

# 4 STEPS

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We know transitioning to a new company will always be worrisome, and that's why we have put together these 4 onboarding steps to put your mind at ease throughout the process.

## Step 1

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We will request any historical data which may help us with your onboarding.

Any admin details for your existing software and hardware will be requested from you or your previous support company.

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## Step 2

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Meet with key people involved to establish:

- Communication preferences
- Timescales for review meetings.
- Confirm needs, goals, and expectations
- Timescales for review meetings.
- Discuss long term business objectives and plans.
- Determine current known challenges.
- Discuss long term business objectives and plans.

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## Step 3

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- Complete an in-depth site audit to build our understanding of your current IT infrastructure.
- Obtain images of equipment to assist our technicians when diagnosing faults even if they haven't visited site.
- Asset tag all of your current hardware to ensure we can create a cross-reference log in our IT documentation software (IT Glue).

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## Step 4

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- Provide recommendations for short-term, medium-term, and long-term improvements.
- Suggest improvements to your technology to keep your business ahead of its competition.
- Migrate services from your previous provider, such as the management of Microsoft Office 365 and G Suite.
- We will work with you to understand any outstanding work from our survey.

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