

MSP Client Onboarding Documentation SOP

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Revision	1.0
Owner	Onboarding Project Manager
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Review cycle	Every 12 months

1. Purpose

To onboard every new managed services client the same way, so the MSP takes control of the environment securely, documents it completely and hands the service desk everything it needs from day one.

2. Scope

Applies to the technical onboarding of every new managed services client, from the signed agreement to the start of steady-state support, including takeover from an outgoing IT provider. Commercial onboarding and billing setup are covered elsewhere.

Definitions

Outgoing provider	The previous IT provider or internal IT person who hands the environment over to the MSP.
Discovery	Scanning and inspecting the client environment to find every device, account, service and dependency.
Baseline assessment	A comparison of the client environment with the MSP's technical standards, producing a list of findings and risks.
Go-live	The date the MSP's service desk starts taking the client's support requests under the agreement.

3. Responsibilities

Onboarding Project Manager	Runs the onboarding plan, timeline and kickoff, chases client inputs and owns the onboarding checklist until sign-off.
Onboarding Engineer	Takes over credentials, deploys agents, runs discovery and builds the client documentation.
Service Desk Lead	Sets up the client in the PSA and prepares the service desk to support the client from go-live.
Technical Account Manager	Reviews the baseline findings, agrees the remediation plan with the client and owns the relationship after go-live.
Client Point of Contact	Provides access, documents and contacts, coordinates with the outgoing provider and approves onboarding sign-off.

RACI matrix

Activity	Onboarding Project Manager	Onboarding Engineer	Service Desk Lead	Technical Account Manager	Client Point of Contact
Plan and run the onboarding kickoff	R/A	C	I	C	C
Take over and secure admin credentials	A	R	-	I	C
Discover and document the environment	A	R	I	C	C
Agree the remediation plan	C	C	-	R/A	C
Prepare the service desk for go-live	A	C	R	I	I

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Onboarding checklist and project plan
- Client documentation template set
- Password manager with a new client vault
- RMM tool and agent installers
- Network discovery and scanning tool
- PSA ticketing system
- Baseline assessment checklist

5. Procedure

Step	Task	Owner	Done
5.1	Hold the onboarding kickoff The Onboarding Project Manager meets the client to confirm scope, timeline, go-live date, contacts and the list of information and access the MSP needs.	Onboarding Project Manager	☐
5.2	Collect access and existing documentation The Client Point of Contact provides admin access, license and vendor details and any existing documentation, and introduces the MSP to the outgoing provider. Warning: Do not accept passwords by email or chat. Send a secure vault request link and have credentials entered there.	Client Point of Contact	☐
5.3	Take over and rotate admin credentials The Onboarding Engineer changes every administrative password, stores the new ones in the client vault and enables MFA on admin accounts that lack it. Checkpoint: The outgoing provider's accounts and remote tools are disabled on the agreed cutover date.	Onboarding Engineer	☐
5.4	Deploy monitoring and management agents The Onboarding Engineer deploys the RMM agent and security tools to every server and endpoint and compares the agent count with the client's expected device count.	Onboarding Engineer	☐

Step	Task	Owner	Done
5.5	Run network and asset discovery The Onboarding Engineer scans each site to find network devices, printers and other equipment that cannot run an agent, and records anything unexpected for review.	Onboarding Engineer	☐
5.6	Build the client documentation The Onboarding Engineer creates the client hub from the standard template and documents sites, network, servers, cloud tenants, applications, backups and vendors.	Onboarding Engineer	☐
5.7	Assess the environment against standards The Onboarding Engineer completes the baseline assessment, recording gaps such as missing MFA, failing backups, unsupported operating systems or open remote access.	Onboarding Engineer	☐
5.8	Agree the remediation plan The Technical Account Manager prioritizes the baseline findings, estimates effort and agrees with the client which items are fixed in onboarding and which become projects.	Technical Account Manager	☐
5.9	Set up the client in the PSA The Service Desk Lead configures the client's contract, SLA, contacts, approvers, after-hours rules and ticket routing in the PSA.	Service Desk Lead	☐
5.10	Brief the service desk The Service Desk Lead walks the technicians through the client hub, key runbooks, VIP users and known issues before the go-live date.	Service Desk Lead	☐
5.11	Tell client users how to get support The Onboarding Project Manager sends the client's staff a welcome guide explaining how to raise tickets, support hours and what to expect on go-live day.	Onboarding Project Manager	☐
5.12	Sign off onboarding The Technical Account Manager reviews the onboarding checklist with the Client Point of Contact, records sign-off and moves the client to steady-state support. Checkpoint: Every checklist item is done, or open with an owner and due date that the client has accepted.	Technical Account Manager	☐

6. Quality checks

- All administrative credentials were rotated and stored in the client vault before go-live.
- Agent coverage matches the expected device count, with differences explained.
- The client hub contains the full core documentation set at sign-off.
- Baseline findings have an agreed owner, priority and plan.
- The outgoing provider's access was removed on the cutover date.

7. Records

- Completed onboarding checklist with client sign-off
- Baseline assessment report and remediation plan
- Credential takeover log
- Agent deployment and discovery results

8. KPIs

- Days from signed agreement to go-live
- Percentage of onboarding checklist items complete at go-live
- Ticket volume and escalations in the first 30 days
- Number of critical baseline findings closed within 90 days

9. Common mistakes

- Going live before the outgoing provider's access has been removed.
- Accepting credentials over email and leaving them in the inbox.
- Trusting the client's device list instead of verifying it with discovery.
- Skipping the service desk briefing, so the first tickets are worked blind.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	October 15, 2026	Initial release	Ilia Pirozhenko

Approval

Prepared by	Approved by	Date

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