**Client Information**

|  |  |
| --- | --- |
| **Client Name:** |  |
| **Address:** |  |
| **Address 2:** |  |
| **City**: |  | **State**: |  | **ZIP**: |  |
| **Main Phone:** |  |

**Main Point of Contact (Gate Keeper)**

|  |  |
| --- | --- |
| **Name:** |  |
| **Title:**  |  |
| **Phone:** |  |
| **Mobile**: |  |
| **Email:** |  |

 **Billing Contact Information** [ ]  **(Check Box If Same as Above)**

|  |  |
| --- | --- |
| **Name:** |  |
| **Title:**  |  |
| **Phone:** |  |
| **Mobile**: |  |
| **Email:** |  |

|  |  |
| --- | --- |
| Agreement Information |  |
| Agreement Type | Complete Care  |
| Billing Type | User Centric |
| Onboarding Start Date | 3/1/2020 |
| Support Start Date | 3/1/2020 |
| Number of Servers | 0 |
| Number of Workstations | 0 |
| Number of Users | 0 |
| Number of Locations | 0 |
| Is the Location Out of State? | No |
| Is There a Project Associated with This Opportunity? | No |
| Client Success Manager (If Determined)  | Choose CSM |
|  |  |

|  |
| --- |
| Opportunity Information (Check if verified and completed) |
| Client has been entered in ConnectWise and approved by finance? |[ ]  **Main point of contact information added to ConnectWise?** |[ ]
| Products added to Opportunity and quantities match signed agreement?  |[ ]  **Agreement reviewed by a Pre-Signature Agreement Reviewer role holder?** |[ ]
| Signed agreement AND this document uploaded to attachments of Opportunity? |[ ]  **ConnectWise dollar amounts match Agreement?** |[ ]
| [ ] lient document folder has been created in SharePoint and all associated documents have been uploaded? |[ ]
| Select Standard Tools (Included with Complete Care Agreement) |
| Agents on Servers |[ ]  **Web Security Filtering** |[ ]
| Agents on Workstations  |[ ]  **Email Spam Filtering** |[ ]
| Advanced Virus Protection  |[ ]  **Crypto Prevent** |[ ]
| Internet/Bandwidth/ Network Monitoring |[ ]  **Backup Device and Disaster Recovery** |[ ]
| Patching |[ ]  **Server Monitoring Support Type** | 10x5 |
| Alternative Backup Solution (KBDR; Veeam; Will this include offsites? Add details below. |[ ]  **Alerts go to Us or Client?** | Choose an item. |
|  |  |  |  |
| Select Additional Premium Tools and or Services Included |
| Premium Including Custom Web Content Filtering |[ ]  **Backup Monitoring for Clients Solution** |[ ]
| Office 365 Products |[ ]  **Hardware as a Service (HAAS)** |[ ]
| Cloud User Storage (Example: One Drive; Sharefile) |[ ]  **Cloud Based Servers / Data Center** |[ ]
| Standard Email Protection Package (Hardening)  |[ ]  **Advanced Email Protection Package**  |[ ]
|  |  |  |  |

|  |
| --- |
| Customer Pain Points to Address (Example: Line of business application is slowing systems down; LOB Vendor says it their network equipment / configurations.) |
| Click here to enter text. |

|  |
| --- |
| Onboarding Special Request |
| Click here to enter text. |
| Click here to enter text. |

**Schedule Onboarding Handoff with the following people:**

|  |  |  |
| --- | --- | --- |
| **Department** | **Primary**  | **Secondary**  |
| Sales | Billy  | Chad  |
| Finance | Sophia  | Rebecca  |
| Service | Matt  | Kyle  |
| Onboarding Team  | Mark  | John |
| Account Manager | Josh  | Robert  |