pim

Welcome Guide

Synchronizing people, process, and technology.

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,

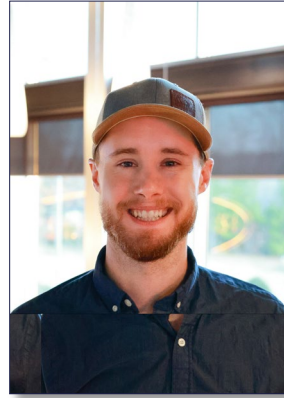Andrew Blais
General Manager

Meet the team

Andrew Blais
General Manager
ablais@proactive-info.com

Andrew is our fearless leader who makes sure the pim team stays ahead of the curve.

Kyle Newman
Project Manager
knewman@proactive-info.com

As project manager, Kyle ensures that all installations and special projects are top notch.

Marissa Binck
Customer Success Manager
mbinck@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.

Cari Grafton
Virtual CIO
cgrafton@proactive-info.com

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

Angela Davis
Virtual CIO
adavis@proactive-info.com

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

Mission, Vision, and Values

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At pim, we take pride in providing the highest level of service and support available. Our values reflect how we do business, but also our culture and how we treat our customers, partners, and fellow employees.

These values and principles influence our actions and every decision we make. We use them as our moral compass as we lead and advise our clients, thereby earning their trust.

Our Core Values:

1. **Our client is a part of our family; their success is our success.**

2. **We are inspired by results and motivated by action.**

3. **We learn, grow, and stay curious.**

4. **We invent, simplify and act.**

Our mission is the engine that drives us.

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

Our vision is to help you soar.

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

Transitioning to pim

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It is our goal at pim to have your entire engagement with pim to 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 only 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 teammates who will serve your organization. You will be served by our:

- Client Onboarding Specialist
- Technology Alignment Manager
- Service Manager
- Virtual Chief Information Officer (vCIO)
- Centralized Services and Help Desk

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 Client Onboarding Specialist will be available to help you.

Client Onboarding Timeline △pim

Week 1

Introduction of Onboarding Team.

- Onboarding process overview
- Explanation of team member roles
- Receive paperwork such as client questionnaire, contracts, etc.)
- Onsite professional services scheduled

Weeks 2-3

TAM is active onsite to collect data.

- Tools installed to manage your network and collect data so that we may best serve you
- On-site survey (between 4-8 hours)
- Onboarding specialist communicates data collection findings with you

Weeks 4-5

Introduction of vCIO and Client Success Manager.

- Centralized Services and Help Desk Support service dates established
- vCIO, having reviewed data findings done by TAM, communicates how best to serve you now and in the future

Weeks 6-8

vCIO becomes your main point of contact.

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

pim Finance Department

General Payment Terms Policy: Due upon receipt

Ways to Pay: 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 auto-drafts direct from your business bank account, and store payment methods in a 100% PCI compliant platform.

- **ACH and Credit Card Payments at:** **https://proactiveinfo.connectboosterportal.com**

pim Service Department

The pim Service Team is ready to assist you and can be reached in the following ways:

