



A PowerSchool Unified Classroom™ Product

Welcome Packet

Next Steps, Getting Started, and General Information

Welcome to Schoology!

We're excited to welcome you to the Schoology Community! As a new customer, we are dedicated to helping you along every step of the way.

This packet contains information to a) help you understand our onboarding process, b) provide suggestions about thoughtfully approaching change, and c) give you guidance on what to expect in the coming weeks.



Onboarding Overview

The Schoology Onboarding team will collaborate with you to thoughtfully plan for the various phases of our process. The four-phases below outline how we approach a successful onboarding experience.



Schoology Compass



**Planning
Onboarding
Specialists**



**Technical and
Platform Setup
Onboarding Specialists**



**Training and
Rollout
Professional
Development
Specialists**



**Customer Success
Customer Personnel
and Success Team
Together**



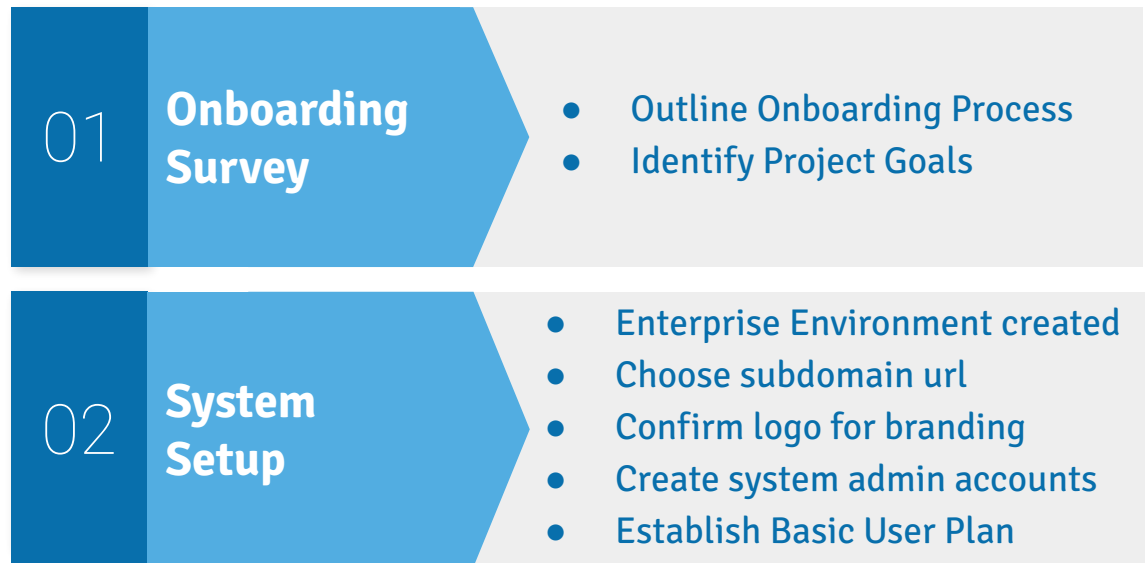
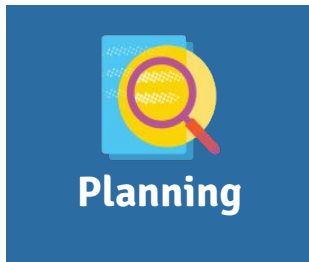


Planning

Schoology's onboarding process starts with a Welcome email and Pre-Onboarding Survey where we will gather essential information about your organization.

Who from your organization will be part of this process? We recommend that you include the following*:

- **Project Lead:** Responsible for leading the implementation for client, communicating project milestones to Schoology Project Manager, and monitoring client project team task completion.
- **Tech Lead:** Responsible for managing: database, data extracts, and data population.
- **Training Lead:** Responsible for managing professional development within your organization



*While we have broken up these responsibilities into three roles, the process can be achieved by a single individual or expanded to a larger team



Technical and Platform Setup

Your Technical and Platform setup will begin with your self-paced admin training in our Learn Together course in Schoology. Upon completion of the Learn Together course, your Onboarding Specialist will assist you in provisioning your data and configuring your authentication.

