Client Onboarding Timeline

Week 1
Introduction of Onboarding Team.

- Onboarding process overview
- Explanation of team member roles
- Receive paperwork such as client questionnaire, contracts, etc.
- Onsite professional services scheduled

Weeks 2-3
TAM is active onsite to collect data.

- Projects team installs tools and all security features to devices
- On-site survey (4-8 hours)
- TAM completes first "alignment"

Weeks 4-5
Meet vCIO and Client Success Manager.

- Centralized Services and Service dates established
- vCIO, having reviewed data findings done by TAM, communicates how best to serve you now and in the future

Weeks 6-8
vCIO becomes main point of contact.

- Centralized Services and Help Desk Support ticketing begins
- vCIO presents all projects to you and establishes project timelines