ConnectWise
Customer Relationship Management

Mark E Smith

Agenda

- What is Connectwise?

- Why did ControlCase make the change?

- What will be the customer impact?

- Questions

ControlCase
Compliance as a Service

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
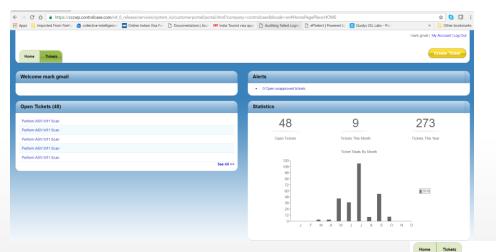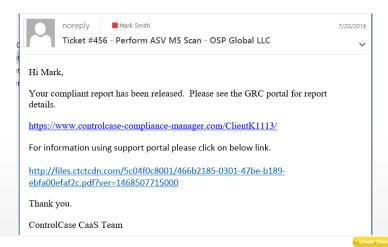   - GRC
    - SIEM NextGen
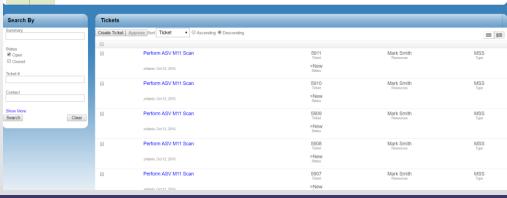
What will be the customer impact?

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

Thank You !