

# ONBOARDING ROADMAP

Incorporating a new documentation system in your organization requires careful consideration of various things. While it may seem overwhelming at first, you can manage this by following the proper guidelines. We've come up with this infographic to help you onboard your documentation system the right way.

## THE ROADMAP TO DOCUMENTATION ZEN

Here's an easy step-by-step guide to put you firmly on the path to documentation Zen.

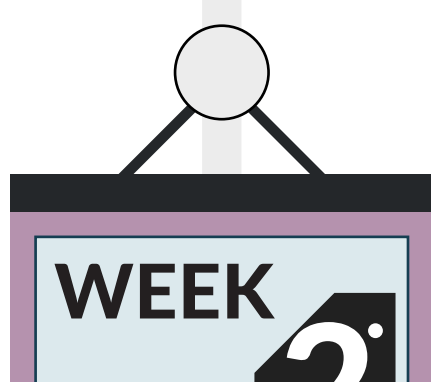


### GET ORIENTED

Your first few days in IT Glue are all about getting you and your team oriented with the platform. There are some key concepts that make IT Glue different from other documentation tools, so taking the time to understand them will greatly improve your efficiency in the future.

- Activate account
- Invite implementation team
- Assign a "documentation champion"
- Review key concepts in the IT Glue academy

KEY STEPS TO TAKE:



### CREATE INSTANT VALUE

Now that you're familiar with the IT Glue platform, start by creating your organizations (if you have them) and hardware assets. These can be easily created through one of our many integrations. Next, import your passwords. Although these are only two of the many asset types you will document, having them together will enable you to build relationships between them.

This will remove the "space between" spent searching for information and will save your techs significant time by providing the information they need at their fingertips.

- Create organizations & hardware assets
- Choose and connect primary data source/integration
- Import & relate passwords
  - If you have an existing password management system, you can decommission it to reduce your software costs

KEY STEPS TO TAKE:



### APPS & SERVICES

By this point, IT Glue is already acting as your central Asset and Password Management system, delivering a great amount of value. However, IT Glue can offer so much more. Revisit the IT Glue Academy to learn about apps & services along with procedural documentation.

- Complete concept training in IT Glue Academy
- Document apps & services and relate to hardware assets & passwords

KEY STEPS TO TAKE:



### ROLLOUT

Now is the time to document a model client or organization using the concepts of structured and standardized documentation you just learned. Once you're comfortable, develop a project plan to roll your documentation system out to the rest of your clients.

- Document a model client
- Create a project plan for your remaining clients
- Configure advanced features

KEY STEPS TO TAKE:



DOCUMENTATION ZEN

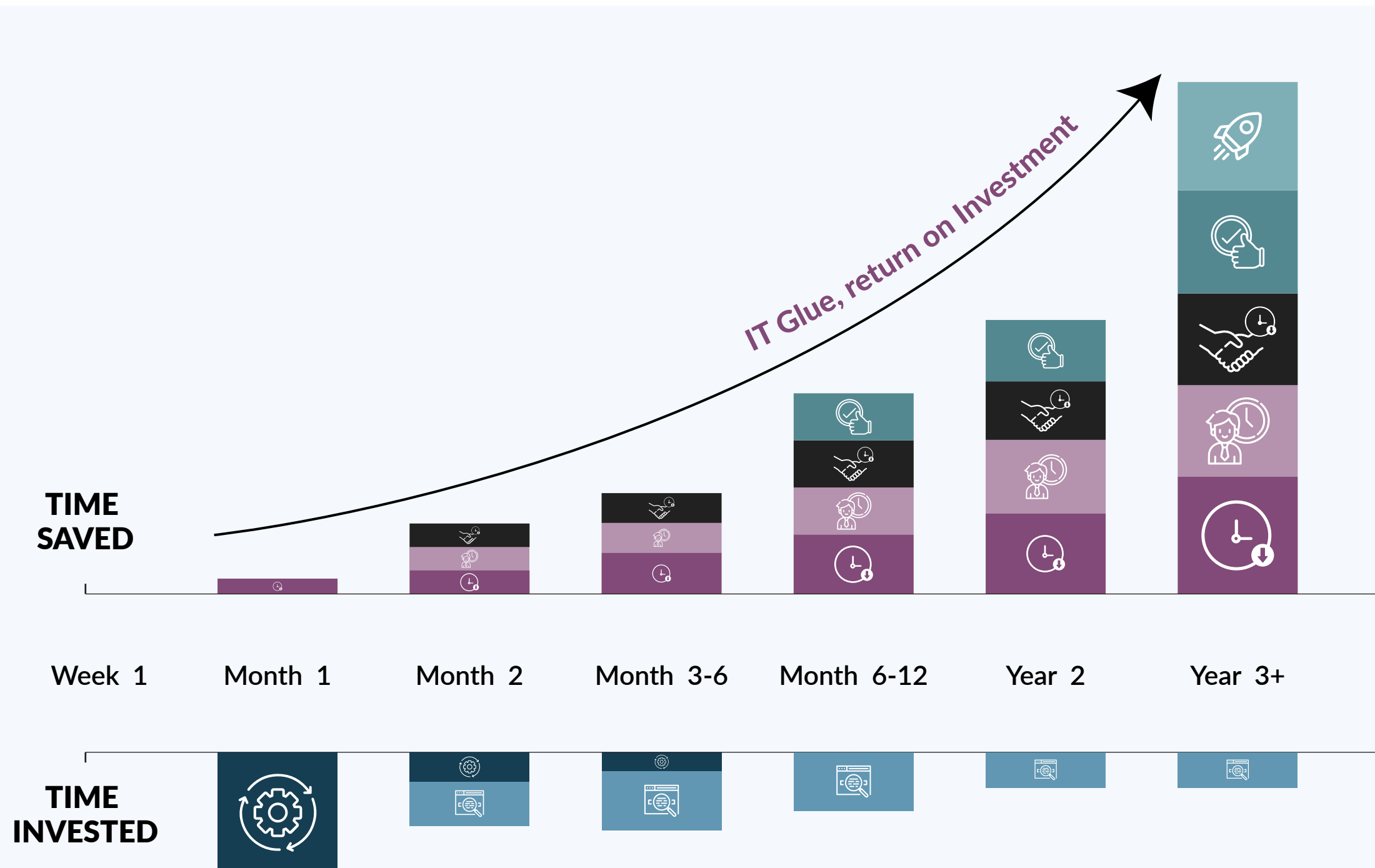
## IT Glue return on investment - Compounded year after year

