

## Onboarding Checklist

Company Name: \_\_\_\_\_

Date: \_\_\_\_\_

VO Onboarding Specialist: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Thank you for choosing Virtual Office. The following checklist will assist us as we work together to onboard your company. This is just the “what” for the process; the specifics of “where”, “when” and “how” will be defined by the information you provide on the Client Onboarding Questionnaire and the worksheets that go with it.

This list offers an overview of the process and some of the specific data and forms that will be required to get your company up and running on Virtual Office. Keep this handy, and refer to it often.

If you have any questions, please contact your onboarding specialist.

	Task	Your Action Required ★	Completed ✓
1	Onboarding Specialist assigned by VO		✓
2	Sign and return your <b>Client Engagement Contract</b>	★	
3	Identify primary contact inside your company		
4	Trainer assigned to you by VO		
5	Complete and return <b>Client Onboarding Questionnaire</b>	★	
6	Onboarding timeline provided to you by VO		
7	Account setup / Administrator Training	★	
8	Complete <b>Archive Account Request Form</b> , sign and return to VO	★	
9	Archive setup completed and verified by VO		
10	Complete <b>DNS Update Request Form</b> , sign and return to VO	★	
11	Complete <b>SSL Revocation Request Form</b> , sign and return to VO	★	
12	Login information provided by VO		
13	Complete <b>MX Record Modification Request Form</b> , sign and return to VO	★	
14	Existing Data imported into the VO servers and verified		
15	Mobile device setup		
16	User Training		