



IT NATION™

SECURE

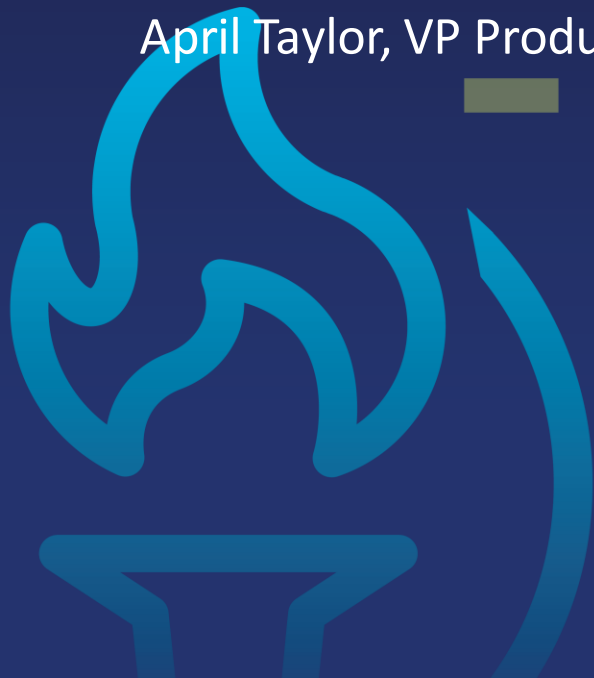
hosted by  CONNECTWISE

How ConnectWise Business Management Solutions Support Your Cybersecurity Business

Presented by

James Riley, CEO, JNR Networks

April Taylor, VP Product Management, ConnectWise



IT NATION™ **SECURE**

Agenda

1 **Why standardize?**
Importance in security

2 **Integrity in your process**
Consistency between systems

3 **Templates**
Kick start your setup

Purpose

- Provide insight into how you can use our Business Management products to optimize your processes and improve your client experience in your cybersecurity business
- Share real life experiences to help you on your journey
- Offer suggestions on where to start and templates to get you going

James Riley

- Founder and CEO – JNR Networks
- Engineering CEO
- 30 Years in IT
- CW Systems Consultant to MSPs
- CW Partner for 13+ years
- CW Stack: Manage, Sell, Automate, Control
- james@jnrnet.com
- [Facebook.com/rileyjd](https://www.facebook.com/rileyjd)
- [Linkedin/in/jnrjamesriley](https://www.linkedin.com/in/jnrjamesriley)



April Taylor

- ConnectWise colleague for over 17 years
- Current role: Vice President of Product Management, Business Management products
- Industry honors: CRN Channel Chief (2015), selection as one of CRN's Women of the Channel (2017, 2018, 2020) and inclusion on the MSPMentor 250 list (2014)
- MBA (University of South Florida)



Why standardize?

Importance of standardization

- Business benefits
 - Increased productivity and customer satisfaction
 - Decreased ambiguity
- Critical to your cybersecurity business, especially with the constant changes
- Need to innovate and ensure your processes are evolving as changes happen

How do you make standardization a part of your business?

Part of your culture



- Standards & innovation are connected
- Once your team realizes the impact, they will become champions of standardization
- Colleagues are empowered and are the voice for change in standards

