# Client
# Welcome
# Guide

**pim**

Dear Valued Client,

Welcome! Thank you for selecting pim as your IT service consultant and provider. pim provides world-class support by offering more than the average MSP, serving as a strategic partner in your business.

As your technology consultant, we are your guide, steering you through what, at times, can be complex decisions around cybersecurity and aligning you with leading industry best practices. We believe our approach allows you to focus on your business and leave the rest to us.

We pride ourselves on providing the highest quality service and support. We strive to make your engagement with us as effortless as possible. From project requests and equipment installation to invoicing and how to contact us, we want working with us to be an easy, enjoyable process. Our motto is Synchronizing People, Process, and Technology.

Thank you for allowing us to be your IT service provider. Your satisfaction is our measure of success, and we are excited to have the opportunity to work with you and your team.

Regards,

Cari Grafton
Director of Operations

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# Meet the Core Team

**Cari Grafton**
**Director of Operations**
cgrafton@proactive-info.com

Cari is our fearless leader who makes sure we stay proactive in our services to you.

**Kyle Newman**
**Project Manager**
knewman@proactive-info.com

As project manager, Kyle ensures that all installations and special projects adhere to industry best practices.

**Will McCauley**
**Service Manager**
wmccauley@proactive-info.com

Marissa leads our service team, ensuring your daily IT needs are covered.
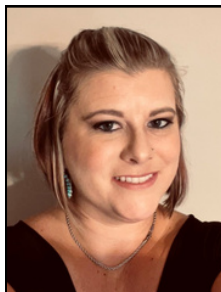
**Brandon Walcott**
**Technical Alignment Manager**
bwalcott@proactive-info.com

Brandon aligns our services with your IT and cybersecurity needs.

**Stacy Aitken**
**Cyber Security Program Manager**
saitken@proactive-info.com

Stacy heads up our Compliance and Security Program Management team.

**Angela Davis**
**Virtual CIO**
adavis@proactive-info.com

Angela provides strategic solutions to help your overall business through technology.

**Joanna Peterson**
**Virtual CIO**
jpeterson@proactive-info.com

Joanna provides strategic solutions to help your overall business through technology.

**Chris Harris**
**Sales Director**
charris@proactive-info.com

Chris develops relationships so that we can learn how we can best meet your needs.

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# Mission, Vision, and Values

**MISSION**

Our mission is to enhance your ability to deliver and achieve your business goals and objectives expertly and efficiently through technology.

**VISION**

Our vision is to enhance client growth, operational efficiency, sustainability, and profitability through predictive technology solutions.

**VALUES**

- Our clients are a part of our family; their success is our success.
- We are inspired by results and motivated by action.
- We learn, grow, and stay curious.
- We invent, simplify, and act.

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# Transitioning to pim

It is our goal to have your relationship with pim be effortless. From project requests and equipment installation, to invoicing and how to contact us, we want working with us to be easy and enjoyable. We take pride in providing you with the best customer service and support. Your satisfaction is our measure of success. We hope to make the transition to pim seamless with minimal disruption to your business continuity.

Our onboarding process is 6-8 weeks. During this transition time, you will meet all the pim team members who will serve your organization. You will be served by our:

- Technology Alignment Manager
- Service Manager
- Virtual Chief Information Officer (vCIO)
- Service Delivery Team

## Client Responsibility

We may provide you with a basic network questionnaire requesting usernames, passwords, and important data regarding your most used software packages and vendor information. Should you have questions about how to answer this questionnaire, our team will be available to help you.

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# Client Onboarding Timeline

## Phase 1

### Pre-onboarding data collection secures smooth transition

- Transition from Sales to TAM
- TAM collects information about infrastructure, network, and team members
- Customer notifies current IT vendor of termination

## Phase 2

### TAM is active onsite to collect data.

- TAM communicates with current IT vendor for further data collection
- TAM begins scheduling Projects team for transition to pim services

## Phase 3

### Meet vCIO and Service Manager.

- Implementation of pim tools for smooth service transition
- vCIO, having reviewed data findings done by TAM, communicates how best to serve you now and in the future

## Phase 4

### vCIO becomes main point of contact.

- Centralized Services and Help Desk Support ticketing begins
- vCIO presents all projects to you and establishes project timelines

# Finance Department

## General Payment Terms Policy: DUE UPON RECEIPT

The most convenient way to pay is through the **Client Portal**. Offering you a more secure platform, the Client Portal allows you to make payments, set up automatic drafts direct from your business bank account, and store payment methods in a 100% PCI compliant platform.