Who from your organization will be part of this process? We recommend that you include the following*:

- Tech Lead: Responsible for managing your database, data extracts, data population, and authentication method.



01

Learn Together Course

- Determine roles, permissions, settings
- Prepare data for integration

02

Production Environment Configuration

- Provision user, course, enrollment data & grade passback
- Configure authentication
- Establish Support workflows

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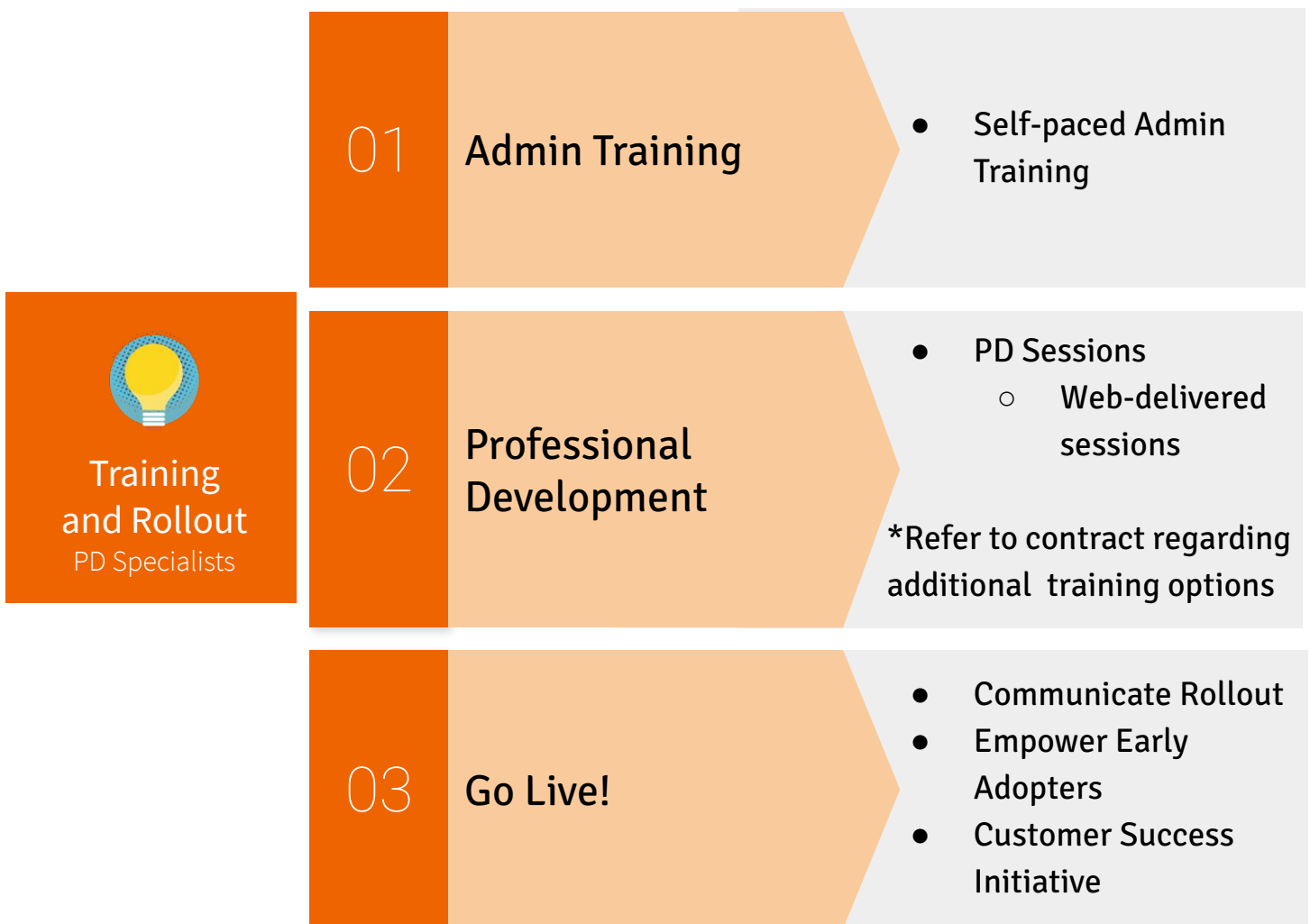