Impact



90% of proposals convert just based on Order Porter



Average time to work on a new ticket is under 5 minutes



6 months to ramp up a new tech

Integrity in your process

#ITNation



Integrity is a part of our culture

OUR VALUES

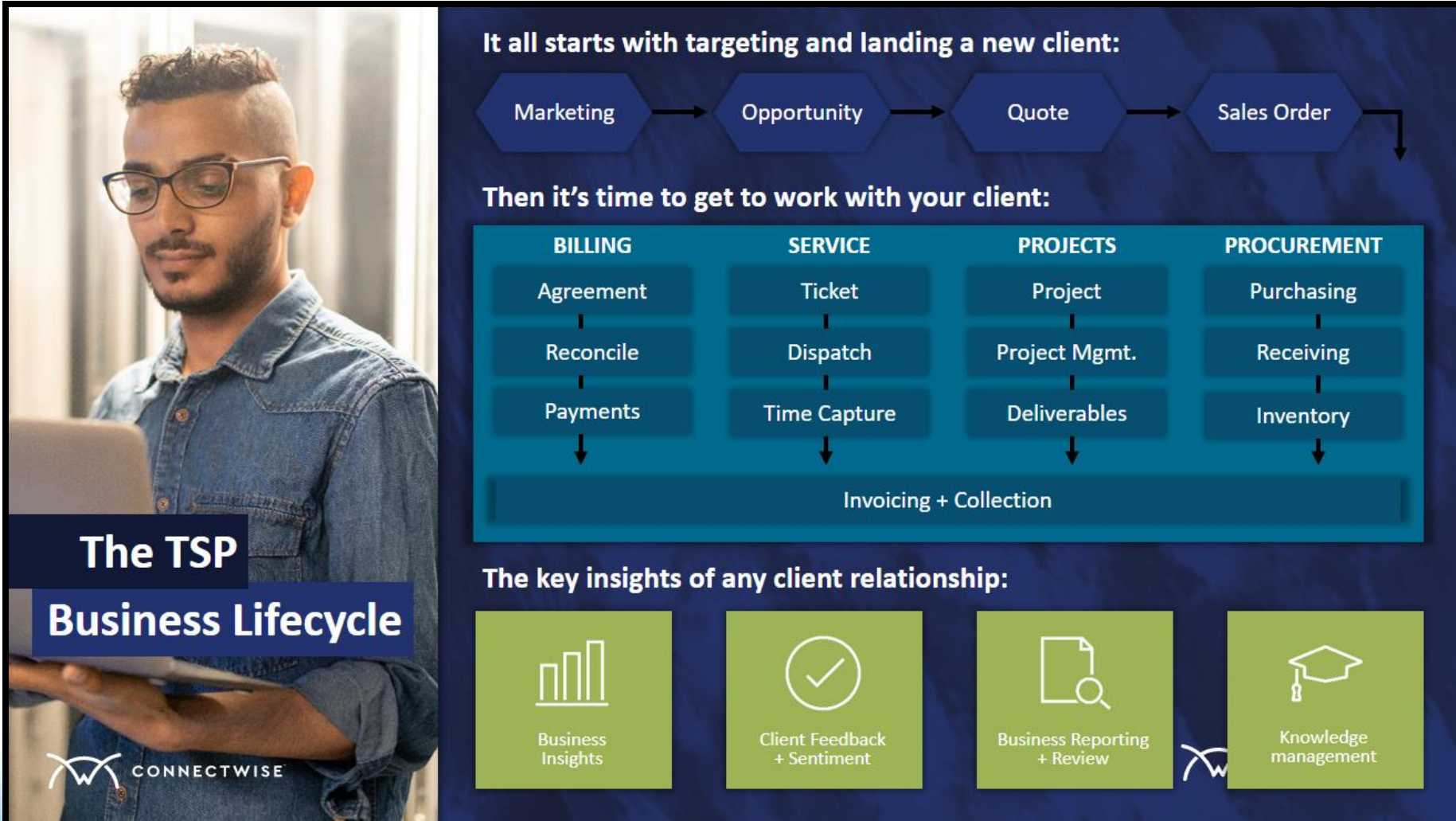
We believe that something amazing happens when you have personal and professional integrity while focusing on having a substantial and positive impact...things grow.

We see integrity as two distinct but related things. The first is an assessment of a person's character in that there is an integration or consistency between what they say and what they do...they are a person of their word. The second is similar but is more related to objects or systems instead of a person. In this, we value objects and systems that do what they say they will do as well as integrate well with other objects and systems.

Integrity is a nice concept but, until it is put into action, it sits on the shelf, collecting dust...it cannot have impact. We believe that we are designed to do more than have great ideas and philosophies. We are designed to put them into action in order that we may have a positive impact on those that we have the honor of working with and serving. As such, all of our work filters through an evaluation of its impact...if it won't have a positive impact, we set it aside.

