

### **Offboarding a contact:**

- ✓ COMPLETED - Update the contact in the PSA to "inactive" and "GONE - No longer with the company" - This will also archive the contact in Hudu on next sync cycle - 2024-08-29 at 3:46 pm
- ✓ COMPLETED - If the contact has a M365 license, log in to the M365 admin portal - 2024-08-29 at 3:46 pm
- ✓ COMPLETED - In M365 admin portal - Reset email password to standard archived password format - 2024-08-29 at 3:46 pm
- ✓ COMPLETED - In M365 admin portal - Block 365 login - 2024-08-29 at 3:46 pm
- ✓ COMPLETED - In M365 admin portal - Rename email address to "user-ARCHIVE-date" and contact name to "ARCHIVED-user" - 2024-08-29 at 3:46 pm
- ✓ COMPLETED - In M365 admin portal - Remove User from Global Contact List and any group memberships - 2024-08-29 at 3:46 pm
- ✓ COMPLETED - In M365 admin portal - Convert 365 mailbox to shared mailbox (to the delegated user if applicable) - or forward Email (If Requested by client) - 2024-08-29 at 3:46 pm
- ✓ COMPLETED - In M365 admin portal - Remove Office 365 license assigned to that contact and make a completion note in the process as to what license was removed - 2024-08-29 at 3:46 pm
- ✓ COMPLETED - Update documentation with new termination passwords - If client uses a domain controller, change Active Directory account password and then disable the AD account - 2024-08-29 at 3:46 pm
- ✓ COMPLETED - Adjust Client's M365 billing (and any other applicable billing) - 2024-08-29 at 3:46 pm

### **Onboarding a contact:**

- ✓ COMPLETED - Create the new contact in the PSA, to include full name, email address, job title, contact phone number - Ensure sync of contact in to Hudu before moving to next step - 2024-08-29 at 3:47 pm

✓ COMPLETED - If email and AD account passwords have been requested, insert as Hudu passwords for the contact - 2024-08-29 at 3:47 pm

✓ COMPLETED - Determine access and permissions for new user - Specific drive or group access for AD and M365 if possible - 2024-08-29 at 3:47 pm

✓ COMPLETED - Create user in Active Directory with existing company standards for username and password. Copy an existing user with same access rights and responsibilities if applicable. If not applicable, create user and assign to appropriate security groups - 2024-08-29 at 3:47 pm

✓ COMPLETED - Confirm file access - 2024-08-29 at 3:47 pm

✓ COMPLETED - Determine licensing requirements - 2024-08-29 at 3:47 pm

✓ COMPLETED - Procure licensing from previous step - 2024-08-29 at 3:47 pm

✓ COMPLETED - Create email account with existing company standards for username and password - 2024-08-29 at 3:47 pm

✓ COMPLETED - Send credentials to client representative through Hudu's share features - 2024-08-29 at 3:47 pm

### **Onboarding a new client:**

✓ COMPLETED - Send New Client Intake Survey - 2024-08-29 at 3:48 pm

✓ COMPLETED - Familiarize the team with the new client then schedule a client kickoff meeting. Discuss information gathered during the discovery and sales process - 2024-08-29 at 3:48 pm

✓ COMPLETED - Define roles and responsibilities with the team - Including new client's expectations regarding services provided - 2024-08-29 at 3:48 pm

✓ COMPLETED - Prepare a kickoff meeting agenda and send to client at least one day before meeting - 2024-08-29 at 3:48 pm

✓ COMPLETED - Determine the kickoff meeting flow of information and discussion of topics - Who is going to speak about each topic? - 2024-08-29 at 3:48 pm

✓ COMPLETED - Plan for importing new client's data - Establish connections to data resources, before providing services - 2024-08-29 at 3:48 pm

- ✓ COMPLETED - Import - Assign experienced team member to connect accounts and oversee the data import process - 2024-08-29 at 3:48 pm
- ✓ COMPLETED - Import - Use the information gathered during the sales and discovery process to set up the import - 2024-08-29 at 3:48 pm
- ✓ COMPLETED - Import - Use automation whenever possible to simplify data imports and integrations - 2024-08-29 at 3:48 pm
- ✓ COMPLETED - Import - Use beta data to test the import process - 2024-08-29 at 3:48 pm
- ✓ COMPLETED - Import - Orchestrate the client's new system with data on existing systems - Monitor carefully to ensure best practices - 2024-08-29 at 3:48 pm
- ✓ COMPLETED - Enable 2FA and set up account privileges - 2024-08-29 at 3:48 pm
- ✓ COMPLETED - Set up the RMM software - Ensure RMM software is compatible with client hardware and software including security software like antivirus - 2024-08-29 at 3:48 pm
- ✓ COMPLETED - Set up the RMM software - Install the remote agents on the client's workstations, servers, and mobile devices - 2024-08-29 at 3:48 pm
- ✓ COMPLETED - Set up the RMM software - Thoroughly and completely test the monitoring and notification system functionality - 2024-08-29 at 3:48 pm
- ✓ COMPLETED - Set up the RMM software - Set up / script automation workflows - 2024-08-29 at 3:48 pm
- ✓ COMPLETED - Security and stress test the new client's network - penetration tests or ethical hacking. Report any issues for follow up - 2024-08-29 at 3:48 pm
- ✓ COMPLETED - Continuing the relationship with the client - monthly and quarterly progress reviews after taking client "live" - 2024-08-29 at 3:48 pm