





# We are you.

ConnectWise has been a leader in the IT services industry for nearly 30 years. Founded in 1982 as an IT solutions company, we have lived through the operational challenges you face every day.

How do you make your business more efficient? How do you get everything done and still find time to plan for strategic growth? To answer these questions for our business, we developed ConnectWise PSA to help significantly streamline and automate our work while achieving higher levels of customer satisfaction and profitability.

ConnectWise delivers a vision of success for the IT Nation™, a community of industry leaders and more than 50,000 IT professionals who use ConnectWise to gain a 360 degree view of their business. ConnectWise supports the IT Nation through training, best practices, user groups, discussion forums, tradeshow, social media, and more. We are committed to helping IT companies remain competitive in a rapidly changing marketplace with an effective way to lower costs, increase revenue, and improve customer service.

As the CEO of ConnectWise, I always strive to make our solution more dynamic and intuitive, so that it is even easier for businesses like yours to embrace best practices. At ConnectWise, we make time to dream about new technologies and service opportunities that will take your business to the next level. ConnectWise is more than software – it's a team of experts behind you, a culture of excellence to drive your business forward, and the experience and tools to help you grow your business.



We are you. We are united in purpose and united by ideas. With a common platform and level of high standards, ConnectWise helps ensure that the IT Nation will be successful not only today but well into the future. Backed by the wisdom and power of the collective, we will continue to succeed by sharing best practices and building expertise. Together, we will win and win big.

A handwritten signature in black ink, reading "Arnie Bellini, II". The signature is stylized and fluid, with a large, prominent "A" and "B".

Arnie Bellini  
CEO, MBA, CPA, ConnectWise



# ConnectWise PSA: Making It All Manageable

In a rapidly changing IT services marketplace, automation is the key to growing your business. ConnectWise helps you do that. Designed exclusively for the IT industry, ConnectWise is Professional Services Automation (PSA) software for service providers, MSPs, technology consultants, integrators, and developers. ConnectWise PSA gives you all the information you require to be successful in one centralized system and delivers optimal control of every aspect of your business.

## 360° View of Your Business

If your company wants to improve productivity, raise customer satisfaction levels, and increase revenues, having control over your business is crucial to your success. With ConnectWise, every essential business process is linked together, from initial sales efforts to problem

management to procurement to customer relationship management. You get everything you need to give customers direct feedback confidently and understand what your team is doing at any time.

