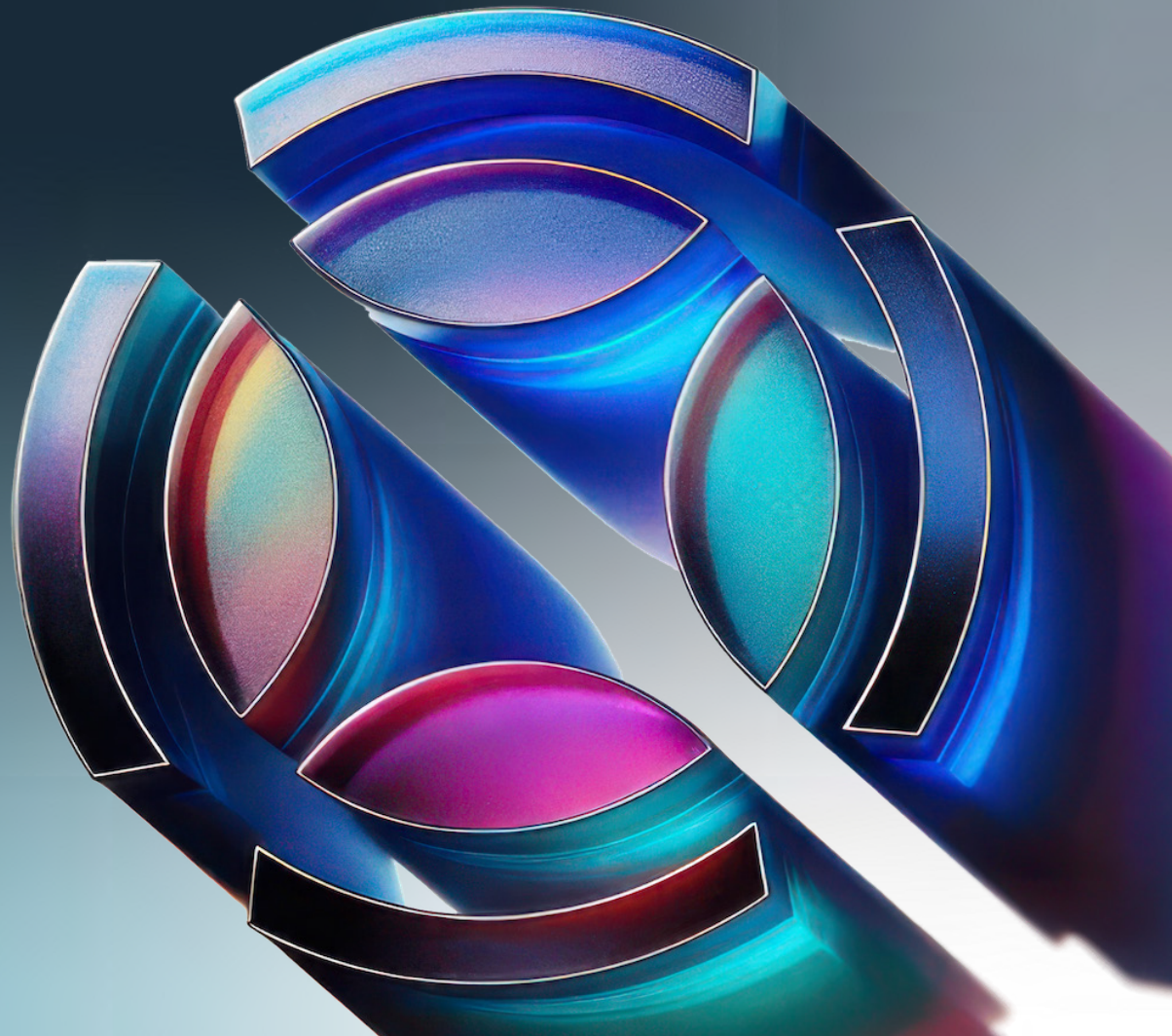