



**You Request. We Respond.
IT Gets Done!**

MSP Onboarding Checklist

Keep this simple client onboarding checklist handy to ensure your MSP follows best practices during your transition.

- ☐ **Onboarding Planning & Kickoff Complete**
- ☐ **Agent Deployment & Discovery/Information Gathering Finished**
- ☐ **Technical & Security Deployments Completed**
- ☐ **Testing & Verification Completed**
- ☐ **User Training & Final Launch Completed**
- ☐ **First 90-Day Review Scheduled**
- ☐ **Continuous Monitoring Enabled**