**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 |