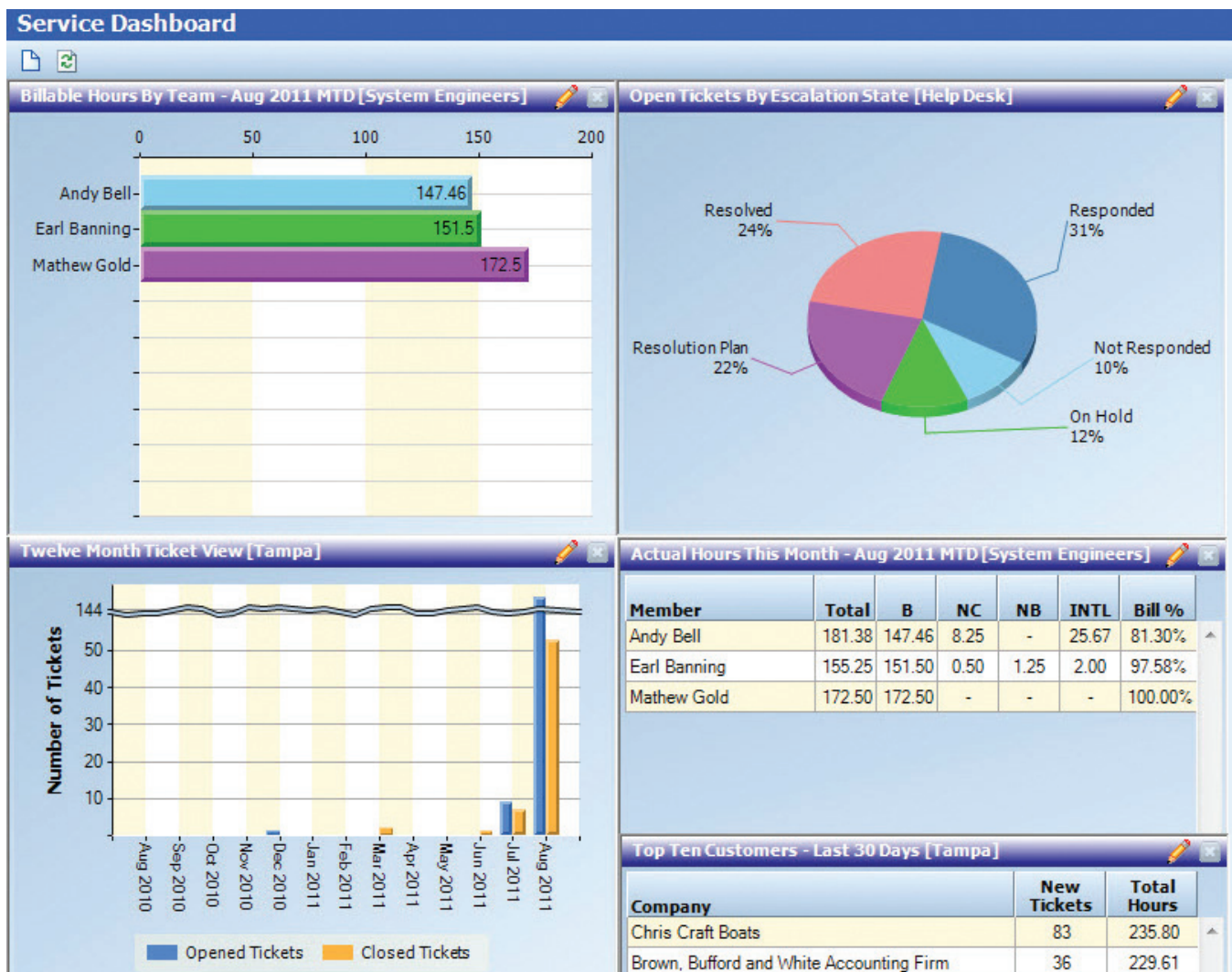
ConnectWise gives you a complete 360° view of your company's day-to-day workflows and results so you can work with greater collaboration than ever before. Through ConnectWise, everyone in your company can connect and communicate through one unified and fully integrated operational platform that manages every aspect of your business.

## Enhanced Service Delivery

From Help Desk to Dispatch to Field Personnel and Engineers, having the ability to interact in a clear and concise manner is key to meeting – and exceeding – important customer service level agreements (SLAs). ConnectWise enables







you to create and capture service tickets and effectively track time spent on those tickets. Using automation, you will improve problem resolution times by keeping your people focused and ensure your resources are managed properly. With ConnectWise, you'll enjoy greater efficiency, more effectiveness, and happy clients.

## Intelligent Sales and Marketing Campaigns

With ConnectWise, back and front office tasks are coordinated like never before. The motivation, resources and business intelligence required to make your sales results jump is in the right hands at the right times. Marketing efforts are tracked effortlessly, making sure you are reaching your target audience. And our account management tool set helps your team stay on top of client issues and concerns.



A high-angle, top-down photograph of two men in business suits shaking hands on a light-colored, tiled floor. The man on the left is older, with grey hair and glasses, wearing a grey suit and a blue striped tie. The man on the right is younger, with brown hair, wearing a dark pinstripe suit and a blue tie. They are both looking down at their clasped hands.

## Quotes & Proposals Made Simple

Providing timely, high-quality quotes will give you a powerful advantage over your competitors. Manually creating quotes and proposals takes too much valuable time and are often error prone. With an easy-to-use quoting integration, you will create proposals that win and quotes that close.

## Project Collaboration

Best practices in project management require two essential elements: collaboration and coordination. ConnectWise gives you both, ensuring a smooth running project from beginning to end from integrated project management capabilities to system-generated templates.

