

THE SECRETS OF SUCCESSFUL SOFTWARE IMPLEMENTATION IN EDUCATION



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Preface

Management Information Systems, Human Resources Software, Compliance Trackers... The list of systems and software in play in the education sector is vast, and only growing.

Considering new software to aid existing processes may be an active decision, say if your current MIS contract is soon up for renewal, or a more proactive choice if, for instance, there are common frustrations among your school/trust's staff about a certain system's flaws.

Whatever the reason, navigating the world of the software market within the education sector can be a difficult and time-consuming task thanks to the complex nature of activities requiring aid. Especially when you are not entirely sure what it *is* that you are after in a system; more, what you are *not* after.

This guide has been designed and developed to be your all-encompassing partner during your software choosing and implementation. Insight from professionals within the sector that have recently stood in your shoes to review, choose, and successfully implement new software is detailed alongside our first-hand experience of developing and applying our own software to schools and trusts.

The rich bank of resources will help to stimulate thought and prompt discussion within your educational organisation to ensure that all essential considerations are managed and met in your new software. All documents here are also available at the weareevery.com website and can be easily reproduced via photocopy or download, then edited to cater to the unique needs of your school or trust.

Introduction



The education sector is undergoing a significant digital transformation reflective of the modern age. Since its introduction in 2004¹, the now-simple trend of converting documents from paper assets to digital counterparts has advanced at substantial scale, with monumental scope. The once-visionary idea of a fully-digital era has persisted and is steadily being pioneered within education. Pedagogical practices are being transformed through an abundance of learning programmes; administrative tasks are seeing efficiencies increased via the integration of bespoke management information systems (MIS). Staff development has started to incorporate holistic digital platforms to better manage and progress increasing numbers of employees.

Digitising school systems is an exercise imperative to future-proof the education sector. The digital paradigm shift can no longer be treated as a thought; its ability to not only maximise teaching but to optimise all processes, from business management to employee well-being, must be recognised.

Combining groups of schools to make multi-academy trusts (MATs) is one of the sector's most favoured trends and positive choices. As the number of sites adopted increases, so too does the number of staff, students, and operations they control. MATs are just one page of a far more detailed textbook that help to demonstrate the hunger – and arguable obligation – the sector has to streamline its activities. Increased workloads, constantly evolving requirements, and financial constraints aren't going to counteract themselves.

The Current State of Education

1.1 Covid 19: The Catalyst to Digitally Transform

The Covid-19 pandemic stimulated new urgencies to shift a sector heavily reliant on face-to-face practices to remote systems. There was not a single aspect of a school's operations that avoided significant change; all of a sudden, teachers were delivering lessons via video streams; compliance officers were adjusting existing, and generating new, policies and procedures to reflect the alternate landscape.

Rapid response to swift change is not exactly a 'new' milestone for education; more, a testament to those that work in it. For example, standard practice sees guidance from the Department for Education (DfE) under constant review, sometimes requiring eleventh-hour updates. Existing qualifications are developed to reflect curriculum changes, or omitted completely; new qualifications are introduced alongside associated new delivery and assessment. In light of coronavirus, there were also direct changes to inspection criteria² and the handling of examinations.

Despite the remarkable circumstances the UK's schools and trusts found themselves in from March 2020³, many educational establishments thrived. On the whole, it was those that had already made some form of headway on the journey to digitally-enabled teaching and office operations. Technology allows for an adaptable response to dramatically changing environments. Schools that still heavily favoured paper-based systems or physical, onsite information stores found their vulnerabilities laid bare.

That is not to say that just because a school installed brand new, shiny software during the summer of 2019 that the pandemic was a breeze. But what is to say is the control that these schools had over the majority of their day-in, day-out tasks that could be actioned remotely.

1.2 The Remote School: Theory VS Practice

Up and down the country, teachers were forced to grasp an understanding of collaborative platforms, like Microsoft Teams or Zoom, virtually overnight. In fact, Microsoft reported that as of 2021, over 230,000 educational institutions⁴ were using Teams to aid remote learning. Though video applications are not altogether a 'new' development, their use as a primary teaching resource was.

Teachers of all ages and at all stages of their career tried to rapidly embrace digital tools. But technological understanding varies massively in such a diverse sector. Select staff with more advanced knowledge soon became heavily relied upon as the digital wizard, helping, training, and fixing tech all whilst trying to deliver their own lessons or carry out their specific role.

In practice, many activities within schools already rely on the use of tech, like streaming an explainer video onto a whiteboard via an overhead projector. But what about a school's backline? The HR teams handling personal leave requests; the estates staff reporting on, and maintaining, a school site's condition. Where was the digital platform to aid the remote execution of their critical tasks?





1.3 Championing Digitalisation in Education

Specialising in the development of EdTech, Every® has been championing digitisation of the education sector for over fifteen years. Despite the mass adoption of tech by private businesses and many of our fellow public services, it can sometimes feel as though education is a little lost in its own digital movement.

The reasons why range, from the recurrent theme of funding through to the plausibly inherent reluctance to change. Yet, it's imperative that one of the biggest realisations education must take from the pandemic is its dependence on digitally-enabled practices and software.

Not only that, but also the prosperous opportunities technology enables. Digitising systems is not just an exercise to be ticked-off the to-do list in the next couple of years or so. It is a forward-thinking motion that will continuously future-proof the sector, inspiring further developments to pedagogical practices and increasing the efficiencies of statutory processes. The list of benefits that advanced software offers schools and MATs constantly grows; we are seeing it exceed any expectation of time, money, and employee energy retained.

1.4 The Secrets of Software Implementation in Education

So, the need to invest in, and embrace, technology across all aspects of a school's operations has been laid out; where do you go from there? Understandably, there are a lot of important considerations and decisions to make when digitising your school or MAT's systems. Whether your school is part of a trust that strategically used the pandemic to catalyse its software adoption, or you work within a school that is just starting to explore new software, this guide has been designed to talk and walk you through everything you need to consider to choose, implement, and maximise new software, and to do so successfully.



How to Review Current Software

One of the most important stages of successfully implementing new software is to look back; what do you already have in place, and how is this working? Just because current operational tasks are getting completed does not mean they are being conducted in the most efficient, thorough, or straight-forward manner. Such a rhetoric can be easy to fall into, stimulating a generalised assumption that no system reconsideration, let alone improvement, is necessary.

We recommend that you not only make the time to carry out a review of current systems, but ensure the exercise is rigorous for the best results. Use the information below to begin to design and scope for your school/trust's software review; you will be surprised at both the efficiencies and inefficiencies you uncover along the way.

2.1 Getting Started

Take things back to basics and remind yourself of the systems your school or MAT currently uses. Compare your purchase information against what is currently in play, namely to ensure that you are getting what you pay for, but also to discover any features you are yet to capitalise on. Think about why this is; has a certain feature been there all along, but perhaps staff have not been trained on how to use it? Does it hinder, rather than speed up, a task/process?

Understanding what you currently have in place is imperative to establish the most detailed and informed picture of existing arrangements. It will help you to determine software that works well and does not work so well; the advantages and limitations of current systems.

2.2 How Many Systems are Currently in Play?

When was the last time you checked the variety of internal digital platforms your school or MAT relies on? Does the same company provide all software assets, from the management information system to the compliance tracker? Get to know your current infrastructure before you get to know another.

For Schools

Individual schools tend to choose and manage their own systems to improve internal workflows. Use the questions below to start thinking about how effective your current resources are.

Does your school use the same software provider for all digital solutions?