We see growth as the natural result of doing the right things for the right people for the right reasons. When we do impactful things, with integrity, growth is a natural result.

Integrity between systems



Ensure integrity between



SALES



SERVICE



BILLING

Starts in CPQ



- Remove friction for the client
- Create the detail in the proposal to push to a project
- Leverage tabs in the quote to bucketize the project work

Quote – Inside (1/3)



		Project - One-Time		jServices - Monthly		jServices - Monthly		MS Licenses - Annual			
		1) Security Project Hardware and Labor		2) jSupport - Advanced		3) jCloud - Offsite Backup		4) O365 Licenses - Annual		+	
		Manufacturer Part Number	Product Description	Override Price	Quantity	Extended Price	Bundle Qty	Is Printed	Is Phase Item	Is Taxable	
						\$44,200.00					
◇	<input type="checkbox"/>	Services - Project - Bund	Security Project Labor	\$23,500.00	1.00	\$23,500.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
◇	<input type="checkbox"/>	Services - Project	Scope	\$250.00	8	\$2,000.00	8.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
◇	<input type="checkbox"/>	Services - Project	Procurement	\$250.00	4	\$1,000.00	4.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
◇	<input type="checkbox"/>	Services - Project	Project Management	\$250.00	8	\$2,000.00	8.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
◇	<input type="checkbox"/>	Services - Project	Decommission Old Equipment	\$250.00	4	\$1,000.00	4.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
◇	<input type="checkbox"/>	Services - Project	Fallout	\$250.00	8	\$2,000.00	8.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
◇	<input type="checkbox"/>	UXG-Pro	UniFi UXG Pro Firewall	\$585.00	1.00	\$585.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
◇	<input type="checkbox"/>	USW-Pro-48-PoE	Ubiquiti UniFi 48 Port PoE Switch - MDF	\$1,305.00	2.00	\$2,610.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
◇	<input type="checkbox"/>	USW-Pro-48-PoE	Ubiquiti UniFi 48 Port PoE Switch - IDF	\$1,305.00	1.00	\$1,305.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Quote – Order Porter Web (2/3)



2. Review Your Options

Your Available Options

Quote Summary	Recurring	One-Time
Project - One-Time		
<input checked="" type="checkbox"/> Security Project Hardware and Labor Subtotal	\$0.00	\$44,200.00
jServices - Monthly		
<input checked="" type="checkbox"/> jSupport - Advanced Subtotal	\$2,256.00	\$0.00
<input checked="" type="checkbox"/> jCloud - Offsite Backup Subtotal	\$2,050.00	\$0.00
MS Licenses - Annual		
<input checked="" type="checkbox"/> O365 Licenses - Annual Subtotal	\$5,424.00	\$0.00
Subtotal	\$9,730.00	\$44,200.00
Tax	\$304.08	\$1,159.20
Total Amount	\$10,034.08	\$45,359.20

Quote – Order Porter PDF (3/3)



Security Project Hardware and Labor	Price	Qty	Ext. Price
Includes: <ul style="list-style-type: none">• Design, Procure, Build and Implement Server, Firewall, Switches and WAPs.• All necessary mounting hardware			
Assumes: <ul style="list-style-type: none">• Internet is working.• Environment is the same as when the survey was performed.• MDF is air conditioned			
Security Project Labor	\$23,500.00	1	\$23,500.00
UniFi UXG Pro Firewall	\$585.00	1	\$585.00
Ubiquiti UniFi 48 Port PoE Switch - MDF	\$1,305.00	2	\$2,610.00
Ubiquiti UniFi 48 Port PoE Switch - IDF	\$1,305.00	1	\$1,305.00
Ubiquiti UniFi 6 Professional U6 Pro Dual Band 802	\$175.00	4	\$700.00
Misc Hardware and Patch Cables	\$500.00	1	\$500.00
Lenovo ThinkServer SR650, 2x Intel Xeon CPUs, 64GB RAM, 4TB SSD RAID6 Storage	\$15,000.00	1	\$15,000.00
Security Project Hardware and Labor Subtotal			\$44,200.00