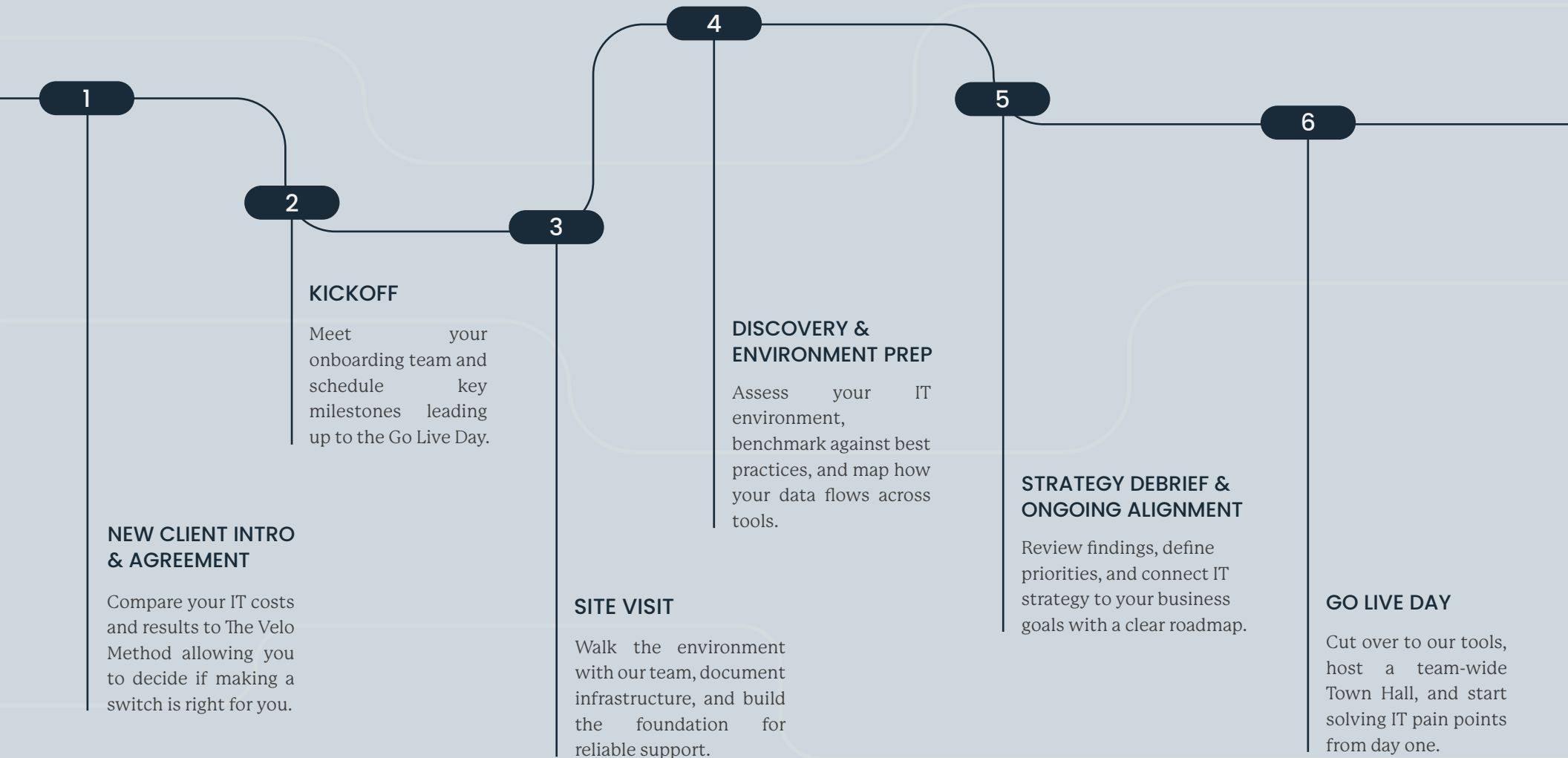# New Client Onboarding Roadmap

