Your First 30 Days with NinjaOne

The essential guide to getting the most out of your new unified IT operations platform.



ninjaOne®

Welcome to NinjaOne!

Here at NinjaOne, we give you more than a unified IT operations platform. We give you an award-winning support team that is committed to helping you make the most of your NinjaOne investment from day one.

Your first 30 days with NinjaOne are structured around a smooth transition from your previous solution and a clear definition of what success looks like for your business.

This guide covers the key factors for your first month: what the NinjaOne team is doing with you and what you are building in the product to ensure that it meets your expectations.

Let’s get started.

Meet your NinjaOne team

Here's who you'll work with and how they will support you.

Customer Success Manager (CSM)

Manages your account and helps you maximize the value of your products.

Solution Engineer (SE)

Supports technical skill building sessions, shares platform and product best practices, and provides technical insights.

Technical Support Specialist

Helps to efficiently troubleshoot and resolve any technical issues you are experiencing.

Business Development Representative (BDR)

Proactively shares insights on new product capabilities, invitations to informative webinars, and opportunities where additional NinjaOne solutions could further optimize your operations.

Product Success Specialist (PSS)

Supports your CSM with feature demos and product inquiries.

Product Manager (PM)

Supports your CSM by acting as the strategic voice to any functional feature or product inquiries.

Customer Retention Specialist

Provides resolution to any active invoicing, billing, renewals and contract communication.



Free and unlimited

Onboarding, training, and support are free and unlimited for every NinjaOne customer.

Book SE sessions, attend informative Office Hours led by technical experts to learn best practices and have your questions answered, and contact support as often as you need.

Your first 30 days at a glance

	FOCUS	KEY ACTIVITIES
Week 1	Customer Success onboarding	CSM-led session, goal-setting, initial setup, “Getting Started” videos
Week 2	Technical onboarding	SE session, feature configuration, best practice guides, platform consolidation review
Week 3	Deployment	Mass deployment to endpoints, support ecosystem
Week 4	Review and planning	30-day goal review, 6-month targets, next steps
Ongoing	Continued success with NinjaOne	SE sessions, Office hours, NinjaOne Academy®, Dojo, Discord, CSM check-ins

Week 1: Setup and visibility

Customer success onboarding

Your first session with your CSM is a working conversation. Before touching configurations, your CSM wants to understand how your IT infrastructure is set up, how many and what types of endpoints you have, what tools you were using before, and why you chose NinjaOne. That context shapes your roadmap.

This session also covers your contract, billing contacts, and procurement process.

Setting your goals

Your CSM will work with you to define success at three points in time: 30 days, 6 months, and 1 year. These goals will be documented, shared with you, and tracked to completion. All future check-ins will reference them.

"Getting Started" videos

Before your SE session in week 2, spend time in the NinjaOne Dojo video library. These are short, easy to follow, practical walkthroughs that get you oriented before the technical work begins.

You can access the Dojo directly from the NinjaOne console by clicking the "?" in the upper right corner.

We recommend you watch these demo videos first:

- Dashboards
- NinjaOne Remote
- Create a policy
- Automation library
- Policies: Condition configuration
- Policies: Windows patch management
- Device search grid
- Create a technician
- Custom fields

Bonus

"NinjaOne Speedrun: From zero to fully functional IT in 60 minutes" by Jeff Hunter. You can find this in the Dojo video library for a high-level overview.

Initial setup

In addition to your onboarding session, your first week in the product covers the foundational configuration. After watching the onboarding videos, feel free to get hands-on in the console.

Start to:

- Set up roles and permissions
- Enable SSO (single sign-on)
- Add users
- Set up and configure organizations
- Set up custom branding

TIP: ONE ENVIRONMENT PER EMAIL ADDRESS

Your NinjaOne environment is built for multitenancy, which means a single environment can hold all of your different organizations under one roof. Each of your technicians accesses every organization they support from that one environment — no separate logins, no jumping between systems. When you invite teammates to join, make sure they're joining through your account, since each email address can only be tied to one NinjaOne environment. Getting this right from the start keeps your team working from a unified platform the way NinjaOne was designed.

Week 2: Technical onboarding

Working session with your Solution Engineer

Your SE session is built around your existing environment. The SE will bring NinjaOne platform depth to the session, and you will bring your business context and workflow requirements. The goal is a configuration that reflects how your business really runs versus a default setup.

Feature configuration

This is where you create your environment. Here are the core areas to work through after your session with your SE:

- Enable and configure your PSA and/or any 3rd party integrations integration
- Set up remote access
- Configure AV and security features
- Build out policies for monitors, alerts, and automations
- Configure patching schedules for newly created policies

Your SE is available to provide guidance throughout this process.

