

The Arbor Customer Experience for Primary Schools

A deep dive into our migration and onboarding journey, and how we make Arbor a long-term success at your primary school

A note from Sonia, our Chief of Customer Success



There's no denying it, change can be tricky. And we know that moving MIS is one of the biggest and most complex changes your school will go through. It's completely normal to feel a bit daunted by it all!

But please don't worry. As Chief of Customer Success at Arbor, my team and I have helped over 3,500 primary schools move MIS, from every system on the market.

Our process, which this book will take you through, is built on over a decade of experience helping schools make the move. I think at this point, we've seen it all!

We also understand that a successful transition involves more than making sure all the data is in the right place and everything works as it should (although that's critical, too).

Success also depends on how you bring people along on the journey, and manage challenges on the way.

So, during your onboarding with us, we'll be bringing along our years of insights into successful change management, as well as our deep experience with primary MIS systems, to make sure Arbor really works for your primary in the long run.



This book is designed to give you clarity on who you'll meet and what to expect over the next few weeks, as well as practical tips on change management that we've learned over the years.

We hope you find it a useful and insightful resource.

One final note to say that we've seen, many times, just how much a move to Arbor can genuinely transform the way a school works for the better. It's the best part of our job, and we're extremely passionate about making Arbor a success for schools — we're so excited about helping to make it happen for you.

Wishing you the warmest welcome to the Arbor community,

Sonia Leighton

Sonia Leighton
Chief of Customer Success

"If every implementation process was as seamless as Arbor's, no one would have sleepless nights over such a big organisational move. The support and direction throughout has been brilliant!"

CLAIRE CLAYSON, SENIOR OFFICE
MANAGER AT PRESTON HEDGE'S MAT

Managing and communicating change

Over the years, we've learned a lot about managing big changes, like an MIS migration, in schools and trusts. The most important thing? Great communication from the very start.

Here are some tips to help smooth the path for everyone in your school.

Transparency brings trust and support

Besides getting the nuts and bolts of the system running smoothly, long-term change needs people's support. It's a good idea to let your staff know what's going on as soon as you can — even if you don't have all the details yet. Next, create a communication plan that answers important questions, like:

Why are we doing this?

It's good to let everyone know why you are making the change. It might be to save money, help students do better, or just to make things run more smoothly. When people understand why things are changing, they're more likely to back it.

When is it happening?

Share the schedule. Make sure everyone knows when the new system will be up and running and why you chose those dates. This helps everyone plan their work.

Who will it affect?

Consider who will be most affected by the change and make sure they get the right support and information. Leaving people out can create tension.

How can we stay updated?

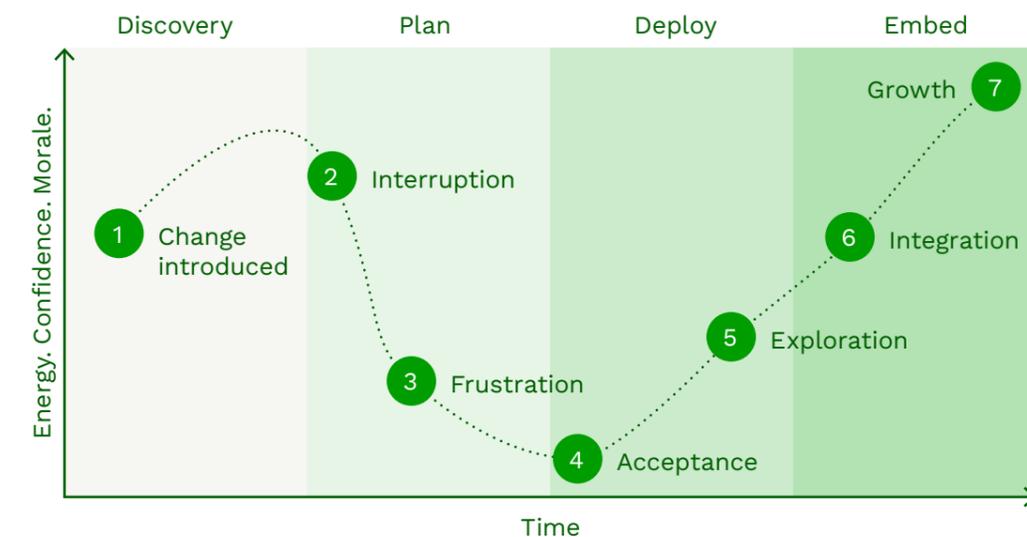
Make sure everyone knows how to get the latest information, whether it's regular emails, a shared place online like Teams or SharePoint, or regular meetings.

How can I share my thoughts?

