pax8 Academy

AGREEMENTS IN CONNECTWISE

Syllabus

Updated: February 2025

Training Overview

Agreements in ConnectWise is a 6-week, virtual, live-instruction training course. This training is designed to build a framework for ConnectWise Agreements that produces measurable reporting of profitability and efficiency. We will explore best practices and key foundational components such as parameters, additions, service components and how they are applied to Agreement types. We will further explore use cases for each contract type and how they are constructed to produce a measurable outcome.

This training is designed for:
• MSPs who have recently started using ConnectWise
• MSPs who are looking to improve contract profitability and efficiency within ConnectWise
• ConnectWise users with roles in Finance Administration, Account Management, Sales Administration, Service Executives, Owners

If you are new to contracts and agreements outside of how it's managed in the PSA (for example if you don't have an MSA), it is recommended that you take the Pax8 Academy course Contracts and Agreements, as it will provide an overview of all contract and agreement types.

What You'll Get

- 6 hours of virtual, interactive, instructor-led content taught by an expert in contract profitability and efficiency in ConnectWise.
- Downloadable videos* of the content you can rewatch on-demand at your convenience.
- Downloadable slide decks, handouts, and resources.

Learning Objectives

By attending this course, you will learn how to:
- Applying Agreement Types to Business Units
- Agreement Foundations – PSA Impacting Components
- Agreement Compartments by Agreement Type – Services, Billing Terms, Exclusions, Charges, Addition Items and Projects
- Agreement Management and Profitability Reporting

* Videos will either be recordings from your session or previously recorded material in which partner faces and voices have been removed. It is recommended to attend courses live to receive the full benefits of interactive Q&A with the instructor and class.

Schedule of Topics

1. Financial Overview
    a. Measuring Profitability
    b. Lines of Business Defined
    c. Agreement Gross Margin and Efficiency

2. Agreement Types
    a. Mapping Agreement Types to Lines of Business
    b. Use case for each Agreement Type
    c. Application to Board Frameworks

3. Building Agreement Components
    a. Work Types
    b. Lines of Business
    c. Identifying and Calculating Labor Revenue
    d. Identifying and Calculating Hard Costs

4. Understanding Agreement Components
    a. Application Parameters
    b. Exclusions by Work Role or Work Type
    c. Agreement Terms
    d. Agreement Billing Cycles
    e. Adjustments and Prorations
    f. Bill To and Sub-Companies

5. Deploying and Managing Agreement
    a. Additions
    b. Resource Burden Costs
    c. Agreement True-Up Best Practices
    d. Agreement Templates

6. Agreement Reporting
    a. Workflows
    b. Profitability Live Reporting
    c. Performance Metrics

Instructor

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Next Steps

Explore your next step with Pax8 Academy:
- On-Demand Content
  - [The Four Levers of Gross Margin](#)
  - [EBITDA Demystified: From Numbers to Strategy](#)
  - [MSPCFO 101](#)
- Instructor-Led Courses
  - [Contracts and Agreements](#)
  - [Operations for Efficiency and Profitability](#)
  - [Managing Projects in ConnectWise](#)
- Peer Groups
  - [Join a Peer Group](#)
- Coaching
  - [Sign up for Business Coaching](#)

Register for this course through the Instructor-Led Training Subscription

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