CPQ Tips



- Create cybersecurity quote templates for consistent proposals
 - Ensure your product catalog is setup correctly in ConnectWise PSA™
 - Develop good product descriptions to make it easy for client to understand
 - Same easy transition to onboarding
 - Create different agreements based on the cybersecurity offering purchased (ex. incident response, monthly security agreement, etc.)
- Ensure you consistently have the appropriate detail and verbiage for security with the right messaging
 - Help your sales team deliver what is needed, legally
 - Ensure it is there every time with templates

Projects



- CPQ scopes to pay it forward to projects
 - Project matches quote which matches invoice

Project Work Plan (1/2)



Project Totals		Open	94.00
<u>Phase 1</u>	Security Project Labor	Open	94.00
<u>1009599</u>	Scope	New	8.00
<u>1009600</u>	Procurement	New	4.00
<u>1009601</u>	Project Management	New	8.00
<u>1009602</u>	Initial System Design	New	4.00
<u>1009603</u>	Initial Network Equipment Build	New	10.00
<u>1009604</u>	Base Server Build	New	4.00
<u>1009605</u>	Onsite Install	New	20.00
<u>1009606</u>	Data Migration	New	20.00
<u>1009607</u>	Setup Backups	New	4.00
<u>1009608</u>	Decommission Old Equipment	New	4.00
<u>1009609</u>	Fallout	New	8.00

Project Products (2/2)



Product ID	Customer Description	Bill	Taxable	Quantity	Picked Q...	Shipped Q...	Quantity Can...	Unit Price
Services - Project - Bundle	Security Project Labor	B		1.00	0	0	0	\$23,500.00
<u>UXG-Pro</u>	UniFi UXG Pro Firewall	B	✓	1.00	0	0	0	\$585.00
<u>USW-Pro-48-PoE</u>	Ubiquiti UniFi 48 Port PoE Switch - MDF	B	✓	2.00	0	0	0	\$1,305.00
<u>USW-Pro-48-PoE</u>	Ubiquiti UniFi 48 Port PoE Switch - IDF	B	✓	1.00	0	0	0	\$1,305.00
<u>U6-Pro-US</u>	Ubiquiti UniFi 6 Professional U6 Pro Dual Band 802	B	✓	4.00	0	0	0	\$175.00
<u>Miscellaneous - Bundle</u>	Misc Hardware and Patch Cables	B	✓	1.00	0	0	0	\$500.00
<u>Miscellaneous - Bundle</u>	Lenovo ThinkServer SR650, 2x Intel Xeon CPUs, 64GB RAM, 4TB SSD RAID6 Storage	B	✓	1.00	0	0	0	\$15,000.00

Projects Tips



- Transition from sales to onboarding smoothly
- Create project templates for onboarding and incident response to ensure consistent processes across your team
- Check out our templates in the Partner Exchange

The screenshot displays a list of project templates in a user interface. Each entry includes an icon, a title, a description, a star rating, the number of users, the version number, and an 'Import' button.

Icon	Title	Description	Rating	Users	Version	Company	Action
Project Board	CW: Incident Response - May 13, 2022	This project board is to be used when investigating and responding to potential security incidents. Use it for projects created from the CW: Security Incident Response project template for maximum effect!	★★★★★	1 users	v2021.2 (91899)	My Company	Import
Project Template	CW: Security Incident Response - May 12, 2022	This project template defines the phases and tasks to be completed when responding to a security incident. What to do immediately following a cyber attack.	★★★★★	3 users	v2022.1 (95360)	Your Company	Import
Project Template	CW: Security Onboarding - May 12, 2022	This project template defines the phases and tasks to be completed when onboarding a new customer for the security services offered by your company. Add any onboarding procedures to this template for the specific security services your company provides.	★★★★★	2 users	v2022.1 (95360)	Your Company	Import

Ongoing Support



- Same team for ConnectWise Help Desk Services™ and security
- Tip: Be cautious when creating new service boards
- Hot ticket: Some is always on the ticket



