

ConnectWise PSA QuickStart Implementation

Accelerate PSA Deployment. Reduce Internal Lift. Realize Faster ROI. ROI

Statement of Work

[PSA QuickStart Implementation Service](#)
[Description](#)

Service Overview

PSA QuickStart is an accelerated onboarding program designed to help partners stand up ConnectWise PSA quickly while reducing internal effort. Our experts lead your team through a streamlined, best practice implementation that delivers foundational configuration, administrator readiness, and operational clarity without disrupting your service delivery.

By the end of the engagement, you'll have a fully functional environment configured for your business needs, aligned to industry standards, and ready to support your operational growth.

What You Get: High Value Deliverables

The implementation is completed within **two (2) months** of project kickoff, assuming Client engagement and scheduling availability. **7 Webinars + three (3) 1:1 Sessions + 5 Pro Package Sessions (if purchased)**

Platform Build Out & Verification

Platform configuration is completed using Partner supplied requirements and validated through a dedicated review session.

- **Build the PSA platform based on documented requirements**
- **Review configuration, processes, APIs, integrations, and implementation readiness**

Core PSA Configuration & Administrator Enablement

Structured implementation sessions provide configuration guidance and administrator training across core PSA functions.

- **Service Management, Agreements, Sales, Procurement, Projects, and Finance**
- **Reporting, Dashboards, Automation, Workflows, and RPA capabilities**

Adoption & Operational Readiness

Final sessions help prepare administrators for ongoing platform usage and long term adoption.

- Q&A review and implementation completion activities
- Post implementation resources and adoption guidance

(Optional PSA Pro features/sessions such as Procurement, Reports & Dashboards, Accounting Sync, WisePay and Advanced Platform Workflow capabilities require the PSA Pro package)

Partnering With ConnectWise

What ConnectWise Provides

- **Dedicated Implementation resources** to guide your onboarding
- **Remote delivery** via Microsoft Teams or other approved platforms
- **Session agendas, minutes, and recordings** for each of the nine sessions
- **Issue and risk management** with escalation to appropriate ConnectWise teams
- **Transparent communication** via email and project tickets throughout the engagement

Client Responsibilities

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

- **Designate a primary ConnectWise administrator** to act as project liaison
- **Complete all required ConnectWise University coursework** before scheduling begins
- **Provide accurate documentation** within five (5) business days of any request
- **Ensure availability** of personnel, systems, and resources for remote sessions
- **Report issues or risks promptly** to ConnectWise
- **Handle custom reporting development** (available as an add on service)
- **Manage external integrations** (email, calendar, accounting, third-party tools) and review API documentation for compatibility

Your engagement is essential to keeping the project on schedule.

Why Choose PSA QuickStart?

- **Accelerated implementation timeline** with predictable delivery
- **Hands-on best practice configuration** ensures long-term stability
- **Reduced internal workload** with ConnectWise-led onboarding
- **Comprehensive admin training** builds confidence and operational readiness
- **Faster time-to-value** and improved ROI for your investment

Your transformation starts here with an efficient, expertly guided launch.

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