## Procurement and Inventory

With ConnectWise, you get full visibility of the entire purchasing cycle. It eliminates the guesswork by providing automated notifications of product deliveries and the ability to schedule installations with just a few keystrokes. Track your inventory any number of ways, even across multiple warehouses. Know where everything is so you can pull it when the situation demands it.



### Quarter 3 Summary for Andy Bell

| Month                 | Quota          | %Quota       | Open           | Won            | Lost           | Total          |
|-----------------------|----------------|--------------|----------------|----------------|----------------|----------------|
| July                  | 50,000         | 175 %        | 0              | 87,581         | 102,299        | 87,581         |
| August                | 50,000         | 162 %        | 106,843        | 81,061         | 31,442         | 187,904        |
| September             | 50,000         | 0 %          | 287,223        | 0              | 0              | 287,223        |
| <b>Quarter Totals</b> | <b>150,000</b> | <b>112 %</b> | <b>394,067</b> | <b>168,642</b> | <b>133,741</b> | <b>562,709</b> |
| <b>YTD Totals</b>     | <b>450,000</b> | <b>61 %</b>  | <b>394,067</b> | <b>276,211</b> | <b>173,658</b> | <b>670,277</b> |

### July 2011: Opportunities for Andy Bell

| Company                          | Opportunity                      | Open | Won           | Lost           | Close Date | Prob% | Expected      | Stage        |
|----------------------------------|----------------------------------|------|---------------|----------------|------------|-------|---------------|--------------|
| Chris CraftBoats                 | Replacement Network              |      | 67,343        |                | 7/5/2011   | 100 % | 67,343        | 4. Committed |
| Brown, Bufford and White Account | T3 Installation between branches |      | 20,238        |                | 7/12/2011  | 100 % | 20,238        | 5. Won       |
| Chris CraftBoats                 | Altigen Phone System 50 Ports    |      |               | 55,366         | 7/1/2011   | 60 %  | 0             | 3. Quoted    |
| Chris CraftBoats                 | Sharepoint Server                |      |               | 46,933         | 7/19/2011  | 0 %   | 0             | 4. Committed |
| <b>Totals</b>                    |                                  |      | <b>87,581</b> | <b>102,299</b> |            |       | <b>87,581</b> |              |

### August 2011: Opportunities for Andy Bell

| Company                          | Opportunity                         | Open   | Won    | Lost | Close Date | Prob% | Expected | Stage        |
|----------------------------------|-------------------------------------|--------|--------|------|------------|-------|----------|--------------|
| Chris CraftBoats                 | IBM Blade Servers- DataCenter       | 37,200 |        |      | 8/26/2011  | 100 % | 37,200   | 5. Won       |
| Chris CraftBoats                 | Sales Team Mobility                 | 22,872 |        |      | 8/29/2011  | 80 %  | 18,298   | 4. Committed |
| EZ Printing & Copying Services   | Sales Force Mobility                | 18,423 |        |      | 8/29/2011  | 0 %   | 0        | 1. Lead      |
| Chris CraftBoats                 | Server + 10 Workstations            | 12,763 |        |      | 8/29/2011  | 50 %  | 6,382    | 3. Quoted    |
| EZ Printing & Copying Services   | ASP solution for Marketing Software | 10,500 |        |      | 8/31/2011  | 0 %   | 0        | 1. Lead      |
| Chris CraftBoats                 | New Notebooks for Sales floor       | 4,585  |        |      | 8/22/2011  | 70 %  | 3,210    | 3. Quoted    |
| Chris CraftBoats                 | Free Network Audit                  | 500    |        |      | 8/29/2011  | 0 %   | 0        | 1. Lead      |
| Chris CraftBoats                 | Quote #000397 New Quote             |        |        |      | 8/29/2011  | 10 %  | 0        | 1. Lead      |
| Chris CraftBoats                 | Gold MSP w/ 3 Add On                |        | 23,000 |      | 8/4/2011   | 100 % | 23,000   | 5. Won       |
| Brown, Bufford and White Account | Hosted Exchange 16 Users            |        | 18,559 |      | 8/11/2011  | 100 % | 18,559   | 5. Won       |
| Chris CraftBoats                 | Managed Services Gold/ 8 WS         |        | 14,155 |      | 8/29/2011  | 50 %  | 7,078    | 2. Qualified |
| Chris CraftBoats                 | Network Upgrade                     |        | 13,114 |      | 8/1/2011   | 100 % | 13,114   | 5. Won       |
| Chris CraftBoats                 | Wireless Network at 4 branch of     |        | 9,433  |      | 8/29/2011  | 100 % | 9,433    | 5. Won       |
| Chris CraftBoats                 | Web Host ChrisCraft.com             |        | 2,800  |      | 8/26/2011  | 100 % | 2,800    | 5. Won       |

## Keen Business Intelligence

Managing to your objectives is easier than ever with ConnectWise and its integrated dashboards and reporting. Retrieve the business intelligence you require and view it in the way that is most helpful to you. Understand at a glance where you stand in terms of your revenue projections and sales goals, and adjust accordingly. You know exactly how your business is doing and why.

## Integration

ConnectWise offers seamless integration with all major accounting and quoting software, including Quickbooks, the industry standard. ConnectWise also integrates with the software tools most commonly used by MSPs, such as Remote Management and Monitoring (RMM), backup, network security, and spam stats. With ConnectWise, you enjoy organizational visibility into every aspect of managing your clients' IT solutions. ConnectWise makes everything in your business work together toward the common goal of ensuring success!

## Designed to Enhance Your Success

ConnectWise was built by IT people, for IT people.

Our PSA solution is designed to help you achieve greater accountability, operational efficiency and profitability through automating key tasks and following best business practices. Through one centralized system, ConnectWise brings it all together with the real-time collaboration you need for increased business insight. ConnectWise provides the support you need to succeed today and well into the future:

- Increase profitability by automating common tasks.
- Improve cash flow by better tracking billable hours and managing employee work and resources wisely.
- Enhance service levels and customer satisfaction with closed loop client communication to ensure accountability in your service level management.
- Build your business with support from a growing community of IT services companies that use ConnectWise.





# ConnectWise

## Brings It All Together

Just imagine: Trading in those long hours and slim profit margins for greater efficiencies; true control over time and resources; recurring revenue streams; and increased profitability. ConnectWise can deliver these benefits and more to your business.

ConnectWise supports the needs of IT services business by replacing your spreadsheets, white boards and stand alone applications with one complete end-to-end solution. It fully integrates business processes across your organization so you can work more effectively and efficiently. With ConnectWise, you will unlock the information hidden in your business and gain true insight into your company's day-to-day workflows—so you can achieve success.

**Enhance service levels and customer satisfaction.** The minute you make a promise of excellence in service delivery, client expectations climb accordingly. Making those numbers becomes a key driver and often makes the difference between a long-term, happy client and one who cancels service with you as soon as possible. ConnectWise helps ensure accountability in your service level management by tracking SLAs, and providing closed loop client communication.







800.671.6898 | [connectwise.com](https://connectwise.com)



**Improve cash flow.** ConnectWise tightens the tracking of billable hours and your invoicing process. You no longer have to struggle to keep accurate time records or details of activities because everything is tracked in one centralized system. Bill your client according to existing individual agreements or by industry standard rates. Manage employee work and resources wisely. Instead of a grueling billing process, streamline that process and invoice clients the same day the work gets done.



**Save time.** ConnectWise brings all business critical information together in one integrated system so you can save time on regular tasks. You'll have configuration information at your fingertips so you know when client subscriptions need to be renewed and warranties expire. You'll have everything

needed to create invoices, saving hours of backtracking a week. By automating key processes and getting better visibility into your business, you'll have more time to focus on growing your business.

**Improve processes.** With new departments and employees, your company will face new challenges. With defined workflow processes in place, you can ensure that work gets done the way you want it to get done. ConnectWise is built with best practices to help you ensure consistency, accountability and improved productivity.