Encourage discussion and feedback. If people can share their concerns and ideas, they're more likely to feel part of the change.

It's natural to have ups and downs

Change brings a mix of emotions and it's normal to have highs and lows. Understanding the common stages people go through can help you prepare for them.



With a little thinking ahead, you can minimise roadblocks and tension. Here's how you can help:

Recognise the extra mile:

Change often means extra work. Make sure you acknowledge this and give a well-deserved thank you.

Watch for the ripple effect:

Consider how the change might shake up other areas, to avoid unwanted surprises down the line.

Keep it clear and simple:

Provide everyone with an easy-to-understand plan and timeline, so they know what's coming.

Minimise other changes:

While you're making a big change, try to keep some things the same. This can help people feel more grounded.

Remember, facing change as a team always makes it easier. With the right mindset, your school can tackle any change.

The [Arbor Help Centre](#) is packed with free resources you can use to help your team get ready

*Source: www.ekrfoundation.org

Your journey with Arbor

Your journey with Arbor is split into three main phases, and your onboarding will take just 8 weeks. Here we've outlined what you can expect from each phase.

Phase 1

Data migration and onboarding training begins

Your data will be migrated to Arbor from your previous MIS safely and securely. You'll also start learning the basics of Arbor.

Weeks 1 and 2

- **We get started**

Once you've signed your contract with Arbor, our team starts preparing for you to come on board. You'll hear from them 24 days before your migration date

- **Welcome video**

Staff watch an onboarding welcome video where we'll walk them through what to expect on their journey

- **Training starts**

We'll send your Project Lead login details for the Arbor Training Hub, where you'll complete your onboarding training at your own pace with other schools

Weeks 3 and 4

- **Data upload**

You'll get clear instructions on how to upload and thoroughly check your data

- **Data migration**

Your data gets migrated over the course of one weekend

Phase 2

Set up Arbor in your school and get to grips with how to use it

Arbor is now live in your school! You'll finish your training now that you've mastered the foundations of Arbor.

Weeks 5 and 6

- **Arbor goes live in your school!**

You're using it to take daily registers and send comms

- **Continued training**

You'll start training on other areas of Arbor, such as a personalised assessment session or payments

Weeks 7 and 8

- **Hand over to Account Management team**

Your onboarding is complete and you'll be introduced to the Account Management team

- **You'll officially move on to Phase 3**

Ongoing usage and long-term success

"The migration process was eased by knowledgeable staff. I like the fact that we are signposted to guides and training at every step of the way. There appears to be a structured network of available support which is crucial to any changeover"

ANNETTE WHITTAKER, ADMINISTRATOR
AT DOVE BANK PRIMARY SCHOOL



Phase 3

Ongoing usage and long-term success

Keep your local support partner



We have a network of over 50 accredited support partners who can support you during your onboarding, so you can keep your trusted, local support. Partners offer a variety of support services, from project management to data cleansing.

Whether or not you're partner supported, you'll still get the same high quality, Arbor migration experience.

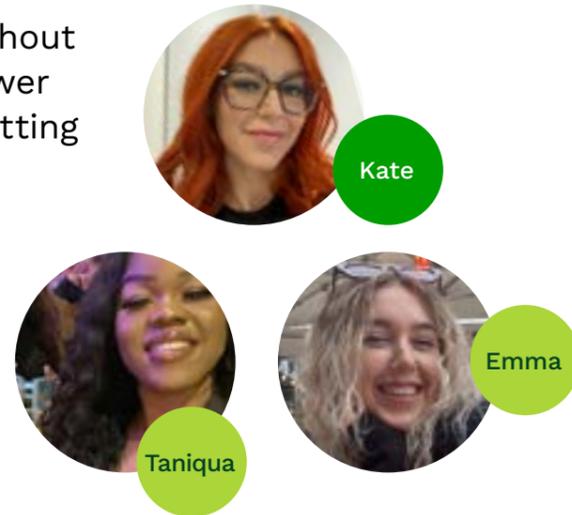
The people you'll meet

Primary Onboarding Team

Kate and her team are on hand throughout your onboarding journey, ready to answer any questions and make sure you're hitting the ground running.

Here for you for:
Anything during your first 8 weeks with Arbor

Best for questions like:
What training do I need to complete?
How does the data migration work?

