pax8 Academy

MSP EMPLOYEE ONBOARDING

Syllabus

Updated: February 2025

Training Overview

MSP Employee Onboarding is a one-week, live-instruction, virtual course that will get your new employees ready for their first month on the job by learning how an MSP operates.

We will review core MSP technical tools and processes like PSAs, RMMs, remote access, and backups. You will learn essential technical terms at an MSP. The course will cover why real-time time entry is so important and discuss how time is our product in a service-based business. Additionally, the course will give great advice for how to be successful at an MSP, set goals, and make an impact at the business.

This class is designed for:
- New hires for any role within an MSP (helpdesk, reception, HR, account managers, etc.) that are new to the industry
- Engineers coming from an enterprise IT background who would like a common MSP language and definitions of technical terms
- Managers who are considering sending their new hires through the class

A major benefit of the course is the workbook that goes along with it. Each session will have knowledge checks (a great way to take notes throughout the class), questions for the participant find out related to the MSP they are working for related to what was learning in class, and a space for any questions that come up to bring to a manager.

What You'll Get

- 5 hours of virtual, interactive, instructor-led content taught by an experienced MSP expert.
- Downloadable videos* of the content you can rewatch on-demand at your convenience.
- Downloadable slide decks, handouts, and resources.

Learning Objectives

By attending this course, you will learn:
- How to be ready for your first month working at an MSP and what to expect
- Understand the core concepts around technical processes and tools
- How to properly process a ticket and submit time, no matter what PSA is used
- How time is our product and how your role supports the company's function and growth

* Videos will either be recordings from your session or previously recorded material in which partner faces and voices have been removed. It is recommended to attend courses live to receive the full benefits of interactive Q&A with the instructor and class.

Schedule of Topics

- Session 1: What is an MSP?
  - Services offered
  - Benefits of the MSP model
  - Expectations when working in an MSP

- Session 2: Tech tools and processes
  - PSA and RMM
  - Remote access
  - Documentation and SOPs

- Session 3: Tech talk and MSP basics
  - Networking infrastructure
  - Endpoint security
  - Backups and what to do if you suspect data loss

- Session 4: Time, tickets, KPIs and Success in your Role
  - Life of a ticket
  - Why it's important to enter time and good notes (and how to do it)
  - ITIL service types
  - Key Performance Indicators and why they matter
  - Client satisfaction scores (CSAT)

- Session 5: Common Roles at an MSP
  - Overview of Owner/CEO, Admin, Account Manager, Operations/HR, Helpdesk, Service Manager, Dispatcher, Project Manager, Engineers, Sales
  - Organizational Chart examples
  - MSP workplace scenarios to determine who to go to and actions to take

Instructor

Natalie Hell
Peer Group Facilitator

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Testimonials

"The Employee Onboarding course is a great start for anyone new to MSP's and how they operate properly. The instructor was a very informative host. Highly recommend this course to anyone working in the MSP space."
-D. Primley, All in IT

"The MSP Employee Onboarding course is the perfect way to arm new-hires that lack MSP experience with the foundational knowledge they'll need to orient themselves in the MSP world. The course covers a nearly all aspects of the MSP industry in a concise, efficient way. This course is a must for all new hires without experience in the industry."
-C. Mangham, Premier One

"The MSP Onboarding course was a great experience. There was lots of good discussion between the instructor and the class; the instructor created many opportunities for us to learn from each other as well as from him. The instructor was a good fit to lead the course; they created a fun and engaging environment while keeping things on topic."
-C. Schneider, Common Angle

Additional Resources

- Review the Ivanti Glossary: What is ITIL?
  - https://www.ivanti.com/glossary/itil
- Read Adventures of an IT Leader, by Robert Austin, Shannon O-Donnell, and Richard Nolan
- Read The Lean Startup: How Today's Entrepreneurs Use Continuous Innovation to Create Radically Successful Businesses, by Eric Ries

Next Steps

Explore your next step with Pax8 Academy:
- On-Demand Content
  - Check out the Career Training Category
  - Service: Time Entry & Time Tracking
  - Strategic Time Management
- Instructor-Led Training
  - Customer Service Skills
  - Elevating Client Support: Proactive Care and Problem Solving
- Peer Groups
  - Join a Peer Group
- Coaching
  - Sign up for Business Coaching

Register for this course through the Instructor-Led Training Subscription

Already have a subscription?

Register for the next session!

Learn more about the subscription and get your team started today!
- 1-5 employees
- 6-25 employees
- 26-50 employees
- 51+ employees