# TECH ONBOARDING FOR SUCCESS

## (And How Not To Do It)



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**2023 MACADMINS CONFERENCE**

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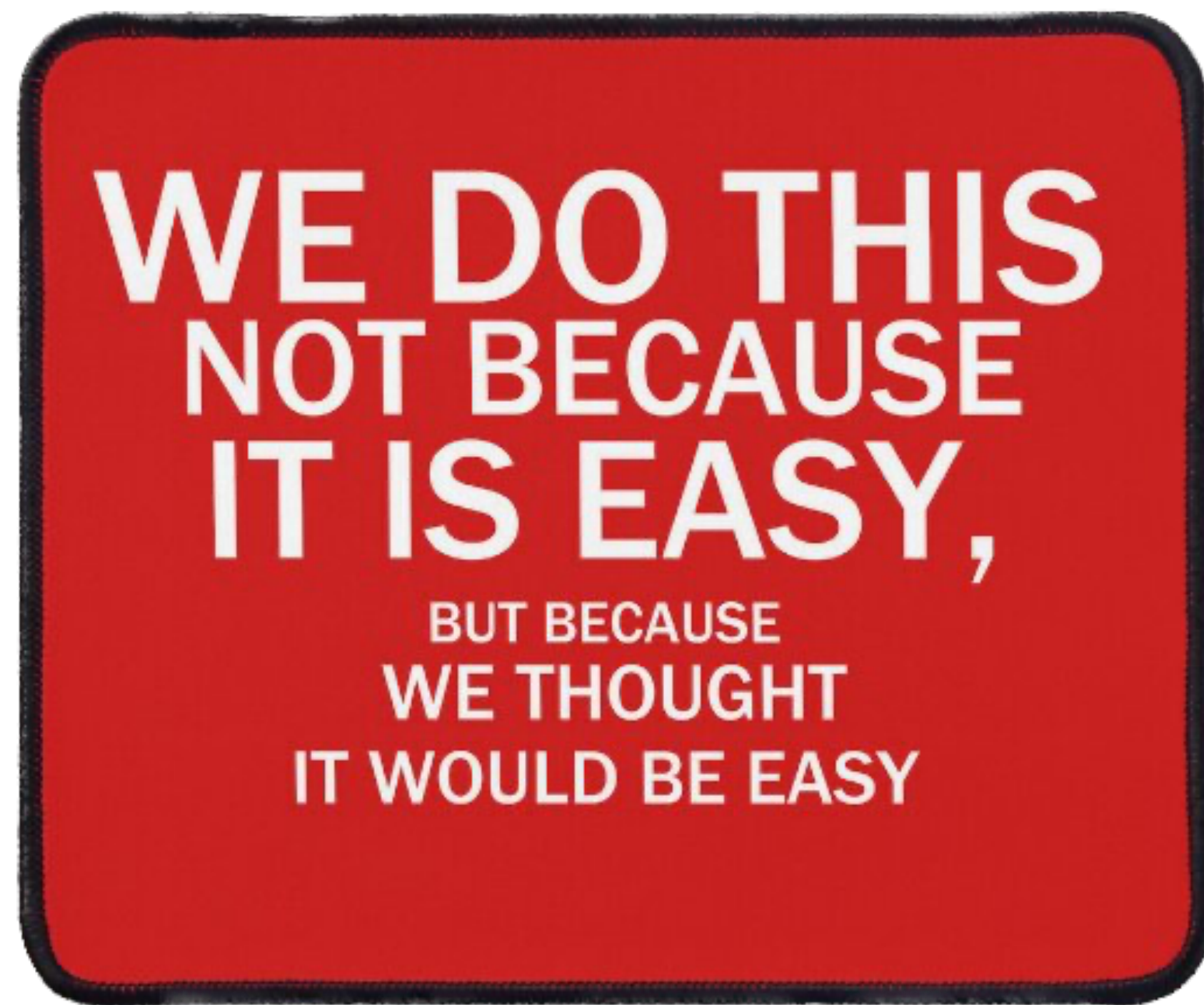
# WHAT IS TECH ONBOARDING?

"How to bring people and technology together to meet the goals of the organization."