Training and Rollout

Once your systems are integrated with Schoology, the phase of getting users trained and using the platform begins.

Who from your organization will be part of this process? We recommend that you include the following*:

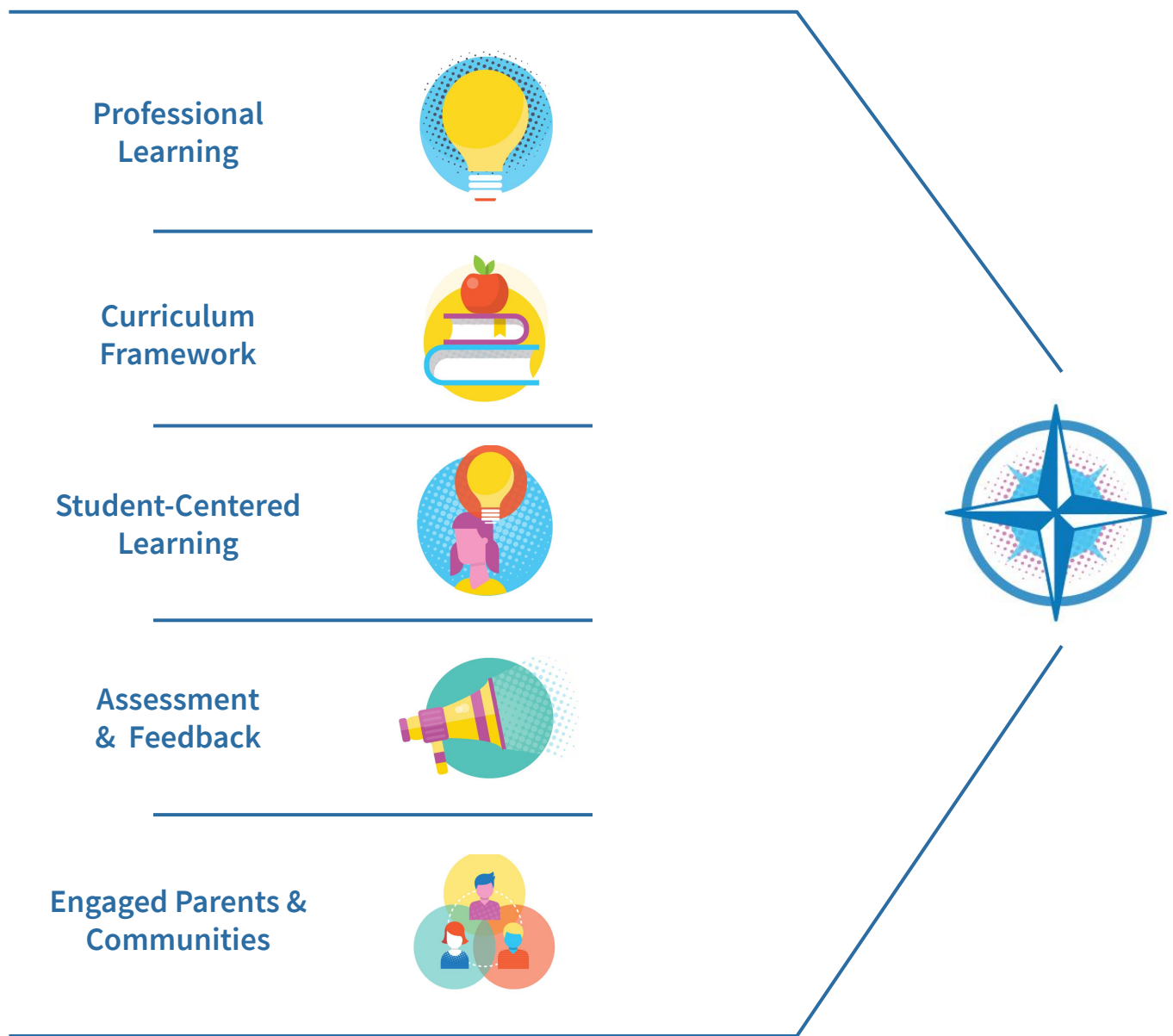
- Project/Curriculum Lead for PD: Responsible for leading the professional development planning and goals for your organization



