pax8 | Academy

Mastering MSP Client Onboarding

Syllabus

Training Overview

Onboarding new clients is one of the most critical processes for Managed Service Providers (MSPs). A well-structured onboarding experience sets the tone for the client relationship, builds trust, and creates a foundation for long-term success. This course provides a practical framework for delivering consistent, high-quality onboarding that benefits both clients and internal teams.

Over four sessions, participants will learn how to transform onboarding from a series of tasks into a formalized project with clear milestones and defined roles. We will cover the entire process, from the sales hand-off through go-live, and explore best practices for communication, documentation, and collaboration across teams.

The program also dives into essential tools, security standards, and automation strategies that streamline onboarding while reducing risk. Advanced techniques such as creating onboarding videos and leveraging AI for documentation will help MSPs deliver a modern, scalable experience.

The final session brings everything together with a working review of project plans, client-facing materials, and process diagrams. By the end of the course, attendees will have the knowledge and tools to implement a repeatable onboarding process that improves client satisfaction, strengthens team performance, and drives profitability.

This training is designed for:

- **MSP Business Owners/Principals**
- **Service Managers**
- **Project Managers**
- **Other MSP professionals who are involved with new client onboarding**

Training Inclusions

- **4-hours of virtual, interactive content taught by an expert instructor with 25 years of MSP expertise**
- **Downloadable videos* of the content you can watch on-demand at your convenience**
- **Downloadable slide decks, handouts and resources**

Learning Objectives

Partners attending this training will learn how to:

- **Understand why a structured onboarding process is critical for MSP success and client satisfaction**
- **Identify the key roles and responsibilities involved in client onboarding**
- **Design and manage onboarding as a formal project with clear milestones**
- **Apply best practices for documentation, communication, and client expectation setting**
- **Explore tools, security standards, and automation strategies that streamline onboarding**
- **Develop a repeatable onboarding framework that improves efficiency and profitability**

---

* 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 trainings live to receive the full benefits of interactive Q&A with the instructor and class participants.

Training Topics

Session 1: Overview and Team Roles

- **Why onboarding is critical for client success and MSP profitability**
- **Review of the onboarding process from sales hand-off to service transition**
- **Defining the roles involved in onboarding and their responsibilities**
- **How collaboration between teams impacts client experience.**

Session 2: Process Deep Dive

- **Best practices for tool deployment and automation**
- **Documentation standards and introduction to AI-assisted documentation**
- **Effective communication strategies for kickoff, check-ins, and go-live**
- **Opportunities to enhance onboarding with client-facing videos**

Session 3: Tools, Stack, Security and Helping Users

- **Essential tools and processes for consistent onboarding**
- **Assessing client environments for stack alignment and roadmap planning**
- **Implementing security baselines during onboarding to reduce risk**
- **Strategies for supporting users and minimizing day-one issues**

Session 4: Putting It All Together

- **Analysis of a sample client slide deck and onboarding project plan**
- **Review of process diagrams and workflow for clarity and consistency**
- **Building a roadmap and communication plan for onboarding**
- **Sharing insights and finalizing a repeatable onboarding framework**

Meet the Instructor

Adam Hannemann

Manager of Academy Peer Groups

Email: ahannemann@pax8.com
LinkedIn: www.linkedin.com/in/ahannemann

Explore your next steps with Pax8 Academy

- **On-Demand Learning**
  - Onboarding a New Engineer
- **Instructor-Led Training**
  - MSP Employee Onboarding
  - Problem Solving and Proactive Support
- **Peer Groups**
  - Connect, collaborate and grow with a Peer Group
- **Coaching**
  - Transform you business with coaching for Value Creation, Operations, Sales and Security

Register for this training through the Instructor-Led Training Subscription

Already have a subscription? Register for the next training session!

Want to learn more about subscriptions? Discover how to get your team started today!

- **1-5 employees**
- **6-25 employees**
- **26-50 employees**
- **51+ employees**

MSP User Onboarding

The Art and Science of New MSP User Onboarding (YouTube)

Creating a Great Onboarding Experience

The Magic of Onboarding New Hires | LinkedIn Learning

3 Operational Efficiencies

Work smarter, not harder: 3 key operational efficiencies for MSPs - Pax8 Blog