**Coordinate sales and marketing efforts.** When your company grows, you need to attract and maintain more business to support your employees. In order to be successful, you need the right tools to help you keep track of important client data so you can keep your hard-won customers. ConnectWise helps everyone in your company stay informed about your customers – from sales orders and service tickets to new projects and product orders. The key to effective sales and marketing programs is the ability to work together throughout the total customer lifecycle.





**Increased profitability.** ConnectWise helps increase profitability by automating common tasks. It also helps account for where money goes as well as exposing areas within the business where money seeps away. With ConnectWise, you get the ability to strengthen

those existing client relationships while attracting new clients at the same time.

**Grow your business without needing an upgrade.** No matter how big your company grows, ConnectWise will always be there for you. With ConnectWise, you

get all of our features at once and can choose to use what you need, when you need it.

## Service Ticket Management

Providing quality service to your clients is the key to your ongoing success. ConnectWise enables the timely creation and capture of all service tickets—all in one centralized location. With better management and accountability, you ensure that no tickets fall through the cracks and you provide the superior service your clients expect.

ConnectWise gives you seamless management of the ticketing process: Once tickets are logged into the system, you can track or review all tickets through the service boards you create and ensure consistent response times. Interactive tools such as the knowledgebase, customer portal and automated notifications enable you to improve first, and overall, call resolution times by helping you solve issues faster. ConnectWise helps you configure automated workflow, and create escalation rules and audit trails, so that you can gain insight into your service operation and keep your service levels high.





ConnectWise helps you increase the effectiveness of your service team with the ability to:

- Configure automated workflow, notification and escalation rules
- Create audit trails and track SLAs
- Improve first and overall call resolution time
- Reduce call volumes through self-service customer portal
- Enable better management and accountability with automated notifications
- Keep clients informed of progress with regular status updates and proactive communication

## Technician Dispatch and Scheduling

Dispatch and scheduling works hand in hand with your ticketing process. How do you schedule resources? Do you assign projects manually? With ConnectWise, you can easily align the right resources with the right project, improve issue resolution times and maintain high utilization of your valuable resources.

A centralized dispatch portal keeps everything visible at all times and you can use drag and drop capabilities to schedule and reassign









## Time, Expenses and Billing

ConnectWise simplifies communication between sales, service, project management, help desk and accounting so that you can decrease your time to bill. Our PSA solution empowers you to capture additional billable hours while accurately tracking time and expenses to customers. ConnectWise captures this important information and automatically updates other areas of your business so you can ensure compliance and increase the accuracy of invoices.

With ConnectWise, you gain the ability to invoice services, expenses and products on one invoice, with the detail needed to satisfy clients. ConnectWise directly integrates with many popular accounting packages and also offers an accounting API so you can automatically pass invoices into your accounting system. ConnectWise helps you:

- Eliminate multiple data entry points
- Offer customers choice via flexible agreements and billing formats

- Track customer renewals, domain and license expirations and more

- Deliver detailed invoices to your customers

## Project Management

ConnectWise helps you create, schedule, manage, and invoice all of your company's projects so you can deliver on time, within budget, and with superior service. You coordinate all aspects of project management from start to finish. You have the choice to start from project templates, Microsoft Project, or you can seamlessly convert opportunities into current projects.

ConnectWise enables you to stay up to date on key project milestones and compare budget to actual time or expenses. You can also view all resources and scheduled tasks, evaluate availability, and ensure your project is following the work plan. Once completed, all of your project information is shared seamlessly with accounting for faster, more accurate billing.



