

Business Management QuickStart Implementation

Accelerate Business Management Deployment. Reduce Internal Lift. Realize Faster ROI.

Statement of Work

[QuickStart Business Management Implementation](#)

Service Overview

Business Management QuickStart is an accelerated onboarding program designed to help partners stand up Business Management solutions 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.

Provisioning

- Activation and configuration of Business Management licenses
- Delivery of administrator login credentials
- Environment prepared to begin setup and training

Administrator Training: 6 Webinars and three (3) 1:1 Sessions

Delivered remotely by ConnectWise experts, training includes comprehensive instruction on core platform modules.

- Each session includes:
- Structured agenda
- Meeting minutes
- Full session recording
- Hands-on platform walkthroughs

Best Practice Configuration

Based on questionnaire answers, standard configuration is completed before any webinars or training sessions begin, and to help align your system to:

- Industry best practices
- ConnectWise recommended usage patterns
- Your business goals and operational workflows

(Custom configuration available under separate scope.)

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
- **Develop and execute user acceptance testing (UAT)**, including plans, scripts, and feedback
- **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 Business Management 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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