



CLIENT ONBOARDING PROCESS

WELCOME TO YOUR NEW IT SUPPORT TEAM

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

Intuition Consultancies Inc. is dedicated to delivering top-tier service and ensuring a seamless transition. This document outlines the key steps in our onboarding process, including expectations, requirements, technical onboarding, and other essential details.

1 Step 1: Onboarding Meeting

THE ONBOARDING MEETING

Your account manager will schedule an onboarding meeting with your IT contact, key decision-makers, and relevant stakeholders. During this session, we'll gather the necessary information to get you up and running efficiently.



Contact Information

Provide primary contacts for business and after-hours, including those authorized for service requests and issue resolution.



Third Party Vendor Information

Share details of your ISP and third-party software vendors to enable us to coordinate support on your behalf if issues arise.



Maintenance & Report Preferences

Let us know your preferred maintenance schedule (e.g., patches and updates) and how often you'd like to receive status reports.



Passwords

Provide admin-level access to enable proper management of your network.



Submitting Service Requests

We'll guide you on submitting service requests via our online portal, phone, or email, and identify contacts for non-support-related inquiries.

2 Step 2: Technical Onboarding

TECHNICAL ONBOARDING

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



Remote Onboarding

We'll complete the following tasks remotely to set you up in our system:

- Deploy 24/7 remote monitoring tools.
- Install security tools (Open DNS, Antivirus, Spam Filter).
- Review data backups.
- Inventory and configure items remotely.
- Perform necessary maintenance tasks.



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 assess your organization's security risks, address concerns, and identify vulnerabilities that could compromise your data.



Recommendations

We'll present recommendations for hardware/software upgrades, risk management solutions, and strategies to enhance network efficiency 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

Regular touchpoints include quarterly business reviews, detailed status reports, and 24/7 access to our Client Resources Center for seamless support and strategic planning.



Quarterly Business Reviews

As a client, you'll meet quarterly with your Account Management Team to:

- Review your company's current state
- Analyze past service requests to identify trends and areas for improvement
- Prioritize goals and initiatives for the next quarter
- Address any issues or concerns



Status Reports

You'll receive detailed reports to monitor your network and service requests, including:

- Antivirus and Patch Health Reports – Monthly
- Backup Status Reports – Daily, weekly, or monthly
- Hardware and Software Inventory Reports – Quarterly or annually
- Service Ticket Summary Reports – Quarterly or annually



Client Resources Center

Access our online Client Resources Center anytime for quick support guides, key links, and contact information for our sales and service desk.

