MSP Resource: Customer Onboarding Strategies

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There are four aspects to onboarding – two are locked-in, the other two have options associated with them.

Locked-In Requirements:

- Create the account for your customer
- Deploy the Dynasend O365 add-in (when everything else is done)

A Requirement, but with Options:

- Design the signature (visually and content options)

Fully Optional:

- Create the Entra ID to Dynasend sync

The Locked-In requirements are not covered here - you'll find details on them in the Onboarding Guide.

Design the signature (visually and content options)

There are two aspects of any signature program:

- the content it includes
- how it appears (layout / fonts / colors)

Our "Guided Setup" process is a super-easy DIY widget that will quickly lead to a good outcome for in terms of both these aspects.

However, the decisions regarding the content and appearance are often best left with your customer – it's going to be *their* signature.

We recommend one of these two options:

1. Identify a person at your client's company that will do the design and **have them complete the design process prior to roll-out**.
2. **You create a very basic generic design for them**, roll-out the program, and then **let them fine-tune the design post launch**.

The first option is probably best when you have an enthusiastic customer who is willing to spend a little time (20 minutes or so) creating the signature design they want.

The second option is probably best if the customer is ambivalent about email signatures. You can create a quick, but still good, signature design for them. They may become more interested in refining the signature themselves once the program is in use and they are seeing their new signatures on their emails.

Entra ID Sync

The decision surrounding the Entra ID sync is fairly straightforward. If the sync is set up, Dynasend will pull whatever user data is available in Entra ID automatically, and keep the user data synced going forward.

It's important to note that many email signature programs will have content options that exceed what is available in Entra ID. Typically the data that we are able to import from Entra ID is:

- Email address
- Name
- Title
- Phone Number
- Mobile Number
- Location

It’s quite possible that the email signature program will contain additional content options such as:

- Professional Credentials / Certifications
- Personal LinkedIn URL
- Calendar URL

The data for these fields will not exist in Entra ID and hence cannot be imported / synced. The solution is a hybrid approach where the available data is pulled from Entra ID and the rest is manually input via Dynasend’s user portal or manager’s dashboard.

If you elect to skip the Entra ID sync altogether, then all the user data will need to be manually input via Dynasend’s user portal or manager’s dashboard. This is a perfectly acceptable option in most cases, especially for smaller companies.