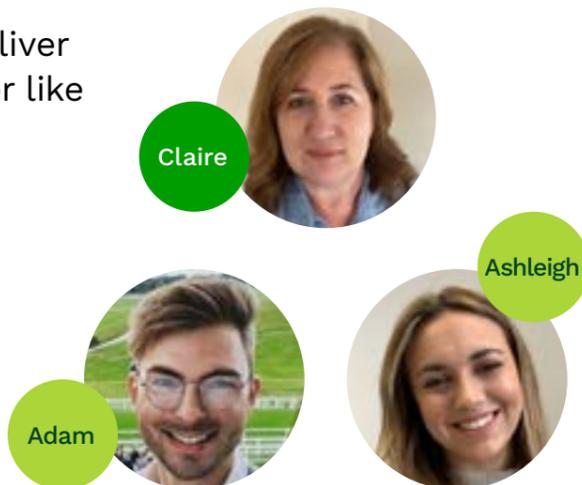


Customer Education Team

Claire and her expert team will deliver your training to get you using Arbor like a pro in no time.

Here for you for:
All things training and learning the system

Best for questions like:
What are the different options for emailing out report cards?
How do I set up a rotating meal menu?

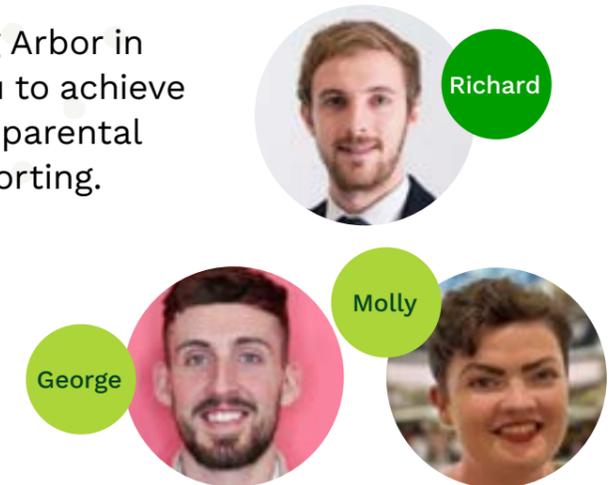


Account Management Team

Once you're all set up and using Arbor in your school, we'll work with you to achieve long-term goals, like increasing parental engagement, or better data reporting.

Here for you for:
Understanding your school's goals and making sure you get the best out of Arbor

Best for questions like:
How can we increase our parental engagement?
What training options are available for SENCOs?

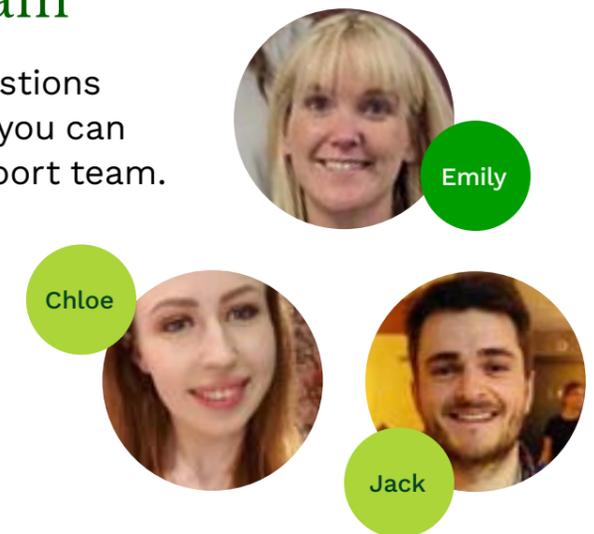


Customer Support Team

If you need quick answers to questions about the platform at any point, you can always get in touch with our support team.

Here for you for:
Any technical bugs or questions that come up about your site

Best for questions like:
How do I complete the census?
How do I give staff access to registers?



Arby

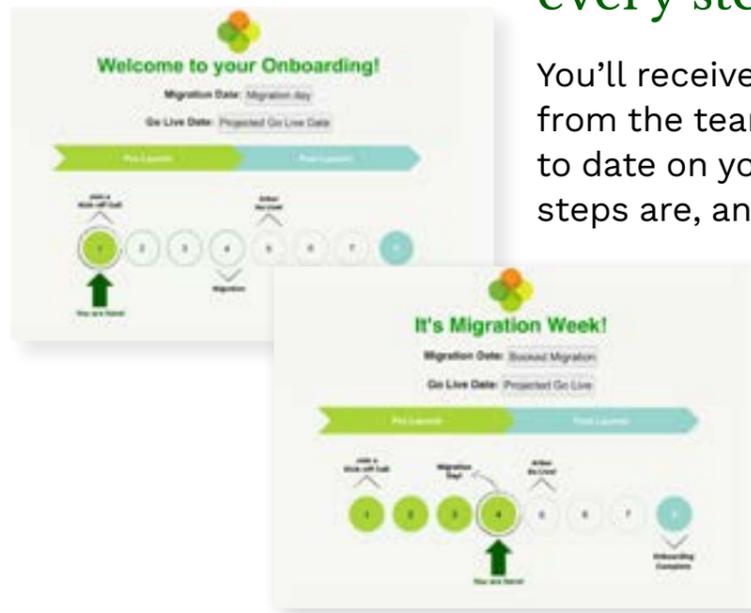
Our friendly knowledge bot, Arby, will help you get to grips with the system, with personalised tips and tricks, and in-app guidance.