- > If yes, how do these systems interact?
- > Have you seen increased efficiencies?
- > What are the general advantages and disadvantages of using the same provider?
- > If no, why not? *Perhaps that provider only has expertise in a single operational area, like Human Resources (HR); maybe the cost of using the same provider was more than outsourcing tasks to a variety of companies.*

Which systems work the best?

Consider the perspectives of both the user and the organisation's business management.

Which systems do not work as well?

- > What is stopping them from assisting your school with its processes?
- > Is it complicated to navigate?
- > Does its capacity have a ceiling?
- > Can it not integrate with other integral systems?

For MATs

The variety of software used across a trust can differ hugely. Three of the main points to touch on before carrying out a meticulous software review are detailed below.

1. Is one blanket software provider currently used trust-wide?

Using the same software in all schools within a MAT is a great way to streamline and effectively manage the trust's activities. If this is the case in your MAT, it is important to think about when this action came into play:

- > Was it a recent change? If so, why did you choose that provider? Has it demonstrated advantageous qualities?
- > Is it a requirement that all schools joining the trust must commit to this specific system? Again, why was that provider chosen? What could they offer your MAT that other suppliers could not? How do new schools react when they hear the source of internal systems?

2. Where the software differs across the trust, is the same provider used for the same department - i.e. do all HR teams across all schools use the same system?

3. In the case that each school relies on its own preferential software, how much of an impact, both positive and negative, does this have on wider trust activities?

When your trust has schools already united by software, either by coincidence or an active choice, use this to your advantage. Find out the common likes and dislikes of the system; how well it works to synchronise activities across the trust; what the areas of weakness are and the types of improvement your schools would like to see.

2.3 What is the Role of Software?

Software is strictly defined as 'the instructions that control what a computer does⁵'. In schools and MATs, software falls under the sub-category 'application software', meaning when a user gives a command, the computer follows it out. Formats range from databases to inventory management to payroll programmes, among many more.

To make your software review as fruitful as possible, it is important to evaluate it in line with what it should be setting out to achieve. Commenting about exactly what his trust needs from software, Nick Doy, Head of Data at Nicholas Postgate Catholic Academy Trust (NPCAT), explains:



As a large MAT, it is crucial for us to have the ability to access, showcase, and compare the same segments of information from different schools to help us with decision-making and troubleshooting.

Prior to implementing new software, our HR department lacked consistent information across our schools. Most data was stored in traditional paper files or on individual school systems, meaning you had to travel to site to retrieve information. Nothing could be accessed remotely and there was no consistency.

- Nick Doy, Head of Data at Nicholas Postgate Catholic Academy Trust (NPCAT)

2.4 The Structure of a Comprehensive Software Review

The full checklist of questions to answer during software reviews can be found in the 'Resources' section of this guide and can be easily edited to your school or MAT's current offering. Below, the key considerations are explained in greater detail.



SPEED

You should not be investing in software for processes to take more time! How much time has your current system saved your school or MAT? This could be in terms of quickening a wide range of other-wise-manual tasks or not having to switch between multiple systems to find all necessary data to complete one assignment.

ACCURACY



To what degree is your software increasing your process' accuracy? For example, when inputting employee information, how confident are you in your system's ability to alert of gaps in data or suggested errors?



EMPLOYEE PRODUCTIVITY

The faster tasks are completed and the more accurate their nature usually corresponds with increased employee productivity. Understanding the impact of your software on your employees' day-to-day working lives is arguably the most important factor when making software considerations. Simply put, if you are not seeing productivity increase, what exactly are you seeing? Technology is an enabler; it should work with your staff rather than against them. It does not matter if you have just incorporated the most advanced piece of software on the market; if your employees do not understand how to use it and decide to revert back to slower, manual practices, what really have you gained?

EMPLOYEE SATISFACTION



With productivity comes satisfaction It's widely acknowledged that the happier staff are at work, the more productive they are. A recent study by the University of Warwick found that 'happier workers use the time they have more effectively, increasing the pace at which they can work without sacrificing quality⁶'. Generally speaking, the standard of work increases, too!

Measuring staff satisfaction is not a black-and-white process; a quantitative approach, for example a weighted questionnaire, could determine that employees are happy with systems on the whole thanks to majority scores of satisfactions However, this risks failure to acknowledge anomalous results.

This said, asking your staff how they feel about existing systems is one of the simplest yet most effective ways of determining feelings. Encourage roundtable reviews; instigate polls to determine direct answers; set up one-to-ones for in-depth findings.



SPECIFICITY TO THE EDUCATION SECTOR

Thankfully, more schools and MATs are choosing to implement software that has been developed to specifically target the activities of the education sector. As Nick Doy explains, "General HR systems are restricted as to how they can help schools track certain information as we have different reporting requirements and statutory returns."

Using this example of HR systems, we know that they must effectively manage and support all employees in addition to carrying out the range of mandatory tasks unique to the education sector.

Take the Single Central Record; its accurate completion is a critical component of a successful Ofsted inspection.

- > Does your current software support your HR colleagues with this task?
- > Can it pinpoint gaps in data, and work with you to fill these in?
- > Does it completely shy away from this responsibility?

Similarly, the annual job of the School Workforce Census.

- > How well does your existing software complement fast and accurate completion of this data-reliant and time-consuming requirement?

In terms of employee-focussed activities like continuous professional development, how well does your software help your HR teams to manage, monitor, and record staff development? Can it remind you of outstanding training obligations? Does it work to stimulate professional progress?

LOOKING TO THE FUTURE



As technology advances, software for the education sector will undergo continuous developments, from increased capabilities to easier integration with other providers. The investments you make now should be the investments that reward your school/trust in the long-term; this consideration makes up the final crucial component of your software review.

In line with your one-year, five-year, and ten-year strategic plans, consider the objectives your school or MAT aims to meet and how your existing software can, or cannot, facilitate this.

For instance, your trust may plan to expand, so one of your primary needs from your software is scalability. Another example could be that your secondary school is required to accommodate a significantly higher student uptake and consequently needs more staff. How well can you rely on current systems to aid you with this?

A few final points of consideration when it comes to looking at the longer picture:

- > Will your system support your organisation through forecasted and unpredicted change and growth?
- > What are its limitations in terms of capacity, if any?
- > Are you required to upgrade your subscription/package as your school/MAT expands?

What is Important to Schools and MATs when Choosing Software?

In January 2022, we conducted interviews with three members of three different trusts in England that had recently implemented new software across their school sites. So, what was important to them when choosing software? Read their first-hand accounts below to find out!

Our Contributors

Adam Anderson, Trust Business Operations Manager at Minerva Learning Trust

Lindsay Al-Kaisy, Head of Human Resources at Magna Learning Partnership

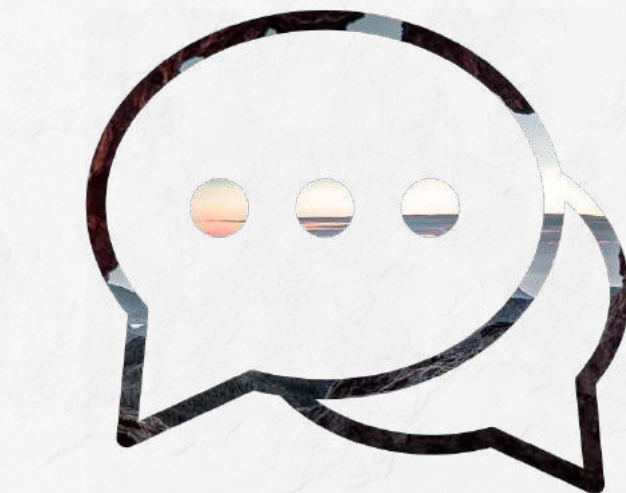
Nick Doy, Head of Data at Nicholas Postgate Catholic Academy Trust (NPCAT)

What was your starting point when thinking about new software?

