CLIENT SERVICE & TRANSITIONS

Client onboarding & service transition

Move into managed support with verified ownership, a documented baseline and explicit acceptance of the starting environment.

DOCUMENT	PREPARED	STATUS
MSP-02	1 October 2026	Draft for adoption

Scope & application

New MSP clients, incoming-provider transitions and additions to an existing managed environment. Access and tooling require client authority before installation or connection.

Who does what

NovaSoft engagement lead

Scopes the work, assigns authorised personnel and maintains implementation and exception records.

Client service and risk owners

Approve access, business decisions, priorities, notices and residual risks; provide accurate scope and timely lifecycle requests.

Users and suppliers

Follow the approved arrangements, report issues and perform responsibilities assigned in the service schedule.

Draft for adoption. Confirm applicable requirements, implementation, owners and approval in the written client service schedule before operational use. Effective date is assigned on adoption.

THE POLICY IN PRACTICE

Control requirements.

01 Authorise the transition

Identify the client decision-maker, outgoing provider, business owners and transition contacts. Record permission to discover systems and the date responsibility for each service changes.

02 Discover without disrupting

Inventory accounts, devices, networks, applications, licences, backups and dependencies. Use read-only discovery first where practical. Record unknown ownership and unsupported assets for resolution.

03 Exchange access securely

Use an approved vault or secure handover channel. Verify ownership before granting delegated administration. Separate client environments and avoid copying another client's permissions or credentials.

04 Check the baseline

Review access, MFA, endpoint protection, updates and recovery arrangements. Record observed evidence and gaps; a checklist alone does not establish that a control is operating effectively.

05 Introduce management tooling

Agree agent installation, permissions, telemetry, remote access, support notices and removal arrangements. Test a limited deployment before expanding to the agreed inventory.

06 Accept the service start

Agree outstanding remediation, accepted risks, included assets and escalation details. Confirm backup and restoration responsibilities before removing existing protection or ending an outgoing service.

FROM POLICY TO DELIVERY

Operate. Record. Review.

01 Approve discovery and obtain the existing documentation.

02 Validate inventory, ownership, access and recovery dependencies.

03 Deploy agreed tooling in stages and test essential functions.

04 Sign off the baseline, outstanding actions and service start.

Agree with the client

- Transition dates and outgoing-provider coordination
- Tool permissions and data collection
- Remediation priorities and funding
- Acceptance of unresolved risks

Evidence to retain

- Discovery inventory and handover receipt
- Baseline findings with evidence
- Tool deployment and service acceptance record

Exceptions & review

Record the requirement, reason, affected scope, risk owner, compensating measures and expiry or review date. Seek approval before deviating, or use documented emergency authority and arrange prompt review. Exceptions cannot waive applicable legal duties.

Review trigger: At onboarding, when adding a major service, and at the first scheduled service review.

Proposed owner: NovaSoft engagement lead with the client service/risk owner. Review at least annually, and earlier when the trigger above applies. Version changes require an approval and client-impact record.

References & related information

ASD/ACSC - Managed service provider guidance

ASD/ACSC - Essential Eight maturity model

NovaSoft public policy library and application notes