5 Best Practices for Onboarding New Customers

eBook

Table of Contents

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You work hard to win new customers. Whether you spend time on sales outreach, invest money in marketing, or simply earn referrals by offering outstanding service, you don't want to waste your hard work once the customer is in the door.

The onboarding process is your first opportunity to impress your new customer with your diligence and professionalism. First impressions matter, so make sure they count. Thankfully, you can help ensure onboarding is a positive experience for customers and your team by following a five-step process based on best practices.

1. Plan and communicate
2. Audit and catalog
3. Assess and inform
4. Deploy and configure
5. Review and schedule

1. Plan and Communicate

Before taking control of your customer's IT environment, develop a thorough plan to ensure your onboarding process is efficient and transparent. Customers need you to be clear about exactly what you'll do and when you'll do it. And your internal team needs you to clearly communicate what the customer expects.

A good portion of this comes from the contract you sign. While this isn't a book on sales, remember you should consider the onboarding process and what resources you'll use when you're pitching customers on your services. For example, what will you be responsible for? Is it everything? Or will your team only have to manage portions of devices?

Some points to consider here include:

- **Internal IT employees:** If you're working in tandem with an internal IT team, make sure to clearly delineate where your responsibilities begin and theirs end. Your goal is to reassure the existing team that you're an extension of their team, not a replacement. IT teams can get nervous around outsourcing, so you should reassure them and get them on your team internally.
- **Outgoing service providers:** If the organization currently has an IT service provider, try to make the transition seamless. Make sure you or your customer retrieves necessary passwords and accounts from the outgoing support provider. A clean changing of the guard will stay in your customer's mind as an example of your effective planning and reliable execution. Also, if any issues arise, you'll be responsible for fixing them. Resist the urge to blame any outgoing providers—just deal with issues as they arise calmly and professionally.
- **Don't reinvent the wheel:** If you're just getting started with managed services, make sure to document any onboarding steps. You can use this documentation as a starting point for future clients, making the onboarding process even more efficient each time you do it.

2. Audit and Catalog

Next, audit everything in your new customer's environment. A complete audit of your new customer's environment shows diligence and good process on your part, not to mention a genuine interest in their needs.

You can and should automate as much of this as you can. While many MSPs still take a pen-and-paper approach to this project, working "analog" is time-consuming and can be disruptive for your client. Using tools to automate device and network discovery helps you reduce errors and complete the process far more quickly.

Beyond devices, however, you should audit user accounts and permissions as well. With the growth of regulations like the General Data Protection Regulation, maintaining least privilege for data and accounts has become written into law, with potential fines and penalties for failure to comply. Keeping a running list of user accounts now helps you make sure employees don't end up with excessive permissions or make off with important data if they leave the company. Taking these extra steps can help reduce the risk of a potential data breach down the line—and it demonstrates your long-term commitment to your customer's business.

Finally, make sure to review this audit with them. There's a chance it may be the first complete audit report of their environment they've ever seen.

3. Assess and Inform

If you haven't already, consider investing in a reporting tool so you can begin showing value right out of the gate by providing proactive assessments, even before you've completed onboarding. Your customer will appreciate an easy-to-understand view of their network and IT infrastructure. This will be the baseline for assessing your value-add and establishing SLAs to set expectations.

Your reports will also identify potential problem areas that your customer should address before you complete onboarding. This is your chance to shine. Walk the customer through their environment, point out anything you feel is out of place or in need of attention. Don't speak too poorly about the current setup. Your role here involves simply showing how you can improve performance or security by making changes, not to knock the previous IT provider or the current IT team (which will reflect poorly on you at best or earn you enemies at worst). Rank the issues in terms of criticality and ensure the customer understands the potential fallout from not addressing them to help ensure you are covered should something fail under your watch.

Showing these initial reports also gives you a chance to demonstrate the value of your work overtime. Having this initial snapshot lets you show continuous improvement. Plus, if you discover a risk early on and they seem hesitant to fix it, this initial snapshot can let you demonstrate urgency if the problem gets worse.

4. Deploy and Configure

If you haven't already done so during a previous step, consider setting up a remote monitoring and management (RMM) tool and deploying agents across the customer's environment so you can remotely manage the customer environment easily on an ongoing basis.

A good RMM solution will let you create and configure site and device profiles so you can push agents with the proper settings fast. After pushing agents, set up checks to alert you to issues and schedule automated tasks for the customer such as patching, keeping antivirus up to date, and running backups on a regular cadence.

5. Review and Schedule

Once onboarding is complete, sit down with your customer and review what's been done and what, if anything, is outstanding. Based on deployment results, your SLAs may need adjustment. Make sure you leave no gray areas, such as unsupported hardware or software, that could cause confusion or disagreements.

Ensure you have a plan in place for unexpected costs and projects, but don't leave contractual holes that may put you in a position where the customer believes something is covered when it's not. If there are elements of the environment you don't cover, make sure your customers accept any risk and that you have all your "t's" crossed and "i's" dotted.

Starting on a solid, well-defined foundation is in everyone's best interest. You may want to offer your managed customers discounted rates for project work to encourage more business and to establish goodwill. Many providers offer a sliding scale—the more project work they request, the higher the discount over the course of a year.

If your customer agrees, you should consider sending an onboarding email to your customers' employees, so they know who you are and how to get support. This can also be a great opportunity to teach them about security best practices such as recognizing phishing emails and setting strong passwords.

Finally, schedule quarterly business review meetings at the end of this process. During these meetings, you can present high-level reports demonstrating the services you're offering and their value to the customer's business. You can also use this opportunity to note additional issues in the environment and either offer project work to fix it or upsell on other services. For example, if customers opt for antivirus, you could take the opportunity to upsell them on signatureless endpoint protection software that helps protect them against even emerging threats. Or suppose they're only backing up a single server. In that case, you could try to increase the amount of backup coverage by offering them the ability to back up critical business documents on endpoints.

Making a Strong First Impression

When you pick up a new customer, you want to make sure you kick off your relationship on the right foot. The onboarding process is your first chance to demonstrate your professionalism and commitment to your new customer. Make sure you follow the best practices outlined here and don't forget to continue offering outstanding service for the months or years to come.

About N-able

N-able empowers managed services providers (MSPs) to help small and medium enterprises navigate the digital evolution. With a flexible technology platform and powerful integrations, we make it easy for MSPs to monitor, manage, and protect their end customer systems, data, and networks. Our growing portfolio of security, automation, and backup and recovery solutions is built for IT services management professionals. N-able simplifies complex ecosystems and enables customers to solve their most pressing challenges. We provide extensive, proactive support—through enriching partner programs, hands-on training, and growth resources—to help MSPs deliver exceptional value and achieve success at scale.

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