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
- Linkedin/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)

CONNECTWISE™

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

IT NATION

Integrity is a part of our culture

OUR VALUES

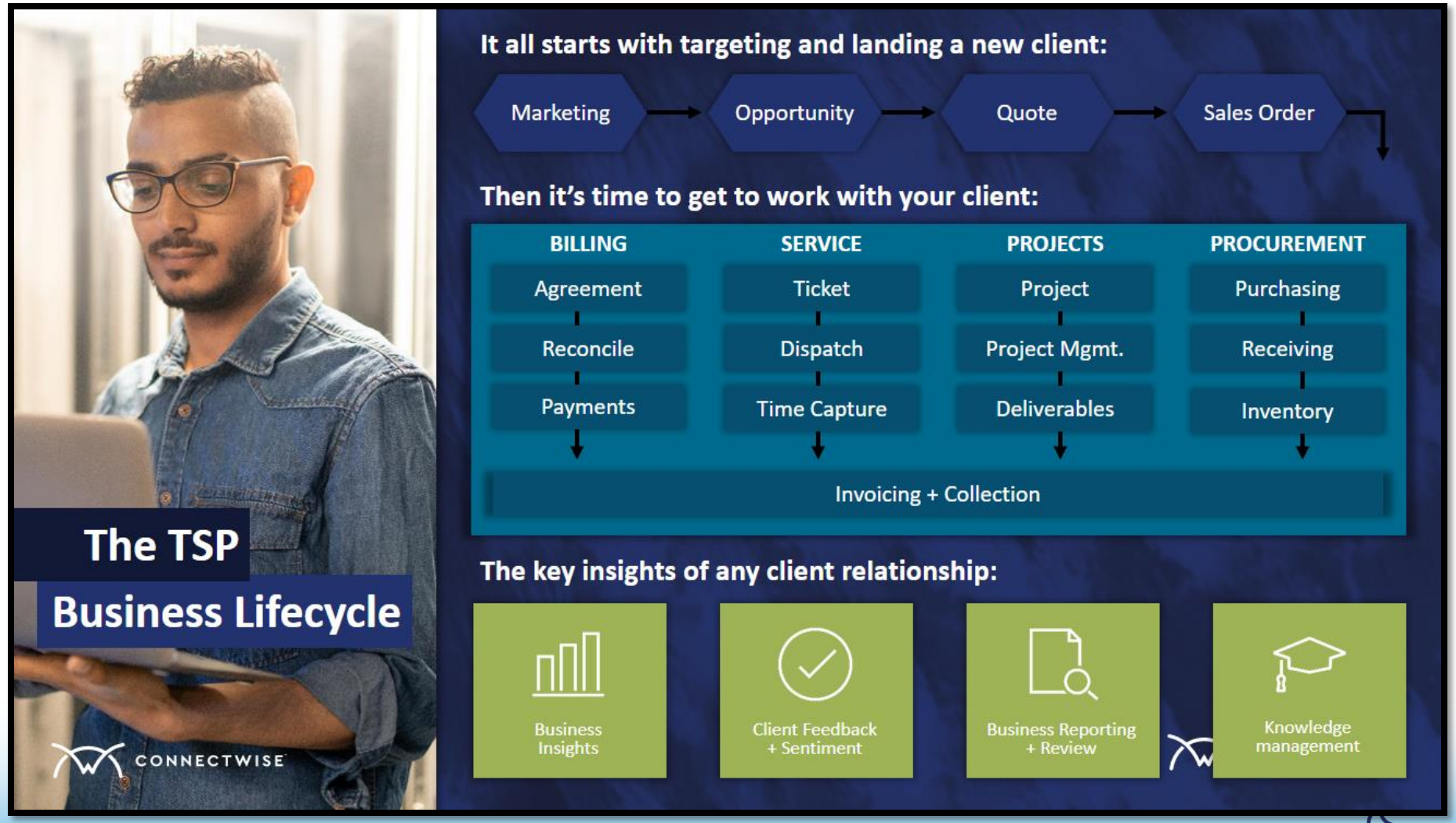
We believe that something amazing happens when you have personal and professional integrity while focusing on having a substantial and positive impact…things grow.

