New Client Onboarding Process and Transition Procedure

The following process is a summary of the tasks that Myrtec follows when transitioning new customers over from their existing provider. This process has been carefully refined after more than ten years of experience in the IT sector dealing with a range of industries and customers.

Myrtec service staff are well adept at dealing with incumbent providers and are always courteous and professional.

Myrtec manages the transition process by liaising with the primary contact to ensure clear, honest and consistent communication. The transition is broken down into three key stages:

Pre Transition

- **Sign the Agreement** - You've signed the Myrtec FLEX Agreement
- **Onboarding questionnaire and meeting link** - We'll send you an onboarding questionnaire and a link to book the transition planning meeting
- **Transition planning meeting** - We'll have the transition planning meeting and discuss the responses to the questionnaire
- **Preparation and communication** - Your Primary Engineer will then setup portal access and start preparing everything on our end for the transition

Transition

Your Primary Engineer will install Agents on company devices (remotely or via an existing tool), change Admin passwords, remove your previous provider's access and complete an audit of systems, apps, licenses and disaster recovery systems.

During this stage, we recommend you sent out the templated communication to your staff with our contact details.

Post Transition

- **Technical Review** - We'll complete an audit and document of systems, apps, licenses, and disaster recovery systems. We'll also complete the security assessment (if required) and review for recommendations. And finally, we will complete your onboarding and compliance report and distribute these ready for your post-onboarding meeting

- **Post-onboarding review and strategy planning** - Your Account Manager will book a meeting with you to discuss risks, your business goals and plan IT risk remediation and improvements
- **Ongoing business review** - As your new business partners, we will consistently ensure your technology strategy and business goals are aligned

Note: Most onboardings are complete within 2 weeks. Typical hours consumed for onboarding would range from 2 hours -where applications are standardised and users install Agents themselves, through to 10 hours - where Engineers install Agents onsite and need to visit multiple offices with complex applications.