Hours of Service: Onsite and remote service is available 8:00am-5:00pm Monday-Friday and can be reached by phone, (804) 897-8347, or through our Client Portal at: **https://pim.myportallogin.com**.
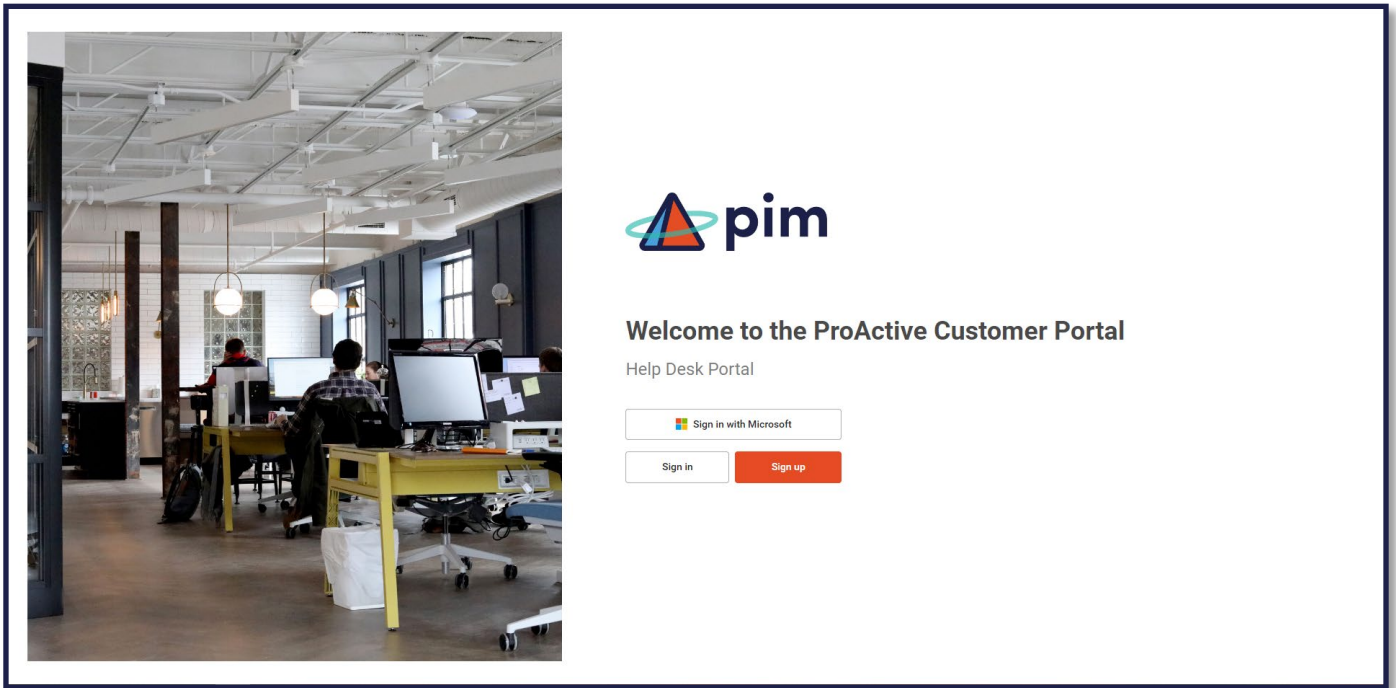
24/7/365 Support Line: (804) 897-8347, option 2.

Brief Overview of Our Service Level Agreement:

1 hour response time for any service call, 24 hours/day.

Please see the pim **Master Service Agreement** or your pim Sales & 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

Through the 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 bar of the **pim website**. Look for the "Get Support" button! This button takes you to the Login page where you can enter your email address and password to access the ticketing system.

pim Directory

Key Company Links and Communications

We invite you to visit our website, follow our blog and social media and sign up for our emails. Doing so will get you information on the latest technology trends and product offerings that can help you manage your IT needs better, more efficiently and cost effectively. Click on the links provided below to learn more.

Support: Through your **client portal** or 804-897-8347, option 2.

Website: **www.proactive-info.com**

Facebook: **www.facebook.com/ProactiveInfoMgt**

LinkedIn: **www.linkedin.com/company/proactive-information-management**

Subscribe to our blog: **www.proactive-info.com/blog**

General Contact Information

Client Success Manager: Marissa Binck, 804-897-8347 x6113, or **mbinck@proactive-info.com**
Sales: Chris Harris, 804-897-8347 x6110, or **charris@proactive-info.com**
TAM: Brandon Walcott, 04-637-6590, or **bwalcott@proactive-info.com**
vCIOs: Angela Davis, 399-7888, or **agdavis@proactive-info.com**
Cari Grafton, 804-897-8347 x6111, or **cgrafton@proactive-info.com**
Special Projects: Kyle Newman, 804-823-7550, or **knewman@gproactive-info.com**
Support: 804-897-8347, option 2 or through your **client portal**
Finance: 804-897-8347, option 3 or **finance@proactive-info.com**