

MSP Name: [Your MSP Name] | Client: [Client Name]

Contract start: [Date] | Technical lead: [Name]

Phase 1: Pre-Onboarding (Before Day 1)

- Signed MSA and SoW received and filed
- Client contacts collected: primary, billing, technical, escalation
- Kickoff call scheduled and confirmed with decision-maker
- Internal team briefed on client background, scope, and known issues
- PSA/RMM client record created
- Welcome email sent with helpdesk contact, hours, and ticket process
- NDA and data handling agreements signed if required

Phase 2: Discovery and Audit (Week 1)

Technical

- Network audit completed (topology, IP scheme, VLANs, Wi-Fi)
- Hardware inventory documented (make, model, age, warranty expiry)
- Software inventory completed (licensed, unlicensed, end-of-life flagged)
- Server roles and OS versions documented (flag any EOL)
- Cloud services inventory completed (Microsoft 365, Google Workspace, other)
- Cloud admin accounts reviewed (MFA status, shared accounts flagged)
- Backup status confirmed (what, where, how often, last tested date)
- Security tools reviewed (AV/EDR, email filtering, MFA, DNS filtering)
- Firewall rules reviewed and documented
- ISP details documented (provider, speeds, contract end date, failover)

Access and credentials

- All admin credentials collected and stored in password manager
- DNS and domain registrar access confirmed
- Firewall and router access confirmed
- Cloud admin portals access confirmed
- Third-party vendor contacts documented

Phase 3: Environment Setup (Weeks 2-3)

- RMM agents deployed to all endpoints
- Monitoring alerts configured and tested
- Backup solution confirmed or deployed, restore test completed
- Security baseline applied: patching policy, MFA enforcement, AV/EDR
- DNS filtering configured
- Email filtering confirmed (anti-spam, anti-phishing)
- Patch management schedule set and communicated

- Remote access solution documented and secured
- Escalation path documented internally

Phase 4: Client Communication and Training (Weeks 3-4)

- All staff notified of helpdesk contact details and ticket process
- Ticket submission demonstrated to client primary contact
- SLA terms confirmed and explained in plain English
- Emergency out-of-hours contact procedure confirmed
- Basic security awareness guidance shared with staff
- Key contacts trained on password manager or MFA if applicable

Phase 5: Handover and First Report (Day 30)

- 30-day review call scheduled with decision-maker
- First monthly report prepared and delivered
- Outstanding discovery items documented and tracked
- Client satisfaction score captured
- Internal lessons-learned notes recorded
- Onboarding project formally closed in PSA

Formal Sign-Off

Role	Name	Signature	Date
MSP representative			
Client representative			

Key Contacts

Role	Name	Email	Phone
Client primary			
Client billing			
Client technical			
Client escalation			
MSP account manager			
MSP technical lead			