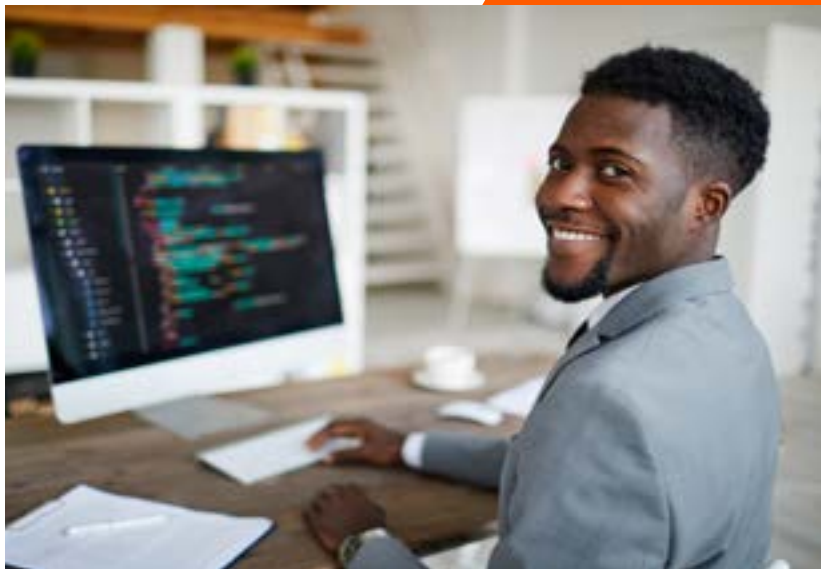
[Vulnerability scanning and management](#)

[Annual security risk assessment](#)

Additional IT Services

Depending on your business needs, you may also want to add optional IT services that meet the unique needs of your environment:

- ✓ [Dedicated IT support](#)
- ✓ [Backup Services](#)
- ✓ [Mobile device management](#)
- ✓ [AI & Digital Transformation](#)
- ✓ [Co-managed IT](#)
- ✓ [vCIO](#)



Optional cybersecurity services include:

- ✓ [Intrusion detection and response](#)
- ✓ [Penetration testing](#)
- ✓ [Email encryption](#)
- ✓ [Security assessment](#)
- ✓ [MFA](#)
- ✓ [vCISO](#)
- ✓ [Cybersecurity policy authoring](#)
- ✓ [Dark web monitoring](#)

Your Ntiva Support Team

Each Ntiva client benefits from ongoing, comprehensive tech support through our remote service desk, account management, and IT advisory teams, guaranteeing personalized and streamlined service for your organization.

Beyond these core offerings, you also have access to a comprehensive suite of additional support teams, each dedicated to ensuring the success and efficiency of your IT operations, including:

- ✓ **Account Management Team**
- ✓ **Client Strategy Team**
- ✓ **Remote Service Desk**
- ✓ **Dedicated IT Support Team**
- ✓ **Network and Security Operations Team**
- ✓ **Professional Services Team**
- ✓ **AI & Digital Transformation Team**

Account Management Team

Each Ntiva SSP client will be assigned a dedicated account manager (AM). Your AM will provide overall account management and is your primary point of contact to address any questions about any aspect of your service or relationship with Ntiva.

Your Account Manager (AM) will also schedule regular meetings to review service requests, monitor resolutions, and ensure your ongoing satisfaction.

This service is included in your Ntiva SSP.

AM SERVICES INCLUDE:

✓ **Point of Escalation:**

Your AM is your primary point of contact and the dedicated advocate for your needs. They act as a strategic partner, ensuring that any concerns, escalations, or specific requirements are addressed promptly and efficiently. This personalized attention means you have a direct line to someone who understands your business intimately.

✓ **Quarterly Ticket Reporting and Review:**

Transparency is key to a successful IT partnership. Your AM provides you with detailed quarterly reports on ticket resolutions, including insights into trends, common issues, and areas of improvement. This information empowers you to make informed decisions about your IT strategy and ensures that you are always in the loop regarding the status of your systems.

✓ **Invoice Accuracy and Review:**

Financial clarity is paramount. Your dedicated account manager meticulously reviews all invoices to guarantee accuracy, whether they're related to user counts, licensing agreements, or any other relevant aspect. This commitment to precision ensures that you are billed correctly and that your investment in IT services aligns with your usage and business goals.

✓ **Relationship Management:**

Ntiva account managers prioritize building a strong and enduring relationship with your organization. Your AM is not just a liaison; they are a strategic partner invested in your success. Regular check-ins, strategy sessions, and a proactive approach to problem-solving are all part of the relationship management service we provide.

✓ **Main Point of Contact for Upgrades and Renewals:**

Staying current with technology is crucial for maintaining a secure and efficient IT environment. Your AM takes the lead on managing upgrades and renewals, keeping you informed about the latest advancements, and ensuring that your systems are always up to date. This proactive approach means you can focus on your core business while we handle the technical intricacies.