Ongoing Support Tips

- Setup right at the beginning = better analytics in the long run
- Categorize your tickets with types, subtypes & items (*check out the service types examples spreadsheet in the University. Link on next page*)
- Service ticket templates can be auto-applied with key content for that ticket

Board	Statuses	Types	Subtypes	Items
<	+	SEARCH	CLEAR	
Type ^			Default	Req
<u>Improper Usage by an Administrator</u>				
<u>Malware</u>				
<u>Unauthorized Access</u>				

Board	Statuses	Types	Subtypes	Items
<	+	SEARCH	CLEAR	
Subtype ^		Types	Inactive	
Advanced Persistent Threat 1				
Hacktivism Threat 1				
Insider Threat 1				
Opportunistic Threat 1				
Targeted Threat 1				

Board	Statuses	Types	Subtypes	Items
<	+	SEARCH	CLEAR	
Item ^		Subtypes	Inactive	
Accidental 1				
Email 1				
Intentional 1				
Unknown 2				
Unpatched Software 1				



Type, Subtype, and Item Examples

Not sure where to start? We've got you covered:


Type	Sub-Type	Item	Type	Sub-Type	Item	Type	Sub-Type	Item
Application	Adobe	Change	Network	VoIP	Change	Server	Keyboard	Install
Application	Adobe	Failure	Network	VoIP	Failure	Server	Keyboard	Product Sold
Application	Adobe	Install	Network	VoIP	Install	Server	Keyboard	Remove
Application	Adobe	Password	Network	VoIP	Password	Server	Malware	Change
Application	Adobe	Product Sold	Network	VoIP	Product Sold	Server	Malware	Install
Application	Adobe	Remove	Network	VoIP	Reboot	Server	Malware	Product Sold
Application	Anti-malware	Change	Network	VoIP	Remove	Server	Malware	Remove
Application	Anti-malware	Failure	Network	VPN	Change	Server	Memory	Change
Application	Anti-malware	Install	Network	VPN	Install	Server	Memory	Install
Application	Anti-malware	Password	Network	VPN	Password	Server	Memory	Product Sold
Application	Anti-malware	Product Sold	Network	VPN	Product Sold	Server	Memory	Remove
Application	Anti-malware	Remove	Network	VPN	Remove	Server	Monitor	Change
Application	Antivirus	Change	Network	Website	Alert	Server	Monitor	Failure
Application	Antivirus	Failure	Network	Website	False Alert	Server	Monitor	Install
Application	Antivirus	Install	Network	Website	Offline	Server	Monitor	Product Sold
Application	Antivirus	Password	Network	Website	Outage	Server	Monitor	Remove
Application	Antivirus	Product Sold	Phone	Analog	Change	Server	Mouse	Change
Application	Antivirus	Remove	Phone	Analog	Failure	Server	Mouse	Failure
Application	Apple	Change	Phone	Analog	Install	Server	Mouse	Install
Application	Apple	Failure	Phone	Analog	Product Sold	Server	Mouse	Product Sold
Application	Apple	Install	Phone	Analog	Reboot	Server	Mouse	Remove
Application	Apple	Password	Phone	Analog	Remove	Server	Network Jack	Change
Application	Apple	Product Sold	Phone	Cabling	Change	Server	Network Jack	Failure
Application	Apple	Remove	Phone	Cabling	Failure	Server	Network Jack	Install
Application	Backup	Change	Phone	Cabling	Install	Server	Network Jack	Product Sold
Application	Backup	Failure	Phone	Cabling	Product Sold	Server	Network Jack	Remove

https://university.connectwise.com/University/content/User_Document_s/ServiceTypeExamples.xlsx



Ongoing Support Tips

Check out the Security Alerts service board and the change Management service board



CW: Change Management - Apr 21, 2015
This Service Board contains items specific to managing your change process. It can be used to help implement new changes into your process, products, partners/vendors, or automation. Each change made to these should be reviewed and approved or rejected, and this service board will help implement this process.