*While we have broken up these responsibilities into three roles, the process can be achieved by a single individual or expanded to a larger team

Organization Adoption & Success

Our work with you doesn't end when you go live with the platform. We have developed Customer Success routes to help all customers reach their goals. As we continue to work together to impact teaching and learning, we will continue to monitor progress, adapt to your organization's needs, and advance what's possible for education.

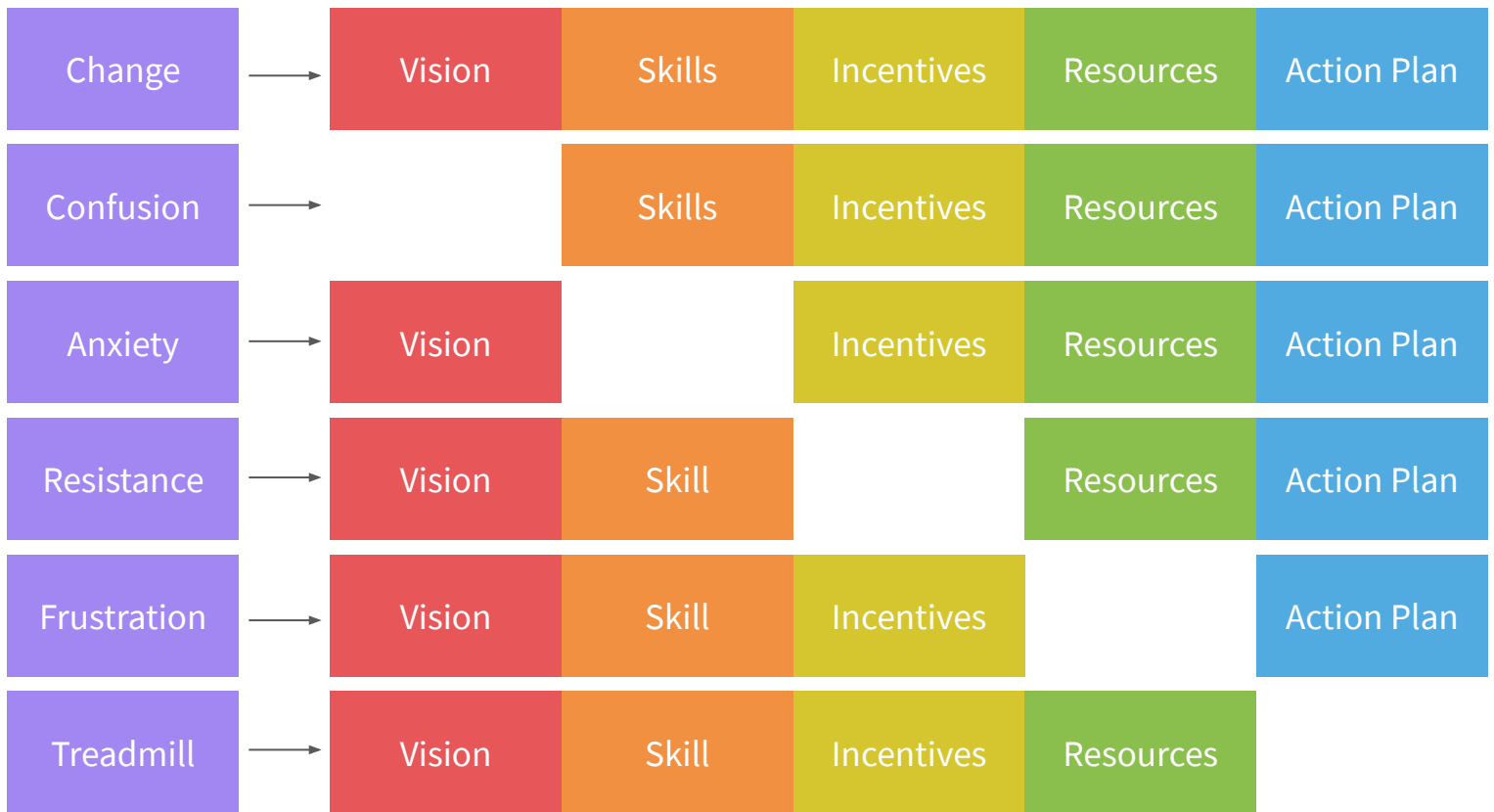




Vision for Schoology

Even if you have used a Learning Management System before, it is important to think about what elements of complex change you should consider as we look ahead at onboarding and long-term implementation and success.

We recommend getting together with other leaders in your organization and thinking through these various elements. We will talk more about this with you as we begin our onboarding process, but it's important for us to know what your vision is for learning -- and where Schoology fits into that overall vision.



Adapted from Knoster, T. (June, 1991). Factors in Managing Complex Change. Material presentation at TASH Conference, Washington, DC.

