

ebook

8 Best Practices for Automating MSP Onboarding

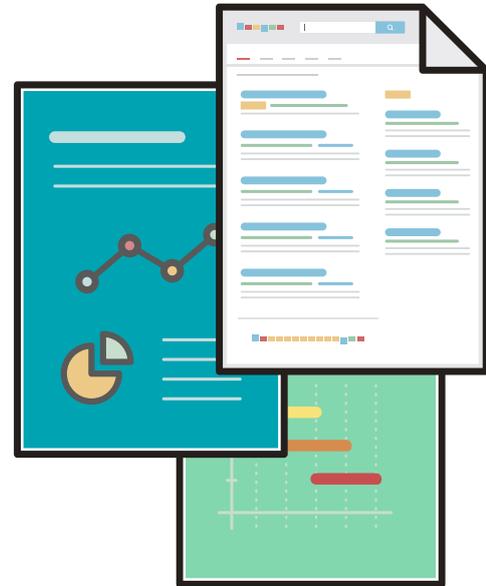
In the fast-paced MSP world, time is of the essence. Manual onboarding can slow you down, leading to inconsistencies and missed opportunities. In this eBook, we'll discuss best practices to automate your onboarding processes so you're consistent with every client, save valuable technician hours, and deliver exceptional service.



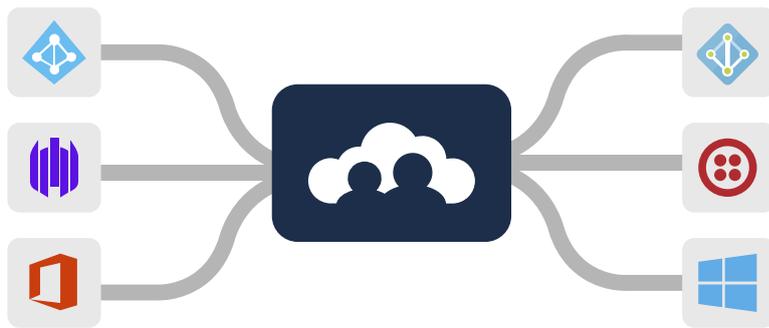
1. Document your current process

You can't automate something that doesn't exist. Moreover, you can't automate something you don't know exists. To initiate an effective and automated onboarding process, you need to understand and document the current process you have in place. Think about the existing tools you have and list their role in your current onboarding.

Documentation could be as simple as listing out tasks in Microsoft Word. Then, get feedback from your team and refine your process before you begin building your automation. This becomes your blueprint for building automation.



2. Don't build what already exists



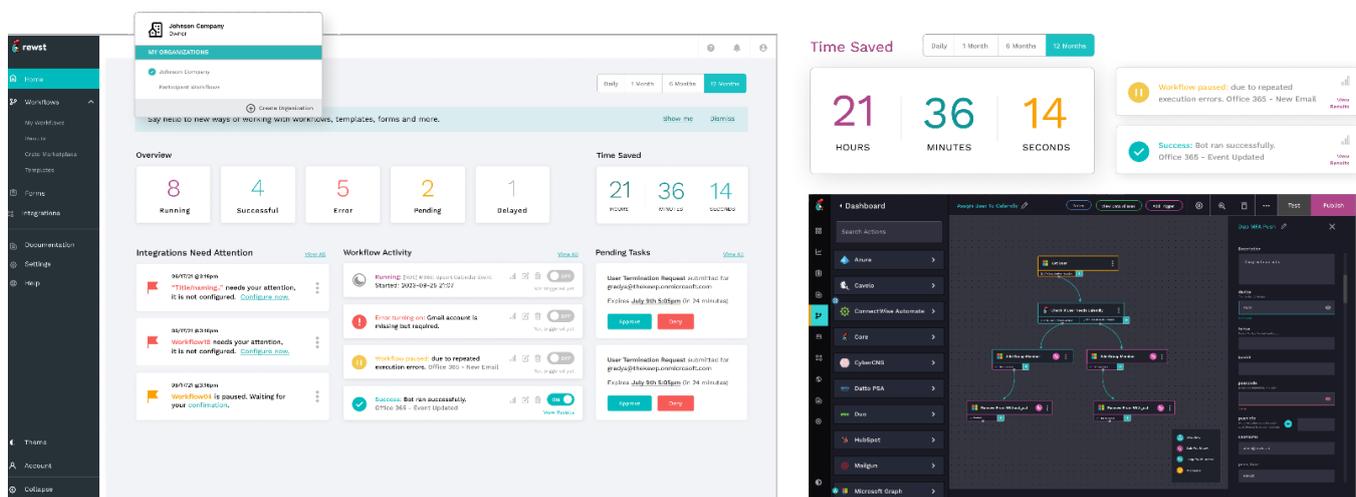
Some Robotic Process Automation Platforms (RPAs) have pre-built automations that help you realize value quicker without reinventing the wheel. With some minor configuration, you can have a workflow that runs and then customize it from there.

