

# Onboarding for the ConnectWise Partner Program™

Accelerate Your Security Practice. Empower Your Team. Maximize Your Investment.

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**Service SKU:**

[CU-CPP-ONBOARDING](#)

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**Statement of Work**

[Partner Program Onboarding \(CPP\)](#)

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**Eligible Products:**

SIEM NFR, Risk Assessment, Webroot,  
Endpoint Policy Management

## Service Overview

Onboarding for the ConnectWise Partner Program is designed to fast-track your success with the Partner Program for Cybersecurity. Our experts guide you through every critical module and workflow, ensuring you get immediate value from your Partner Program investments. Whether you're adopting SIEM, Risk Assessments, Webroot, or Endpoint Policy Management, this onboarding delivers the foundational knowledge, configuration, and operational readiness your team needs to begin delivering high-value cybersecurity services.

By the end of the engagement, you'll have a fully functional security foundation and the confidence to expand your cybersecurity offerings.

## What You Get: High Value Deliverables

The onboarding journey includes core deliverables for Partner Program, Endpoint, and SIEM to ensure your entire ecosystem is configured for success.

### Partner Program Core Implementation

#### Account Creation

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

#### Deployment Planning Session

- Discuss your security journey
- Review Partner Program product capabilities
- Set expectations for timelines and deliverables

#### Pre-Sales Tools Education

- Identify overview
- Risk Assessment introduction
- Endpoint Policy Management overview

This enables your team to articulate value and align solutions to customer needs.

### Endpoint Core Implementation

#### Account Creation

We establish the necessary endpoint accounts and frameworks.

#### Endpoint Onboarding

- Educational overview of the endpoint protection tool
- Review of site policies
- General setup and best practices

You'll walk away ready to roll out endpoint security with confidence.

## SIEM Core Implementation

### Pre-Installation

We discuss infrastructure requirements and verify readiness.

### Installation Support

- Mirror port/cable patching verification
- Switch configuration support
- Deployment guidance

### SIEM Onboarding

- SIEM app overview
- First alert review
- Understanding escalations and security event workflows

Your team gains visibility into real-time threats from day one.

## ConnectWise Responsibilities

### Dedicated Project Coordinator

Manages provisioning, scheduling, ConnectWise University access, logins, and onboarding logistics.

### Expert Implementation Specialists

Deliver training, configuration, and walk-throughs across the Partner Program, Endpoint, and SIEM modules.

### Remote Delivery via Microsoft Teams/WebEx

All sessions delivered virtually for convenience and flexibility.

### Clear Communication

Post-session summaries recap key achievements, next steps, and action items.

### Issue and Risk Management

We document and escalate issues to ensure progress stays on track

## Client Responsibilities

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

- **Designate a Project Manager/Administrator** as the single point of contact
- **Provide required system access and documentation**
- **Manage and execute UAT**, including plan creation and test execution
- **Complete necessary data entry** (Companies, Contacts, Agreements, Configurations, Projects, Tickets, Tax Codes, etc.)
- **Populate import templates** for any data imports (Custom ETL/import services available separately)
- **Manage custom reporting** (Dashboards, KPIs, and reporting can be contracted separately)
- **Manage integrations** with non-ConnectWise systems and review API documentation

Full participation ensures a smooth, on-schedule onboarding.

## Why Choose Partner Program Onboarding?

- Accelerates your ability to deliver security services
- Ensures proper configuration for SIEM, endpoint, and assessment tools
- Builds a strong operational foundation for your security practice
- Reduces ramp-up time with hands-on guidance
- Aligns your team with ConnectWise best practices
- Enables faster time-to-value for your Partner Program investment

This onboarding helps you build a scalable, profitable cybersecurity practice from day one.

## CONTACT US



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