Adam: "We look for systems that have good working track records; simply, we want to know that something does what it says on the tin. Ease of use is also a major factor; it can be a balancing act to have an advanced software that goes above and beyond the capacities of its competitors but can also easily be implemented, understood, and used by our staff."

Lindsay: "Four key considerations: cost; reducing administrative time and tasks; ease of navigation; accessible via the web from anywhere."

Nick: "Initially, making sure we identify what our trust needs and fully review processes so that we understand the problem. We wanted to choose a system that was easy to use but also comprehensive. So, as we were looking to make integral processes more efficient and eliminate frustrations, we looked at software that promised to help with this."



What other key elements do you consider?

Adam: "One of the most important aspects of choosing the software provider is really considering their experience in the education sector. If, say, their HR system was generalised to the whole public sector, it wouldn't be favoured as well as a system unique to the nuances of HR in education."

Nick: "We also ensure we keep the nuances of the education sector at the forefront of any decision-making. My main aim has always been to have a single source of truth, one place we could refer to when asked questions like 'what was the impact of Covid-19 on staff absences in X school in 2021?' or 'how compliant was Y school last term compared to the same the year before?'. Being able to leverage information to inform decision making and take action is key."

It sounds like software that enables full visibility over tasks was a crucial factor in the decision-making process; please can you explain why?

Adam: "As a MAT, one of our main needs from software is an overview of activities across our schools that doesn't require visits to multiple sites or access to numerous systems. Cloud-based systems are essential; gone are the days of physical installation!"

Were there any problem areas in particular that prompted your trust to start looking for new software?

Nick: "We really wanted to improve how we monitor and manage staff performance. It had been identified that some of our employees had never experienced a true, structured performance cycle. They did not know how well they were doing; their managers couldn't pinpoint what their issues were. We wanted a system that would help us to formalise performance and instigate a cultural change; we wanted to empower staff with visibility and control over their own professional progression."

Adam: "The software provider we now use for an array of compliance and HR tasks was initially found by one of our schools before it became part of the trust. One of their Business Managers (at the time) saw how compliance tasks could be managed and monitored from one central place, a dream come true! This same software has since been implemented in all of our schools."



How do Schools and MATs Decision-Make when it comes to Selecting their Next Software Provider?

There are a variety of factors that influence choice of provider, from needs to budgets to timelines. No two trusts' decision-making processes mirror exactly; procedures differ depending on leadership, governance, and requirements. As such, a one-size-fits-all approach to answering the above question is not appropriate. Instead, read through the question-answer accounts of how our contributors' trusts make their decisions; discover common ground and new ideas to help refine your school/trust's decision-making process.

Who was involved in the decision-making process?

Nick: "When choosing compliance software, it was just the Estates Manager and myself involved in the process. At the time, our trust was experiencing financial restraints, so cost was one of the main drivers in terms of decision-making."

When it came to selecting new HR software, our Head of HR and our Chief Operating Officer were involved. We also sought input from our Primary and Secondary Standards Leads to understand the teaching aspects. Primarily, it's the HR team who would be using the software day-in, day-out; they know more than anyone what their pain points are and what they need from a system, so ultimately the HR team's decision had the most weight."

Where do you begin when shortlisting different companies?

Adam: "We make sure that we strictly identify the criteria/tasks/problem areas that the asset must aid us with; if it doesn't, we stop considering it. One of the most imperative parts of change management is being able to sell the product internally, so if you can't pin-point the areas that it is going to help with, or how it is going to make working lives easier, that's a real problem."

How do you compare different software providers?

Adam: "Depending on the finances, we can either directly compare several companies before shortlisting or we submit a tender. In both cases, we find out:

- > Exactly what we are getting for our money in terms of product;
- > Included services as well as additional support (if any);
- > The companies' values on things like sustainability, morals, and long-term visions.

The Government are putting more weight on schools and trusts to choose suppliers that can prove environmental/sustainability policies and codes of conduct surrounding ethical practices. Understandably, too – if the supplier's vision does not align with the beliefs/pillars of your school/community, it's a relationship that is probably going to struggle."

Lindsay: "Firstly, we look at cost. Then, we host a 'beauty parade' of potential suppliers and check this against our list of sought criteria."

Nick: "We looked at around five of the key HR providers on the market, though once again, cost did pose certain restrictions. Our main aim was to find something that was going to be easy to use, though we didn't necessarily want the most simplistic or basic software. On the whole, what we find most appealing is a system that demonstrates and promotes user-ease but is complex in its infrastructure behind the scenes. Not that we need to get involved in that, but you can always gather a level of understanding by the way it works and how intuitive it is."

Which decisions best paid off?

Nick: "The HR software we chose was still in development which presented us with a rare opportunity. We have been able to work with the provider to finetune the system to make it the all-encompassing platform it is today. I genuinely feel we've got one of the most comprehensive HR suites on offer and I look forward to all the upcoming releases to see where it is going next."



Additional Services - As Important as the Digital Offering?

5.1 Implementation Considerations

Before signing the dotted line and sealing your investment in your next digital system, be mindful of exactly how the software is to be installed in your school or MAT. That is in terms of general management, like timeframes, as well as systematic infrastructure.

Key points to think about:

- > How does the company deliver the software (remote or onsite installation; downloadable software)?
- > What does your school or trust need to do before the software is installed? This could include backing up all existing files or collecting and auditing all technical assets (like laptops) on which the software needs installing/downloading.
- > How long does the installation/download take (a minute, an hour, a morning, a full day)?
- > What sorts of disruptions should the school or trust expect – if any – and what types of support are on offer to best prepare for this?
- > If the software is installed by the company onsite, which members of the school or MAT should be present (the key user(s); the IT team)?
- > If the digital system is installed remotely or by the school(s) itself/themselves, which user(s) needs to do this? How much time do they need to set aside? Who is on-call to assist with any issues or questions?

“We consider how, and the timeframes for, any required data migrations; who is on hand to help set things up; how the most seamless transition is aided. After all, any systematic change is not to be underestimated; making it as easy as possible is really important.”

**Adam Anderson, Trust Business Operations
Manager at Minerva Learning Trust**

Software companies usually offer a bank of additional services to complement their digital offerings. Depending on the provider, amenities may be included in the subscription as standard, or be added-on in time. Though most of the initial and immediate setup arrangements tend to be covered in the purchase, it is important to consider the type of support extended throughout your subscription in case of problem, confusion, or error.

“It’s important to establish the support that is on offer during the entire relationship, not just what is provided at the start. So, we find out how the company helps to mobilise and implement the software as well as the types of support/service that are accessible on an ongoing basis.”
– Adam Anderson

Successfully implementing new software is only one half of the story. Incomprehensive and rushed introductions can cause more long-term problems than gains. To fully get the most out of your system and future-proof its use for years to come, what types of additional service should you be aware of when searching for new software?

Here, we deconstruct the most popular – and necessary – services the market currently offers, how these are of benefit to your school or trust, and what our collaborators think of additional service provisions.

“If a software company didn’t offer any support – in terms of implementation or ongoing help – we wouldn’t feel confident we could leverage it effectively and so wouldn’t go any further.”

**Nick Doy, Head of Data at Nicholas Postgate Catholic
Academy Trust (NPCAT)**

5.2 Types of Support

As soon as your investment in a new system is 'live' you should want to start experiencing its benefits straight away. Naturally, one of the most straightforward ways to do this is to receive support directly from the supplier; after all, they've developed the product and they should understand its iterations and best use inside-out. What is more, established software providers boast a wealth of experience of applying their systems to school and trust processes.

