

CPQ Implementation

Establish Quoting Foundations. Configure Product Sourcing. Prepare Proposal Templates.

Statement of Work

[CPQ Implementation Service Description](#)

Service Description

The CPQ Implementation service provides remote software implementation for the ConnectWise CPQ software package. ConnectWise resources support software provisioning, configuration, setup, administrator training, and adoption using ConnectWise recommendations and best practices.

The implementation covers quoting foundations, recurring revenue, product sourcing, vendor integration, catalog and punchout setup where applicable, proposal content and templates, and a Q&A wrap up.

What You Get: High Value Deliverables

The engagement provides foundational configuration, administrator enablement, and guided adoption of ConnectWise CPQ. **(5 Sessions)**

Foundations of Quoting : One 1:1 Session, 1 Hour

Establish the core quoting framework and administrator setup needed to begin using CPQ.

- CPQ dashboard review and administrator setup
- Quote lifecycle guidance and one test quote configuration

Quoting and Proposals : One 1:1 Session, 1 Hour

Configure recurring revenue capabilities and establish vendor sourcing workflows.

- One recurring revenue cycle configuration
- One vendor integration and sourcing configuration

Products and Sourcing: One 1:1 Session, 1 Hour

Enable catalog management and procurement workflows.

- Catalog configuration and vendor mapping support
- Punchout setup support where applicable

Proposal Templates & Content: One 1:1 Session, 1 Hour

Build the customer facing proposal experience and supporting templates.

- Company overview, executive summary, and terms & conditions setup
- Quote forms, output grids, Order Porter, and one customized order form

Q&A: One 1:1 Session, 1 Hour

Prepare administrators for ongoing management and adoption of CPQ.

- Workflow recommendations and administrator best practices
- Final configuration review and Q&A session

Partnering With ConnectWise

- **ConnectWise provides remote implementation guidance** for CPQ setup, configuration, and administrator enablement.
- **Software access and login guidance are supported** along with ConnectWise University access coordination during the engagement.
- **Guided walkthroughs cover core quoting workflows** including quote creation, product selection, publishing, and delivery.
- **Scoped configuration support includes user access** recurring revenue, vendor setup, sourcing, and templates.
- **Project communication includes status updates** session recaps, and issue or risk documentation.
- **Final Q&A support addresses outstanding questions** about workflow and functionality at the end of the engagement.

Client Responsibilities

To support the implementation, the Client must:

- **Assigned ConnectWise University coursework** must be completed before implementation begins.
- **Project stakeholders and key decision makers** must be available to support timely decisions.
- **Vendor XML feed credentials must be provided** along with required access details before vendor setup begins.
- **User acceptance testing plans and scripts must be owned** by the client team and completed on the agreed schedule.
- **Required data entry and import templates** must be completed to support implementation progress.
- **Custom reports, dashboards, KPIs, and integrations** remain client managed along with APIs and non ConnectWise products.
- **Information shared during remote sessions must be reviewed** and any added assumptions should be tracked.
- **New initiatives or scope changes** must be submitted in writing through a ticket.

Client availability and timely decisions are required to support the planned timeline.

Why Choose CPQ Implementation?

- **Guided setup and configuration** create a stronger CPQ foundation for administrator training and long term adoption.
- **Standardized layouts and quote lifecycle steps improve** consistency across quoting, publishing, and delivery workflows.
- **Vendor integration and real time pricing** support more accurate sourcing across catalog setup and product sourcing workflows.
- **Prepared proposal content and templates** help sales teams create cleaner, repeatable client facing quotes.
- **ConnectWise led guidance and project communication** reduce guesswork during implementation and final Q&A.

Refer to the Statement of Work for complete scope, assumptions, responsibilities, and terms.

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Service scope may vary. Refer to the Statement of Work for complete details.