Client Strategy Team

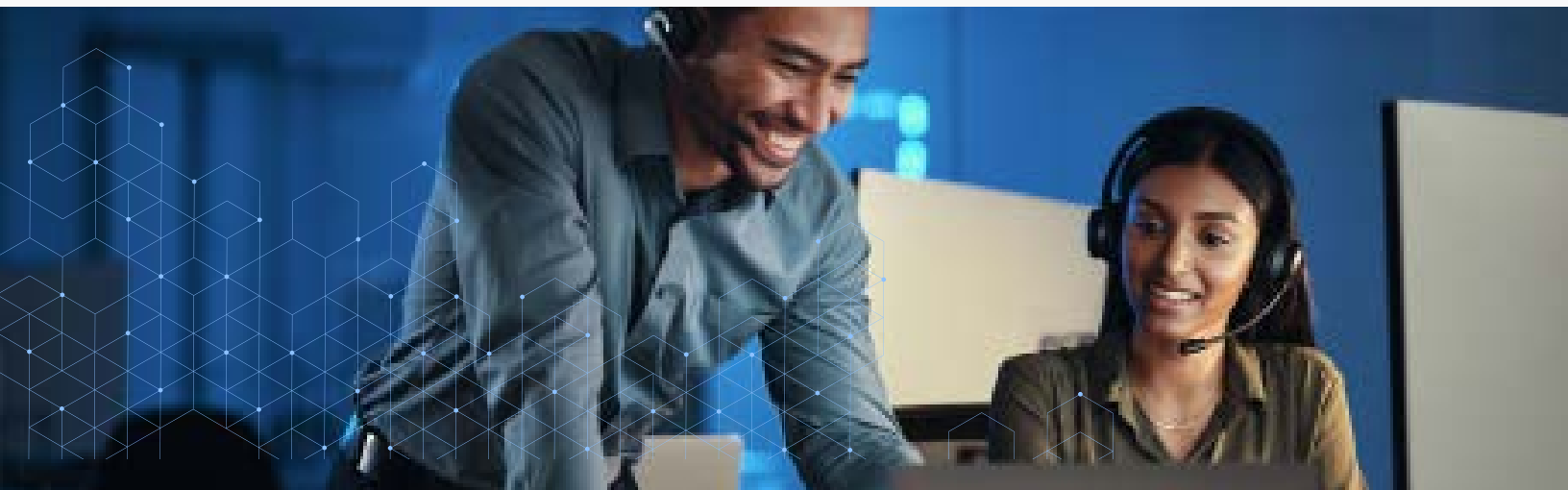
Our Client Strategy team unites the expertise of IT Advisors, vCIO, and vCISO services to provide comprehensive, strategic guidance tailored to your organization's unique needs. This team assumes a holistic role in aligning your IT and security strategies with your overall business goals, offering both executive-level insight and hands-on implementation for long-term success.

IT Advisory Services

Included in every Signature Support plan, our IT Advisory Service ensures that your IT environment is optimized for performance and aligned with business objectives. This service covers essential reviews, budgeting, and customized guidance to maintain and improve your IT infrastructure.

Your IT advisor will also assist with the following:

- ✓ **Yearly Budgeting and Strategic IT Planning:**
Collaborating with clients to create IT plans and budgets aligned with business objectives
- ✓ **IT Risk Management:**
Offering proactive risk assessments and mitigation strategies
- ✓ **Compliance and Regulatory Guidance:**
Keep up to date with GDPR, HIPAA, and PCI DSS regulations
- ✓ **Technology Optimization:**
Assessing and optimizing technology infrastructure
- ✓ **IT Governance and Performance Management:**
Establishing governance frameworks and performance measurement systems



Virtual CIO Services

For clients seeking additional strategic IT leadership, our vCIO Service offers executive-level guidance. This add-on option helps develop long-term IT strategies, manage critical projects, and align IT goals with your overall business vision.

This service can be purchased as an addition to your Ntiva SSP.

Ntiva's vCIO service is a seamless experience designed to scale with your needs, providing that extra layer of strategic depth and leadership.

When to consider a vCIO services:

- ✓ **Complex IT Projects:**
When undertaking major IT initiatives that require detailed planning, coordination, and management
- ✓ **Scalability Challenges:**
As your business expands, a vCIO can design IT road maps that grow with you, ensuring scalable solutions
- ✓ **Risk Management:**
When you need sophisticated risk assessment frameworks to protect against evolving threats
- ✓ **Innovation Leadership:**
If staying ahead of the curve with cutting-edge technology is critical, a vCIO can lead the charge on innovation

Virtual CISO Services

When your organization needs dedicated security expertise, our vCISO Service provides tailored security consulting as an add-on to support your evolving security requirements. Working with your vCISO ensures that your security posture is robust, compliant, and ready for future challenges.

