Sample document. The firms in it are described by their trade, and every figure is illustrative.

Onboarding pack for an architecture practice with two offices

Your first ninety days with us

Who does what, what we need from you, and when each part of the move happens.

Prepared for
An architecture practice with two offices

Prepared by
An IT support firm

Date
November 2026

Welcome

Thank you for choosing us. This pack covers the handover from your current provider, the security work in the first three months and how to reach us. Nothing changes for your staff until week two, and we will tell them before it does.

What happens first

1. **Week 1: discovery.** We list every laptop and user account, and agree the handover date with your current provider.
2. **Week 2: handover.** Support moves to us on the agreed date. Your staff get one email explaining how to log a request.
3. **Weeks 3 to 6: tidy up.** We remove old accounts and turn on multi-factor sign-in for everyone. Backups are tested monthly.
4. **Month 3:** Cyber Essentials. We prepare you for the assessment and book it once every control is in place.

What we need from you

ITEM	WHO USUALLY HAS IT	NEEDED BY
Admin access to email and file storage	Office manager	Week 1
List of starters and leavers this year	Office manager	Week 1
Contract end date with current provider	Practice director	Week 1
A convenient evening for laptop updates	Practice director	Week 3

Today and after onboarding

TODAY

- × Shared passwords for some accounts
- × Backups not tested
- × Three accounts for staff who have left

BY MONTH THREE

- ✓ Every person signs in with their own account and a second step
- ✓ Backups tested every month
- ✓ Leavers removed on their last day

Your setup ILLUSTRATIVE

How we will work together

30 min
First response, urgent

4 hours
First response, normal

Monthly
Review meeting

SOURCE Our standard service levels

Contacts

ROLE	FOR	HOW TO REACH THEM
Service desk	Any problem or request	Phone or the support portal
Account manager	Contracts, projects and reviews	Email, replies within a working day
Security lead	Cyber Essentials and incidents	Through the service desk

Next steps

Book the discovery visit for week one

Then

1. Send admin access before that visit