There are still compelling arguments on both sides of the coin as to an in-person versus remote implementation approach. External factors (like pandemics) aside, our ever-digitising world continues to bask in the advantages of virtual assistance. Undeniably, it saves in terms of time (especially when travel between sites is required), cost, and offers more of a flexible provision.

However, the more traditional method of in-person implementation support allows for face-to-face communications which may be clearer than their virtual equivalent. Issues can be troubleshooted onsite; there is also arguably more plausible opportunity to better develop the relationship between the school/trust and software provider.

There is no strict 'right' or 'wrong' type of support to look for; mainly, it is unique to the needs of your organisation and comes down to preference. When reviewing additional service offerings, be mindful of your school/trust's past experiences and partialities:

- > Is there a format staff favour or loathe receiving new information or instruction via?

From handheld and digital guides, to pre-recorded training videos and interactive webinars, to group workshops and one-to-one support, there are an increasing number of channels for assistance opportunities. Make sure that system aids come in a variety of formats to engage and benefit as many staff as possible to maximise the product's use.

"Securing a strong understanding of the core system before detailing any extra features/aspects is certainly the route that works best for us when implementing something new. We also took advantage of the support provided during setup as well as for ongoing developments."

- Adam Anderson

It is noteworthy that research has found that 65%⁷ of the general population are visual learners; in order to retain information, they need to actively see it. In fact, 3M Corporation determined that humans process visuals (i.e. images and videos) 60,000 times faster⁷ than they do text. So, it is worth stopping to think about how effective a provider's proposed delivery of their new system would be to your staff.

5.3 Once You're Up and Running...

In an ideal world, once a new system is set up, you should be able to use it flawlessly, maximising its functionalities and optimising your operations. Regardless of the most effortless setup, queries and/or questions are bound to come further down the line. As well as this, a good, forward-thinking software provider should also be making constant tweaks and developments to

their system to further task efficiencies and accurately reflect changes to the sector.

"Training and aftercare are important, as are updates to new features and fixes of glitches."

Lindsay Al-Kaisy



5.4 Types of Additional Service

Regular training

Remember that the workforce that experienced the introduction of the new system will not necessarily be the same workforce that use the system day-in, day-out in a term's time.

Employees leave and new staff are on-boarded; trusts change in size. The addition of schools brings staff that need training on an entirely different system.

What to think about:

- > Who provides this training for new individual staff or entirely new schools?
 - > Is it included in your subscription?
 - > Can it be accessed on-demand (e.g via a pre-recorded video)?
 - > Is it an add-on service?
- > Does the company offer your school/trust's key users advanced training so that they can responsibly introduce new staff to the system?
- > How does the company aid trust expansion?

System updates, upgrades, and new features

You know as well as we do that every day is a school day. As such, there are always opportunities to learn. When your software provider releases a new feature, how is this communicated to you? An email with a 'how to' guide is perhaps the simplest answer; not all platform tweaks/updates are comprehensive so do not require detailed particulars.

However, what about wholly new features? Or an entire systematic upgrade? Whether included in your subscription or not, how are you informed of such events, and how can you learn to use these attributes effectively?

Webinars

Webinars have become a mainstay way of delivering new information to a specific audience in a timely manner. With regards to software, they help to virtually introduce and share new product features, system updates, and best practice. Most webinars are interactive in their nature, allowing users to chat, ask questions, and partake in polls to finetune the messaging and learning to the audience's needs and interests. Whether a new platform trait has been introduced or the kinks of a common system frustration have been ironed out, webinars are one of the most accessible ways of enhancing your school's understanding of its systems.

Webinars do not need to be strictly related to the platform or its features, either; they also offer the chance for sector professionals to interact over topical talking points. For instance, a webinar may be targeting staff absence management, aiding collaboration on best practice of how to overcome that current challenge. Professional networks expand and schools become inclined and encouraged to share how they get the most out of the same systems, opening up opportunities to further streamline software outcomes.

'Help' desks and in-platform support

Take a moment to consider the following:

It is nearing 4pm on a Friday and you are just tying up a few loose ends ready to leave for the weekend when you realise that the document you had spent the afternoon updating in accordance with new legislation has suddenly disappeared. Your initial devastation is replaced by a sense of calm as you click on your software's 'live chat' feature – thank goodness! You capitalise on the dedicated customer support team (available both in and out of school hours) who work to retrieve your lost document; it is re-upload to the necessary areas and you are out of the door by 4:30pm.

This scenario demonstrates the importance of timely and responsive support. Whilst most queries are not immediate in their nature, some do require an emergency-esque response. Do your shortlisted software suppliers:

- > Provide instant, on-demand help? *Perhaps in the form of online chats, phone calls, or screen-sharing.*
- > Offer this aid during certain days and times?
- > Have a dedicated space for non-urgent, but still important, queries?

NPCAT's Nick Doy comments, *"We have now got access to live chat support that provides the fast answers we need to most problems, and direct lines to the support team help us to rectify anything larger or more pressing. It is also really important to us that we know that we are going to be listened to and supported when we have an issue."*

Account checks

To ensure your awareness of continuous developments and extra features to the software, many companies incorporate a form of account management. To save you the additional job of checking, say bi-termly, for any available updates, they will do the legwork for you.

Instead of sending you a bulk list of all available upgrades that term or leaving it up to you to check their website for new releases, real service management issues bespoke suggestions that complement your current subscription and school's needs. Ask the provider how they actively ensure you are getting the most out of your system during both its implementation and long-term use.

5.5 Further Comments from Our Contributors

Nick:

"The ability to have open conversations about issues, solutions, and even our platform desires has proven to be very fruitful. If we have a suggestion, say, about an additional button on the dashboard, there's obviously a reason for it; perhaps it could speed up the process or make things clearer to the end-user."

Adam:

"We like support that is face-to-face by nature. Granted, that might be happening through screens at the moment, but having the option to talk to somebody, rather than only relying on other useful resources, like live webchats, is key."

Nick:

"When software companies have open ears, it helps us and them – they can further develop their system to complement the nuances of our sector; we receive a system that is bespoke to the specifics of certain operations. As a larger trust, it's likely that if we run into a problem, other schools and trusts will, too."

Adam:

"It's not a service, per-se, but having an understanding of how that particular software or system will be further developed in line with upgrades and new features helps us to differentiate between companies, too."

Just because a software provider has a reputation for an easy implementation does not mean the service levels should stop there. Look for companies that offer you the comprehensive level of support that your school or trust requires, and make sure that your staff know how to access it!

How to Choose Software



“If you’re going to procure a system, you need to be thinking in terms of the next five to ten years realistically and get a feeling of where the supplier will be. The risk will always be that software companies’ development could go stale as others’ take off. Certainly, don’t look at it like apps that you download and delete when the next best one comes along. It’s more like choosing a bank account – who changes that every year?”

Nick Doy, Head of Data at Nicholas Postgate Catholic Academy Trust (NPCAT)

Now that the operational research is complete, it is time to get to the real business in hand: shopping for software. Equipped with a complex projectile of wants, needs, and desires, the more straight-forward the selection should be. You know exactly what you require the software to aid and you are aware of what you are and are not willing to compromise on.

6.1 The Recipe Analogy

Theoretically, choosing software is similar to determining the final outcome of a recipe. When cooking, you list the components for a desired dish where ultimately, the success of the end-product depends on what you put in. That is in terms of ingredient quality, quantity, and human effort.

In this example, ingredients A, B, and C are staple; the final dish cannot be achieved without them. Elements D and E offer some way of flexibility; their use is ideal, but they could be subbed for close alternatives that almost do the same thing.