This guide is your roadmap to what you can expect during onboarding. It's designed to give your team clarity, confidence, and insight into how we begin working together. We'll walk you through each milestone, from the first handshake to the point where your IT environment is secure, documented, and fully supported by our team. Every step is built to be thoughtful and efficient, with clear timelines and communication.

Your Onboarding Roadmap

MAKING NECESSARY IMPROVEMENTS TO IT INFRASTRUCTURE, PROCESSES, AND MANAGEMENT IS EASY WITH OUR THOUGHTFUL TRANSITION PROCESS.

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KICKOFF

Meet your onboarding team and schedule key milestones leading up to the Go Live Day.

DISCOVERY & ENVIRONMENT PREP

Assess your IT environment, benchmark against best practices, and map how your data flows across tools.

NEW CLIENT INTRO & AGREEMENT

Compare your IT costs and results to The Velo Method allowing you to decide if making a switch is right for you.

SITE VISIT

Walk the environment with our team, document infrastructure, and build the foundation for reliable support.

STRATEGY DEBRIEF & ONGOING ALIGNMENT

Review findings, define priorities, and connect IT strategy to your business goals with a clear roadmap.

GO LIVE DAY

Cut over to our tools, host a team-wide Town Hall, and start solving IT pain points from day one.

New Client Intro & Agreement Signing

Every new client relationship begins with a value-driven conversation, not a sales pitch. In our first meeting, we work together to understand how technology currently supports your business: what you're spending, where it's working, where it's not, and how IT fits into your revenue, margins, and team productivity.

From there, we provide a side-by-side comparison of your current IT investment versus what our clients experience daily: the tools, the support, the cost, and the outcomes. If you need more evidence, you can talk with a client reference or you can come see our operation in person! At the end of it, you'll have a tailored analysis designed to help you make a confident, informed decision.

If you decide the Velo Method is a fit, we walk through the agreement and terms together. Our contracts are structured with partnership in mind: clear commitments, balanced responsibilities, and a full satisfaction guarantee after the first year.

We also review the onboarding calendar. Because we limit the number of onboardings we perform each month, every new partnership receives focused attention and the highest quality experience.

Once an agreement is signed and your onboarding fee is paid, we begin preparations immediately. We'll also provide a transition letter with a turnover checklist you can send to your previous provider, outlining what we need and how we'll handle the switch. Our team has successfully transitioned clients away from dozens of different providers—we know how to make it smooth, professional, and respectful.

"We had played the MSP game. We had been with multiple MSPs over the years, and we hadn't found that Goldilocks partner. We could never really find one that resonated or worked for us. I was dealing with a lot of pain for myself and my team, being consumed with day-to-day firefighting on technology issues. After relying on a referral from a trusted advisor, I called Velo. And that was one of the best decisions."

JAY SWINDLE

PRESIDENT, STAGEN LEADERSHIP ACADEMY

Kickoff Meeting

Usually done virtually, the kickoff meeting is where our teams come together, align expectations, and establish the working rhythm that will guide onboarding.

We start by introducing the key players on both sides: your stakeholders and our onboarding specialists. Then we walk through the onboarding process step by step, confirming timelines, sharing documentation expectations, and reviewing our mutual responsibilities.

DURING THIS MEETING, WE'LL:

Finalize key dates for the Site Visit, Discovery Meeting, and Go Live Day

Review the **turnover checklist** and discuss any gaps in credentials needed

Set expectations for 24/7 or after-hours access and site security

Begin learning about your standard operating procedures and internal IT norms

We'll also provide a secure **client data room**, where files and credentials can be exchanged safely throughout onboarding. Whether you're transitioning from an internal IT team, a previous provider, or partnering with us in a co-managed model, this is where the handoff begins.

"We've been with Velo IT Group for many years now, and these guys are the real thing. They are highly responsive, committed to excellence, and they've helped us to modernize our IT infrastructure across multiple states. Velo delivered on all of their promises, and we couldn't be happier to work with them."

TODD TRAHAN

PRESIDENT, CAL-CHLOR, CALCIUM CHLORIDE DISTRIBUTION COMPANY

Site Visit

Our first technical site visit marks the beginning of hands-on collaboration. With administrative access confirmed, we're ready to get boots on the ground

During this visit, we conduct a full inventory of your IT environment: hardware, software, infrastructure, and physical setup. We tag and document key assets, verify network and server configurations, and begin building the detailed documentation library that supports long-term reliability.

Just as important: we meet the people we'll be supporting.

We send key members of our team who will be dedicated to your account long-term. This is our chance to connect face to face, answer questions, and build trust. We may grab lunch together, walk the office, and get a feel for how your business operates in real life—not just on paper.

Photographs and visual documentation are captured during this visit. That way, if a Velo technician ever needs to support your site in person - even if it's someone new, they'll arrive equipped with a better understanding of your environment.