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: 1) Security Project Hardware and Labor | jServices - Monthly: 2) jSupport - Advanced | jServices - Monthly: 3) jCloud - Offsite Backup | MS Licenses - Annual: 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				
Services - Project - Bund	Security Project Labor	$23,500.00	1.00	$23,500.00		☑	☐	☐
Services - Project	Scope	*$250.00*	8	$2,000.00	8.00	☐	☐	☐
Services - Project	Procurement	*$250.00*	4	$1,000.00	4.00	☐	☐	☐
Services - Project	Project Management	*$250.00*	8	$2,000.00	8.00	☐	☐	☐
Services - Project	Decommission Old Equipment	*$250.00*	4	$1,000.00	4.00	☐	☐	☐
Services - Project	Fallout	*$250.00*	8	$2,000.00	8.00	☐	☐	☐
UXG-Pro	UniFi UXG Pro Firewall	$585.00	1.00	$585.00		☑	☐	☑
USW-Pro-48-PoE	Ubiquiti UniFi 48 Port PoE Switch - MDF	$1,305.00	2.00	$2,610.00		☑	☐	☑
USW-Pro-48-PoE	Ubiquiti UniFi 48 Port PoE Switch - IDF	$1,305.00	1.00	$1,305.00		☑	☐	☑

Quote – Order Porter Web (2/3)

2. Review Your Options

Your Available Options

Quote Summary	Recurring	One-Time
Project - One-Time		
☑ Security Project Hardware and Labor Subtotal	$0.00	$44,200.00
jServices - Monthly		
☑ jSupport - Advanced Subtotal	$2,256.00	$0.00
☑ jCloud - Offsite Backup Subtotal	$2,050.00	$0.00
MS Licenses - Annual		
☑ 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: • Design, Procure, Build and Implement Server, Firewall, Switches and WAPs. • All necessary mounting hardware Assumes: • 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)

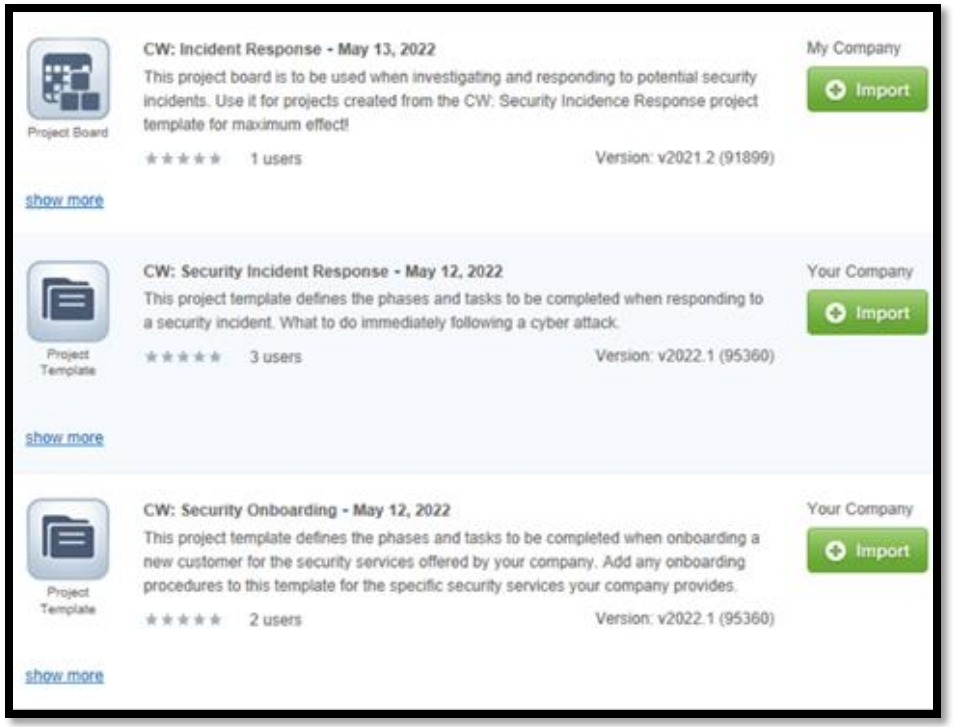
Project Totals		Open	94.00
Phase 1	Security Project Labor	Open	94.00
1009599	Scope	New	8.00
1009600	Procurement	New	4.00
1009601	Project Management	New	8.00
1009602	Initial System Design	New	4.00
1009603	Initial Network Equipment Build	New	10.00
1009604	Base Server Build	New	4.00
1009605	Onsite Install	New	20.00
1009606	Data Migration	New	20.00
1009607	Setup Backups	New	4.00
1009608	Decommission Old Equipment	New	4.00
1009609	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**
UXG-Pro	UniFi UXG Pro Firewall	B	✓	1.00	0	0	0	$585.00
USW-Pro-48-PoE	Ubiquiti UniFi 48 Port PoE Switch - MDF	B	✓	2.00	0	0	0	$1,305.00
USW-Pro-48-PoE	Ubiquiti UniFi 48 Port PoE Switch - IDF	B	✓	1.00	0	0	0	$1,305.00
U6-Pro-US	Ubiquiti UniFi 6 Professional U6 Pro Dual Band 802	B	✓	4.00	0	0	0	$175.00
Miscellaneous - Bundle	**Misc Hardware and Patch Cables**	**B**	✓	**1.00**	**0**	**0**	**0**	**$500.00**
Miscellaneous - Bundle	**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

