



NEW CLIENT ONBOARDING PROCESS

7900 Westpark Drive, Suite A100 | McLean, VA 22102
1-888-996-8482 | www.ntiva.com

INTRODUCTION

At Ntiva, we pride ourselves on delivering an excellent customer experience from day one. In order to achieve this across a broad spectrum of industry verticals, a robust onboarding process has been developed.

The key goal of this process is to collect all vital technical information as well as institutional knowledge of your business as efficiently as possible, in order to ensure delivery of the best experience moving forward.

This process typically takes 30 days from start to finish, in order to get you set up and prepared for long-term success with our services.

Before onboarding begins, you can expect to receive a welcome packet that includes a summary of the onboarding checklist and a short questionnaire. Providing us the requested information in advance helps to aid in a timely transition and successful ramp up!

This intensive discovery process, which also includes security and environmental reviews, will be documented for your examination in the form of a client manual that is presented at the end of the onboarding project.

This final review also includes any recommendations we may have to help your business operate more efficiently and securely, preparing you for success in the years to come.



PROCESS SUMMARY

The onboarding process consists of 4 main phases:

- Service Definitions
- Data Collection
- Information Review
- Service Handoff

The entire onboarding process is handled as a separate project with assigned resources from beginning to end - details of each stage are documented below.

PROCESS DETAILS

① Service Definition

At the beginning of any onboarding, the definition of services is a crucial part of the entire process. Every service outlined in the signed Service Agreement (SA) is discussed in detail by an assigned Ntiva team, which will consist of a Customer Relationship Manager (CRM), Solution Consultant (SC), Technical Operations Manager (TOM), and Project Manager (PM).

This process allows this dedicated “supporting cast” to have an in depth understanding of your business in preparation for the onsite data gathering, process documentation and ongoing support.

We have found that involving the team members early on not only ensures a more efficient onboarding process, but also assists with continuity in the expected service delivery.

A designated member of this team will be responsible for documenting a clear definition of your expectations, known issues and possible challenges. This helps prepare the technical team who will be going onsite with advance information on where any pitfalls might be, specific items they may need to collect, or if they need to pay extra attention to areas that might need additional care.

② Data Collection

Once definitions are completed, the data collection process begins with an onsite visit by Ntiva technicians.

The technicians will gather all information pertaining to your IT environment and begin the documentation process. All client documentation is securely housed in a custom-made document management system that allows us to store data in a predefined format, meant to ensure consistency in service delivery.

There is an extensive engineering checklist of discovery items and procedures that occur during data collection, which can be provided at request, but in summary following is a short list of items:

- Site survey and documentation
- Network investigation
- Security assessment
- Backup verification
- Server room inspections
- Policy documentation (existing)
- Hardware and software categorized, logged and warranty information collected
- Agents installed on appropriate devices for monitoring purposes

Once the process is completed, the data is documented, uploaded and sent to the Ntiva support team (see Phase 3) for review and planning.

Note that any critical concerns found during this process will be communicated to the client immediately.



③ Internal Information Review

The primary function of this phase is to ensure your IT environment is meeting your needs and you have the right technology in place to help your business to grow.

The information collected in the previous phase is gathered and provided to your Technical Operations Manager (TOM), which is then reviewed with your dedicated team alongside specialized senior technicians, as applicable.

This helps develop a good understanding of the environment from the beginning and ensures continuity in knowledge as your structure grows and changes.

This review looks at not only what is currently in place, but at what can be changed, improved and any points of immediate concern.

As an example, this could range from reviewing Microsoft licensing and offering recommendations for any changes that might make sense for your unique business, to looking at your backup and recovery plans, which are a critical component of any business in today's world.

Your Ntiva team also reviews potential ways we can provide the same level of services but at a reduced cost. We often find there are unnecessary layers of hardware or software, or outdated systems which can be replaced by much more cost-effective solutions.

Once all the data is reviewed and verified it is summarized and compiled into your client manual. This contains the names and contacts of all your team members, an explanation of support procedures and the summaries and proposed plans for any upcoming upgrades and changes to your environment.

④ Orientation Meeting and Service Handoff

This is where the onboarding process ends, and the service delivery begins.

It starts with a meeting between the Ntiva team and the client to review the client manual. The review includes a discussion and agreement on all findings, including any recommendations for additional changes which will be prioritized at the client's discretion, and the final tailoring of support procedures if needed.

Any recurring onsite visits are scheduled along with setting the cadence for recurring meetings between the client and your Customer Relationship Manager (CRM).

At this point, end users can begin calling the Service Desk for support and day-to-day support has formally started. Note that we can also assist with educating your end users on the correct procedures to contact the Service Desk, including creating emails for you to send out to your team, holding a training webinar or even providing on-site training if necessary.



SUMMARY

Our intensive onboarding process was designed to provide the most successful transition possible and is continually being refined and improved.

All clients will receive an implementation survey at the end of the onboarding cycle, which will be reviewed by our leadership team. We appreciate your honest feedback and use it to for continued improvement and growth.

Should you have any questions during this transition period, please reach out to any member of our team. We take our service seriously and do our best to make this a smooth transition, so your business can remain successful and poised for growth.

ABOUT NTIVA

Founded in 2004, Ntiva is a people-focused IT services company that partners with over 500 businesses in various industries, primarily in the Metro DC area. Our team of world-class talent genuinely cares about the relationships we build and understand the response and precision are keys to a successful partnership.

We've grown almost exclusively through client referrals, and our unwavering focus on our three core values:

- Customer service first
- Managing every dollar as if it were our own
- Hiring, developing, and retaining only the very best people