# What Have We Seen?

Good - Methodical approach

Bad - Toss a computer at the user

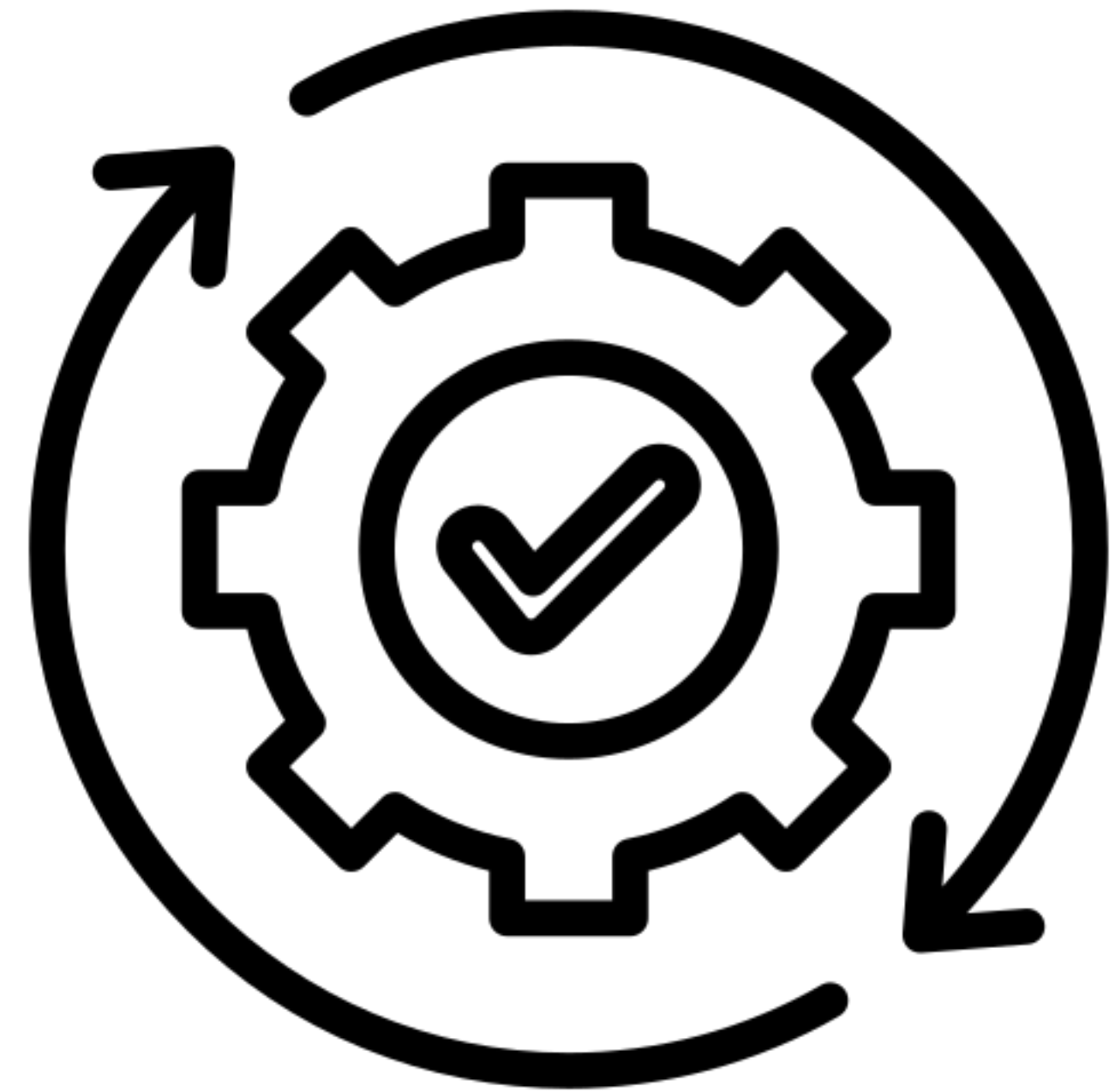# Checklists!

# Approach
## Setting Goals

- Business/Organization Goals

- Technical Goals

- Human Goals

- Allowing Choice

# Process - High Level
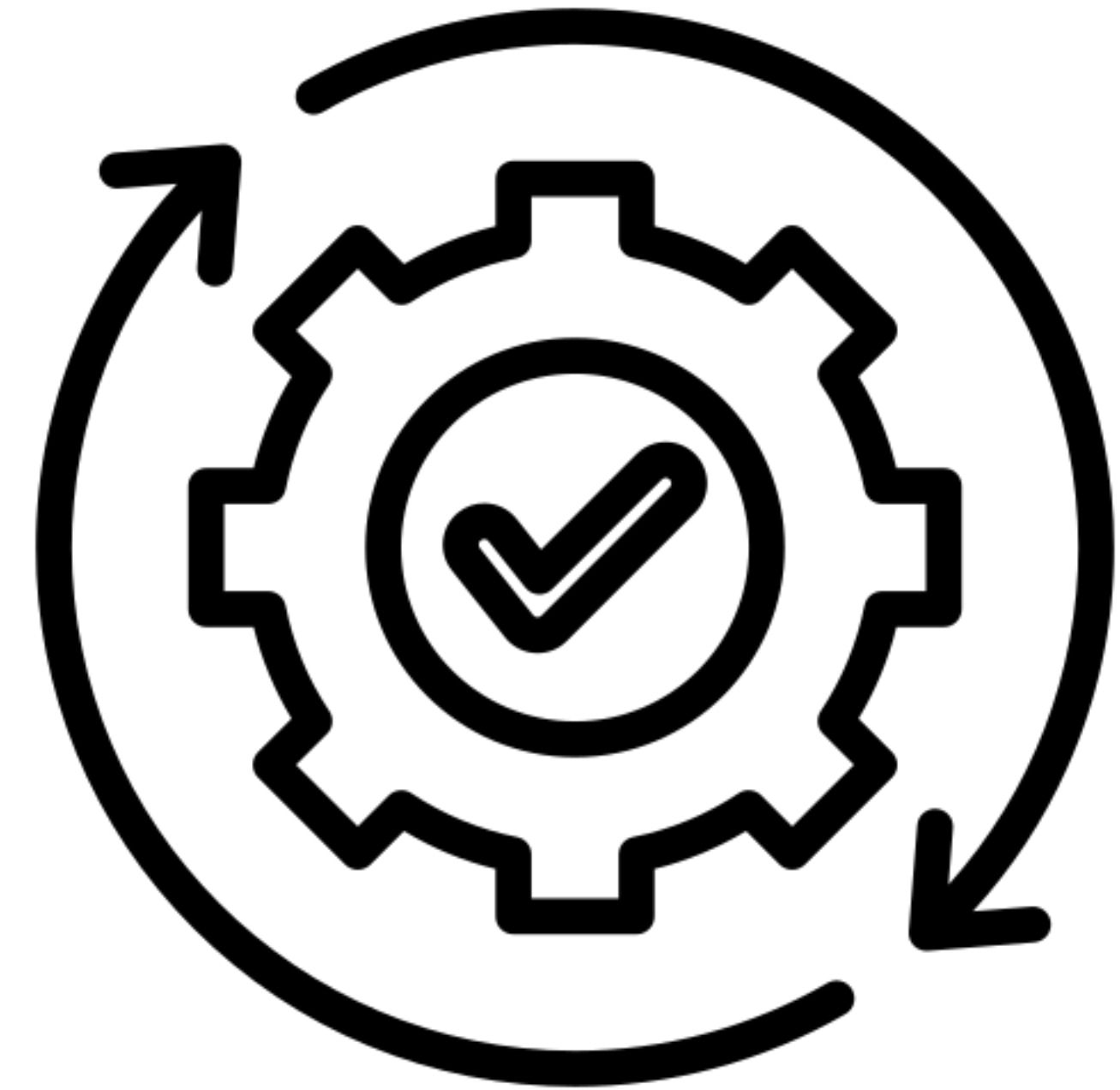
## General Flow

- Techniques and Tools

  - Order of Operations

  - Scheduling

- Followup and Support

- Self-Check Feedback

# Process - High Level
## Initial Steps

- Notification from HR

- Order hardware/licenses

- Set up accounts

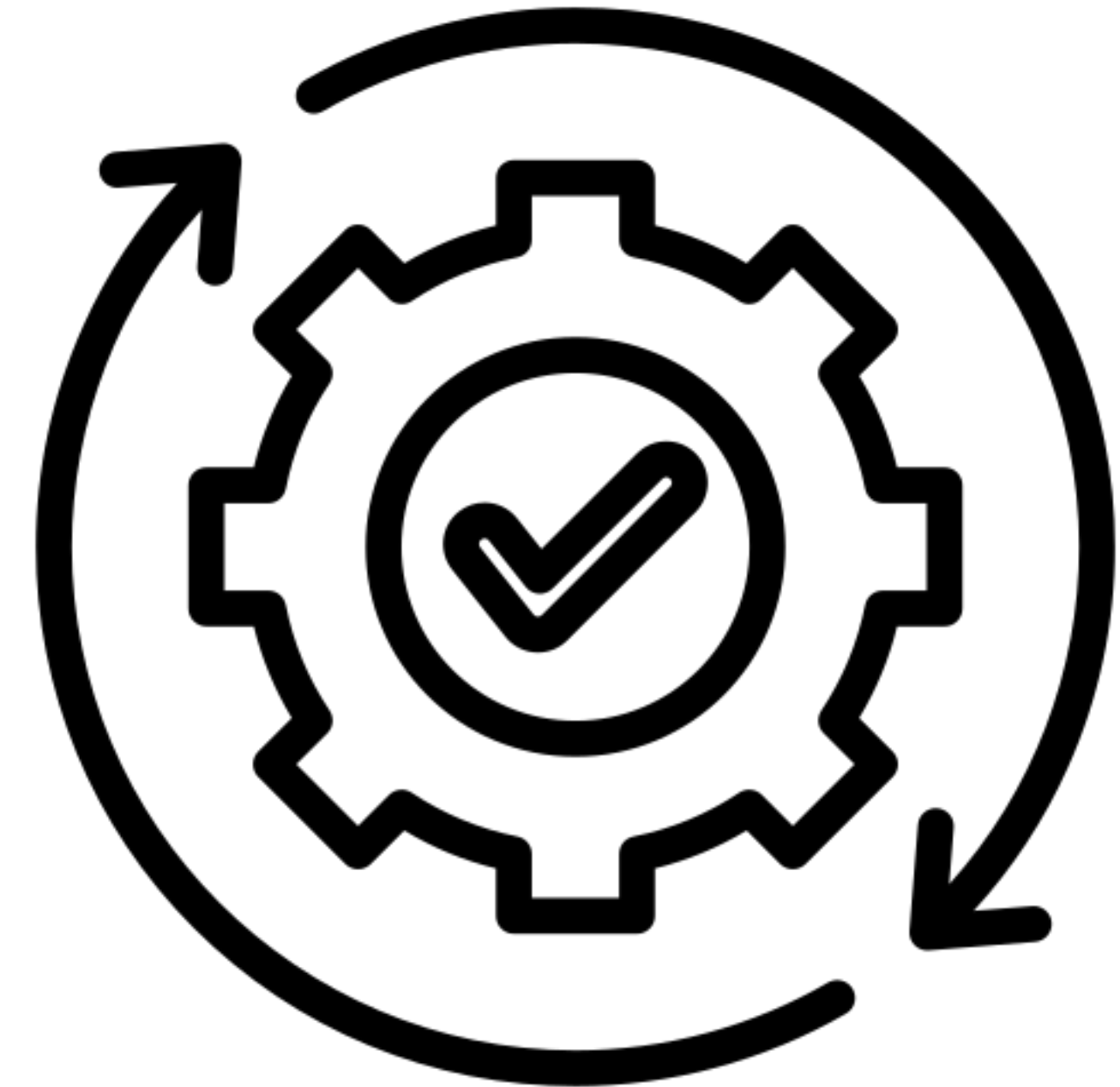- Confirm availability of all above

# Process - High Level
## User Contact

- Set up direct training

- Review corporate acceptable use standards

- Define security processes

- Provide follow up support

- Demonstrate access to self support

# Non-Tech Onboarding Stuff
## *More important than you think*

- Whose responsibility?

- Wayfaring and Directions to/from locations or buildings?

- Gender Neutral bathroom locations?

- Who to contact with questions?

- Workspace modifications? Ergonomics?

- Cafe locations? Pantries? Refrigerator?

- Where are the office supplies?

- Lactation room?

- Any special accommodations?
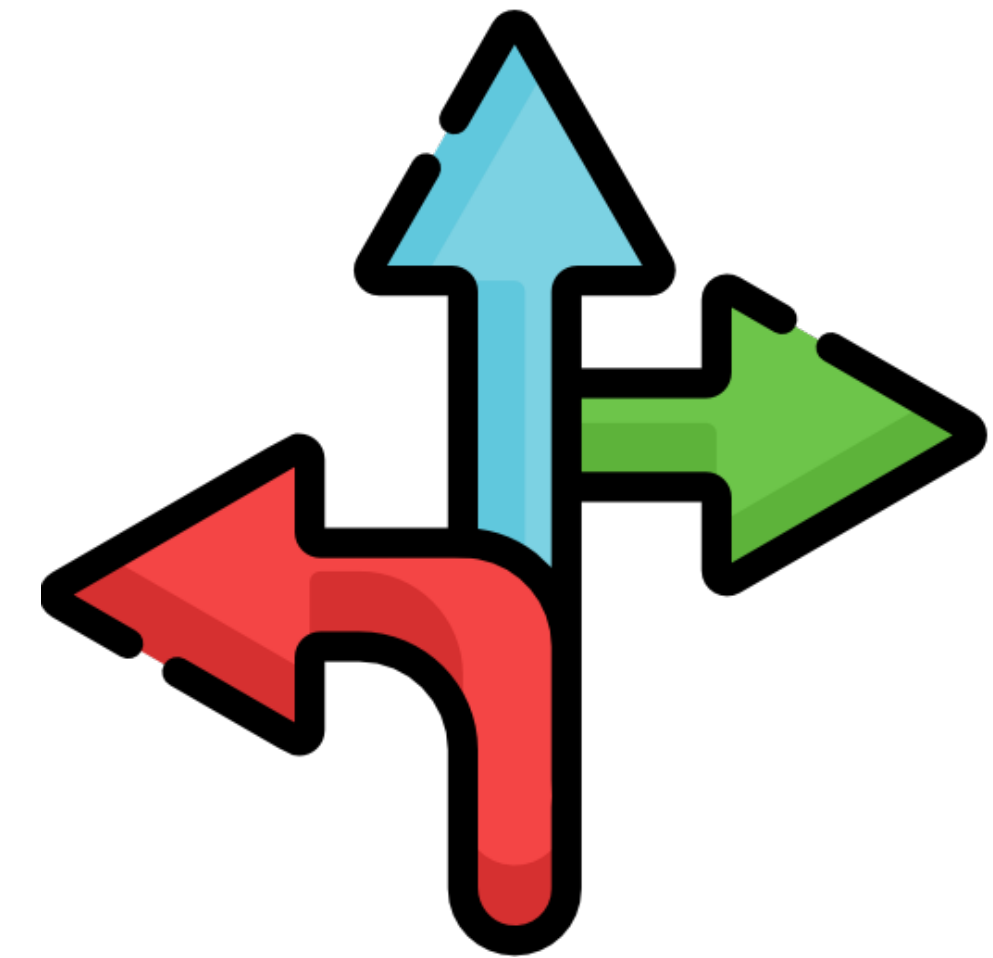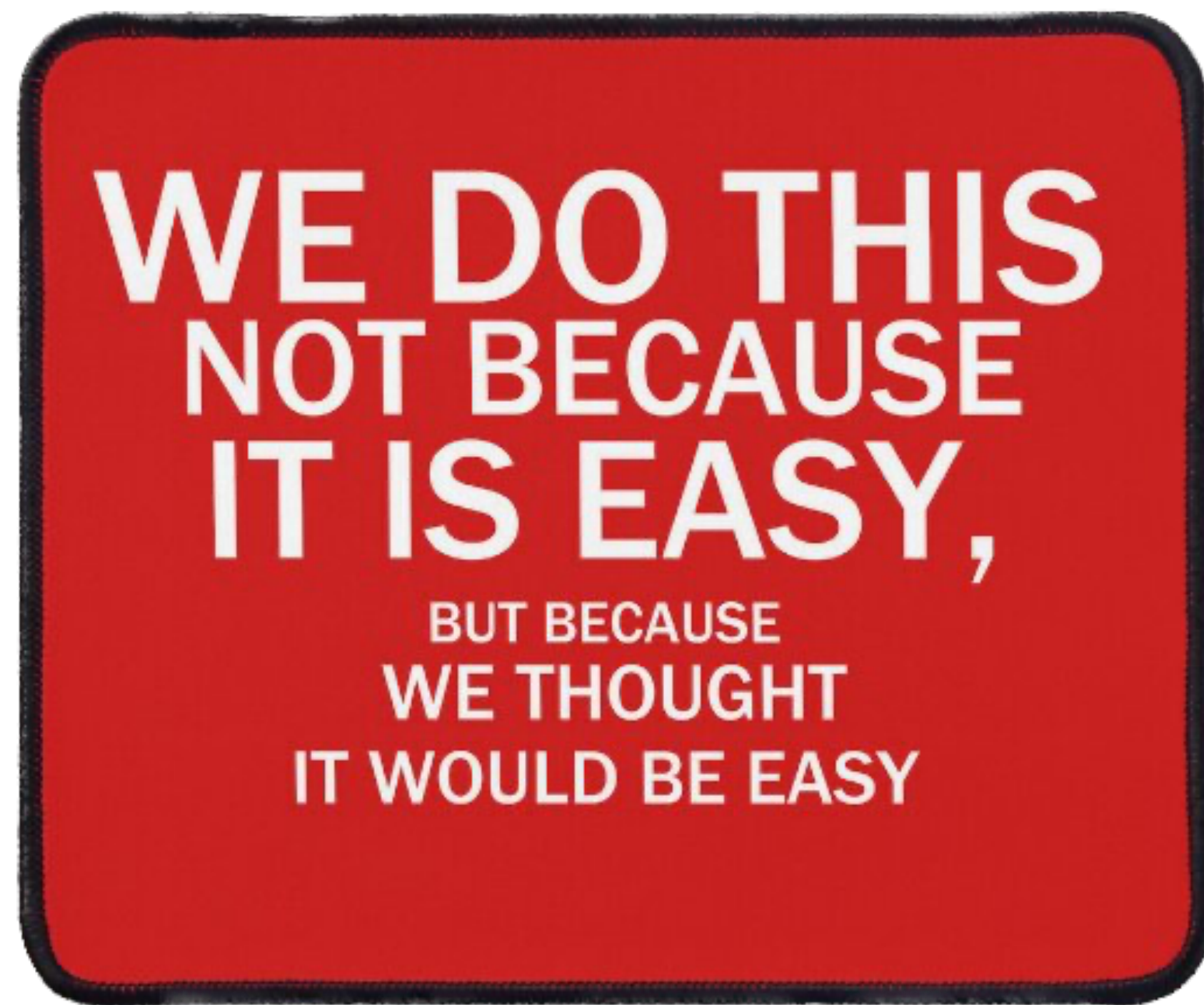
# Zero Touch Provisioning
## The Holy Grail

- Drop-ship a Mac directly to the end-user

- IT does not physically touch the Mac

- Extra savings in shipping costs

- Offloads the responsibility of "setting up" the Mac to software tools and the end-user

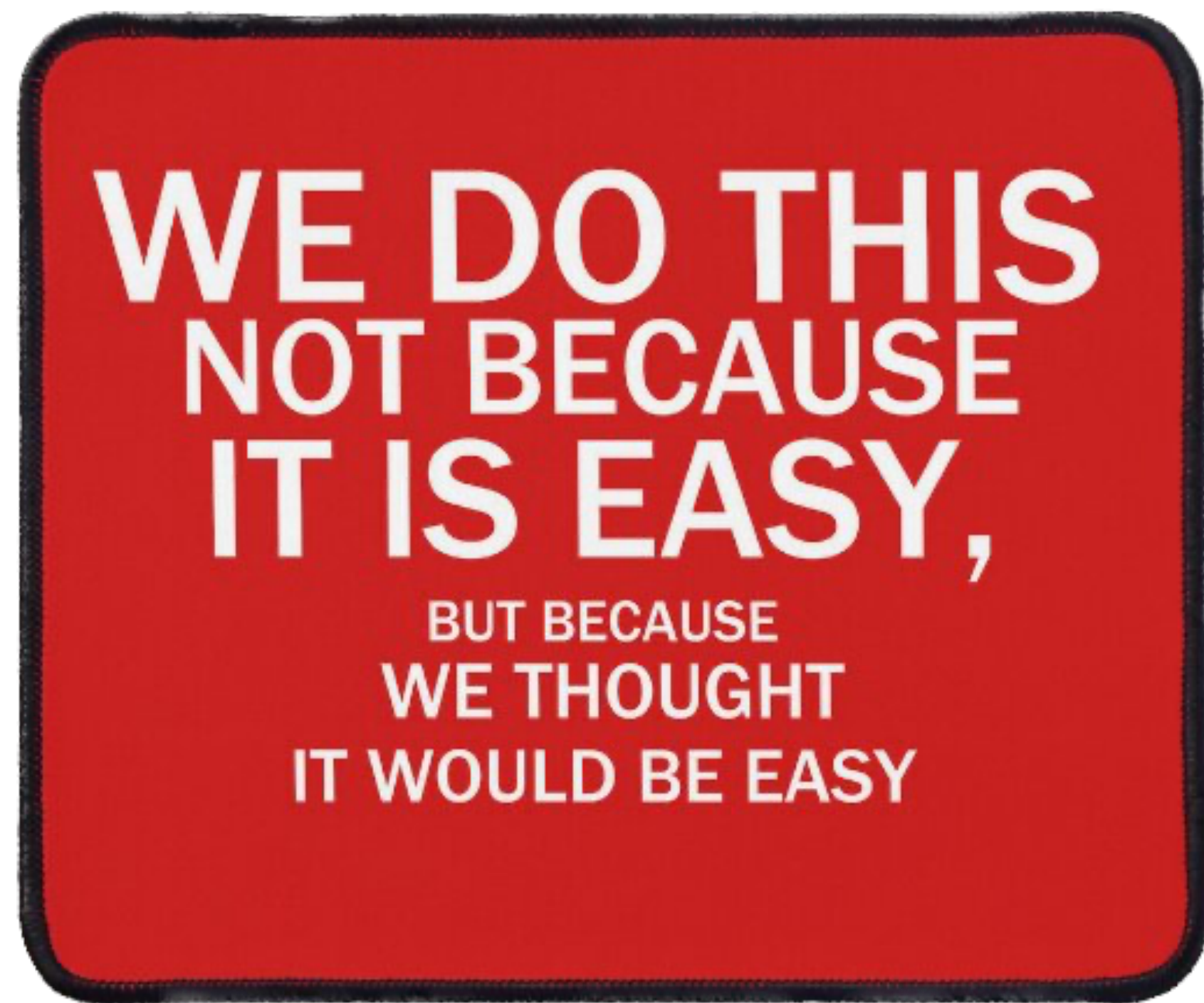- Sometimes not achievable regardless of what the MDM vendor says
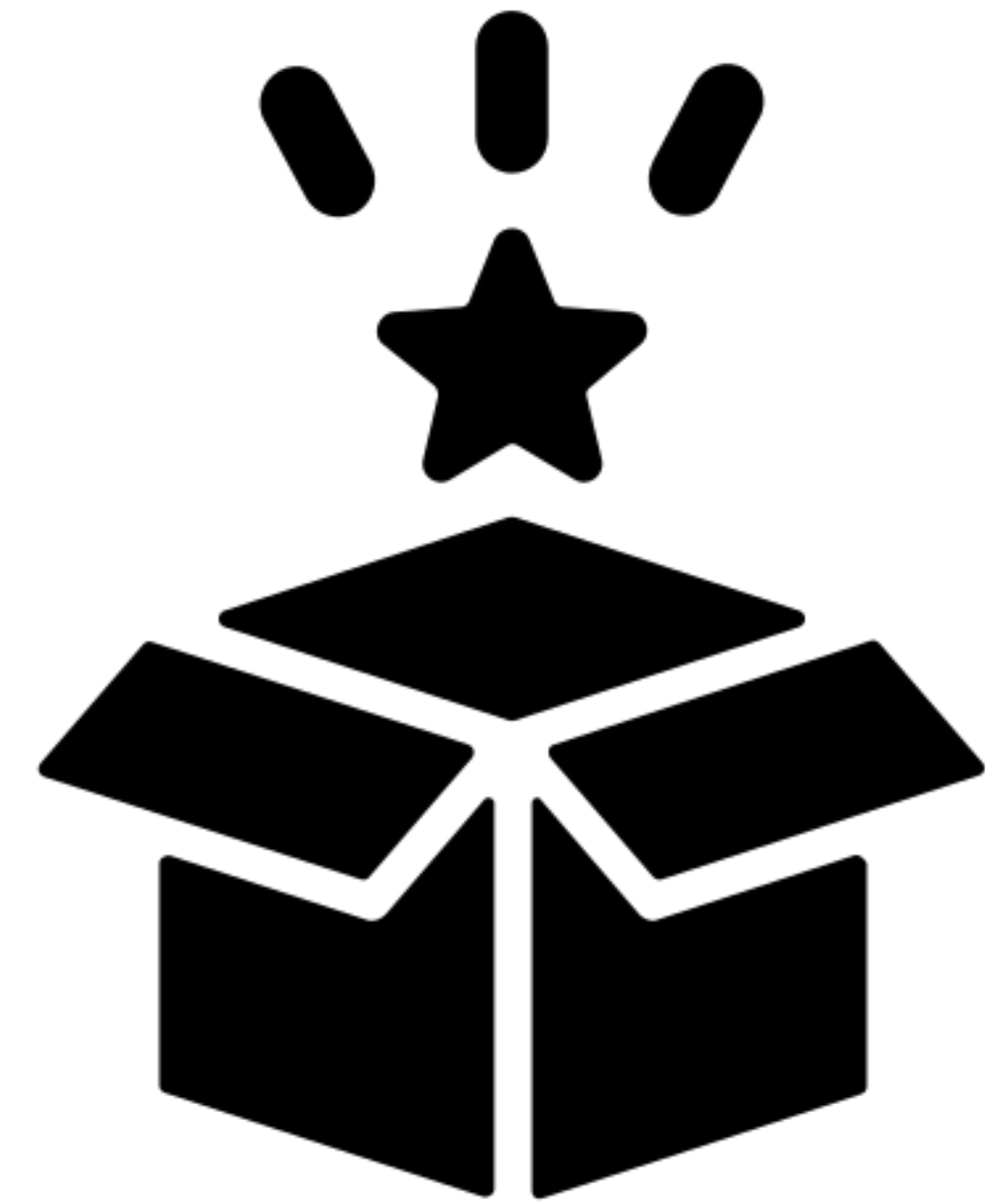
# What Have You Seen?

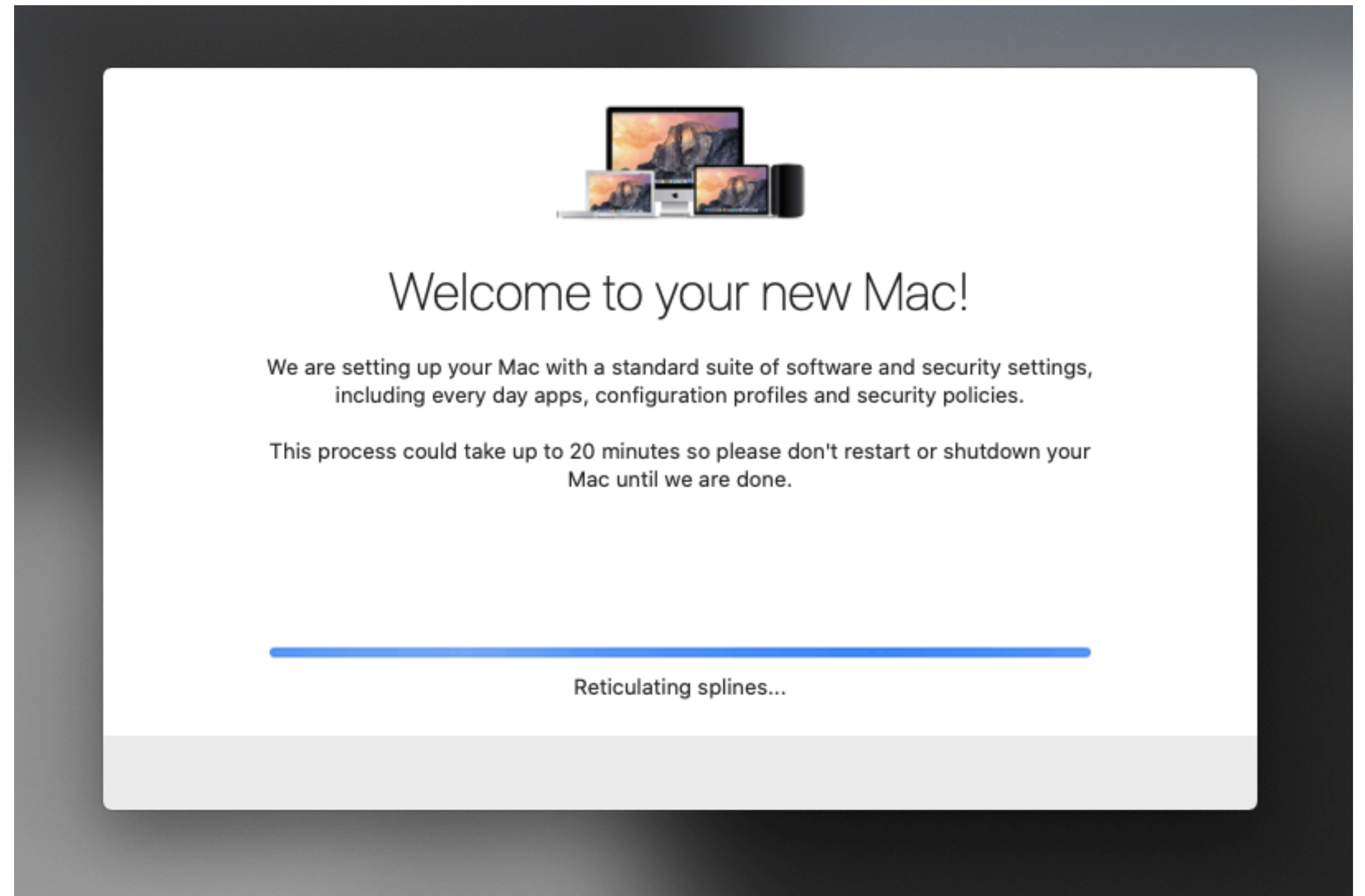# What has worked for you?

# Bonus Slides:

## Various tools

# DEPNotify
## Joel Rennich

- Jamf-focused

- uses SwiftDialog for UI



https://gitlab.com/Mactroll/DEPNotify

# Setup Your Mac

## Dan Snelson

- Jamf-focused

- uses SwiftDialog for UI



https://snelson.us/2023/05/setup-your-mac-1-10-0-via-swiftdialog/

# Baseline

## Second Son Consulting

- MDM-agnostic

- uses SwiftDialog for UI



**Your computer setup is underway**

Feel free to step away, this could take 30 minutes or more.

Your computer will restart when it's ready for use.

| | |
|---|---|
| Google Chrome | ✅ |
| Microsoft Office | ✅ |
| Nudge | ✅ |
| Renew | ⏳ |
| SSC Branding | |
| Security Tools | |
| IT Utilities | |

OK

https://github.com/SecondSonConsulting/Baseline
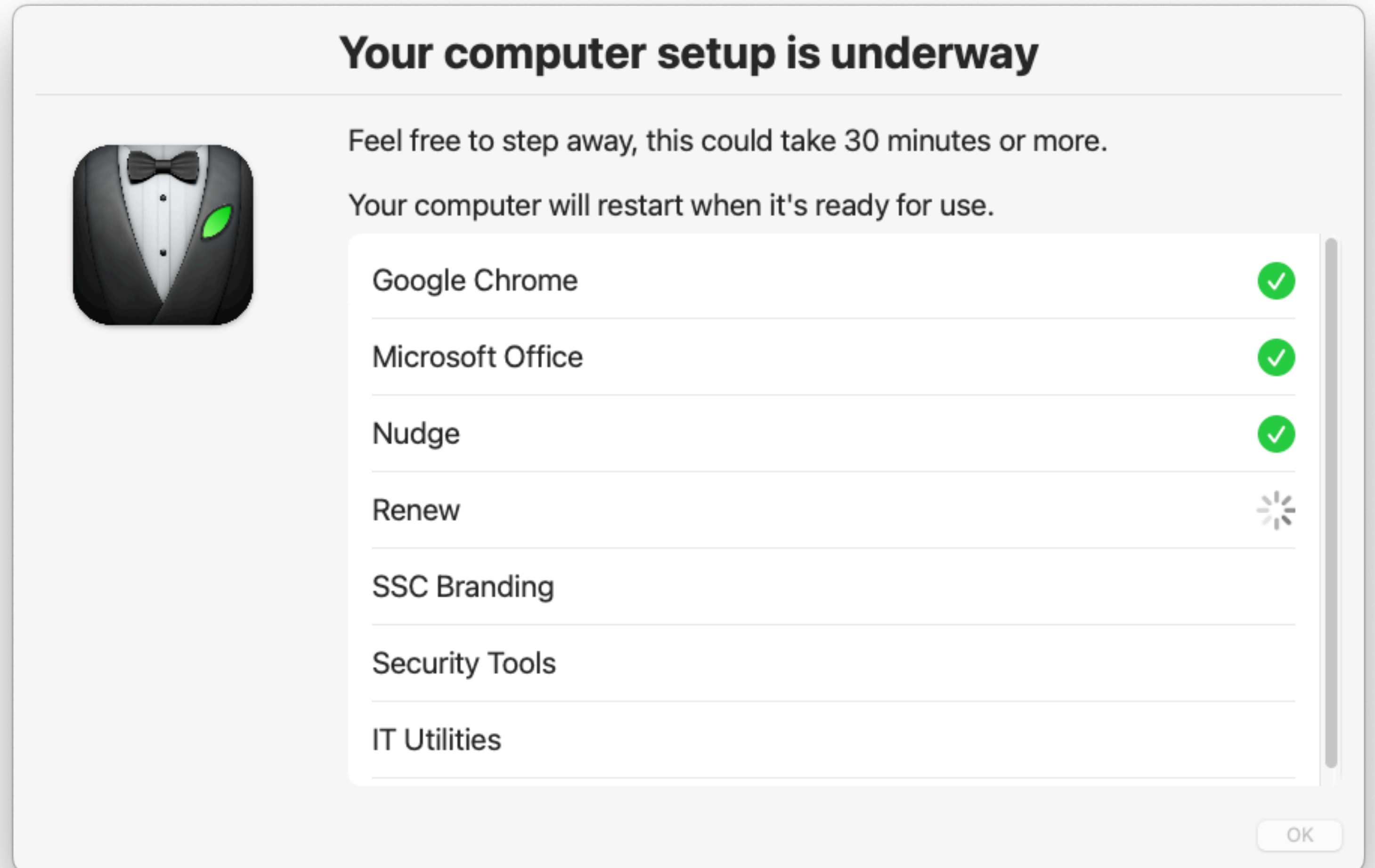
# Octory