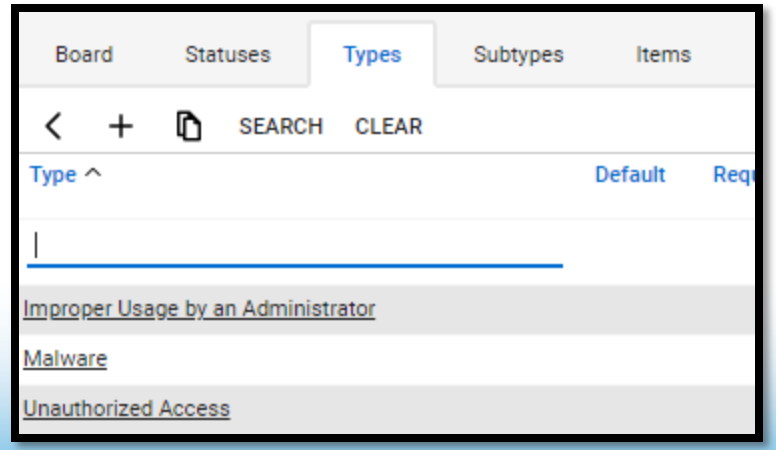


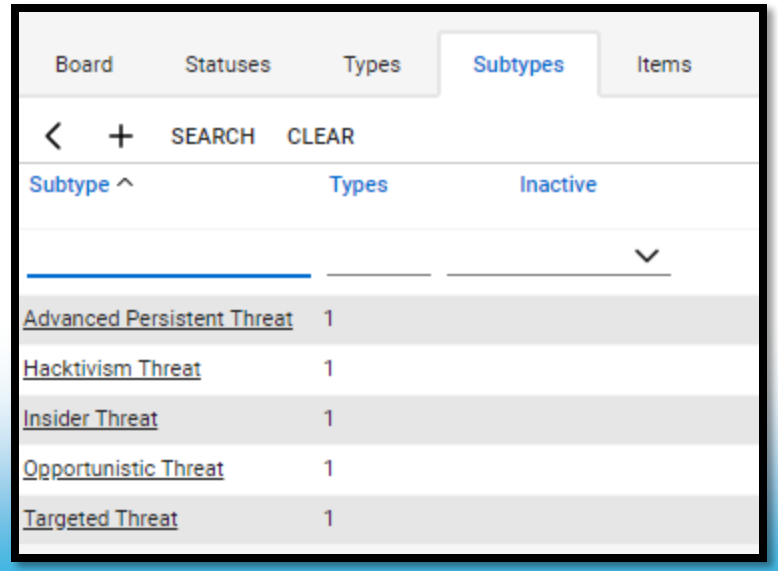
Ongoing Support

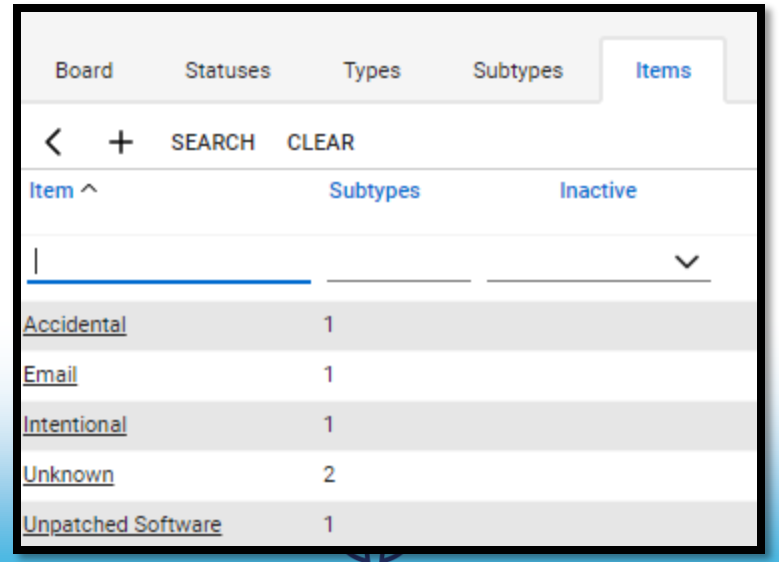
- Same team for ConnectWise Help Desk Services™ and security
- Tip: Be cautious when creating new service boards
- Hot ticket: Some is always on the ticket

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







Type, Subtype, and Item Examples

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

Type	Sub-Type	Item
Application	Adobe	Change
Application	Adobe	Failure
Application	Adobe	Install
Application	Adobe	Password
Application	Adobe	Product Sold
Application	Adobe	Remove
Application	Anti-malware	Change
Application	Anti-malware	Failure
Application	Anti-malware	Install
Application	Anti-malware	Password
Application	Anti-malware	Product Sold
Application	Anti-malware	Remove
Application	Antivirus	Change
Application	Antivirus	Failure
Application	Antivirus	Install
Application	Antivirus	Password
Application	Antivirus	Product Sold
Application	Antivirus	Remove
Application	Apple	Change
Application	Apple	Failure
Application	Apple	Install
Application	Apple	Password
Application	Apple	Product Sold
Application	Apple	Remove
Application	Backup	Change
Application	Backup	Failure