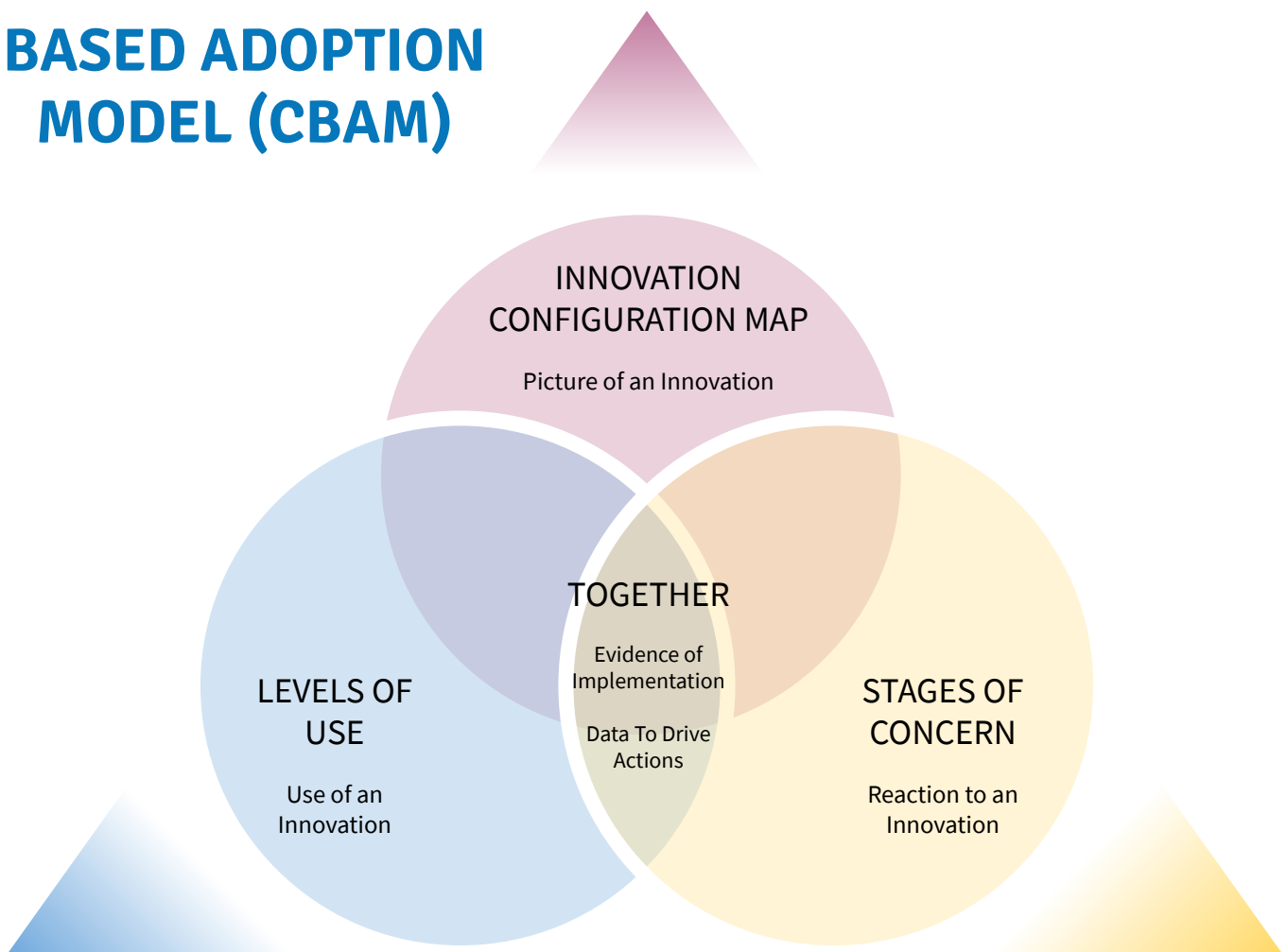


Approaching Change

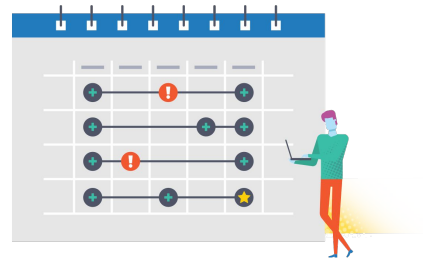
In addition to vision, being cognizant of the various dimensions of change is important for any endeavor where you want to see a systemic shift in practices, approaches, and beliefs.

Schoology supports organizational change by using the Concerns-based Adoption Model (or CBAM). As we work together, we'll be exploring these various dimensions with you and your larger leadership team(s).

CONCERNS BASED ADOPTION MODEL (CBAM)



What's Next?



Here's a brief checklist to help you prepare for the phases in our process:

- Be sure that Schoology has received the signed contract
 - Decide whom from your organization will be leading the onboarding project
 - Communicate with leaders of the technical, instructional, and professional learning areas to make them aware of their vital involvement in the project
 - Consider early communication about Schoology to build awareness (website announcement, newsletter blurb, social media post, etc.)
 - Identify members of your team that will be responsible for answering questions from your community who will be fielding support questions
 - Be ready to provide us with some information about your organization in the Pre-Onboarding Survey, including:
 - Your desired timeline for going “live”
 - The targeted grade levels for Schoology use in the first year
 - Information about any content migration from other systems that will be part of the project (if applicable)
 - Information about your SIS, authentication methods, and desired domain name
 - Information about student and staff devices
 - Productivity Suite information (Google, Microsoft, both)
-

Onboarding Roadmap

1. Onboarding Survey

This survey collects important information for configuring your Schoology Enterprise environment



2. Environment Configuration

Your Environment and Custom Branding is created



3. Learn Together Course

Self-paced Schoology course to begin your System Admin training



4. Technical Call Configuration

1-2 screenshare calls to provision your SIS data, configure your SSO, and review grade passback options



5. Professional Development Hours

Choose between 3 different training options with your 4 Web Hours of training



Onboarding is Complete!



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