EdTech Onboarding 101 GUIDE

Mastering the Art of Education Client Onboarding

Of all of the industries that could benefit from implementing new technology, the education industry may take the cake. Educators are constantly managing a hefty load of projects to complete, students to manage, and meetings to attend. With the efficiency that EdTech software can provide, educators finally have some room to breathe.

But, how can you prevent the introduction of this well-intended software from turning into another time-consuming task for educators to tackle? Simple: By providing a user-friendly, high-quality onboarding experience.

The onboarding process for your EdTech software is a critical part of your clients' experience with your company. If it doesn't go well, you and your clients could face challenges ranging anywhere from unhappy customers to lost data.

Laying out the onboarding process for your EdTech clients will help you to achieve the following:

- **Accommodate a wide variety of users**
- **Ensure seamless software integration**
- **Speed up the onboarding process**

In this guide, we'll teach you what challenges you'll face in onboarding EdTech clients, how to prepare for those challenges, and what traits you'll need to help you overcome those challenges.

EdTech Onboarding Challenges

As mentioned, the education industry poses several unique challenges to the onboarding process. With the wide scope of users, variety of existing softwares to be integrated, and busyness inherent to most educational institutions, EdTech companies have a lot of hurdles to overcome. Let's look at some of the most common onboarding challenges that EdTech companies face:

Different User Levels

Although it's likely that only a handful of people were involved in the decision making process of implementing your EdTech software, it may end up being accessed by hundreds—or even thousands—of users. These users may be administrators, teachers, or in some cases, students. Each group will have different levels of understanding and motivation to use the software and will need different tools and instructions on how to navigate it. For the groups who were not involved in the decision to implement your software, you may have to take extra steps to make sure that their onboarding process runs smoothly.

In addition, some users will require full access to all functions of your software, while others need limited access. Each user will need to be taught the software capabilities that pertain to them in a way that they will understand. (After all, you wouldn't want a bunch of senior pranksters learning the same account settings functions that school administrators learn, would you?)

One other issue that you may experience in onboarding EdTech customers is a lack of communication. Since many of your software's users will likely be expected to learn the program quickly, they may feel pressured not to take their time and ask questions to make sure they understand how to use it. Additionally, they may not know who to ask for help, since their supervisors and colleagues likely won't know how to use the software yet, either. And, if your users are students, they may not even think to ask questions about the software.

Integrating Existing Software

In the onboarding process, some users may also struggle to integrate the new EdTech software into their existing projects and programs. This is an important challenge to handle within the initial onboarding procedure—if initial software adoption is low or existing programs fail to be connected with the software from the get-go, you're unlikely to see these problems resolve later on.

Some of your customers may resist your software and continue to use their previous system because it's familiar and easy. They may not be able to use the same functions that their previous system had and find it difficult to transition. Because they may have to rework several parts of their current project management system, these users will need extra support in the onboarding process.

With the transition between EdTech platforms, it can be easy for important information to get lost. As educators update the software at different rates and with different levels of detail, it's not hard for data to go missing. Make sure that your onboarding process includes a way for data to get transferred seamlessly.

Educator Workload

Another challenge in the EdTech industry is finding time to onboard individuals whose job responsibilities often cause them to work beyond normal school hours. Educators are notoriously busy and will likely have little opportunity or willingness to spend time outside of their busy school schedule to be trained on new EdTech software.

What's more, educators likely won't be paid to be trained on the new software, which leaves them little incentive to participate in outside-of-work training. With such busy schedules to work around, you'll need your onboarding process to be quick and easily digestible.

Though these challenges can pose a threat to successful EdTech onboarding, there's no need to fear—differing user levels, existing software complications, and busy educators can all be managed with adequate preparations.

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3 Ways to Prepare for EdTech Onboarding

To prepare yourself adequately for these EdTech onboarding obstacles, you won't have to bend over backward. Making simple adjustments to the way that you orchestrate your onboarding process will help you meet the unique challenges of the education industry. Here's an ultimate EdTech study checklist to help you ace your next onboarding test:

- **Communicate frequently with the client about their progress**
- **Schedule your onboarding meetings early on**
- **Create simple, customized to-do lists for your client**

With this onboarding cheat sheet, you're one step closer to earning an A+ from your EdTech customers. As you follow these steps, you'll transform EdTech onboarding from a struggle into a success.

Communicate

Communication is key. In order to help a variety of new users understand your software and resolve their questions and concerns, you must have a solid system of communication. Gauge their progress by regularly checking in with representatives from different user levels. Be proactive in offering support and identifying concerns. As you make it a habit to establish frequent communication with your customers, you can help them have a happy EdTech onboarding experience.

Another important aspect of onboarding communication is showing your customers their progress in the onboarding process. By providing a system where they can see their onboarding accomplishments and the rest of the work they have left to do, they will be better equipped and motivated to use your EdTech software.
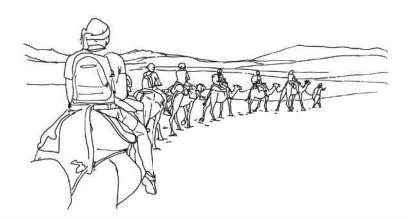
Schedule Meetings Ahead of Time

Planning ahead is another great way to resolve EdTech onboarding issues. As you identify potential problems and schedule your meetings in advance to resolve them, you can coordinate with your clients' leaders to create a plan for integrating your software with theirs. Once you create this plan and present it to your clients early on in the process, you will be able to increase your adoption rate and reduce churn in client onboarding.
By scheduling your onboarding meetings ahead of time, you can also overcome the challenge of educator busyness. Creating check-ins with your clients in advance will help ensure that they stick to deadlines and give you the chance to interact with them about their experience with the onboarding process.

Assign Clear, Simple Tasks

Another way to accommodate your customers' diverse levels and busy schedules is to assign clear, simple tasks. Since each user group will likely have a wide range and variety of onboarding tasks to complete, giving them a simple, customized to-do list will greatly improve their onboarding experience.
Creating this list of tasks will also greatly benefit busy educators who don't have time to watch a demo or spend extra time on the onboarding process. As you make their next steps easy to understand and complete, you can change their onboarding experience from a challenge to a useful tool.

Not sure how to create and distribute a client-facing, customized task list? GUIDEcx's onboarding software makes it easy for EdTech companies to help their clients adopt new platforms and get to work. Through clear, simple, and accessible onboarding task assignments, you'll be more prepared for the onboarding process than ever before.

Ready to Take Client Implementation and Onboarding to the Next Level?

Our platform reduces time to value, creates visibility, and saves time with automation, ensuring project managers and their clients get work done as quickly as possible. To learn more about how GUIDEcx can address your business needs, reach out to us and ask for your free **14-day trial** to get started.

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