Type	Sub-Type	Item
Network	VoIP	Change
Network	VoIP	Failure
Network	VoIP	Install
Network	VoIP	Password
Network	VoIP	Product Sold
Network	VoIP	Reboot
Network	VoIP	Remove
Network	VPN	Change
Network	VPN	Install
Network	VPN	Password
Network	VPN	Product Sold
Network	VPN	Remove
Network	Website	Alert
Network	Website	False Alert
Network	Website	Offline
Network	Website	Outage
Phone	Analog	Change
Phone	Analog	Failure
Phone	Analog	Install
Phone	Analog	Product Sold
Phone	Analog	Reboot
Phone	Analog	Remove
Phone	Cabling	Change
Phone	Cabling	Failure
Phone	Cabling	Install
Phone	Cabling	Product Sold

Type	Sub-Type	Item
Server	Keyboard	Install
Server	Keyboard	Product Sold
Server	Keyboard	Remove
Server	Malware	Change
Server	Malware	Install
Server	Malware	Product Sold
Server	Malware	Remove
Server	Memory	Change
Server	Memory	Install
Server	Memory	Product Sold
Server	Memory	Remove
Server	Monitor	Change
Server	Monitor	Failure
Server	Monitor	Install
Server	Monitor	Product Sold
Server	Monitor	Remove
Server	Mouse	Change
Server	Mouse	Failure
Server	Mouse	Install
Server	Mouse	Product Sold
Server	Mouse	Remove
Server	Network Jack	Change
Server	Network Jack	Failure
Server	Network Jack	Install
Server	Network Jack	Product Sold
Server	Network Jack	Remove

