



# ConnectWise®

## PERFECT 7 IMPLEMENTATION ROAD MAP



Dear MSP leader,

You know that your Professional Services Automation (PSA) package is your most important business investment, and no one knows your PSA like the experts at Bering McKinley.

Time and experience have taught us that there is a best way and order in which to implement ConnectWise to maximize business efficiency and outcomes. We call this *The Perfect 7*, and it is our time-tested proven order for implementing ConnectWise Manage, Automate & Sell.

Review each step below and the expected outcomes you are likely to achieve!

All the best,

*Josh Peterson*

CEO, Bering McKinley



**BeringMcKinley**

1

## CONNECTWISE SET-UP

The first step of our process is to obtain a clear picture of what's been set-up and what's needs to be implemented. Taking a close look at all set-up codes, we will dive into tax codes, and billing rates and all the necessary components in which to address.

2

## DATA REFRESH

We believe in clean data, and that begins by taking a structured look at your CRM. Bering McKinley helps you clean that CRM data in a way that prevents duplicate accounts, and incorrect data placement that could get in the way of accurate financial reporting being sent to your accounting package down the road.

### EXPECTED OUTCOMES:

- Clean demographic information speeds invoicing.
- Clean base configuration leads to greater confidence in inputted data.
- A well-implemented CW Manage results in greater flexibility in future enhancements.
- When CW Manage is implemented, smartly, clients can better able to transfer knowledge by not having to remember the “gotcha’s” “yeah buts” and “we need to go back fix that’s.”
- When thought is put into Company Type – users can quickly build marketing lists and set rules for who to contact about various services.
- Thought put into “Market” selection clients can segment customers into buckets for marketing efforts based on vertical.
- Having thorough contact information allows clients to serve their companies more completely. Knowing who works in each department allows notifications to go out to specific people on specific topics.

## 3

## AGREEMENTS

We build out the Agreements section of your platform, setting up your company for optimized use of agreements, including automation of note-taking and reconciliation. Agreements are the lifeblood of building steady and profitable recurring revenue. Your costs, your revenue product additions and, your limitations on service life in these complex agreements. Translating your existing business offerings to an equivalent agreement in your ConnectWise is an arduous task. Mapping and setting-up your Agreements with the correct revenue streams that come from those Agreements hold the keys to understanding the profitability of your services. Don't overlook the importance of getting this right from the start. Also, it's never too late to do a little touch-up work or have them "sanity checked."

### EXPECTED OUTCOMES:

- When agreements are built to the highest standards, BMK clients can begin to measure contract profitability accurately and ultimately increase profits
- Agreements set up with accurate limits create more profits. Getting paid for out of scope work on an agreement is critical to increasing revenue and protecting profits.
- Agreements with covered work roles and work types capture out of scope work and eliminate revenue leaks that chip away at MSP profits
- Agreements that utilize additions are easier to reconcile to proper headcounts or machine counts. Loss of billing for giving away end-user licenses accounts for thousands of dollars every year.
- Agreements with Additions reduces confusion in how agreements were originally priced.
- Well-built agreements make annual rate increases much simpler, thus increasing profits.



## 4

## SERVICES MODULE

Starting with a proven methodology for services module setup, our team will work alongside your team to train and best utilize the setup that we agree on. You end up with a consolidated platform that reduces idea overlap, technical mud, and clears the connection between hubs and dispatch.

### EXPECTED OUTCOMES:

- Service departments who invest time in accurate creation of ticket statuses enjoy much greater accountability and utilization rates.
- Utilizing service ticket types increases reporting functions to assess where the leaks are in your client's networks.
- Learning how to build the perfect ticket decreases inefficiencies when it comes time to invoice for services.
- Setting up charge codes for time entries decreases ticket noise.
- Charge codes increase and expose leaks and inefficiencies in dispatch practices.

5

## PROJECT MODULE

After services are set, we will focus on organizational and optimization automating workflows, training your staff to creatively use ConnectWise features to build out customized modules specific to your organization.

### EXPECTED OUTCOMES:

- Provide greater invoicing flexibility throughout each project stage.
- Have a greater ability to track the progress of complex projects.
- Reduce noise in Service Boards by utilizing simple project templates.

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## CONNECTWISE SELL

ConnectWise Sell provides an enormous amount of value in collecting critical sales information regarding pricing and intended project outcomes that eventually turn into sales orders. Discover the best practices to help your teams sell more.

### EXPECTED OUTCOMES:

- Opportunities ease conversion to sales orders.
- Reduce loss of critical sales information regarding pricing and intended project outcomes.
- Create opportunities BEFORE close of sale increases scheduling flexibility and setting the right expectations.
- Utilizing activities/tasks in CW Manage increases sales accountability.

## 7

## ACCOUNTING INTEGRATION

Accounting is merely documentation of all the business decisions that have been made, and that is why we leave it for last. We now have to make the accounting integration work based on the business decisions we have made around service, agreements, projects, time and expenses, procurement, etc. By the end of this process, your company will be fully integrated through ConnectWise into your preferred accounting package ensuring, accurate data flow from sales to accounting.

### EXPECTED OUTCOMES:

- Reduce the fear of integrating accounting that can eventually lead to massive time leaks and inefficiencies.
- Speed the time of invoicing by up to 10X.
- Increased collection times.

## READY TO MAXIMIZE YOUR INVESTMENT?

With over 500 ConnectWise implementations and tens of thousands of hours spent consulting under our belt, the Bering McKinley brings business best practices that will help you get the most out of your ConnectWise investment.

**FIND A TIME TO TALK**



**BeringMcKinley**

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