- ✓ Conducts Security Risk and Gap Assessments to enhance security posture.
- ✓ Provides compliance consulting for CMMC, ISO 27001, and other standards.
- ✓ Drafts security policies and ensures adherence to industry best practices.
- ✓ Develops and manages Plans of Action and Milestones (POAMs) for security remediation.

Remote Service Desk

Our 24/7 remote service desk team is designed to provide fast issue resolution, offering unlimited support for all your employees around the clock. This service is included in your SSP.

If we encounter an incident or problem that cannot be resolved by the remote service desk and requires either an on-site dispatch or a system engineer, the service desk manager will escalate to Ntiva's field operations team for a dispatch.

This service is included in your Ntiva SSP.

Remote service desk commonly supports:

- ✓ **Troubleshooting Technical Issues:**
Assistance with software glitches, hardware malfunctions, network issues, etc.
- ✓ **Software Installation and Configuration:**
Guidance on installing and configuring software applications
- ✓ **System Cleanup and Optimization:**
Regular system cleanups to enhance performance
- ✓ **Virus and Malware Removal:**
Comprehensive virus and malware removal services
- ✓ **Hardware Troubleshooting:**
Assistance with diagnosing and resolving hardware issues remotely
- ✓ **Peripheral Device Setup and Support:**
Support for setting up and troubleshooting peripheral devices
- ✓ **User Account Management:**
Managing user accounts and access privileges
- ✓ **Email Configuration and Support:**
Assistance with setting up and troubleshooting email services

On-Site IT Support Team

Ntiva's on-site dedicated support hours service complements our remote service desk services by providing additional specialized technical support.

This service is available on-site and remotely, tailored to address unique client challenges in business and technology.

This service can be purchased as an addition to your Ntiva SSP.

On-site support deliverables:

- ✓ We will provide a skilled technician selected to match your specific technical needs. This ranges from end-user support augmentation to high-level technical expertise for project work and proactive maintenance.
- ✓ Our team is available Monday-Friday during regular business hours at locations within our support radius. Support is offered in minimum eight-hour increments, extendable up to 40 hours per week.
- ✓ Clients must commit to at least eight hours to receive dedicated on-site support.












Network and Security Operations Team

Ntiva provides a wide range of security services built into your SSP. You can check your plan [here](#) to determine which security services are included.

We also offer a suite of advanced security solutions, ranging from individual products and services that can be layered onto an existing security program up to a comprehensive and fully managed security program—including vCISO services.

Additional security services can be purchased as an addition to your Ntiva SSP.

Optional cybersecurity services include:

-  Intrusion detection and response
-  Email encryption
-  Business continuity planning
-  Multi-factor authentication (MFA)
-  Cybersecurity policy authoring
-  Dark web monitoring
-  Penetration testing
-  Security assessment
-  Security incident response planning

Professional Services Team

Our managed services offer comprehensive IT support and extend into specialized project initiatives. At Ntiva, we define 'projects' as any undertaking requiring more than eight hours of dedicated effort.

Our Professional Services team (Pro Serv) is dedicated to these customized and advanced IT projects. This specialized team tackles complex challenges and leverages opportunities beyond the scope of our standard service agreements. Whether you require a significant infrastructure overhaul, robust security implementation, or a seamless cloud migration, our Pro Serv team delivers exceptional results, ensuring timely completion, adherence to budget, and precise alignment with your specific requirements.

To guide our clients through every phase of an IT project, we follow a clear and structured roadmap. This roadmap outlines each step in our process, from initial project scoping and introduction to post-project support, ensuring transparency, efficiency, and successful outcomes.

This service can be purchased as an addition to your Ntiva SSP.



AI & Digital Transformation Team

Ntiva's digital transformation team is dedicated to seamlessly integrating digital technology across all areas of a business, fundamentally altering the way you operate and deliver value to your customers.

Our specialized approach ranges from enhancing existing systems or developing new workflows to fostering a significant transformation in business operations. This involves not only modernizing how businesses interact both internally and externally via more efficient communication but also improving the management and storage of client data.

The ultimate goal of this team is to boost operational efficiency and customer satisfaction, leveraging technical expertise to meet the unique challenges of each of our clients.

Digital transformation services can be purchased as an addition to your Ntiva SSP.

Ntiva's digital transformation projects can include:



Systems and data migration



Mobile and web development



UI/UX design



Data warehousing



AI consulting and product development

Reach out to your AM to get started with your digital transformation project.

Ntiva Service Delivery Standards

The Ntiva service desk is available 365/24/7 for all clients with a Ntiva Signature Service Plan (SSP). We now offer SSP clients an improved service experience with the assignment of their own dedicated support team and an updated priority-based response model. Below, you will find our service desk objectives and targeted response times.