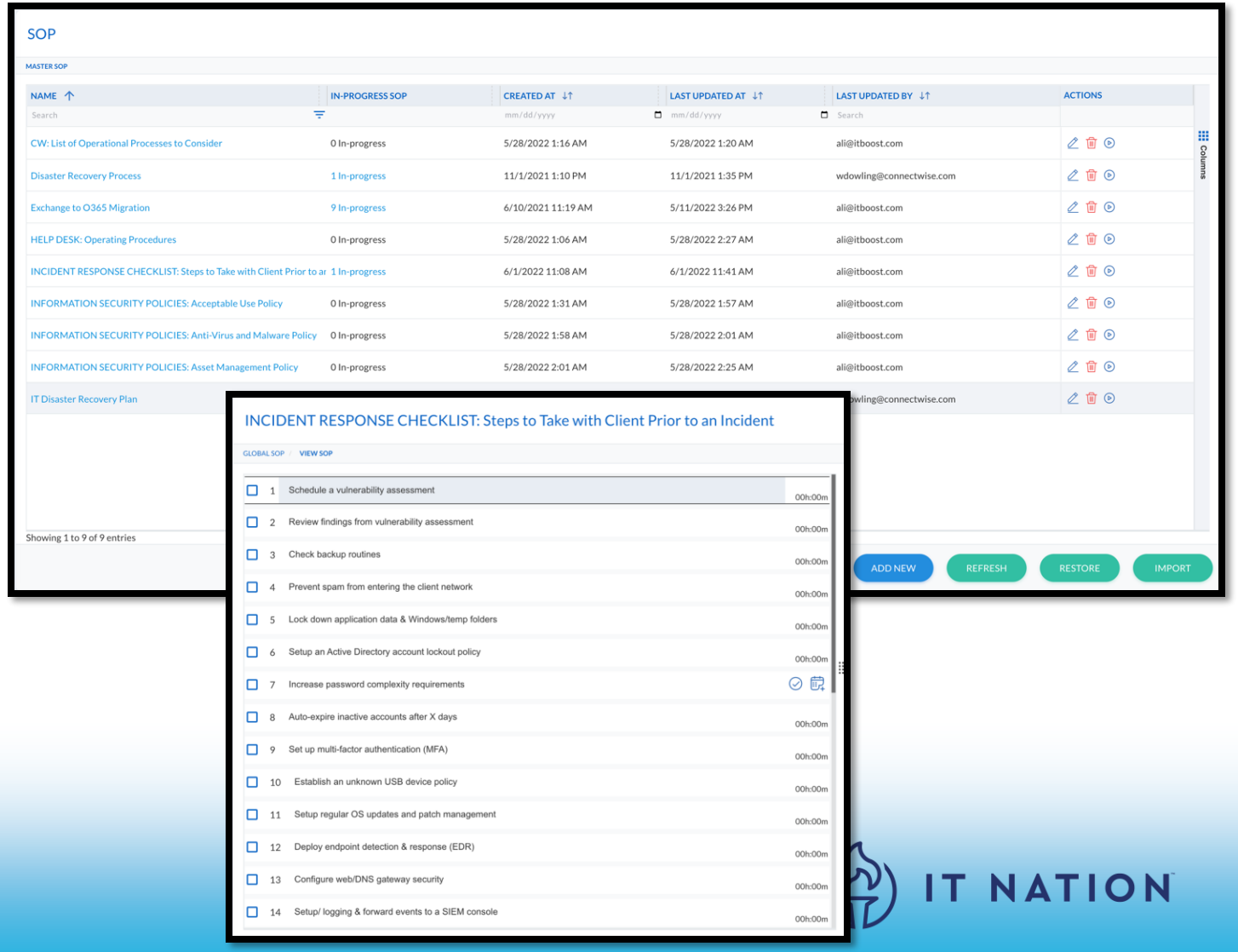
https://university.connectwise.com/University/content/User_Documents/ServiceTypeExamples.xlsx

Ongoing Support Tips

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

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



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	0.00
Amount	0.00
Company Name	ConnectWise
Contact Name	April Taylor

