INTUITION
CONSULTANCIES LANKA (PVT) LTD.

CLIENT ONBOARIDING PROCESS

WELCOME TO YOUR NEW IT SUPPORT TEAM

THANK YOU FOR CHOOSING INTUITION CONSULTANCIES AS YOUR NEW IT PARTNER!

Intuition Consultancies Inc. is committed to providing your organization with the highest level of service and a smooth transition to working together. The first step in our partnership is onboarding. In this document, we have outlined the primary steps of the onboarding process, including what you can expect, what we need from you, technical onboarding, and other important information.

1 Step 1: Onboarding Meeting

THE ONBOARDING MEETING

Your account manager will schedule an onboarding meeting to review all of the information we need to get you up and running. From your company, we recommend that the IT point of contact, key decision makers and anyone else who will be working directly with Intuition Consultancies Inc. attend. During this meeting, we'll gather the following information:

Contact Information

You'll tell us who the primary contacts are for business and non-business hours, so we know who to contact regarding any issues or outages, and who is authorized to make service requests.

Third Party Vendor Information

We'll document your ISP provider and any third party software vendors so that we can make support calls on your behalf in the event that any issues arise.

Maintenance & Report Preferences

You'll tell us what day you prefer maintenance (i.e. patches & security updates) to be performed, and how often you would like to receive your status reports.

Passwords

We'll need admin-level access to your systems in order to properly manage your network.

Submitting Service Requests

We'll show you how to submit service requests during and after business-hours through our online portal, by phone and by email, as well as who you should contact for various non-support related requests.

2 Step 2: Technical Onboarding

TECHNICAL ONBOARDING

There are two components to the Technical Onboarding process - remote and onsite.

Remote Onboarding

We perform several tasks remotely to get you set up in our system. These include:

- Deploy remote monitoring tools so we can watch your systems 24x7
- Install security tools such as Open DNS, Antivirus and Spam Filter
- Review your data backups
- Take inventory and perform configurations of any items that can be done remotely
- Perform any maintenance tasks that are needed

Onsite Onboarding

We will schedule 1 to 2 days to be at your location to complete the onsite onboarding. Onsite onboarding includes:

- Review and document your complete IT infrastructure and network configurations
- Install any agents that couldn't be installed remotely
- Take inventory and configure remaining network assets that couldn't be done remotely
- Install any necessary hardware

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Step 3:
Review & Recommendations

REVIEW & RECOMMENDATIONS

We'll compile and review with you all of the findings and recommendations from the Technical Onboarding phase. These will include:

Network Health Report

A full assessment of your network's health and efficiency.

IT Risk Consultation

We'll discuss your organization's security risks and concerns and identify any weaknesses that may allow your data to be compromised.

Recommendations

We'll provide a summary of recommendations on any hardware or software upgrades, risk management solutions and any other strategies to help improve network efficiencies and overall health.

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Step 4:
Implementation

IMPLEMENTATION

We'll implement the approved recommendations from Step 3 on your network. At the conclusion of this step, you can expect:

- **Security Upgrades**
- **Network & System Improvements**
- **Better Overall Performance**
- **Reduced Risk & Exposure**

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Step 5:
Ongoing Engagement

ONGOING ENGAGEMENT

We'll implement the approved recommendations from Step 3 on your network. At the conclusion of this step, you can expect:

Quarterly Business Reviews

As a client, you'll have quarterly business reviews with your Account Management Team to:

- Discuss the current state of your company
- Review the previous quarter's service requests to identify trends and where focus or improvements need to be made
- Identify and prioritize your company's goals and initiatives for the following quarter
- Address any issues or concerns

Status Reports

You'll receive several reports on a regular basis so you can see the status of your network and service requests. These reports include:

- Antivirus and Patch Health Reports (sent monthly)
- Backup Status Reports (sent daily, weekly or monthly)
- Hardware and Software Inventory Reports (sent quarterly or annually)
- Service Ticket Summary Reports (sent quarterly or annually)

Client Resources Center

Our online Client Resources Center provides you with quick and easy access to support guides, important links and contact information for our sales and service desk. You can access the Client Resources Center anytime at: