

# Customer Onboarding Checklist

## Procurement

Agency Details			
<b>Agency</b>		<b>Department</b>	
<b>Contact Name</b>			

CHECKLIST		
<b>Completed</b>	<i>Action</i>	<i>Note</i>
<b>Become Informed</b>		
<input type="checkbox"/>	Obtained details and copy of agency's existing telecommunications contract	Confirm your current contract information, any expiration dates, termination clauses, unit pricing, special services, existing discount structures, service volumes.
<input type="checkbox"/>	Read through the TPA information available on ProcurePoint that details the contract information, products and services and benefits for customers.	You can contact NSW Procurement Customer Service or ICT Procurement for any questions or clarifications needed.
<input type="checkbox"/>	Complete the Pricing schedule request form to access to the Service Catalogue and email to <a href="mailto:tpa@finance.nsw.gov.au">tpa@finance.nsw.gov.au</a> The Catalogue contains Service Provider's pricing and details of their service offering.	Application request will need to be authorised by agency representative for prior to access being granted and Non-Disclosure Agreement to be completed.
<b>Choosing your engagement type</b>		
<input type="checkbox"/>	1. Direct engagement with Service Provider. Purchase services at TPA pricing	This requires no RFQ, and can be directly organised with the Service Provider
<input type="checkbox"/>	2. Initiate the RFQ Customer Contract Process	Choose your TPA eligible Service Providers and proceed with RFQ processes. Customer Contract template, and RFQ assessment tool is available on Contract 2210 page.
<input type="checkbox"/>	3. Collaborate with other Agencies going to RFQ and aggregate service volumes. <i>(Aggregated volumes may yield larger discounts)</i>	Contact ICT Procurement for any questions or support to facilitate this option, or any other support required.
<b>Engaging the Service Providers</b>		
<input type="checkbox"/>	For options 2 and 3 above, contact Service Provider and prepare for negotiations	This can be supported by ICT Procurement
<b>Contract Preparation, Approvals and Endorsements</b>		
<input type="checkbox"/>	Submit for PTS endorsement	Relevant for contracts above \$100,000 (TCV)
<input type="checkbox"/>	Prepare RFQ or Customer Contract for any additional services, terms and conditions not available in the TPA	Additional services/terms and conditions are agency specific

Agency Representative acknowledgment			
	<i>Name</i>	<i>Signature</i>	<i>Date</i>
Senior Manager			