Other Charges	Quantity	Price	Amount	One-Time
Billable Other Charges				
Security Project Labor	1.00	23,500.00	23,500.00	$44,200.00
UniFi UXG Pro Firewall	1.00	585.00	585.00	$0.00
Ubiquiti UniFi 48 Port PoE Switch - MDF	2.00	1,305.00	2,610.00	$0.00
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	$0.00
Misc Hardware and Patch Cables	1.00	500.00	500.00	$44,200.00
Lenovo ThinkServer SR650, 2x Intel Xeon CPUs, 64GB RAM, 4TB SSD RAID6 Storage	1.00	15,000.00	15,000.00	$1,159.20
		Total Other Charges:	**44,200.00**	**$45,359.20**

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**

WisePay

Get paid faster with WisePay for PSA

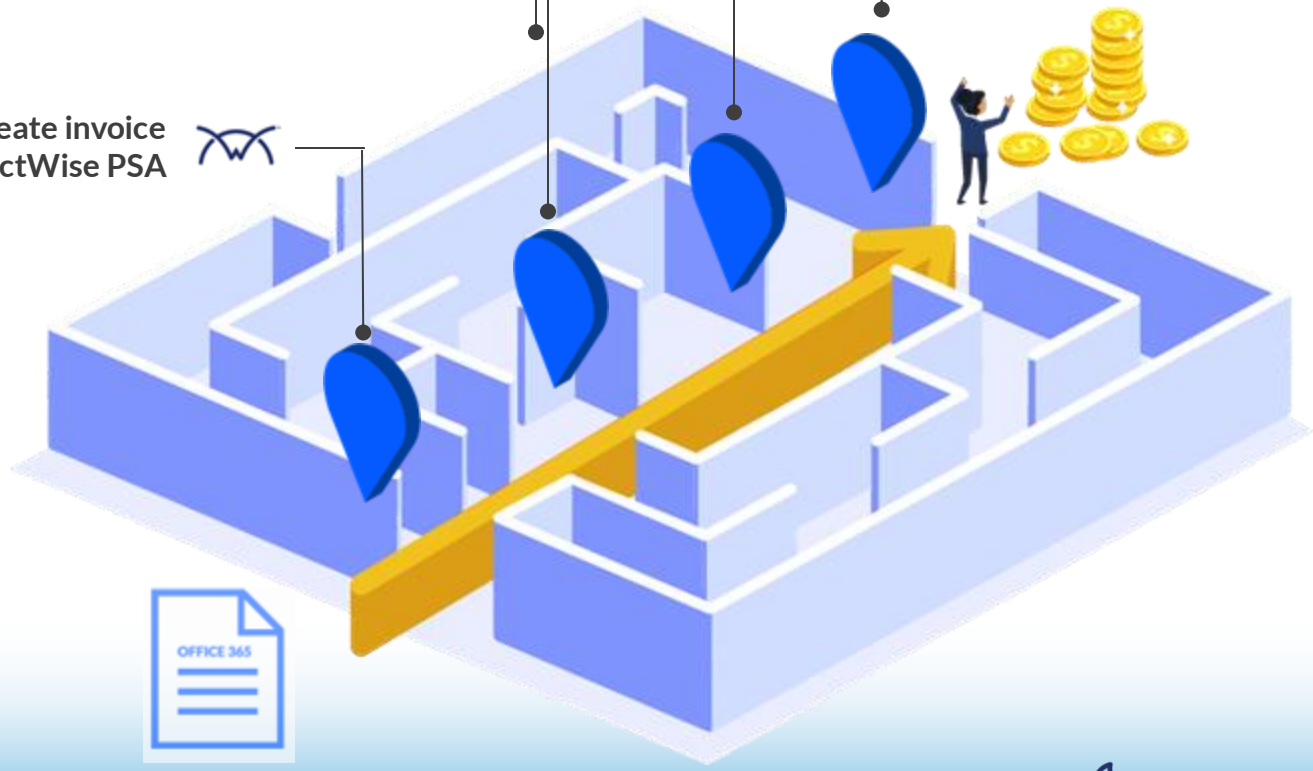
Automate surcharges with fee-free options
Easily and dynamically charge the cost of the surcharge (with separate invoice created automatically).