Ingredient F is tricky to find but you still aspire to discover it; it’s the literal cherry on top.

Though you are not strictly shopping for consumable ingredients, you are trying to acquire the ‘perfect’ blend of components.

In the ‘Resources’ section of this guide, you will find templates that aid the exercise of choosing software.

- Software features
- Additional support
- Future plans
- Cost and contract

Below, we have gone into full detail as to what to consider, and why, when you begin to scour the software market.

6.2 Essential Components

Pricing

Let us not beat around the bush; any decision will have to take the financials into account.

If you are looking for software specific to one operation, say compliance management, you will likely be given a set budget to work with. Make sure you know what this figure corresponds to:

- > Is it for a year’s contract or is it per annum for the next five years?
- > What, exactly, should the budget cover?

In terms of compliance, that could be a system that coordinates assets, condition, and business management. However, what if you come across something more advanced that incorporates wider aspects, like incident reporting and risk management?

- > Would your organisation be better off with an umbrella system that oversees all related tasks?
- > Is there a case to be made to adjust the budget?

Like any ‘switch’ or uptake, it is good practice to take part in an exercise that compares prices of similar software from different providers. This helps to curate an idea of what the market has to offer in terms of product offerings and related pricing. However, it is also an exercise to be undertaken with caution.

Naturally, cheaper products may be more appealing on the finances front; this is your reminder that new software is primarily an exercise to improve processes rather than financials! This said, software should, in the long run, provide your school or trust with a good level of return on investment (ROI) when chosen suitably and thoughtfully.

Equally, how do the more expensive companies justify their pricing?

- > Are there obvious advantages to their provision, or are they capitalising on their generous brand awareness?

Or, flipping the coin:

- > Does a strong reputation necessarily equate to the strongest software offering?

Remember, many systems, especially those targeting HR, are designed with blanket functions; they aid general HR tasks across the wider public and private sectors rather than those specific to the nuances of the education sector.

Timeframes

Do you have deadlines to:

- > Shortlist software by?
- > Present this list to internal stakeholders and decide which to go with?
- > Sign the contract with the new supplier?
- > Install the system?
- > Transfer data (some or all areas)?
- > Train staff on the new software?
- > Demonstrate productivity and/or increased efficiencies and/or positive results?

Deadlines, whether set in stone or in place as more of general guidance, help to give your new software project shape, targets, and accountability. Rash decision-making will not be favourable to your school/trust in the same way that prolonged delays and back-and-forth mindsets are not.

Besides, when you know your estimated timeframes, you can use this to help with shortlisting; the software companies that need more time than what you have been allocated to get your school/trust set up can be withdrawn from considerations.

Immediate issues

Having identified the key struggles or gaps in current processes, make sure that the new software addresses and works to resolve these. It can be easy to get distracted by other benefits that, whilst advantageous in their own right, will not be solving the key issue(s) you set out to rectify.

Priorities

Similarly, make a list of your **absolute** needs and then rank with respect to priority. What must your new system **not** compromise on? Keep it simple and shortlist the those that help you to achieve this whilst disregarding the ones that do not.

The course of implementation

- > How supportive is the company during the installation process?
- > What services come as standard as part of your setup, and what is offered in addition?

Refer back to Section 5, 'Additional Services: As Important as the Digital Offering?' for detailed information of standard and extra resources.

User ease

The best software systems are sometimes the most simplistic, at least in terms of their aesthetic. After all, your key users do not need to understand the coding or the development that went into the system's interfaces; they just need to be aware of how to use it to its maximum benefit.

Like with mobile phones and other handheld devices we use daily, the more straight-forward and intuitive the layout, the quicker and easier it is for a function or task to be completed. In turn, the more satisfied the user and the better the overall experience.

Future plans

Account for your school/trust's upcoming challenges and tasks alongside any planned expansions or scaling to ensure that new software supplies a long- not short-term solution.

- > How well does the software align with your school/trust's one-, five-, ten-year goals?
- > Are there limits to its capacity (i.e numbers of users)?
- > Are the software's systems set in stone, or do they evolve with you?

Company vision

6.3 Additional Considerations

There are also some key questions to take into account depending on whether you are a singular school or part of a MAT.

For standalone schools

Consider the current software you currently have in play.

- > Is there a particular department that raves about their tasks' completion rates and quality?
- > Is there a different area that notes the same problems with their system provider, day-in, day-out?

Use this knowledge to help scope the good, the bad, and the reputations of the market.

Utilise word-of-mouth; listen with intent.

Remember that company whose software you couldn't escape in conversation at last year's Annual Teaching Convention? There is probably good reason for it! Start a conversation with your colleagues within the sector. Find out:

- > Which systems they are currently using - what they like, dislike, and why they chose that provider; how likely they would be to offer a recommendation.
- > Which systems they have gotten rid of, and why.

For MATs

- > **Is different software currently used by the different schools in your trust?**
 - > Is there one provider that has consistently stood out, for good or bad?
- > **Are the same software companies currently being used by the different schools in your trust?**

For all organisations

Read the reviews - with a pinch of salt!

Businesses, no matter their service, are subject to user reviews. Ironically, reviews themselves often have a questionable relationship; it is no secret that more and more businesses are incentivising their customers to write favourable reviews or even sourcing an external company to create a bank of positive reports. It does not take a genius to spot a carefully crafted review, hence why we encourage taking reviews with a pinch of salt. However, it does take a genius company to share fair reviews.

Those that detail the positives, as well as struggles, help to give the most honest and realistic opinions of a business' product or service. In the case of software, systems may be computerised but the people running them are not; there should always be scope for continuous improvement. Encouraging and sharing pragmatic reviews helps to omit the chances of any negative surprises to new customers and creates a sense of trust and credibility.

Take these considerations and use the 'How to Choose Software' Resources on page 38 to draw up your school/trust's comprehensive list of software criteria.

We cover:

- Software features
- Additional support
 - Future plans
- Cost and contract

To ensure that the shortlisting and decision-making process accounts for all factors, direct and indirect.



How to Structure Software Implementation to Ensure Success

7.1 Background of Change

Any changes to the status-quo affect current processes. Despite having negotiated the reasons for a change with an seemingly impenetrable case, there will always be room for resistance. In fact, the amygdala⁹, a part of our brain, depicts change as a threat. It releases fear, flight, or fight hormones as a way of enhancing the body's defensive mechanisms against change. Whilst it is unlikely that your colleagues would literally take flight when a new system is announced, it is likely that they may be experiencing these feelings. As such, that is part of the reason why even the best ideas or intentions with ample benefits can be met with hesitancy.

An awareness and conscious use of this knowledge is one of the most key parts of enabling a successful introduction and implementation of software. In 1960, David Gleicher, an Associate Professor of Economics, proposed the initial formula for change⁹. This was later updated in 1992¹⁰ by Kathleen Dannemiller, co-founder of a change management firm. Widely used by businesses, the formula goes:

$$D \times V \times F \times CL > R$$

D stands for dissatisfaction with the way things are now

V is a positive vision for the future

F represents the first steps/initial practice towards a change

CL stands for the creative leadership required to make the process a success.

Multiplying these four elements must overcome resistance (**R**) to ensure the occurrence of a long-lasting change.

With respect to software change, this formula helps to demonstrate the significance of the implementation; it largely makes up factors **F** and **CL**, as well as **V**. Thanks to over 15 years' experience in applying new software to numerous schools and trusts in England, we have accrued an invaluable amount of first-hand knowledge to help ensure that your initial stages of change are supported by efficacious management to achieve the desired goal.

7.2 The Gradual Approach

Depending on the software you have chosen, you may find the system has to be implemented in one go or there may be the option to introduce aspects gradually. The latter option proves to be the most popular, especially within MATs.

