

EXIGENT Onboarding

START HERE

1 INTRODUCTIONS & OVERVIEW OF PROCESS

- Welcome from founder & president
- Meet your onboarding specialist

2 ALL THE TECHNOLOGY

- Work together to understand your entire IT environment

3 GET TO KNOW EXIGENT

- Meet our Leadership Team
- Learn about our TechWise blog
- Let's get social
- Setting your email preferences

4 HOW TOS FROM SUPPORT TO ACCOUNTING

- How to reach Team Exigent
- Guide to the client center
- Accounting, payments & more
- Asking for help & support

5 FINAL STEPS

- Holidays and after-hour support processes
- Like us maybe? Referral rewards & reviews
- More about our services and specialties
- Your customer success packet
- Last words of advice

 If you have any questions at any point in your onboarding journey, please reach out to chris@exigent.net

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TECHNICAL

LONG-TERM SUCCESS

6 POST GO-LIVE STEPS

- If and as applicable:
 - Web content filtering
 - SPF records
- Local admin account restriction
- Final documentation

5 AGREEMENT & SUPPORT GO-LIVE

- Go-Live for support
- Call with liaison to discuss how to formally work with support
- Access to the Client Center
- Recap patching
- Review service vs. project work definitions
- Setup monthly reporting cadence
- Discuss critical alerting outside of business hours

3 DISCOVERY & DOCUMENTATION PROCESS

- Setup of MS discovery tools/software
- Passwords
- Network/Networking
- Internet and services
- Server/Storage
- Backup
- Applications and data
- Subscriptions and expirations
- Processes and knowledge base creation

4 DEPLOYMENT & CONFIGURATION

- Remote monitoring and management tool
- Endpoint security
- Network monitoring software
- Active Directory/User account synchronization tool
- Coordinated removal of outgoing MSP tools and access (if applicable)

2 INITIAL ONBOARDING SITE VISIT

- Meet and greet with teams
- Probe/Inspector hardware deployment
- Network monitoring preparations including SNMP settings
- Environmental walkthrough
- Photos and labeling of photos

1 ONBOARDING KICKOFF CALL

- What to expect during the transition period
- Coordination and timeline
- Questions and informational intake
- Communication and commitment to success

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