Discovery and Environment Prep

This phase combines automated data collection with human insight to build an even more detailed picture of your IT environment for our team. Led by our Strength Team, we begin a baseline review, a comprehensive assessment of your IT environment, evaluated against our best practices and industry standards.

USING A COMBINATION OF REMOTE MANAGEMENT TOOLS AND ON-SITE FINDINGS, WE DOCUMENT:

- All endpoints, servers, and network hardware

- Security configurations and potential vulnerabilities

- Compatibility gaps and sources of technical debt

- Application and data flows across your organization debt

CORE TOOLSET:

These tools are tested and prepped without interfering with your current environment. No changes are made until Go Live Day. If there's any chance of conflict with existing tools, we delay activation to ensure a clean cutover. But when compatible, our tools may be installed in a "dormant" state alongside what's already in use, ready and waiting for Go Live Day.

Tools

As you probably know, a tool is just a tool until it's in the hands of a skilled craftsman.

Anyone can purchase and turn on a tool like Sentinel One, but the magic is in how we deploy, monitor, and continually improve our tools. Our method works because it's disciplined, tested, regularly examined, and executed with consistency.

Microsoft

SentinelOne®

Addigy

CONNECTWISE

ScreenConnect

Go Live Day

Go Live Day is the turning point, the moment we transition from preparation to active management of your IT environment. By this point, we've gathered the data, walked the sites, met the team, and staged every critical tool. Now it's time for everyone on your team to enjoy the experience of the Velo Method.

TOWN HALL

Equally important is the Town Hall lunch where we cater in lunch and gather your team for a brief, upbeat introduction to the partnership. Your people meet our people. We share how to get support, what to expect, and how to reach us. Every user receives a welcome kit with our contact info so help is always within reach.

We open the floor for feedback, frustrations, IT expectation discussion. Many long-standing issues get resolved the same day or within the first week. The partnership is active. We're ready to support day-to-day needs while also tackling broader, high-impact issues that need strategic planning.

WHAT ABOUT DOWN TIME?

Thanks to our staged approach, we keep disruption to a minimum. Aside from a few planned reboots, typically after hours, there's no broad outage or interruption. Most users experience a seamless shift, supported on-site by our team.

THE TECHNICAL CUTOVER INCLUDES:

- Removing legacy antivirus and management tools
- Activating our monitoring, patching, and security platforms
- Deploying remote support and endpoint protection tools across all devices

Strategy Debrief & Ongoing Alignment

Go Live is just the beginning. After cutover, we shift from setup mode into long-term partnership. In the weeks following onboarding, we meet with you to share findings, clarify priorities, and lay the foundation for a forward-looking technology plan.

STRATEGIC DEBRIEF

Initial discoveries from onboarding and baseline review

Key risks, performance gaps, and early wins

Recommended short-term fixes and long-term strategic improvements

Opportunities to align IT with business growth initiatives

Budget and timeline considerations

Through regular check-ins and ongoing best practice assessments, your **Strategy Engineer** will help you make confident decisions about infrastructure, tools, and investment.

Our goal is to ensure your IT environment stays modern, secure, and aligned — taking full advantage of everything the Velo Method has to offer.

"We were at a point where we had some aging gear and some aging infrastructure, and we knew we had to tackle. We were able to do a Hardware as a Service agreement with Velo. This ensured we are always up to date with the latest and greatest, and we're able to cycle that hardware out as it ages.

They really help us think through the details, use their expertise in the technology field, so we don't have to worry so much about all the nuances and intricacies. We can lean into what we do best and count on Velo to do what they do best."

DAVE CLARK

ASSOCIATE PASTOR, FELLOWSHIP CHURCH

It is our goal to roll out the red carpet to you and your end users as we integrate our IT management program with your business.

When you're dealing with IT issues, switching service providers may seem like a new headache rather than a way to get rid of an old headache. If you were making the switch from one type of IT cowboy to a different type of IT maverick, we could see your conundrum, but we are neither. We have a scientific approach to IT management where our secret sauce is based on industry standards and best practices and attention to fine detail.

Switching IT providers will certainly require some of your time and attention, but the benefits of making the switch to a more efficient, results driven team will be worth the investment. And with our process, you can rest assured that we'll take full responsibility for the transition.