


## IO Insights Implementation Process

Below are the high-level milestone activities that will take place to ensure a successful implementation.


### Phase 1: Discovery

Partner IO

 <b>Discovery</b> 1 – 2 weeks	Contract signed, implementation handoff	<input type="checkbox"/>	<input type="checkbox"/>
	Welcome email from Customer Success Specialist		<input type="checkbox"/>
	Discovery call with Customer Success Specialist	<input type="checkbox"/>	<input type="checkbox"/>
	IO sends Core Data Specification file		<input type="checkbox"/>
	Data meeting with IO data team (as needed)		<input type="checkbox"/>


### Phase 2: Data Import & Setup

Partner IO

 <b>Data Import &amp; Setup</b> 2 – 8 weeks (after receipt of data)	FTP setup		<input type="checkbox"/>
	Send all required SIS data	<input type="checkbox"/>	
	Send agreed upon state, national & common vendor assessments	<input type="checkbox"/>	
	Automate ongoing SIS data exports	<input type="checkbox"/>	
	Import SIS data		<input type="checkbox"/>
	Setup users; LDAP/user authentication (as needed)	<input type="checkbox"/>	<input type="checkbox"/>
	Import agreed upon state, national & common vendor assessments		<input type="checkbox"/>
	Setup & configure Virtual Data Wall (VDW) and core Dashboards	<input type="checkbox"/>	<input type="checkbox"/>
	Data validation of VDW and Dashboards	<input type="checkbox"/>	<input type="checkbox"/>


### Phase 3: Training

Partner IO

 <b>Training</b> 4 – 16 weeks (after receipt of data)	District core team via Webinar		
	<ul style="list-style-type: none"> <li>System and user management training (district core team) via Webinar</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Assessment importing training (district core team) via Webinar</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	First onsite training		
	<ul style="list-style-type: none"> <li>District core team - Live review of VDW &amp; Dashboards, review of data, plan next steps</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	Admin Rollout (VDW & Dashboards)		
	<ul style="list-style-type: none"> <li>District admin, principals, key leaders</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	Train-the-Trainer (VDW & Dashboards)		
	<ul style="list-style-type: none"> <li>Comprehensive train-the-trainer program (as developed w Implementation Specialist)</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	Metrics Training		
	<ul style="list-style-type: none"> <li>Training occurs upon receipt of all data and setup of metric requirements (weeks 12 - 16)</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

### Phase 4: Ongoing Support & Next Steps

Partner IO

 <b>Ongoing Support &amp; Next Steps</b> Ongoing	Ongoing communication with IO Education		
	<ul style="list-style-type: none"> <li>Send implementation &amp; training needs/requests to your Customer Success Specialist</li> </ul>	<input type="checkbox"/>	
	<ul style="list-style-type: none"> <li>Send issues, inquiries to <a href="mailto:supportteam@ioeducation.com">supportteam@ioeducation.com</a></li> </ul>	<input type="checkbox"/>	
	<ul style="list-style-type: none"> <li>Send new data imports and changes to <a href="mailto:data@ioeducation.com">data@ioeducation.com</a></li> </ul>	<input type="checkbox"/>	
	District ongoing training and support plan		
	<ul style="list-style-type: none"> <li>Develop ongoing support plan</li> </ul>	<input type="checkbox"/>	
	<ul style="list-style-type: none"> <li>Establish and equip district training team</li> </ul>	<input type="checkbox"/>	
	<ul style="list-style-type: none"> <li>Develop subject-matter experts at each site</li> </ul>	<input type="checkbox"/>	
	Evaluate additional modules - Custom Metrics & Dashboards, IO Plans, IO Talent	<input type="checkbox"/>	<input type="checkbox"/>

If you have any questions, please contact your [Customer Success Specialist](#) or [supportteam@ioeducation.com](mailto:supportteam@ioeducation.com).