Process Documentation Template

Client Onboarding Process for IT Managed Services /
T-ONB-010 / 25 Sep 2025

Complete

Score	0 / 0 (0%)	Flagged items	0	Actions	0

Prepared on	25.09.2025 15:00 PST
Prepared by	Jane Lois Hover
Location	New York City Hall, New York, NY 10007, USA (40.7127503, -74.0059765)
Title	Client Onboarding Process for IT Managed Services
Document Number	T-ONB-010

Defining the Process, Project Objective, Process Documentation Goal, and Focus Areas

Identify the process to be documented:

The Process	Client Onboarding for IT Managed Services.

Reason for this process / why does this process exist:

Project Objective

To ensure new clients are smoothly integrated into the company's managed IT services with minimal disruption to their operations.

Reason for documenting this process / motivations behind process documentation:

Process Documentation Goal

- Provide clarity to internal teams (sales, support, IT engineering)
- Reduce errors in onboarding activities
- Standardize client experience

State, in order of priority, particular areas that the process documentation will focus on:

Focus Areas

- Initial client setup in internal systems
- Hardware and software configuration
- Knowledge transfer and client training

Key Stakeholders, Their Responsibilities, and Contact Numbers

Stakeholder

Stakeholder 1

Stakeholder	Client Account Managers

Responsibilities

- Act as the primary liaison between the client and internal teams during onboarding.
- Facilitate the sales-to-service handover meeting and ensure all necessary client information is transferred.

Contact Number	7879999999

Stakeholder 2

Stakeholder	IT Engineering Team

Responsibilities

- Configure and deploy client hardware and software in line with company standards.
- Ensure security protocols, compliance checks, and system testing are completed before client go-live.

Contact Number	7879999900

Stakeholder 3

Stakeholder	Customer Success Team

Responsibilities

- Conduct initial training sessions with the client's staff on how to use provided tools and services.
- Develop onboarding materials (guides, videos, FAQs) to support client self-service.

Contact Number	7879999956

Process Boundaries and Activities Included in the Scope

When does the process start and when does it end:

Process Boundaries

- Start: Client contract is signed.
- End: Client receives full access to IT support and services.

List all activities that are within the scope of the process:

Process Activities

- Sales-to-service handover meeting
- Client data collection and verification
- System account creation and configuration
- Hardware/software setup

Process Inputs, Steps, and Outputs

What triggers the process or is needed for the process to start:

Process Inputs

- Signed client contract
- Client information form
- Assigned account manager

Process Step

Process Step 1

Step	Conduct internal kickoff meeting

Visual aid

Description

Align sales, account management, IT, and customer success teams on client requirements, timelines, and responsibilities.

Process Step 2

Step	Collect and verify client data

Visual aid

Description

Gather all necessary client details (e.g., users, systems, security needs) and confirm accuracy before setup.

Process Step 3

Step	Configure user accounts, email, and software tools

Visual aid

Description

Set up client-specific digital environments, ensuring access rights and integrations are correctly applied.

Process Step 4

Step	Deploy hardware (if applicable)

Visual aid

Description

Prepare, ship, and install physical equipment such as laptops, servers, or networking devices at the client site.

Process Step 5

Step   Test systems and run security checks

Visual aid

Photo 1

Description

Validate that applications, networks, and devices function properly and meet compliance and cybersecurity standards.

Process Step 6

Step   Deliver client training

Visual aid

Description

Provide hands-on guidance for end users, covering system functionality, troubleshooting basics, and support channels.

Process Step 7

Step   Transition to ongoing IT support

Visual aid

Description

Hand over the client to the support team with full documentation, ensuring they are enrolled in standard service processes.

What is the result of the process, the expected outcome or product:

Process Outputs

- Fully onboarded client with access to IT services
- Documented configuration details
- Completed client training record

Exceptions

Exceptions - Not following the process steps in order or deviating from the intended process flow.

Situations that would lead to exceptions:

- Client delays in providing required data
- Incomplete or incorrect contract details
- Technical compatibility issues with existing client systems

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What needs to be done when exceptions occur:

- Escalate to project manager
- Document deviation in onboarding checklist
- Reschedule deployment or training as required

Risks to manage should exceptions occur:

- Delayed client go-live date
- Negative client satisfaction impact
- Potential financial penalties for missed SLAs

Approval, Challenges, and Revision Schedule

Process Documentation approved by:

Joanna Smith, Director of IT Services
25.09.2025 15:59 PST

Challenges to the Process

Expected:

Client delays in providing necessary info

Actual:

Multiple cases of hardware shipment delays

Learnings from Challenges:

Need to include buffer time and stronger vendor coordination in the plan

Revision Schedule

Date process documentation was initially completed (date of approval):	25.09.2025
Process documentation shall be reviewed on:	25.03.2026
Process documentation shall be reviewed by:	Jane Lois Hover
Contact details of person who will be reviewing the process documentation:	janelois.hover@gmail.com
After review, will the process documentation be automatically revised?	No

Steps that need to be taken before process documentation revision:

Must be reviewed manually before revision

Note: To revise process documentation, duplicate the completed inspection and only edit the duplicate and not the original.

Media summary

Photo 1