Setting up the core system ensures staff have a base understanding of its properties. Employees can then use this experience to aid smooth additions of new parts and upgraded operations; layouts, features, and workflows are likely to be very similar, lessening the chances of misunderstandings or problems as Adam explains:

“We use the same provider of software for the majority of our compliance tasks and now we’re beginning to roll-out their HR system. It’s straight-forward and workflows are intuitive, so generally speaking, most users grasp the basic/necessary understanding almost instantly.

The design of the platform and any additional features are all in sync. with one another, meaning every time we add another attribute, it can be easily implemented and used. Staff aren’t confused by different layouts or functions, so they can learn and get used to any additions quickly, with little disruption.

Our staggered approach now means that individual schools, not just our central teams, are beginning to take more responsibility for their use of the software. With experience comes confidence, and this all helps with the larger task of quality assurance. It’s great from a trust-wide perspective to be able to centrally control certain elements and then roll this out to the schools; not only does it lessens their workload, it helps us to ensure trust-wide compliance.”

- Adam Anderson, Trust Business Operations
Manager at Minerva Learning Trust

7.3 Criteria of a Successful Implementation

Influencing the implementation are three main components:

1. Existing infrastructure
2. Data migration
3. People



Existing infrastructure

Referring to the current digital systems in place at your school or trust, what preparations (if any) are needed to ensure that:

1.

- > These crucial practices remain able to work?
- > Internet connections are not interrupted during installation?
- > All necessary assets that require the new software, like laptops and handheld devices, have been handed in to the relevant staff member/department?
- > All assets selected to have the new software have had their existing files backed-up in case of error or issue?

2.

Data Migration

Once the software has been successfully installed onto your chosen assets and systems, it is time to begin populating it. The data you will be inputting will depend on the type of software you have employed; be it employee information for a new HR management system or a site's health and safety records for a compliance apparatus.

For NPCAT, when implementing new compliance software, they decided to keep operations within the constraints of the departments when it came to migrating data. Nick says, *"Our Estates Manager visited every single school site and drew up a comprehensive list of every single compliance activity. Most schools have around 60 activities, but we have a current total of 124 unique checks across the trust. We then put all of this information into the system before checking it was correct."*

Instead of asking each school to do this, we prefer to remove the burden of data population and control it centrally. This speeds up data integration which is a time-consuming task but also ensures that we hand over a system that is up and running which makes adoption a lot easier."

Similarly, Minerva Learning Trust focus a lot of time on making the data migration as accurate and streamlined as possible, as Adam explains, *"Firstly, we focus on migrating our data successfully. It needs to be cleansed, uploaded, and its accuracy checked. Then, we run the new system alongside what we currently have in place; though this duplicates work, it helps a more seamless transition in the long-term. Once we're happy that the information is being reflected accurately, we then start to train our staff."*

Different software providers have different ways of migrating information from existing systems to their own. A variety of factors will also influence this process, especially where existing data is currently held.

If you are moving information from a paper-based store:

- > Is there a way to scan and digitally upload copies?
- > Does this activity require manual data input? If so, consider:
 1. Who will be responsible for this?
 2. How much time is required?
 3. Who, and how, will the data input be cross-checked to ensure that it has been uploaded accurately?

If the information you are moving is already stored digitally, think about how the provider has instructed you to integrate it onto the new system. For instance:

- > Have you been provided with digital templates that will ease the migration process? If so, who will populate these?
- > Will the company take full control of your data integration and input all information for you?

In both cases, make sure you are transparent with your colleagues as to how long this process should take, as well as accounting for any time taken to counteract any issues. Keep in mind that new software has been chosen to help to aid processes that were before lacking; it is probable that the data you are inputting could flag with a variety of errors.

Though this can appear overwhelming, try not to be alarmed; these gaps and issues are exactly what the new system will help you to identify and overcome. It is important to remember that moving a whole department's operations from one place to another is a considerable task, especially when the formats of information can widely differ!

When it came to transferring all HR-related information, like employee data, to their new HR software, Nick took advantage of the software's templates. *"I inputted our information as closely to their templates as possible, and then the provider loaded this onto the software for us. Mass implementation is never the easiest thing in the world, but it's made easier when you know what's expected of you and you're being supported!"*

3.

People

Establishing and underpinning the technicalities completes half of the implementation; the other half is managing your school/trust's people as they operate a new system. Largely, there are not any hard or fast rules; a variety of factors, from type of organisation to size of school to 'key' users, influences best implementation practice.

Parallel to this, identify your school/trust's Changemakers; the employees ready and rearing to champion this change in system! Recognise those that are naturally comfortable with the new system's concepts; do they have the capacity to be an additional 'go-to' colleague for any queries or questions? Reflect and use their excitement and enthusiasm to help motivate all staff.

"When it comes to training our staff on the systems, we tend to host in-depth sessions for key users, like Business Managers, Headteachers, HR/Compliance Teams. They then filter this information through to their respective colleagues, aided by guides that we distribute."
– Nick Doy

Speaking generally, focussing the most comprehensive training to 'key' users and internal stakeholders helps to induce the most successful outcomes. Once their understanding has been cemented and reflected in good use of the software, knowledge can systematically, and naturally, begin to feed into the wider workforce.

"The central team(s) that will be using the software daily receive intensive training on the core platform and its features/nuances. Once their understanding is cemented, we then begin to roll out hands-on training to key staff in schools. A combination of presentations, user-manuals, and system demonstrations help us to educate our employees. The test is when they put theory to practice!"
– Adam Anderson

Why do we recommend this approach?

Take the following situation: you have installed a new system dedicated to aiding your school's compliance. The main users are those involved in compliance activities, like Estates Teams and Business Managers. They helped to choose the software and have been working with the provider to set-up and navigate the system. It is essential that they understand its features; it is recording activities required to ensure compliance with statutory and regulatory standards and responsibilities that are imperative to protecting the health and safety of pupils, staff, and visitors.

All other staff members, from teachers to catering teams, need to be aware of, and recognise how, the system affects their role, but they do not need to understand every single iteration. This is irrelevant information that runs the risk of overwhelming and causing disinterest, both of which can instigate resistance.

In most instances, think about what staff **need** to know about the platform to support their role. Provide targeted training to support this; at the same time, the advantageous features of the system are naturally demonstrated, helping to aid a positive vision.

- > Hold smaller training sessions directed at certain groups of staff based on their role, department, or technical ability. Most staff with the same/similar roles from the same departments are likely to have shared use of the software. Support is more targeted and consequently more relatable; this increases staff's interest and engagement in the software.

An arguable ‘con’ of this method is that it initially can take up more time and resources; however, this is likely to reap the rewards in the long-term by providing more in-depth and relevant understandings of the system that reduce the need for additional training sessions.

What about training all staff in one go?

Typically, smaller schools have smaller staff numbers. It can be the case that job titles and related responsibilities do not strictly correspond with the tasks that person accounts for daily. As such, it can be favourable to train a wider variety of staff who are involved in a variety of processes, and in some cases, all staff.

The main advantage is a general understanding of the system; theoretically, this helps to maximise its use and

rewards. Different staff members have different natural technical abilities, so this also helps to encourage peer-to-peer teaching and troubleshooting.

However, the main disadvantage of this practice is trying to run before you can walk; whilst training all staff on the system in its first few days of roll-out can sound like a good idea, it does not account for teething issues. Realistically, installation and/or initial use can raise problems that need ironing out; as simple as turning a function from ‘off’ to ‘on’ to a larger issue relating to data input, for example. If you are trying to train all staff on a system that is, say, 85% across the line, you can indirectly initiate feelings of dissatisfaction that can influence opinions of resistance.

