

ConnectWise Help Desk Services

Launch Help Desk Services with Confidence. Ensure Accuracy. Empower Your Team.

Statement of Work

[ConnectWise Help Desk Service Onboarding](#)

Service Overview

ConnectWise Help Desk Services™ Onboarding is designed to quickly and confidently enable partners who are activating Help Desk Services for the first time. Our specialists walk your team step-by-step through the setup, data entry requirements, and operational workflows needed to ensure a smooth activation and seamless handoff to Help Desk support teams.

By the end of the engagement, your organization will have the foundational configuration, knowledge, and readiness needed to begin leveraging the Help Desk Services as a true extension of your service delivery team.

What You Get: High Value Deliverables

All sessions are delivered remotely by your dedicated **ConnectWise Help Desk Services Onboarding Specialist**, who guides you through setup, workflows, and activation requirements.

✓ **ConnectWise Platform Setup and Review**

Your specialist will walk you through all essential setup elements, including:

- **Basic Info configuration**
- **Client profile setup (user lists)**
- **Security-related request settings**
- **Network information requirements**
- **Client documentation preparation**

✓ **Help Desk Services Readiness Review**

Including:

- Review of the Help Desk Services statement of work
- Validation of required inputs and configurations
- Ensuring all scope requirements are met prior to activation

✓ **Activation Request Support**

Your specialist will help you:

- Confirm all onboarding prerequisites
- Submit the activation request
- Ensure a seamless transition to ongoing Help Desk Services operations

✓ **Q&A and Best Practices**

Get direct answers from experts on service expectations, workflows, and operational best practices.

Partner with ConnectWise

What ConnectWise Provides

- **Dedicated Help Desk Services Onboarding Specialist**
Leads your onboarding, provides setup guidance, and ensures you are Help Desk-ready.
- **Additional Help Desk Services SMEs (as needed)**
Brought in to support technical questions or complex scenarios.
- **Project Communication and Status Updates**
All updates, recaps, and next steps are posted in your Help Desk project ticket.
- **Session Summaries and Homework Assignments**
After each session, your specialist provides clear, actionable next steps.
- **Issue and Risk Tracking**
Any issue is documented and routed to the right ConnectWise resource.

Client Responsibilities

To ensure a successful onboarding experience, the Client must:

- **Designate a Project Manager/Administrator** as the single point of contact
- **Provide access to all relevant systems and documentation**
- Ensure stakeholders **attend onboarding sessions for their functional areas**
- **Complete the ConnectWise Help Desk Services Onboarding Degree** in ConnectWise University
- Complete assigned homework promptly to avoid timeline delays

Your engagement is essential to smooth activation and ongoing success.

Why Choose Help Desk Services Onboarding?

- **Accelerate your Help Desk Services activation timeline**
- **Ensure all required data and configurations are set up correctly**
- **Reduce misrouting, delays, and service interruptions**
- **Empower your team with expert guidance and best-practice workflows**
- **Achieve seamless handoff to the ConnectWise Help Desk team**

This onboarding ensures you start your Help Desk Services journey fully ready and correctly configured from day one.

CONTACT US



accountmanager@connectwise.com



home.connectwise.com



813.463.4700 Press 1 for Sales
and 1 for Account Management



UK Phone: +44 (0)203 817 6900
Ask for your Account Manager