IT Glue eliminates over 50% in time waste by maximizing the time and expertise of internal resources and eliminating the need for manual documentation. IT Glue's benefits can be witnessed in the form of high ROI as soon as you onboard. In addition, the time saved month over month and year over year is compounded to produce maximum gains.



*From day one, we utilized IT Glue well. Password management helps from day one, so we saw the benefits of IT Glue from the second we started using it. But now, today, we see the benefits of it in a huge way, with all the document management, workflow management, checklists and passwords all come together in one place. If you took it away from us, we'd be in big trouble."*

— Jeremy Anderson, Founder/CEO, OverWatch



### TIME SAVED



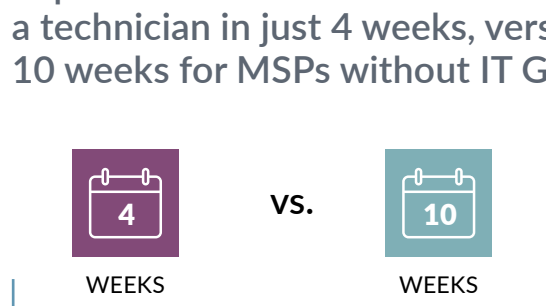
#### Reduced resolution time

- a. Resolution time saved is compounded as more documentation is added and more relationships are created.



#### Reduced technician onboarding time

- a. Technician onboarding time saved is compounded since your organization can leverage the existing documentation to onboard new technicians and get them up to speed as quickly as possible.
- b. IT professionals with IT Glue can onboard a technician in just 4 weeks, versus 10 weeks for MSPs without IT Glue.



#### Reduced client onboarding time

- a. Client onboarding time saved is compounded since your organization can leverage existing structure and standardization to onboard new clients quickly without worrying about which information needs to be captured.



#### Additional efficiency with new IT Glue features

- Q1 2020 • Office cloud editor
- Q2 2020 • Flexible asset automation for active directory security groups
- Q3 2020 • One-time password generator
  - On average, a technician needs to access an OTP code 6 days/week, saving up to 3 hours of operational efficiency
- Q4 2020 • Help center
- Q1 2021 • Technology alignment automation
- Q2 2021 • Live tickets
- Q3 2021 • myITchecklist™



#### Industry best practices

- a. GlueX and ConnectIT: Learn how best-in-class MSPs are leveraging IT Glue to its fullest potential and learn best practices, tips and tricks.
- b. Quarterly business reviews: Conduct a 360-degree review of your company through 4 different QBRs per year to ensure you are continuously driving efficiency and getting the most out of your IT Glue investment.

### TIME INVESTED



#### Setup & implementation



#### Optimization

- Review existing documentation and archive as needed
- Create new documentation based on new processes
- Set up additional integrations and automation