STARTING OR SWITCHING SUPPORT

MSP onboarding workbook

Use this with your incoming provider and internal owner to prepare a documented handover. Tick an item only when the agreed scope has been checked; record gaps on page two.

Organisation / reference	Owner / role	Date / review

CHECK TOGETHER. RECORD THE GAPS.

- [ ] **Confirm the authority**
  Name the client owner, approving contacts and systems included in the engagement.
- [ ] **Map the important work**
  List the business services, applications, suppliers and dependencies that need continuity.
- [ ] **Establish ownership**
  Confirm who controls domains, cloud tenants, licences and device records.
- [ ] **Arrange access safely**
  Agree named administration accounts and approved access paths. Transfer secrets only through the agreed private channel.
- [ ] **Review recovery arrangements**
  Identify backup coverage, recovery objectives and available restore evidence; record gaps.
- [ ] **Agree the support route**
  Confirm request channels, coverage, escalation contacts and outstanding work with both parties.
- [ ] **Accept the baseline**
  Record inherited issues, approved exceptions, actions and the handover acceptance decision.

Ticked boxes record your review; they do not certify compliance. Do not enter passwords, recovery codes or private configuration here.

DECISIONS, ACTIONS & EVIDENCE

Make the next step clear.

Complete locally in a PDF reader or print for a discussion. Keep the completed copy in your approved private record system.

Scope and critical services

Included systems, business owners, supplier dependencies and exclusions.

Ownership and handover

Record owners and references to private transfer records. Do not enter credentials.

Gaps and next actions

Unresolved items, responsible owner, target date and acceptance conditions.

Acceptance and review

Approver, decision, handover date and next review. Use the agreed approval process.

RELATED POLICY / GUIDANCE

Client onboarding

Client offboarding

Service governance

ASD/ACSC: Engaging a managed service provider