

SMARTinsights

Operational Truth
Before Action



Overview

SMARTinsights provides a comprehensive analysis of your ConnectWise PSA and CPQ environments, covering configuration integrity, workflows, billing, automation, data hygiene, and cloud risks. Results are presented in a BrightGauge dashboard along with a clear, actionable roadmap.

Why Choose Us?

- PSA-focused assessment expertise
- Proven operator-built methodology
- Cloud-impact checks baked in
- Dashboard-driven system clarity
- Executive-ready recommendations

The Details



Core Benefits

- Clear insight into system health
- Faster decisions with real data
- Reduced migration and ops risk



Key Capabilities

- Full PSA/CPQ configuration scan
- Cloud-impact readiness testing
- BrightGauge Dashboard with key metrics



Ideal Scenarios

- Preparing for cloud migration
- Standardizing PSA operations
- Validating environment stability



Engagement Model

- Set timeline (2-4 weeks by tier)
- Stakeholder review sessions
- Executive roadmap delivery