For example, Rewst has a pre-built onboarding workflow so you can create new users in the customer environment. We can even support your existing tools like *AAD*, *AD*, and *JumpCloud* as identity providers.

3. Start small for big wins

Begin your automation journey with targeted goals. Identify specific onboarding tasks that are easy to automate. Don't get bogged down by all the contingencies at first. Consider things you can build on that yield immediate results, like adding a user to a group or creating a ticket from a new-user form.

Then test out your initial workflow. Testing drives success because it enables you to identify automation's immediate value and encourages you to map out your next steps. By starting small, you can build momentum, gain valuable insights, and gradually expand your automated onboarding process.



4. Prioritize security challenges

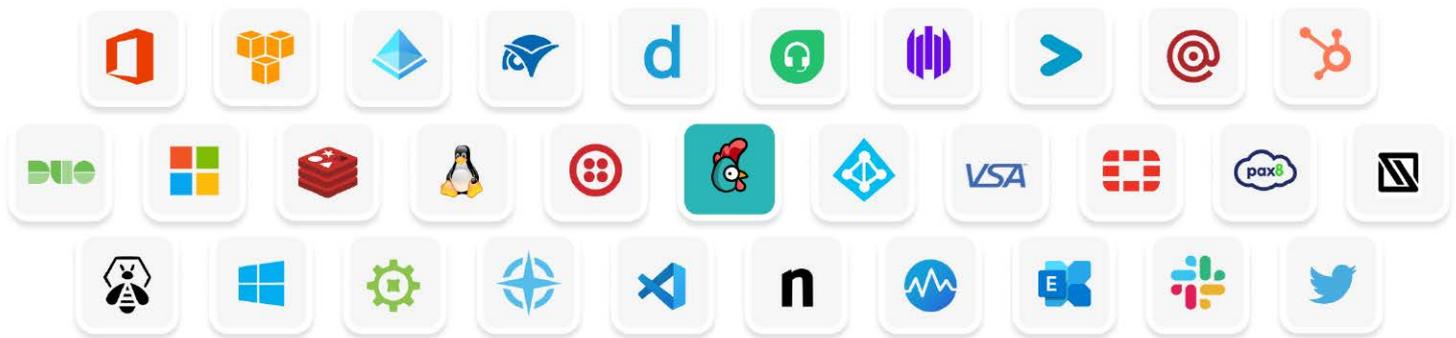
Mitigate security risks associated with onboarding. Implement workflows that help you streamline identity access management (IAM), multi-factor authentication (MFA), and privilege access management (PAM) to safeguard sensitive information. Secure your processes while building client trust.



5. Maximize your existing tools

Harness the power of the tools you already have in your tech arsenal. Leverage your existing software with RPA integrations that connect your RMMs, PSAs, documentation tools, and Primary Identity Providers.

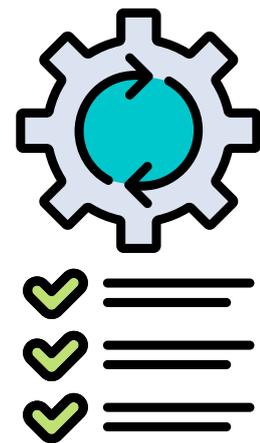
Consider how you can streamline tool-specific tasks associated with service level agreement (SLA) management, account creation, and user provisioning. Then tie all of those microtasks together under one onboarding workflow. This end-to-end process helps you maximize your investments and minimizes disruptions for your clients and technicians.



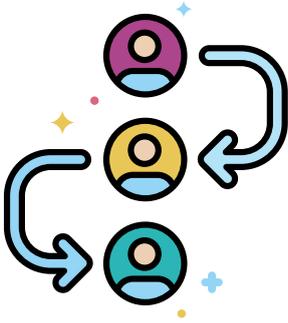
6. Annotate your Workflows

Have those in charge of automation annotate each onboarding workflow they create. This way, someone who didn't build the automation has access to the information they need to understand it.

Over the long run, this will improve the maintainability of the automation and your ability to update it as your needs and processes evolve.



7. Standardize across your team



Achieve consistent service delivery by making automation the standard for your entire team because let's face it. For some reason, clients are generally more understanding when servers break, but they get frustrated when a small step in user onboarding doesn't work.

Automating user onboarding ensures the same steps are followed in the same order, every time the workflow runs. Build client trust and deliver exceptional service by eliminating variations in your onboarding experience.

8. Embrace a future focused on continual development

Starting small with a clear plan allows you to launch quickly and learn as you go. It's not about building everything at once; it's about understanding your core needs, acting on them, and enhancing them as you go.

Unlocking efficiency through automation...

By implementing these practices, you're not just embracing automation – you're embracing the potential to transform your MSP into a powerhouse of streamlined service and client satisfaction.

Discover RPA Platform: Rewst

Want to see these best practices in action? Discover how Rewst's automation platform can help automate user onboarding, elevate your operations, and enhance client experiences.

[Request a Demo](#)