PRIORITY LEVEL	RESPONSE TIME*	DESCRIPTION	IMPACT
1 - Intermediate	15 min	Critical issues that render the system unusable or cause a complete loss of service	<ul style="list-style-type: none"> System failure that creates a severe business impact Client cannot perform any tasks System failure that affects all users No workaround to the problem
2 - Quick	1 hour	Major issues that significantly impact the client's ability to perform their core tasks or affect critical functions of the system	<ul style="list-style-type: none"> System failure that creates a high business impact Client cannot complete core tasks System failure that affects many users Workaround to the problem is not available or feasible
3 - Normal	4 hours	Minor issues that affect some aspects of operations, but do not prevent the client from performing their core tasks	<ul style="list-style-type: none"> System failure that creates a moderate business impact Client can complete most tasks System failure that affects multiple users Workaround to the problem is available but not optimal
4 - Scheduled	8 hours	Non-urgent or routine requests that do not significantly impact operations	<ul style="list-style-type: none"> System failure that creates a minimal business impact Client can complete most tasks System failure that affects 1-2 users Acceptable workaround to the problem has been identified

*Please note that the response times above are based on our normal hours of operations from 7 a.m. to 7 p.m. local time and are calculated based on the time zone of a client's main location.

Ntiva Service Delivery Standards

CALL US

Call us for critical or high-level issues. Examples include:

- ✓ Sever or network down
- ✓ Business-critical application (such as email) down
- ✓ A user is unable to work and no other PC is available
- ✓ Urgent user terminations
- ✓ Password resets
- ✓ PC performance and/or software issues that are preventing work
- ✓ Remote access issues

EMAIL US

Email us for issues that are not as time-sensitive. Examples include:

- ✓ Printing/scanning setup and issues (unless the issue is critical to business operations)
- ✓ New user setups
- ✓ Scheduled terminations
- ✓ Permission changes
- ✓ Software updates
- ✓ Noncritical questions or issues

Billing and Invoicing at Ntiva

Billing and invoicing issues and procedures can often be confusing! In order to demystify the process, below is an overview of the Ntiva process. Our goal is to ensure transparent, efficient, and client-friendly billing practices.

INVOICING TYPES AND AGREEMENT OVERVIEW

SSP Agreement: This is your monthly user-based agreement, where the service level depends on your support plan and the number of users within your account.

- ✓ Each client can choose and identify their SSP users, which impacts invoicing accordingly. If a non-SSP user requests SSP support, they may be denied services.
- ✓ To avoid this service denial, it is critical that you actively manage your SSP user list—please put in a ticket when you need a user removed.
- ✓ Keep in mind user and license counts can vary depending on the service.
- ✓ Your SSP includes various services and monitoring software, with some labor types included in unlimited agreements.
- ✓ Agreements are customizable, reflecting specific client needs. Please reach out to your AM if you would like to review different agreement options.
- ✓ You will be billed and invoiced separately for hardware, software procurement, and projects. Please reach out to your AM to address invoice discrepancies promptly.

Remember, we are here to make billing understandable and hassle-free.

Reach out to your AM at any time for assistance!

Ntiva's Commitment to Security

At Ntiva, your peace of mind is at the heart of our mission. We don't just protect your data; we care for it as if it were our own, with a deep commitment to security at every level of our operations.

Our assurance to you:

- ✓ **Onboarding:**
Every employee begins their Ntiva employment with thorough security training, establishing a security-first mindset across the company.
- ✓ **Leadership:**
Our CISO, part of the executive team, ensures top-down security governance with Ntiva.
- ✓ **Physical Security:**
Access to our facilities is strictly controlled with surveillance and badge requirements, maintaining operation continuity with backup power systems.
- ✓ **Operational Excellence:**
We adhere to stringent policies for network integrity, including vulnerability assessments, change management, and endpoint protection.
- ✓ **Access Control:**
Role-based permissions, complex password policies, and mandatory MFA are standard for all accounts.
- ✓ **Incident Response:**
A formalized plan and trained personnel are ready to address any security incidents, with regular testing of our response capabilities.

- ✓ **Resilience:**
Our business continuity and disaster recovery strategies are rigorously tested to handle unexpected disruptions.
- ✓ **Data Protection:**
We process personal data with the utmost care, backed by a solid privacy policy and strong data management principles.
- ✓ **Compliance:**
Our comprehensive security program aligns with global standards, including NIST 800-171, and is validated by regular third-party audits to ensure SOC 2 compliance.

We at Ntiva believe in building a partnership that you can always rely on because when it comes to your trust and security, we're in it together.

Thank you again for putting your trust in Ntiva.

Additional Resources

[Blog](#)

[Case Studies](#)

[Knowledge Center](#)

[Tech Mastery Videos](#)

