

# Moving to Autotask PSA



**Autotask PSA** is a secure, scalable cloud-based platform with a powerful and intuitive feature set, purpose-built to drive efficiency, accountability and profitability for managed service providers (MSPs). Since 2018, more than 3,000 MSPs have made the switch to Autotask PSA and hundreds more join our community every year. Our experience and know-how with migrating MSPs to Autotask PSA helps ensure a transition with minimal disruptions to your business, lessening your administrative burden and minimizing the cost of change.

## Pre-Sales Engagement

In our pre-sales engagement, we assess in detail your business and technical requirements, as well as your current PSA usage, to determine how to best meet your needs.

Datto product specialists are on hand throughout the evaluation, to ensure that Autotask PSA has the functionality you require. Specialists will also demonstrate how Autotask PSA can transform service delivery with increased efficiency and automation.

## Implementation and Launch

Datto offers a range of implementation packages to suit your specific business needs. Based on industry experience and best practices, we work with you to define the best path for your success and will tailor your implementation based on your team's specific needs, skills, and availability. Implementation options range from video-based online learning to one-on-one onsite engagement with an Autotask PSA implementation expert.

## Committed to helping you start strong - and stay strong

Datto understands your return on investment in Autotask PSA is based on the depth and breadth of your usage - which is why our Partner Success team offers a range of resources after you have successfully migrated to Autotask PSA to help you make full use of the platform, including:

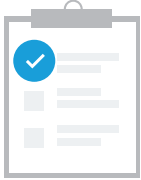
- 24/7 direct-to-tech support
- Best practices consulting and health checks
- Premium training
- Custom reporting
- Communication of product updates
- Vibrant online community of Autotask PSA partners and Product Managers to share tips, tricks, and best practices



**G2's Fastest Implementation product** in the Implementation Index with the shortest go-live time in its category

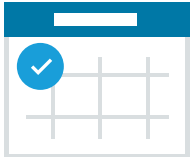
# Move to Autotask PSA in 5 Steps

With your Autotask PSA account provisioned, your Implementation Manager will be on hand to help you deploy and implement the solution from start to finish.



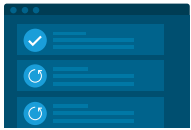
## Technical Business Review

- Review key requirements
- Identify key project stakeholders
- Define success criteria



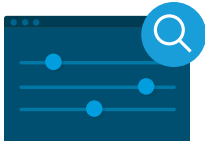
## Develop Project Plan

- Agree on project deliverables
- Develop critical milestones and dependencies
- Review and adjust if needed



## Data migrations

- Select entities and historical timeframes to import
- Data migration utilizing import tools to reduce time required for migration
- Apply best practices for clean data



## Workflows

- Identify key workflows
- Map out existing business processes
- Develop workflows based on best practices



## Integrations

- Identify key integrations
- Develop priority plan
- Assist in integration set up with third-party tools

To learn more about Autotask PSA, please visit:

[www.datto.com/products/autotask-psa](http://www.datto.com/products/autotask-psa)

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## datto

### Corporate Headquarters

Datto, Inc.  
101 Merritt 7  
Norwalk, CT 06851  
United States  
partners@datto.com  
www.datto.com  
888.294.6312

### Global Offices

USA: 888.294.6312  
Canada: 877.811.0577  
EMEA: +44 (0) 118 402 9606  
Australia: +61 (02) 9696 8190  
Singapore: +65-31586291

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