Pros	Cons
All staff are trained to the same level on the system	The level of training is not tailored to individual staff abilities, meaning employees at both ends of the technical ability spectrum risk alienation
Time is streamlined and saved by training all staff in one moment	Questions may take up more time than you had counted on, meaning less time to cover all required information, leaving gaps in understanding
Support, like handheld/digital guides, can be easily distributed to aid understanding and referred to in future moments	Staff may feel this was just a ‘tick-box’ exercise that did not actually provide the level of comprehension they needed
Opportunity for questions which help to strengthen understanding	Not all employees may be able to attend, meaning you need to find additional resources (staff and time) to train them

7.4 The Essence of Digitalisation

When you introduce new technology, it is integral to remember that your staff members’ levels of technical understanding and ability will differ. Make sure that any training sessions cater to the variety of levels. It does not do well to alienate someone used to using pen and paper with technical jargon; equally, you do not want to patronise somebody that is a self-certified technical whizz.

“We’ve found that our staff are not only keen to understand how the software works, but why it’s of relevance to them. If you can explain the efficiencies it will promote, the time it will save, and how using this system helps the wider task, you’re onto a winner! Providing real-life examples of improved work-flows helps to do this.”

Adam Anderson

How to overcome differing digital abilities

- > Make sure there is provision and encouragement for additional support for staff members that are recognised to have a lesser technical ability.
- > Dedicate time for users to freely explore the software. This allows them a hands-on feel for how the software works, what it helps with, and what it achieves.
- > Pair theory (i.e. guides, webinars, instruction manuals) with practice; a kinaesthetic approach allows your staff to learn and discover, often allowing for queries to be overcome through the art of doing. This is an investment of its own; think of it like driving a car - you may have the most comprehensive knowledge of the theory, but that it is not necessarily reflected in your driving ability when you first control a vehicle.
- > Encourage questions and identify areas of improvement; if similar queries are being raised then it is likely there is a shared misunderstanding or lack of support relating to a certain part. Target extra support and training on this topic/area.



Advice to Schools and MATs Considering New Software

By this point, we hope you are equipped with one of the most comprehensive and informed sets of knowledge, guidance, and key considerations to work with to aid your school/trust's next choice of software and its successful implementation.

As with any decision-making process, not all factors are linear; so, detailed below are the outstanding pieces of advice from our three collaborators.

Be concise about your needs.

"Make sure that you are completely clear about what you need from a system. It's far easier to choose between software providers that match these criteria than those that don't; it really helps you to differentiate qualities to determine which system will truly aid the needs specific to your school/trust."

Try not to be too generic about your requirements. 'We just need a new HR system' is far too broad a statement to get something that is going to help with existing troublesome areas, like access to data on staff absences for instance."

- Adam

Practice makes perfect!

"Have a test database (sandbox) to play in to get familiar with the features of the database in a test environment."

- Lindsay

Cohesion is key.

"We're fortunate that our HR provider has recently partnered with our payroll provider; third-party integration for such a crucial task is really helping to reduce workloads and make this aspect of HR as seamless as it can be. Ultimately, you should be looking for a system that is efficient and that reduces workloads."

- Adam

"Ultimately, we want a system that's fit for purpose and lessens the risks of issues but it's important to not run before you can walk. You want to try and source a system that takes care of everything in that domain. For instance, if you're putting the effort in to populate an employee database, then it makes sense to have something that also incorporates absence management; if you're managing absences, you could be monitoring performance and so you should track training, and so on."

- Nick

Do not underestimate the importance of a good working relationship.

"Choose a provider based on their company as well as their product. Relationships between suppliers and consumers, even within our sector, are beginning to really shape parts of the decision-making process. We'd rather partner with a company that is truly passionate about their model, what they do, and how they can help over a company that is purely driven by selling their product. Following this, I'd also say that choosing software from a company that will listen to you – be that praise, problems, or suggestions – helps in all aspects!"

- Adam

"We actively record any improvement suggestions we have and share these with our account manager frequently. I recommend a project manager; they can really help you to keep on top of the implementation as a whole, track timeframes, and help to resolve any issues. They are especially useful if you have operational commitments at the same time."

- Nick

"Keeping regular meetings both with the software company and our own staff is vital to ensure the installation process stays on track and allows opportunity for any issues to be raised and rectified promptly."

- Adam

To Conclude



Education is digitally changing. Its rate of digital transformation is only going to get faster; getting ahead to stay ahead is imperative to not leave certain aspects of the sector behind. It is not enough to only focus on accelerating technology adoption across pedagogical practices; **all** areas of the education workflow must be given equal, and due, consideration.

In writing this paper, a significant number of thought-provoking points about what really matters to the people behind integral operations have been raised. Whether improving a task's efficiency and decreasing the amount of administrative time required, or directly impacting employees' performance ability, the advantages of the right software are more than simply what meets the eye.

The most common theme when choosing software was shown to be a true specificity to the sector and the ability to adapt the system to a school/trust's bespoke activities. Sufficient support and additional services are also hugely influential

in the decision-making process; there is a real want and need to truly understand and utilise a system to its maximum capacity. Bearing increasing weight is the culture of the software company; though people buy with budgets in mind, people ultimately buy from people. A service provider's values should align with those of your school/MAT to best lay the foundations of a positive working relationship and to maintain reputation.

Wherever your school or trust is on its drive to digitise processes, understand that the journey is ongoing, without an end destination. As technology advances, it harnesses real power to alter the way that our operations are fulfilled. Tech is getting smarter; users are becoming more enabled and empowered. The scene is set to embrace digitalisation to improve school and trust possibilities and outcomes to future-proofed effect.

Contributors

Our extended thanks go to the three professionals that dedicated ample time to answer questions about their experience of choosing and implementing new software. We are sure that their insight will be of great value and interest to you reading this paper.

Nick Doy
Head of Data

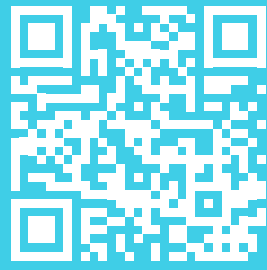


Adam Anderson
Trust Business
Operations Manager



Lindsay Al-Kaisy
Head of Human
Resources





About Every®

A Parting Every® Testimonial

We are a leading EdTech provider of compliance and human resources management solutions for the education sector. Our practical software has been developed to maximise efficiencies across schools and multi-academy trusts nationwide.

From one central place, organisations receive a full and holistic view of all HR and compliance tasks. Interactive, detailed dashboards display an array of real-time data, helping to empower more informed decision-making. Status of activities can be viewed for single schools as well as across trust's schools, working to streamline all internal processes. Our user-friendly software is extremely adaptable and can easily be scaled up or down to meet a school or MAT's needs.

"We quickly identified that Every® was the kind of company that we wanted to work with; they listen, respond and understand education. The amount of granular detail we have access to is great, and it's really helping us to promote things like accountability."

The fact that around 80% of our expenditure goes on staffing costs means our staff should feel they are being supported. Having a system where performance levels are visible to both the employee and the employer has proved important; both parties are accountable to take control of next steps in terms of career progression, and my staff really appreciate the open conversations it generates."

- Nick Doy

About the Authors

Adam Watson



Adam has over 20 years of experience in software and the education sector. This extends back to the late '90s, providing teaching equipment to schools and supporting those seeking conversion to specialist status. Since then, Adam has been providing both software and services to schools, local authorities, and diocese bodies.

Ian Bond



Ian has over 20 years' experience in developing software in the construction and education sector. After originally training as a structural engineer, Ian moved to CSC UK Ltd, delivering software solutions to companies in the design and construction field around the world.

