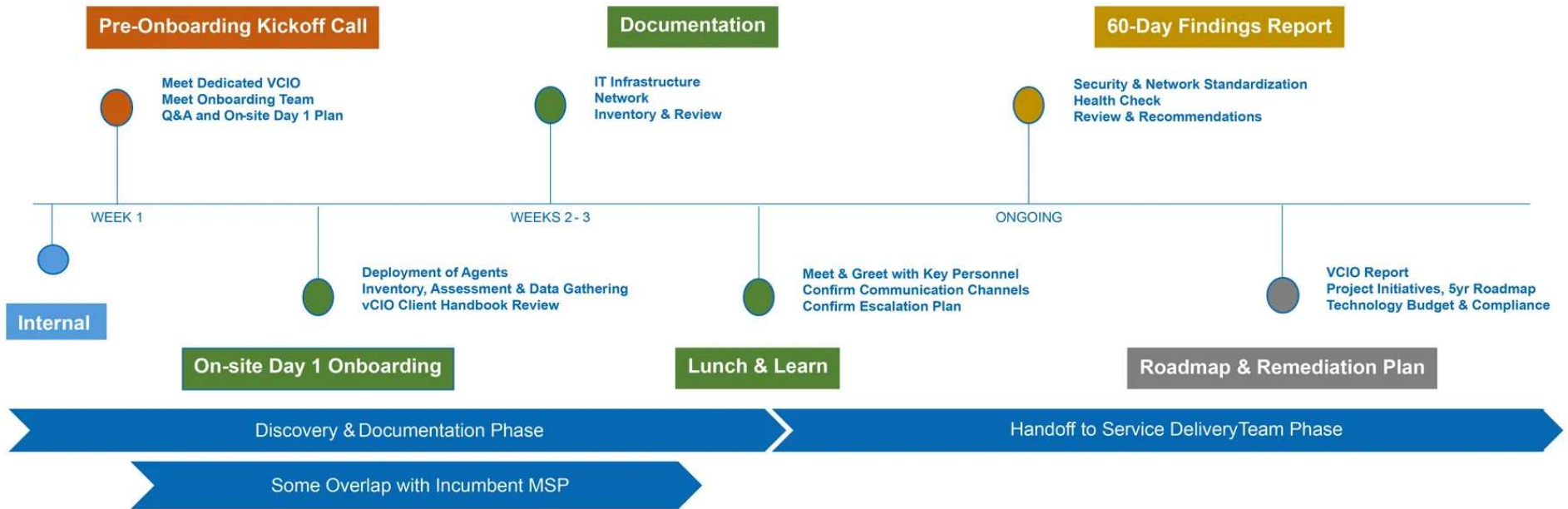


Our Client Onboarding Process

During onboarding, the Proactive Services Team performs discovery and documentation tasks and implements ITS standards. They replace client AV(EDR) and third-party email protections with our plans, document administrator and service accounts, and review network devices for firmware/software versions, support contracts, and vulnerabilities. External and internal network scans are run, and any unsecured external access is removed/replaced. The onboarding engineer and vCIO present the Client with a report of recommendations based on ITS and industry best practices, which may cover various areas such as physical network, device configuration, user policies, endpoint security, and email handling.



| BACKLOG | WELCOME | INITIATION | FOLLOW-UP | CLOSING |
|--|---|---|---|---|
| <ul style="list-style-type: none"> Identify a Point of Contact at your office Assign a Virtual CIO (vCIO) representative Assign a Dedicated Onboarding Engineer Contract analysis and validation Sales briefing regarding logistics and predictions | <ul style="list-style-type: none"> Welcome email introduction Digital Welcome Packet Review Schedule meetings Catalog any client questions Catalog any reactions, red flags, issues, etc. Catalog any positive feedback | <ul style="list-style-type: none"> Schedule a meeting to answer any additional questions and introduction to the management team Discuss how the needs were met before employing the plan Define expectations Planning for staff training (if applicable) | <ul style="list-style-type: none"> Assess the need for meetings Set short and long-term goals Answer any questions | <ul style="list-style-type: none"> Client needs are met vCIO will Review short and long-term goals Answer any questions Assess customer usage of services/tools Note any increase or decrease in use after onboarding completion |