## Amaris Consulting

- MDM-agnostic

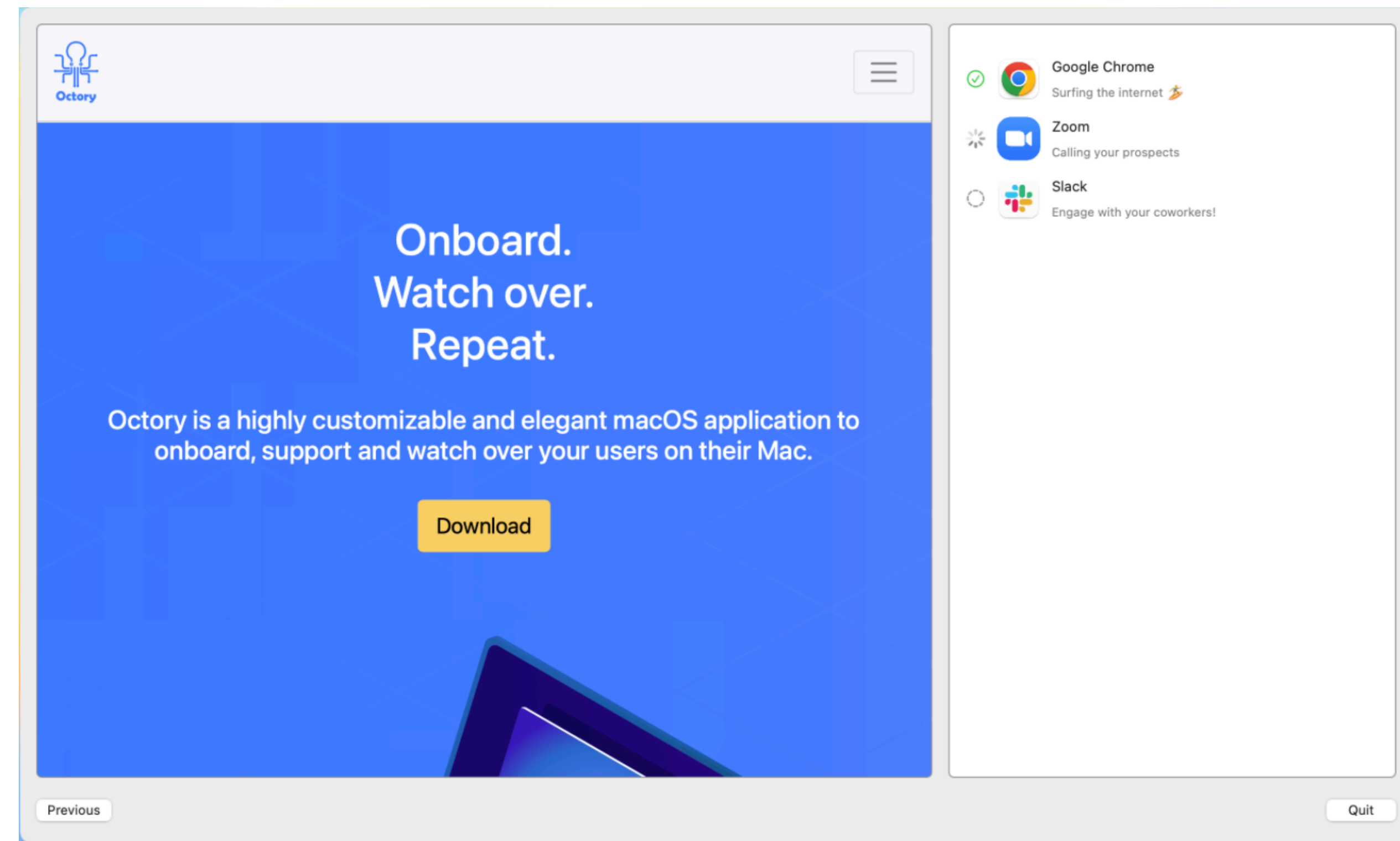- uses custom UI



https://octory.io

**Customizations**
Octory is highly customizable. It is easy to personalize it to suit your needs and your company's branding.

**Components**
Specify the components you need to show. Put them together the way you want. Retrieve inputs entered by the user.

**Reloading**
You can reload Octory's interface at any point in time while making changes in Admin mode. It's like a web page, but it's native and fast.

**Fonts and colors**
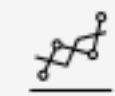Choose any font and color for the text components.

**Appearance**
Specify how Octory's window appears on screen.

**Single configuration file**
Configure Octory with only one file. Create different files to easily target different groups in your company.

**Monitoring**
From files to apps. Track installation from Jamf, Workspace ONE, Intune, Munki, App Store and more...

**Forms**
Use native forms to ask for relevant information to your business.

# Q&A

https://bit.ly/psumac2023-149