

Stapel Managed Service On-boarding Checklist

The on-boarding is designed to make the transition to Stapel's Managed Services as smooth as possible. Based on the availability of information, the process should be expected to take place within a 3-5 week window depending on the services we've partnered to provide. Please refer to the outline below for an overview of our on-boarding process.

Week 1–2: Setup

Task	What we'll do	Your role
Agreement & invoicing	Finalize our proposal based on initial quotations and feedback.	Review & sign.
Kick-off call	We schedule a 30-min call to discuss payment, timeline, and next steps.	Attend call
Remote-monitoring agent	We send a link to install the agent on a server or designated machine. From there it auto-deploys to all other devices.	Install on the primary machine; share the link with remote users if needed.
Getting-Started Checklist	A short form that gathers network, user, and vendor info.	Complete and return.
Help Desk access	Once the agent is online, you can start using our Help Desk for basic issues.	Use as needed.

Week 2–3: Kick-off & On-site Visit

Task	What we'll do	Your role
On-site visit	One business day (or less) to audit hardware, document locations, and note common issues.	Provide access to office & server room; share floor plan.
Follow-up meeting	Account manager + technician review the checklist, fill gaps, and discuss priorities.	Attend.
Configuration changes	Any quick fixes or beneficial changes are applied during the visit.	Approve changes.
Vendor Hand Off	Work with current MSP to coordinate any documentation or system hand-off such as local admin accounts, hosted services, etc.	Assist in communication with current vendor to ensure smooth transition.



Week 3+: Service Roll-out

Task	What we'll do	Your role
Prioritized implementation	Services are deployed in order of your priority list.	Communicate priorities.
Admin accounts	We create necessary accounts for our tools.	Approve.
Software installation	Antivirus, backup, and other services are installed.	Verify.
Best-practice settings	We configure existing services to industry standards.	Approve.
Go-Live date	We agree on a date and inform staff of the new support process.	Communicate to staff.

Getting-Started Checklist (Key Items) we will be touching on throughout the on-boarding process.

- ▶ Floor plan – Label each workstation with the current user's name.
- ▶ Access – Provide keys, cards, or codes for office and server room.
- ▶ Employee list – Name, email, phone, title, location (remote or onsite).
- ▶ Vendor info – Contact details & account numbers for:
 - ◆ Internet, domain registrar, hosting, email, phone, key software vendors, copier leases.
 - ◆ Attach recent statements where applicable to provide detail on specific services
- ▶ Workstation settings –
 - ◆ Printer sharing?
 - ◆ Office version?
 - ◆ Other common applications?
 - ◆ Current antivirus/endpoint security?
 - ◆ License keys & media for all software.
- ▶ Common issues – List recurring complaints, user(s) affected, and any urgency notes.
- ▶ Provider Handoff – Prepare any existing documentation or admin account details from the current MSP vendor

Thank you for choosing Stapel. We're excited to build your technological foundation and look forward to a smooth on-boarding experience.