Automatic Invoice Notifications
Set up custom event notifications inside of Wise-Pay

Invoice Marked Paid in ConnectWise PSA

Email Invoice from ConnectWise PSA with Pay Now Link

Create invoice in ConnectWise PSA



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

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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!

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IT NATION

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**

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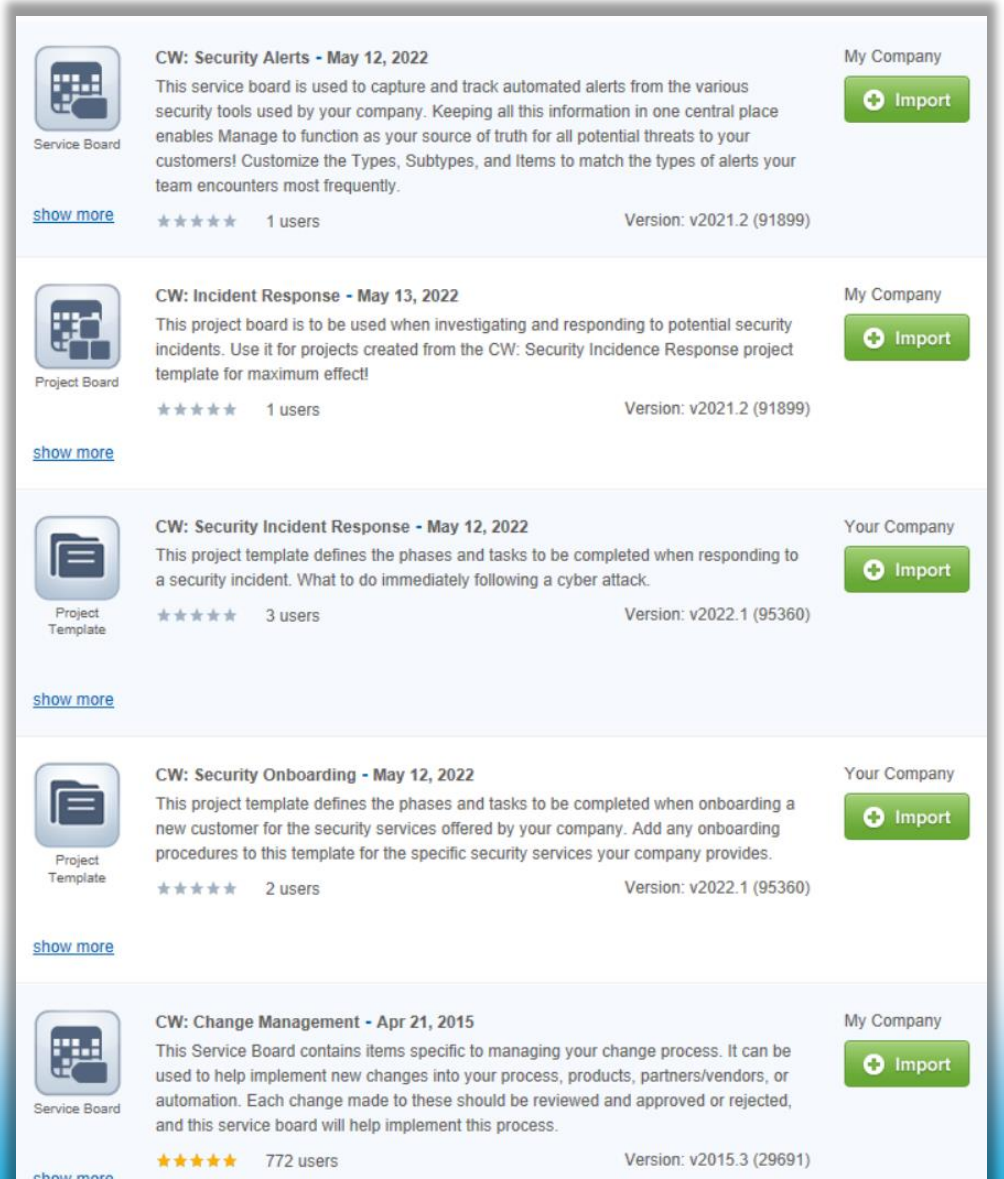

Takeaway

- 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.

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Don't forget to fill out your

SESSION SURVEY