

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

Phase 4: Ongoing Support & Next Steps		Partner	IO
 Ongoing Support & Next Steps Ongoing	Ongoing communication with IO Education		
	<ul style="list-style-type: none"> Send implementation & training needs/requests to your Customer Success Specialist 	<input type="checkbox"/>	
	<ul style="list-style-type: none"> Send issues, inquiries to supportteam@ioeducation.com 	<input type="checkbox"/>	
	<ul style="list-style-type: none"> Send new data imports and changes to data@ioeducation.com 	<input type="checkbox"/>	
	District ongoing training and support plan		
	<ul style="list-style-type: none"> Develop ongoing support plan 	<input type="checkbox"/>	
	<ul style="list-style-type: none"> Establish and equip district training team 	<input type="checkbox"/>	
	<ul style="list-style-type: none"> Develop subject-matter experts at each site 	<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.