

# ConnectWise AI Agents Implementation

Enable AI Agents. Validate Behavior. Prepare Your Service Desk.

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## Statement of Work

[ConnectWise AI Agents Implementation Services Description](#)

### Service Description

ConnectWise AI Agents Implementation helps the Client establish and validate ConnectWise AI Agents within service ticket workflows. The remote engagement covers provisioning, standard configuration, Shadow Mode validation, agent auditing, configuration tuning, SOP alignment, Production go-live planning, and AI Assistant adoption.

The service includes three individual sessions: Initial Enablement and Agentic Platform Configuration for one hour, Agent Auditing and Go-Live Planning for one hour, and AI Assistant Enabled and Wrap-Up for thirty minutes.

### What You Get: High Value Deliverables

The implementation is completed within one (1) calendar month of kickoff and includes three remote sessions totaling two and one-half (2.5) hours.

#### Initial Enablement and Agentic Platform Configuration: One 1:1 Session, 1 Hour

- Create and configure the AI Assistant Pod
- Provision users and validate assigned roles
- Enable core agents and additional agents in Shadow Mode

#### Agent Auditing and Go-Live Planning: One 1:1 Session, 1 Hour

The consultant reviews Shadow Mode results and tunes agent configurations with the Client.

- Session activities include:
- Review Agent Workflow Audit Logs and Client observations
- Revise agent configurations and refine SOP language
- Review edge cases and execute post-change simulations
- Define and confirm the Production go-live plan

#### AI Assistant Enabled and Wrap-Up: One 1:1 Session, 30 Minutes

The consultant prepares designated users to adopt AI Assistant within applicable service ticket workflows.

- Review AI Assistant functionality and practical service ticket use cases
- Provide operational guidance and service desk adoption recommendations
- Review onboarding closure activities and next steps

Custom automation, custom APIs, custom integrations, custom reporting, model training, and ongoing managed services are excluded unless separately scoped.

## Partnering with ConnectWise

A guided implementation built around setup, validation, and adoption.

- **You receive structured implementation support** through remote working sessions that focus on configuration, validation, go live planning, and adoption.
- **ConnectWise helps configure the right foundation** by activating licenses, validating access, configuring the AI Assistant Pod, and enabling the appropriate agents for your environment.
- **Your team validates agent behavior before production use** through Shadow Mode review against service ticket workflows before Production enablement.
- **ConnectWise supports collaborative tuning and planning** by reviewing audit logs, discussing client observations, adjusting supported configurations, and helping confirm the Production approach.
- **The final session supports adoption** by reinforcing AI Assistant usage in service tickets and helping your team prepare internal guidance for service desk users.

## Client Responsibilities

Your team plays an active role in keeping the implementation focused and moving.

- **Your team designates a primary contact** to coordinate internal resources, attend sessions, and help drive timely decisions.
- **Your team completes readiness activities** by submitting requested documentation, completing assigned ConnectWise University coursework, and providing required system access before implementation work begins.
- **Your team participates in working sessions** by making the right people available, providing timely feedback, and giving at least one business day of notice when a meeting needs to be rescheduled.
- **Your team reviews Shadow Mode results** by evaluating workflow audit logs, agent outputs, and service ticket behavior, then providing specific feedback where adjustments are needed.
- **Your team confirms readiness for go live** by approving supported configuration or SOP updates, confirming Production timing, and socializing AI Assistant usage with service desk users.

The estimated cumulative client commitment is approximately ten hours and depends on responsiveness, access, and required participation.

## Why Choose AI Agents Implementation?

- **AI Agents Implementation helps turn licenses into usable workflows** by moving your team from access and setup to practical AI Assistant usage inside service tickets.
- **Shadow Mode helps reduce guesswork before launch** by giving your team a way to observe behavior, review edge cases, and validate readiness before agents are enabled in Production.
- **Agent behavior is aligned to service desk processes** through configuration review, SOP refinement, and post change simulations that reflect the way your team handles work.
- **Practical guidance supports confident adoption** by helping service desk users understand when to use AI Assistant and how it fits into ticket workflows.
- **A defined scope keeps the rollout manageable** with three remote sessions totaling two and one half hours within a one month implementation period.

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

### CONTACT US



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