CW: Security Alerts - May 12, 2022
This service board is used to capture and track automated alerts from the various security tools used by your company. Keeping all this information in one central place enables Manage to function as your source of truth for all potential threats to your customers! Customize the Types, Subtypes, and Items to match the types of alerts your team encounters most frequently.



Documentation Tips

- Create efficiencies by ensuring your team follows consistent processes
- Develop your standard operating procedures (SOPs)
- ITBoost is here to help with SOPs AND templates to get you going

NAME	IN-PROGRESS SOP	CREATED AT	LAST UPDATED AT	LAST UPDATED BY	ACTIONS
CW: List of Operational Processes to Consider	0 In-progress	5/28/2022 1:16 AM	5/28/2022 1:20 AM	ali@itboost.com	[Link] [Trash] [Refresh]
Disaster Recovery Process	1 In-progress	11/1/2021 1:10 PM	11/1/2021 1:35 PM	wdowling@connectwise.com	[Link] [Trash] [Refresh]
Exchange to O365 Migration	9 In-progress	6/10/2021 11:19 AM	5/11/2022 3:26 PM	ali@itboost.com	[Link] [Trash] [Refresh]
HELP DESK: Operating Procedures	0 In-progress	5/28/2022 1:06 AM	5/28/2022 2:27 AM	ali@itboost.com	[Link] [Trash] [Refresh]
INCIDENT RESPONSE CHECKLIST: Steps to Take with Client Prior to an Incident	1 In-progress	6/1/2022 11:08 AM	6/1/2022 11:41 AM	ali@itboost.com	[Link] [Trash] [Refresh]
INFORMATION SECURITY POLICIES: Acceptable Use Policy	0 In-progress	5/28/2022 1:31 AM	5/28/2022 1:57 AM	ali@itboost.com	[Link] [Trash] [Refresh]
INFORMATION SECURITY POLICIES: Anti-Virus and Malware Policy	0 In-progress	5/28/2022 1:58 AM	5/28/2022 2:01 AM	ali@itboost.com	[Link] [Trash] [Refresh]
INFORMATION SECURITY POLICIES: Asset Management Policy	0 In-progress	5/28/2022 2:01 AM	5/28/2022 2:25 AM	ali@itboost.com	[Link] [Trash] [Refresh]
IT Disaster Recovery Plan				wdowling@connectwise.com	[Link] [Trash] [Refresh]

Task	Duration
1 Schedule a vulnerability assessment	00h:00m
2 Review findings from vulnerability assessment	00h:00m
3 Check backup routines	00h:00m
4 Prevent spam from entering the client network	00h:00m
5 Lock down application data & Windows/temp folders	00h:00m
6 Setup an Active Directory account lockout policy	00h:00m
7 Increase password complexity requirements	00h:00m
8 Auto-expire inactive accounts after X days	00h:00m
9 Set up multi-factor authentication (MFA)	00h:00m
10 Establish an unknown USB device policy	00h:00m
11 Setup regular OS updates and patch management	00h:00m
12 Deploy endpoint detection & response (EDR)	00h:00m
13 Configure web/DNS gateway security	00h:00m
14 Setup logging & forward events to a SIEM console	00h:00m

Billing



- Consistent information from proposal to project to billing
- Reduces questions and time to get paid

Billing



Bill To:
ConnectWise Attn: April Taylor 4110 George Rd. Suite 200 Tampa, FL 33634 United States

Date	Invoice
05/29/2023	2300222
Account	
ConnectWise	

Terms	Due Date	PO Number	Reference	Tax ID
Net 10 days	06/08/2023			

Project Name	2023-06 Cool Security Project and jSupport Agreement - Quote #014264		
Billing Type	Standard		
Original Downpayment Amount	0.00		
Company Name	ConnectWise		
Contact Name	April Taylor		

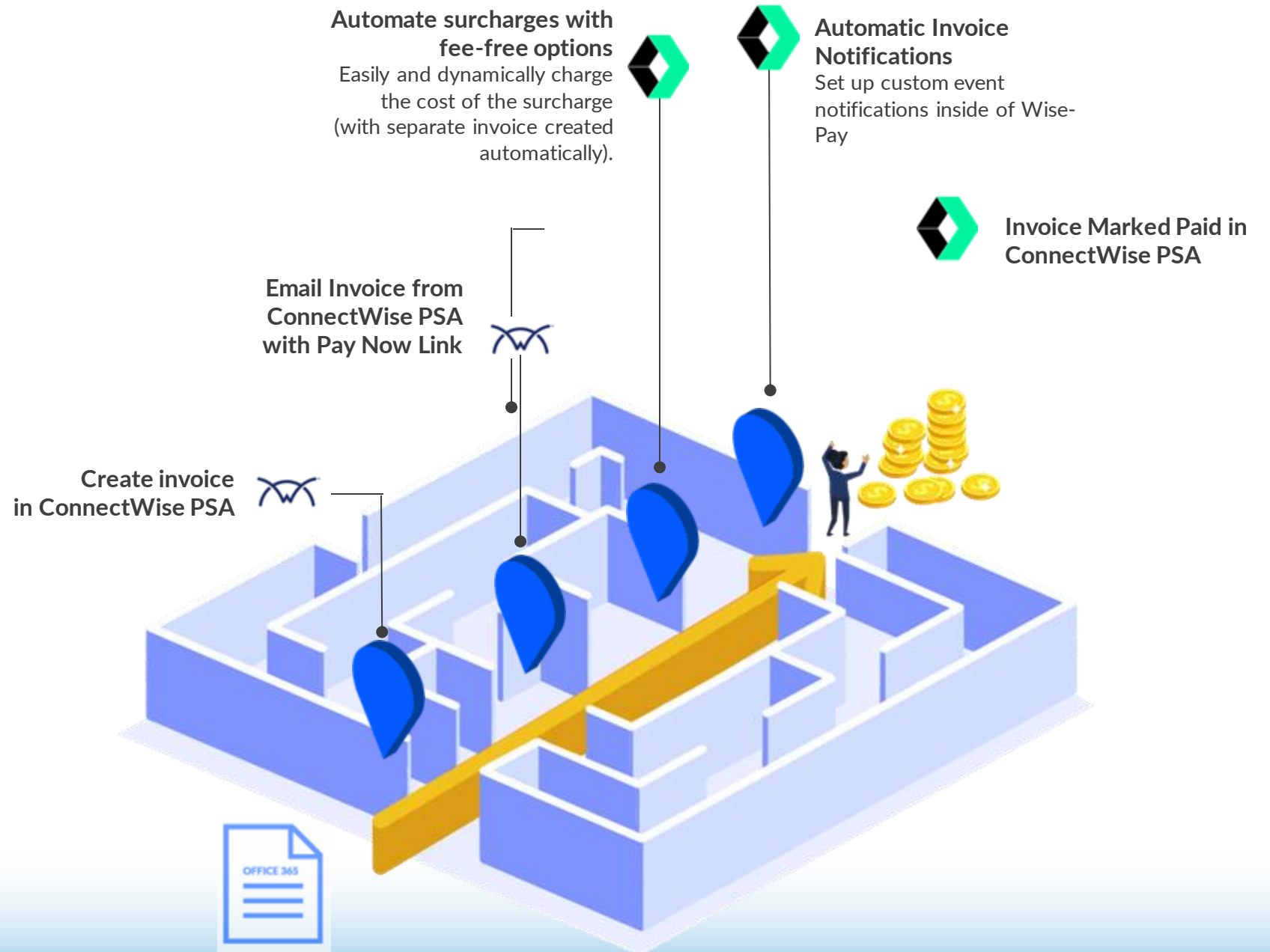
Other Charges	Quantity	Price	Amount
Billable Other Charges			
Security Project Labor	1.00	23,500.00	23,500.00
UniFi UXG Pro Firewall	1.00	585.00	585.00
Ubiquiti UniFi 48 Port PoE Switch - MDF	2.00	1,305.00	2,610.00
Ubiquiti UniFi 48 Port PoE Switch - IDF	1.00	1,305.00	1,305.00
Ubiquiti UniFi 6 Professional U6 Pro Dual Band 802	4.00	175.00	700.00
Misc Hardware and Patch Cables	1.00	500.00	500.00
Lenovo ThinkServer SR650, 2x Intel Xeon CPUs, 64GB RAM, 4TB SSD RAID6 Storage	1.00	15,000.00	15,000.00
Total Other Charges:			44,200.00