The full NinjaOne platform

Your SE session is also a good moment to understand the full scope of what you have access to. The NinjaOne platform includes:

Core capabilities

- Real-time monitoring, alerting, and reporting
- OS and third-party patch management
- Software deployment and management
- Scripting, automation, and remote access*

*via native tools including PowerShell and CMD remote terminals, remote registry editor, task manager, service manager, and AD user manager or domain controllers

Additional NinjaOne products

Vulnerability Management: Amplified patch management efficiency, accelerated security outcomes

Browser Management: Improved control and visibility of browser extension and reduced risk across Chrome, Edge, and Firefox

MDM: Support, control, and security for Android and Apple mobile devices

Unified Backup: Cloud-managed backup for endpoints, servers, Microsoft 365 & Entra, and Google Workspace

IT Asset Management: Real-time asset inventory

Remote: Secure, single-click remote access into managed endpoints

Quick Connect: Fast, remote support for unmanaged endpoints

Ticketing: Easy-to-use IT ticketing with flexible workflows and automations

Documentation: Secure documentation for credentials, procedures, and environmental details

NMS: Integrated network monitoring

Katani AI: AI-guided context and remediation

Not every capability is relevant on day one, but knowing what is available helps you make better decisions about where to focus next.

Best practice guides

NinjaOne provides a set of technical guides to support your configuration. Ask your CSM or SE for direct links, or find them in the Dojo:

- Policy best practices
- Advanced automations
- Monitoring and alerting guide
- Patching best practices guide

Week 3: Deploy and build confidence

Deployment across your environment

With configuration in place, week 3 is about rolling NinjaOne out to your managed endpoints. Your SE is available to provide guidance throughout this process.

Contact support through the NinjaOne app or portal for anything that needs a deeper look.

Your support and education ecosystem

By week three, you should have a clear picture of every resource available to you. Here is what is in the Dojo and beyond.

NinjaOne Dojo

- Your key resource for all things NinjaOne
- Simply click the “?” in the upper right corner of your NinjaOne consoleNinjaOne

Script share

- A repository of automation scripts built by NinjaOne customers, for NinjaOne customers
- Lives inside “Community” in the Dojo

NinjaOne Academy

- Self-paced online courses that take you from basic platform familiarity to a fully-certified power user
- Access through the Dojo

Resource center

- Technical blogs, guides, tools, videos, and more
- Access HERE

Office hours

- Live Q&A with NinjaOne technical experts on the third Thursday of every month
- Ask your CSM to register you

NinjaOne

- Connect with thousands of other IT pros and stay on top of platform developments at discord.gg/ninjaone

Week 4: Review and look ahead

The reflection

Week 4 revisits the goal-setting work from week 1.

Connect with your CSM to discuss 30-day targets: what you hit, what shifted, and what needs attention. The conversation will now focus on 6-month and 1-year goals, and what support or resources you will need to achieve them.

What to prepare for your week-four review

Come to your week-four session ready to discuss:

- Which 30-day goals did you hit?
- What capabilities have you activated?
- What is on your list for the next 90 days?
- Do you have SE sessions and CSM check-ins on the calendar going forward?

Resources

Your ongoing toolkit

Everything introduced during onboarding stays available to you. Here is the complete reference guide:

RESOURCE	WHAT IT'S FOR	WHERE TO FIND IT
NinjaOne Dojo	Central hub: documentation, community, video library, road map, system status	Click the "?" in the NinjaOne console
Documentation	Product answers and "Getting Started" information	Inside the Dojo
Community/ script share	Forums and customer-built automation scripts	Inside the Dojo
Video library	How-to videos and walkthroughs	Inside the Dojo
Features roadmap	Upcoming features, flag your interest	Inside the Dojo

RESOURCE	WHAT IT'S FOR	WHERE TO FIND IT
System status	Live operational status across all regions	Inside the Dojo
NinjaOne Academy	Online courses and NinjaOne certification	Via the Dojo
Office hours	Live Q&A with technical experts, third Thursday monthly	Ask your CSM to register
NinjaOne Discord	Community, peer discussions, product updates	discord.gg/ninjaone
Resource center	Resources and content on industry and NinjaOne topics	https://www.ninjaone.com/resources/
Upcoming webinars	Live and recorded platform sessions	Ask your CSM or check the resource center

Congratulations on completing your first 30 days and ***becoming a true Ninja!***