RESOURCES

Templates to help you determine the right software for your school/trust's needs, as well as to ensure its successful implementation, can be found in the following pages of this guide.

Templates can also be downloaded at the weareevery.com website and distributed to relevant professionals within your organisation.

- i) How to Review Current Software
- ii) How to Choose New Software
- iii) The Importance of Continuous Software Review

How to Review Current Software

Type of Software:

Software Provider:

Date of Implementation:

Contract/Subscription Length:

Renewal Date:

Key Provider Internal Contacts

Name:

Role:

School (if applicable):

Contact Details:

Name:

Role:

School (if applicable):

Contact Details:

Provider Contacts

Name:

Role:

Contact Details:

General Problem-Solving

List the key activities your software should be supporting and detail how the software is aiding - or hindering - these:

1.

2.

3.

Use the following questions to begin to build a picture of how effective your current software is:

- > What do you like about your current software?
- > What are its common praises?
- > What do you dislike about your current software?
- > What are its frequent frustrations?
- > Has the software saved resources, like time and money? If so, by how much?
- > What is its return on investment (ROI)?
- > How easy or difficult is the software to use?
- > How easy or difficult is it to retrieve information from the system?
- > Is information stored in the system in the required format for necessary tasks?
- > How well does the software communicate with other internal systems?
- > Does the software aid organisation?
- > What would you change about the software?
- > Can the system be accessed remotely? How important is this?
- > Using the scale below, generally how satisfied with the software are you?

54321

Very satisfiedSatisfiedAdequateUnsatisfiedCompletely dissatisfied

- > Does the software improve overall accuracy of activities and tasks?
- > How well does it highlight gaps or errors in relevant data?

- > Do you see an increase in productivity thanks to the software?
- > Do employees enjoy using the software?
- > What common praises are raised by staff?
- > What common issues are raised by staff?

- > Is the system adaptable to the nuances of the department or task?
- > How does it support these?
- > How could it support these better?
- > Does the system ensure compliance with necessary regulations, like data protection?

- > What is forecast for your school/trust in terms of change and/or growth?
- > Can your system support this? If not, why not?
- > What are its limitations in terms of capacity, if any?
- > Are you required to upgrade your subscription/package as your school/MAT expands?

Add any additional prompts or comments here.

Then, write down the features of software providers that could provide suitable solutions.

	Software Features			
Problem Area	Company A	Company B	Company C	Notes
E.g. Human error in data management	<ul style="list-style-type: none"> Centralises employee records Employee self-service portal Comprehensive audit trail 			
E.g. Lack of visibility over status of compliance tasks	<ul style="list-style-type: none"> All tasks are RAG-rated Tasks tracked by a central dashboard from initiation to completion Records of historic and completed tasks are easily retrieved 			

Additional Support

List your school/trust's requirements for additional support and service provision, then detail how each provider works to aid these needs.

Required Additional Support	Additional Support			Notes
	Company A	Company B	Company C	
E.g. On-demand platform and assistance for users	<ul style="list-style-type: none">Has an interactive 'Help Desk' complete with user manuals and FAQs available 24-7Offers 'live chat' on the platformHas a dedicated direct dial for emergency assistance			

Future Plans

Think about the upcoming challenges and goals your school/trust is working towards. How can the software providers support these to ensure future viability?

Upcoming Challenges & Goals	Future Plans			Notes
	Company A	Company B	Company C	
E.g. Expansion of trust and incorporation of 5 more schools	<ul style="list-style-type: none">Software is scalableOffers upgrades depending on numbers of userWill assist with the remote installation of software to any new school			

What is your budget? £ _____ - _____

		Cost and Contract			
Consideration	Company A	Company B	Company C	Notes	
Cost What is included? ✓ ✓ ✓ What is not included? ✗ ✗ ✗					
Contract What is the length of the contract? What are its implications?					

How often will reviews take place?

After initial setup, we recommend reviews should take place on a regular basis (every 2-4 weeks for the first couple of months) to help identify and resolve any issues and promote best practice. After this, it largely depends on how well your organisation has taken to the software and relies on your intuition of your school or MAT. If it is working very well and problems are minimal, reviews do not need to take place as often as where there are continuous issues and queries.

Software reviews will take place every 2 weeks for the first 2 months. From month 2 onwards, we aim to review on a bi-termly basis, though recognise this may need to be adapted in response to changing circumstances.

Example prompts and questions after the initial implementation:

- Have we migrated all data? If not, what is outstanding and what is the required timeframe to input this?
- Are there any problems with the software, and if so, what are they?
- Do we have any major concerns?
 - > This could be in terms of the software itself or employees' reaction/uptake of it.
- Is the software working as effectively as we had hoped? If not, why not?
 - > Use this to help identify ways in which to rectify/improve – perhaps more internal training is required, or more support from the software provider.
- What tasks, if any, remain outstanding to complete the setup phase?

Write your discussion points here:

Example prompts and questions for regular reviews:

- What efficiencies has the software uncovered?
- Which resources has it helped to save? Have we identified any others that it could help with?
 - > Think about staff time, general administrative time, money...
- Have the financial implications been what we expected?
- What is working particularly well?
- Where are the troublesome areas? What can be done to overcome these?
- Is there a feature widely not understand or used? How can we rectify this?
 - > Consider running more internal training sessions or asking for additional support from the software provider
- What is the general reaction from staff – positive, negative, indifferent? Why is this?
- Are there any new features/upgrades we should be aware about?

Specific to MATs:

- Which schools are excelling thanks to this software? Is there a reason for this?
- Which schools are struggling? How can we change this?

Add your discussion and action points here:

Reference	Article Title	Date	Source
1	A Brief History of Digitization	August, 2020	exelatech.com/blog/brief-history-digitization?language_content_entity=en#:~:text=Digitization%20essentially%20began%20with%20the,we%20relax%20and%20entertain%20ourselves
2	2019 Ofsted inspection framework: what it means for your school	April, 2021	schoolleaders.thekeysupport.com/school-evaluation-and-improvement/inspection/after-inspection/ofsted-inspection-framework-what-means-your-school/#:~:text=A%20revised%20Ofsted%20inspection%20framework%20came%20into%20force%20in%20September%202019.
3	Coronavirus: A history of English lockdown laws	December, 2021	commonslibrary.parliament.uk/research-briefings/cbp-9068/
4	Schools turn to Microsoft Teams as distance learning grows	September, 2020	vyopta.com/blog/business-collaboration/schools-turn-to-microsoft-teams-as-distance-learning-grows/
5	Meaning of 'software' in English	As of January, 2022	dictionary.cambridge.org/dictionary/english/software
6	New study shows we work harder when we are happy	October, 2021	warwick.ac.uk/newsandevents/pressreleases/new_study_shows/#:~:text=Economists%20carried%20out%20a%20number,people%20around%2012%25%20more%20productive.
7	How to work best with the 4 different types of learners	October, 2018	atlassian.com/blog/teamwork/how-to-work-4-different-learning-types#:~:text=Research%20has%20found%20that%2065.in%20order%20to%20retain%20it.
8	Shifting sands: Are consumers still embracing sustainability?	March, 2021	deloitte.com/uk/en/pages/consumer-business/articles/sustainable-consumer.html
9	We are hardwired to resist change	April, 2018	emersonhc.com/change-management/people-hard-wired-resist-change#:~:text=rest%20of%20us.-.We%20are%20hardwired%20to%20resist%20change,actually%20protecting%20you%20from%20change.
10	What is the formula for change?	January, 2022	wise-geek.com/what-is-the-formula-for-change.htm

References