ConnectWise streamlines project management with the ability to:

- Develop plans, schedules, and assignments
- Evaluate project status, staffing, and profitability
- Monitor and track projects real-time
- Ensure projects stay on track
- Configure workflow rules
- Offer flexible client billing options

### Sales, CRM and Marketing

In order to increase leads and drive more business, you need real time knowledge of where you stand with your sales pipeline. With ConnectWise, you can stay on top of every lead with the essential information you need to focus on, and nurture, every sales opportunity. With informative dashboards and reporting tools, you can easily measure pipeline progress and evaluate where every lead stands with drill down capabilities. Help your sales team leverage best practices for success. With access to current customer and prospect activity, you can ensure consistent sales follow-up and even link individuals to marketing campaigns. With ConnectWise, you can:

- Manage more leads and close more business
- 360 view of customer and prospect activity



- Implement best practices and automated sales workflow
- Produce beautiful, accurate quotes in minutes
- Measure sales and quote progress and profitability
- Develop marketing campaigns schedule email blasts and track results
- Automate handoff between sales, service and accounting

## Business Management

ConnectWise tracks essential financial information such as billable tasks and hours, expensed items, product purchases, and

workflow. You establish the billing guidelines so you have the flexibility to track by hour or project. ConnectWise also provides a detailed audit trail so you have the support you need for billing and invoicing.

The financial management tools provided in ConnectWise help you:

- Improve cash flow
- Capture all billable hours with detailed audit trail
- Send invoices quickly and confidently
- Gain insight into all of your company's finances with informative dashboards

