

# ConnectWise Consulting360™ Essentials

Ongoing Expert Guidance. Strategic Alignment. Monthly Advisory and Technical Execution.

## Statement of Work

[ConnectWise Consulting 360 Essentials](#)

### Service Overview

ConnectWise Consulting360 Essentials is a recurring monthly consulting program designed to guide your organization through the successful adoption, optimization, and strategic use of the ConnectWise ecosystem.

Your dedicated ConnectWise consultants act as an extension of your internal team, providing implementation assistance, best practice recommendations, project planning, platform strategy, and targeted technical services.

This program supports a wide range of ConnectWise solutions and ensures your business receives consistent, structured, and expert-led improvement every month.

### Eligible ConnectWise Solutions

Consulting hours can be used across the full ConnectWise ecosystem, including:

- ✓ PSA
- ✓ Platform-powered PSA
- ✓ CPQ
- ✓ RMM
- ✓ Automate
- ✓ Reports and Dashboards
- ✓ Customer Feedback
- ✓ SLI/SLIQ
- ✓ Documentation
- ✓ WisePay
- ✓ SIEM Classic
- ✓ Pre-sales tools Identify/DarkWeb
- ✓ Cloud Backup
- ✓ SaaS Security
- ✓ x360Recover
- ✓ Managed EDR w/ SentinelOne (ConnectWise service on third-party product)
- ✓ Managed EDR w/ Bitdefender (ConnectWise service on third-party product)
- ✓ Managed EDR w/Microsoft Endpoint (ConnectWise service on third-party product)
- ✓ Managed EDR w/Microsoft 365 (ConnectWise service on third-party product)

### What You Get: Monthly Deliverables

- ✓ **Up to 5 Hours of Remote Consulting Per Month**

These hours can be used for:

- Implementation assistance
- Consulting and strategic guidance
- ConnectWise best practice recommendations
- Project plan execution
- Technical services (including limited data transformation, migration assistance, upgrades, merges, integrations, and customizations)

✓ **A 3-Month Rolling Project Plan**

- Maintained and updated by ConnectWise
- Reviewed with your team monthly
- Priorities may shift based on agreement and resource availability
- All work is **scoped solely by ConnectWise**

✓ **Weekly Project Management Updates**

Your ConnectWise Project Manager provides:

- Status reports
- Task progress
- Blockers and dependencies
- Communication via agreed channels

✓ **Fully Remote Engagement**

All sessions are:

- Delivered remotely
- Conducted using ConnectWise-approved collaboration tools
- Recorded for future reference

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## Why Choose Consulting Hourly?

ConnectWise provides:

- A dedicated **Project Manager** and **Consultant**
- Scheduling coordinators
- Expert resources aligned to your project plan
- Structured delivery and predictable communication

Changes to your project plan require a **2-month advance notice** to ensure resource availability.

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## Client Responsibilities

To ensure a successful Consulting360 Essentials engagement, the Client must:

- Provide a **ConnectWise administrator** as the primary point of contact
- Align internal resources to meet project plan timelines
- Supply accurate documentation in the required formats
- Implement work products in the production environment
- Validate outcomes to ensure they meet expectations
- Provide required third-party software if included in deliverables
- Review materials and ask clarifying questions as needed
- Provide facility access if on-site sessions are included in your package

## Program Terms

- Includes **up to 5 hours per month** (cannot roll over or be moved)
- **Minimum 12-month commitment**
- Client may **upgrade** the plan with 2-month notice (max 2 upgrades per term)
- **No downgrades permitted**
- Monthly invoicing
- Hours expire at the end of each contract month

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## Why Choose Consulting360 Essentials

- **Consistent expert guidance** month after month
- **Strategic alignment** across your ConnectWise stack
- **Accelerated time-to-value** for every product in your ecosystem
- **Reduced risk** through proactive planning and advisory
- **Clear roadmap** managed by ConnectWise experts
- **Flexible hours** usable across multiple ConnectWise solutions

The program ensures your business continually grows, optimizes, and evolves with ConnectWise, backed by the expertise of a dedicated consulting team.

## CONTACT US



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