

ConnectWise Customer Relationship Management

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Agenda

- What is Connectwise?
- Why did ControlCase make the change?
- What will be the customer impact?
- Questions



What is Connectwise?

- Connectwise is a customer relationship management tool focused on the managed services industry.
- Key features
 - › Centralize All Information
 - › Automate All Processes
 - › Discover Real-Time Visibility
 - › Achieve faster resolution time
 - › Manage customer information more efficiently
- Key Functions
 - › Sales
 - › Customer onboarding
 - › Automated ticket generation based on workflow
 - › Centralized management and SLA reporting of tickets
 - › Time Tracking
 - › Automated Escalation





Why did ControlCase make the change?

- ControlCase Goals in Adopting ConnectWise
 - › Combine several discrete management systems into unified platform.
 - › Leverage industry standard workflow and processes
 - › Enable strong ticket management
 - › Enable ticket automation
 - › Enable better reporting
 - › Enable automated SLA escalation
 - › Enable Support Portal for customer transparency on Tickets
 - › Reduce duplicate and “lost” tickets
 - › Enable web services integration with Existing products
 - GRC
 - SIEM NextGen



What will be the customer impact?

- Customer Impact

- › Minimal
- › All ticket creation and management will be via support portal
- › Automated ticket notifications with response links embedded

mark gmail | My Account | Log Out

Home Tickets [Create Ticket](#)

Welcome mark gmail

Alerts

- 0 Open unapproved tickets

Open Tickets (48)

- Perform ASV M11 Scan
- Perform ASV M11 Scan
- Perform ASV M11 Scan
- Perform ASV M11 Scan
- Perform ASV M11 Scan
- Perform ASV M11 Scan

See All >>

Statistics

48 Open Tickets 9 Tickets This Month 273 Tickets This Year

Ticket Totals By Month

Month	Tickets
J	0
F	0
M	0
A	0
M	48
J	36
J	9
A	0
S	63
O	0
N	0
D	0

noreply | Mark Smith 7/20/2016

Ticket #456 - Perform ASV M5 Scan - OSP Global LLC

Hi Mark,

Your compliant report has been released. Please see the GRC portal for report details.

<https://www.controlcase-compliance-manager.com/ClientK1113/>

For information using support portal please click on below link.

<http://files.ctctcdn.com/5c04f0c8001/466b2185-0301-47be-b189-ebfa00efaf2c.pdf?ver=1468507715000>

Thank you.

ControlCase CaaS Team

Home Tickets [Create Ticket](#)

Search By

Summary

Status

- Open
- Closed

Ticket #

Contact

Show More

Search

Clear

Tickets

Create Ticket | Approve | Sort | Ticket | Ascending Descending

Ticket	Status	Assignee	Type
Perform ASV M11 Scan	5911 Ticket	Mark Smith Resources	MSS Type
Admin, Oct 12, 2016			
>New Status			
Perform ASV M11 Scan	5910 Ticket	Mark Smith Resources	MSS Type
Admin, Oct 12, 2016			
>New Status			
Perform ASV M11 Scan	5909 Ticket	Mark Smith Resources	MSS Type
Admin, Oct 12, 2016			
>New Status			
Perform ASV M11 Scan	5908 Ticket	Mark Smith Resources	MSS Type
Admin, Oct 12, 2016			
>New Status			
Perform ASV M11 Scan	5907 Ticket	Mark Smith Resources	MSS Type
Admin, Oct 12, 2016			
>New			





Thank You !