QUESTION

What Happens During the MSP Onboarding Process?

Answer: Looking to switch IT providers? Our onboarding process is simple, seamless, and stress-free. At Captain IT, we specialize in helping small and mid-sized businesses transition to reliable, proactive Managed IT Services — and it only takes 3 easy steps.

Step 1: **You Make the Introduction**
Introduce us to your current IT provider (if applicable). That's it — we'll take it from here.

Step 2: **We Collect Everything**
We reach out to your current IT company (or internal IT team) and gather:

- [ ] Network documentation
- [ ] System credentials
- [ ] Licensing details
- [ ] Access to platforms, servers, and cloud tools

Step 3: **We Take Over and Begin Support**
We transition services behind the scenes and begin providing proactive IT support.

What Does Captain IT Do Behind the Scenes?

Answer: Behind every successful onboarding is a detailed process. Here's a high-level checklist of what our expert team handles during your Managed IT onboarding:

Step 1: **Secure System Access**

- [ ] Lock down administrative accounts
- [ ] Revoke former provider access
- [ ] Set up role-based user permissions
- [ ] Secure access to Microsoft 365, Google Workspace, and servers

Step 2: **Workstation & Server Management**

- [ ] Cloud Email & DNS Configuration
- [ ] Verify email routing and domain DNS records
- [ ] Set up spam filtering, email encryption, and backups
- [ ] Secure Microsoft 365 or Google Workspace with MFA and admin controls

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Step 4: **Backup & Disaster Recovery**

- [ ] Implement automated backups for critical files and systems
- [ ] Test recovery and continuity procedures
- [ ] Ensure data protection meets compliance requirements

Step 5: **Network Documentation**

- [ ] Map your network infrastructure (firewalls, switches, Wi-Fi, etc.)
- [ ] Document vendors, logins, warranties, and licensing info
- [ ] Organize everything in a secure IT management system

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Step 6: **System Optimization & Support Setup**

- [ ] Standardize workstation settings
- [ ] Improve network speed and stability
- [ ] Set up ticketing, support processes, and SLAs

Step 7: **Dedicated Account Management**

- [ ] Assign a dedicated account manager
- [ ] Establish regular check-ins and IT strategy reviews
- [ ] Provide a direct line for fast, responsive support

Why Captain IT?

We help businesses across Southern California and beyond with fast, secure, and fully managed IT support. Whether you're in construction, manufacturing, legal, education, or healthcare, our proven onboarding process ensures zero downtime and long-term IT success.

Ready to switch your IT provider?

Let Captain IT make your onboarding fast, friendly, and frustration-free.

Contact us today to schedule your free consultation.

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