# CNS Onboarding Process

Sacramento's Trusted Technology Partner for Over 30 Years

**CNS**
*Your Partner in Technology*

Over **30** YEARS OF EXPERIENCE

# What is the CNS Onboarding Process?

As soon as you contract with Capital Network Solutions to become your Managed IT Services provider, we kick off our comprehensive onboarding process. In our thirty-plus years in the IT industry, we have onboarded businesses of all sizes in a variety of industries to our managed services plans. Of course, our IT experts will be there to walk you through every part of the process. Just take these seven simple steps with CNS, and you'll never have to worry about your business IT again.

# Kickoff Meeting

**What we do:** This is what we call the front-end onboarding, which is simply the client communication. We schedule a meeting to go over the details of the process and discuss any special requests or policies that might conflict with our standards.

**Why we do it:** Beyond the standard meet-and-greet, we want to set expectations for the onboarding process and discuss how our technology and support will provide a positive impact. We also want to find out why you decided to work with Capital Network Solutions and ensure that we address all your business needs.

**Sample questions:** Were you unhappy with your previous IT provider? Was there an incident? Are there any concerns about your existing infrastructure, such as slowness or crashing? Do you need to meet any security or regulation requirements, such as PCI, HIPAA or CCPA? Does your business use any special apps like POS software or unique hardware like warehouse inventory guns?

# Assessment

**What we do:** We need to know what we're going to support, so we do a full infrastructure assessment. This assessment involves documenting your network equipment, your servers, your applications, your support contracts, your vendors and more. We also perform a Security Risk Assessment to help identify any vulnerabilities that we need to address.

**Why we do it:** We need to make sure everything is accessible to support your employees and manage your IT network. However, our primary goal here is to document everything about your system. We have a secure portal where we keep the documentation, and you will gain access to it once the onboarding process is complete.

**Sample questions:**
- What is your current hardware and software situation?
- Do you operate a firewall?
- Who is your ISP?
- What line-of-business applications do you use?
- Do you limit your employees' access to sensitive data?
- How long do you set your computer screens to lock when not in use?

# Project Plan

**What we do:** We come onsite to meet and review everything together and figure out your unique business needs and goals. Using the gathered information, we will create a list of IT priorities and collaborate to craft the perfect coverage plan.

**Why we do it:** It's about education, not about forcing a solution on you. In the world of managed services, one size does not fit all, so it's essential to tailor solutions to the individual business.

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# Deployment

## Remote Agent and Data Backup Setup

**What we do:** Our trained and certified technicians come onsite to install our remote monitoring agents. These are the same people who will eventually serve as your help desk support. This remote monitoring agent allows CNS to remotely access and support your employees' computers. It also facilitates the Windows Security Patch updates.

The same software agent gets installed on any on-premise Windows Server machines. CNS monitors your Microsoft Windows Server machines and hardware for issues like low disc space, hard drive failures or outages.

If you operate an on-premises server, we will also install a data backup appliance at this time. We will work with you to create a detailed backup agreement outlining the schedule, as well as the retention and recovery options. For clients with Microsoft Office 365, we install the Barracuda Cloud to Cloud backup solution to protect emails and any data store in OneDrive or SharePoint.

**Why we do it:** The remote agent lets us proactively monitor your system. Meanwhile, the backup device protects your data in case of an emergency. Going onsite also allows us to get a visual assessment of your infrastructure. That makes it easier for us to see the big picture.

## Antivirus Deployment

**What we do:** In the other onsite portion of the process, we convert you over to our antivirus software. First, we uninstall any existing antivirus, and then we install the CNS antivirus.  Finally, we confirm that all computers are checking in.

**Why we do it:** Antivirus software is a necessary yet all-too-often overlooked cyber security measure. By requiring clients to use the antivirus products that our technicians know the best, we can provide the most efficient customer service.

## SPAM Filter/Firewall/Patching Setup

**What we do:** More cyber security measures, although these get handled offsite.  We deploy the email filter, set up the firewall rules and come up with a software patch management schedule.

**Why we do it:** Statistics show that most small businesses go out of business within one year of suffering a cyber security incident.  With Capital Network Solutions guarding your perimeter and monitoring your interior, you can sleep easy at night.

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# Transition and Training

**What we do:** The help desk is now open for use. We outline the process for calling in a service issue, discuss our after-hours availability, lay out the patching and backup schedules and more. Welcome aboard!

**Why we do it:** More than anything, we want to make sure that you transition to managed services goes seamlessly and remains tension-free. At this time, we can also discuss big-picture ideas and upcoming projects. Any time you have a question, pick up the phone and give us a call.

# Virtual CIO Meeting

**What we do:** Our Virtual CIO will meet with you bi-annually to discuss your organization's strategic vision. We will develop a three-year Technology Roadmap that will allow you to accurately budget your computer infrastructure expenses for the present and future. These medium- and long-term plans will be incorporated as part of your overall Managed IT services with CNS.

**Why we do it:** Most large organizations have a CIO responsible for developing an overall technology strategy, setting standards for computer operations, and ensuring the computer and network infrastructure meet organizational needs. Smaller organizations often do not have the resources required to support a full-time CIO, yet they still need a highly skilled and experienced information officer to survive and grow.

Our Virtual CIO is familiar with your business processes as well as the current technology you are using. They work with the owner and senior managers at key times of the year to discuss your organization's strategic vision.

*NOTE: The CNS onboarding timeline varies based on the size of your organization and other factors, and some of these tasks may happen simultaneously. Additional information and a more detailed timeline will get dispensed during the Initial Meeting phase. If you have any questions in the meantime, give Capital Network Solutions a call at (916) 366-6566 and find out how we can help your business.*