

# ConnectWise Automate™ Standard Implementation

Automate Your IT Operations. Boost Efficiency. Begin Your Transformation.

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## Statement of Work

### Automate Implementation

## Service Overview

ConnectWise Automate Standard Implementation equips your team with the foundational knowledge and configurations needed to fully leverage your ConnectWise Automate investment. Our experts guide you through the essential modules, best practice setup, and operational workflows so you can begin automating IT tasks, reducing manual effort, and improving service delivery accuracy.

By the end of the engagement, you will have a functional, best practice-aligned Automate environment and a team prepared to scale automation across your business.

## What You Get: High Value Deliverables

The implementation timeline ranges from **60–180 days**, depending on system complexity, resource availability, and Client engagement. It's recommended to schedule two sessions per week and have a motivated Administrator dedicated to the implementation role.

All sessions are delivered remotely and include configuration, training, and guided adoption.

### ✓ Core Implementation Topics

We ensure your Partner Program accounts are correctly set up and ready for activation.

#### Training and configuration sessions may include:

- **User, company, and site creation**
- **Agent deployment strategies**
- **Monitoring and alerting configuration**
- **Automation foundations**
- **Patch management setup**
- **Reporting and platform maintenance**
- **Basic scripting fundamentals**
- **Integrations overview**
- **Monitoring ticket tuning**

These topics ensure your environment is properly structured and your team understands how to maintain and expand Automate usage.

## What ConnectWise Provides

### ✓ Dedicated Project Coordinator Manages:

- Provisioning
- ConnectWise University access
- Login distribution
- Scheduling
- Initial onboarding logistics

Your primary point of contact throughout the setup phase.

### ✓ Implementation Specialists Lead you through:

- Configuration and environment preparation
- Administrator training and workflow development
- Best practice alignment
- Post-session recaps and milestone tracking
- Issue/risk documentation and support escalation

### ✓ Remote Delivery

All services are performed virtually using Microsoft Teams, WebEx, or similar platforms for maximum flexibility.

## Client Responsibilities

To ensure the most successful onboarding experience, the Client must:

- **Provide required environment access and documentation**
- **Designate a Project Manager/Administrator** as the single point of contact
- **Create, schedule, and execute user acceptance testing (UAT)**
- **Complete data entry** (companies, contacts, agreements, tickets, projects, configurations, tax codes, etc.)
- **Populate ConnectWise Import templates** for data imports  
(Custom ETL/imports available separately)
- **Manage custom report creation**  
(Dashboards, KPIs, and reporting services available as add-ons)
- **Manage integrations and review API documentation** for third-party systems

Your active participation is essential to maintain momentum and keep timelines on track.

## Why Choose Automate Implementation?

- **Accelerate your automation adoption**
- **Ensure accurate configuration from day one**
- **Reduce technician workload through automation**
- **Improve monitoring, alerting, and patch reliability**
- **Increase operational efficiency and consistency**
- **Gain a scalable foundation for long-term automation success**

This onboarding ensures you launch ConnectWise Automate correctly, efficiently, and with confidence.

## CONTACT US



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