### Set Up ACH and Credit Card Payments at:

https://proactiveinfo.connectboosterportal.com

# Service Department

**Ready to assist you and is easy to reach.**

**Hours of Service:**
Onsite and remote service is available 8 a.m.-5 p.m. Monday-Friday.

**By Phone:** (804) 897-8347
**Through Client Portal:** https://pim.myportallogin.com.

**After Hours Support Line:** (804) 897-8347, option 2.

Brief overview of our service level agreement:
**1 hour response rime for any service call, 24/7/365.**

Please see the pim Master Service Agreement or your pim Sales and Service Proposal for details.

# The Client Portal

In the Client Portal, depending on your permission level, you can:

- Submit Tickets
- View Tickets
- View Invoices
- Update Company Contacts and Permissions
- Make Payments

In client portal you can edit your account details, including users and their security levels, submit, search, and monitor service request tickets, view invoices, and make online payments. The pim Client Portal provides you with everything you need to know about your account with convenient desktop shortcut access!

For your convenience, the Client Portal is found on the far-right side of the menu of the pim website. This takes you to the Login page where you can enter your email address and password to access the ticketing system.



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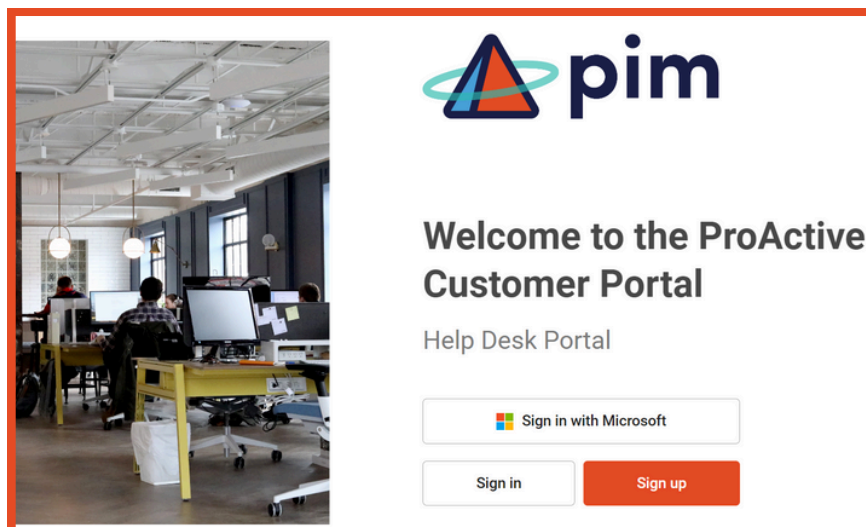
# Company Directory

Visit our website, subscribe to our blog, and follow us on Facebook and LinkedIn to get the latest info on technology, cybersecurity best practices, and our product offerings.

**Support:** (804) 897-8347, option 2 or through client portal
**Finance:** (804) 897-8347, option 3 or finance@proactive-info.com

### Director of Operations
**Cari Grafton:** (804) 956-9330
cgrafton@proactive-info.com

### Service Manager
**Will McCauley:** (804) 459-8452
wmccauley@proactive-info.com

### Technical Alignment Manager
**Brandon Walcott:** (804) 637-6590
bwalcott@proactive-info.com

### Project Manager
**Kyle Newman:** (804) 823-7550
knewman@proactive-info.com

### Compliance and Security Program Manager
**Stacy Aitken:** (301) 787-0227
saitken@proactive-info.com

### Virtual Chief Information Officers
**Angela Davis:** (804) 399-7888
adavis@proactive-info.com
**Joanna Peterson:** (804) 601-0907
jpeterson@proactive-info.com

### Sales Director
**Chris Harris:** (804) 897-8347 x 6110
charris@proactive-info.com