Make checks payable to JNR Networks LLC Past Due Invoices may be subject to a Late Fee of 2%/mo	Invoice Subtotal:	44,200.00
	Pima County Sales Tax:	1,159.20
	Invoice Total:	45,359.20
	Payments:	0.00
	Credits:	0.00
	Balance Due:	45,359.20

One-Time
\$44,200.00
\$0.00
\$0.00
\$0.00
\$44,200.00
\$1,159.20
\$45,359.20



Get **paid faster** with WisePay for PSA



Business Management Packages

Essentials

Streamline your business with **ConnectWise PSA, BrightGauge, and WisePay for PSA**

Pro

Standardize your business with **ConnectWise PSA, BrightGauge, WisePay for PSA, SmileBack, and ITBoost (plus 2 hours of virtual consulting per month!)**

Premium

Operationalize your business with **ConnectWise PSA, ConnectWise CPQ, BrightGauge, WisePay for PSA, SmileBack, and ITBoost (plus 4 hours of virtual consulting per month!)**

Contact your **account manager** today!

#ITNation

*WisePay for PSA available in Canada, USA, New Zealand and Australia



Security Services Solution Set

Solution sets are collections of pre-configured assets that can be imported directly into ConnectWise PSA.

Assets can and should be customized after importing to match the partner's specific needs.

This solution set empowers partners with:

- Standardized incident response plan.
- Detailed onboarding process for new customers.
- Central location to capture and classify security alerts from various cybersecurity tools.
- And more!

Import in templates: PSA desktop client to access [Marketplace > Partner Exchange](#)

#ITNation

The screenshot displays a list of solution sets available for import into ConnectWise PSA. Each card includes an icon, a title, a description, a 'show more' link, a star rating, the number of users, the version number, and an 'Import' button. The cards are as follows:

- CW: Security Alerts - May 12, 2022** (Service Board): This service board is used to capture and track automated alerts from the various security tools used by your company. Keeping all this information in one central place enables Manage to function as your source of truth for all potential threats to your customers! Customize the Types, Subtypes, and Items to match the types of alerts your team encounters most frequently. 5 stars, 1 user, Version: v2021.2 (91899).
- CW: Incident Response - May 13, 2022** (Project Board): This project board is to be used when investigating and responding to potential security incidents. Use it for projects created from the CW: Security Incidence Response project template for maximum effect! 5 stars, 1 user, Version: v2021.2 (91899).
- CW: Security Incident Response - May 12, 2022** (Project Template): This project template defines the phases and tasks to be completed when responding to a security incident. What to do immediately following a cyber attack. 5 stars, 3 users, Version: v2022.1 (95360).
- CW: Security Onboarding - May 12, 2022** (Project Template): This project template defines the phases and tasks to be completed when onboarding a new customer for the security services offered by your company. Add any onboarding procedures to this template for the specific security services your company provides. 5 stars, 2 users, Version: v2022.1 (95360).
- CW: Change Management - Apr 21, 2015** (Service Board): This Service Board contains items specific to managing your change process. It can be used to help implement new changes into your process, products, partners/vendors, or automation. Each change made to these should be reviewed and approved or rejected, and this service board will help implement this process. 5 stars, 772 users, Version: v2015.3 (29691).

Takeaway

- Standardization and innovation are connected. Once your team realizes the impact, they will become champions of standardization.
- Identify opportunities to standardize your process and pick one to start with.
- Look at the Partner Exchange for ideas of what is possible.



IT NATION™

SECURE

hosted by  CONNECTWISE

—

Don't forget to fill out your

SESSION SURVEY

■

■