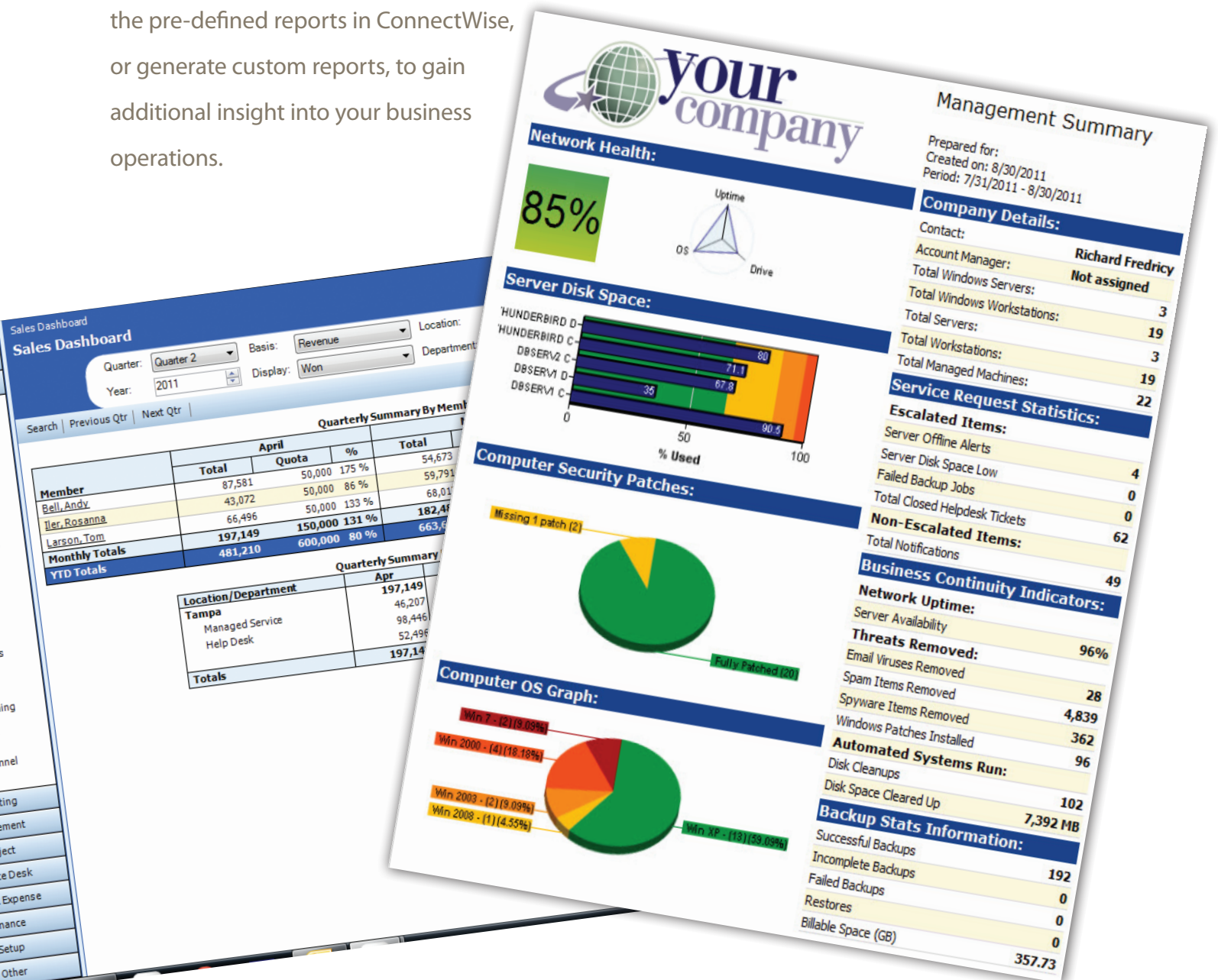


## Dashboards and Reporting

ConnectWise provides you with the actionable, real-time business intelligence you need to stay ahead. With easy-to-use dashboards, you can quickly review key performance indicators to check on the health of your business. You can utilize sales, dispatch, project, service, and financial dashboards to discover what tasks are due today, which customers have generated the most revenue, what is billable now, and which resources are available. You can also use the pre-defined reports in ConnectWise, or generate custom reports, to gain additional insight into your business operations.

With ConnectWise you will:

- Eliminate information gaps and gain real-time visibility to make strategic decisions
- Use KPIs to identify successes and problems and proactively manage your business
- Spend more time acting on intelligent data and less time gathering it
- Access performance and profitability data anytime, anywhere from the Internet





“ConnectWise was the breakthrough our company was looking for. ConnectWise is 100% about helping everyday companies achieve extraordinary results.”

Tim Brewer  
Anittel, Ltd., Sydney, Australia  
ConnectWise Partner since 2007





*ConnectWise Leadership Team*

# About ConnectWise

Established in 1982, ConnectWise delivers powerful IT services and management solutions to small and mid-sized companies. Today more than 55,000 IT professionals rely on ConnectWise to achieve greater accountability, operational efficiency, and profitability. Based in Tampa, Florida, ConnectWise began as a dominant IT solutions company and now offers the premier business operating system for IT solution providers.

ConnectWise is an independent, employee-owned company backed by exceptional people who are passionate about the IT industry and helping IT companies achieve success. Our commitment to excellence and innovation has been consistently recognized throughout the IT industry. With a strong focus on the success of our Partners and the IT Nation at large, ConnectWise has made significant contributions to the managed services market. We have earned business and technology



awards for multiple aspects of our company including channel development, best software solution, best place to work, recognition of innovative team members, and more.

We are so certain of your success that we'll give your money back if you aren't satisfied.

ConnectWise PSA is the leading business automation tool for IT solution providers for a reason: it works! In fact, we guarantee it. If you do not see satisfactory results within 120 days of the date of your signed agreement, we will refund your money.

With ConnectWise, you will see an immediate improvement in the control you have over your business, your utilization rates, as well as an improvement in revenues, profits and cash flow. We are committed to providing you all the tools and resources necessary to successfully implement the ConnectWise solution for

optimal performance. We have developed a comprehensive curriculum of training sessions and video modules targeted at the various individuals/work roles within your organization. By agreeing to allow us to assist you with proper implementation and training, and to work with us through any issues that might arise, you qualify for the ConnectWise Satisfaction Guarantee!

We are driven to help you own your space.

We, the IT solutions companies, will succeed together. To us, you are an integral part of ConnectWise. We are dedicated to using your best ideas to drive changes for continual improvement. ConnectWise will not only support the way you do business today, but also anticipate how you will need to do business tomorrow. That is our commitment to you, and that is our collective future.

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## ConnectWise Awards

We are proud of the recognition we have received from industry leaders and organizations. For a complete list of our awards, visit [connectwise.com/awards](http://connectwise.com/awards)





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