A tried and tested onboarding process

Supportive, clear guidance, every step of the way

You'll receive clear and digestible emails from the team each week, keeping you up to date on your progress, what your next steps are, and any tasks left to complete.



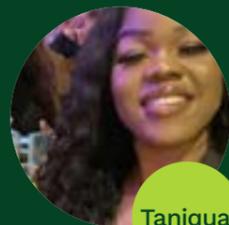
Supported by your

Primary Onboarding Team

Once you've signed your contract with Arbor, our primary school team gets notified and starts preparing for you to come on board. You'll hear from them by email 24 days before your migration date, and they'll be with you every step of the way.



Kate



Taniqua



Emma



Safe and secure data migration

Our thorough data checking and migration process takes place in the third week of your onboarding journey, and is completed over one weekend.

Having migrated data for over 3,500 primary schools (that's over 50,000 datasets!), you can be confident that your data is in the safest of hands.

Training that fits in your schedule, not around it

The Arbor Training Hub is where you'll complete your onboarding training. It's packed with free resources and recordings that you can refer back to at any time.

The Training Hub lets you master the foundations of Arbor and get your entire team up and running according to your schedule. Join bite-sized sessions that range from half an hour to two hours, designed specifically for your role.



Training at Arbor

Our training programme is designed with all levels of expertise in mind, catering to a variety of school roles.

The Arbor Training Hub

All our training is booked, scheduled, and delivered online via the Arbor Training Hub. This setup lets you fit sessions into your day more easily, and if someone can't make it, no problem — you can send them the recording later. The Arbor Training Hub is your go-to spot for recordings, resources, and live training sessions.



Supported by your

Customer Education Team

Our Customer Education team brings over 100 years of combined experience in the education sector. Many of them have worked in schools using Arbor, coming from a wide range of roles such as Headteachers, Data Managers, and SENCOs.

Their first-hand experience ensures they understand your needs and challenges.



Becoming an Arbor expert

Once you've got the Arbor basics under your belt, we have three types of training available for purchase, to help you make the most of Arbor and learn how to make your MIS a strategic tool.

1. Tailored training

These in-depth, one-to-one sessions can take place in Phase 2 or 3 of your journey. They cater to your school's specific policies, like assessment and behaviour setup.

Who it's for: This training is ideal for new users in specific roles, like your Assessment and Behaviour leads.

2. Pick and Mix training

This one-to-one style training is available in Phase 3 of your Arbor journey. Your Account Manager will work with you to build a 'Pick and Mix' training agenda, depending on which system areas you need a refresher on or want to delve deeper into.

Who it's for: Pick and Mix training works for both new and experienced users, with sessions spanning from beginner to expert levels. Multiple attendees from your school can join if needed.

3. CPD courses

Every day is a school day at Arbor. Alongside our training programme, we offer a variety of CPD courses to help your team become Arbor experts in their specific roles, with in-person and online options.

Who it's for: This is for both new and experienced users who want to become an Arbor expert in their role.

Life after migration

Once you're all settled into Arbor and you've mastered the basics, your Account Management team will work alongside you to help you reach your long-term goals.

Staying on track

To make sure you're on track to achieving your goals with Arbor, the Account Management team will check in with you on how you're using Arbor and how to get the most out of your MIS. It's a chance for you to review how you're using Arbor in your school, looking at usage, adoption and staff satisfaction.

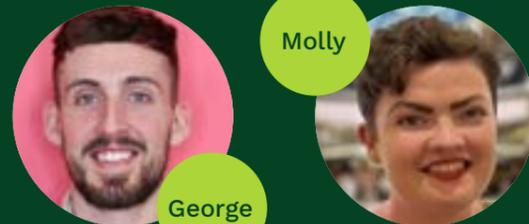
Supported by your

Account Management Team

The Account Management team is your dedicated point of contact at Arbor after you've onboarded. They're on hand to discuss your Arbor package, how to access new features, or booking on to training sessions and courses.



Richard



Molly

George

Understanding your goals

Every school has its own unique challenges.

Here are some of the common areas where we've worked with our primary schools to make big strides:

Get rid of long-winded workarounds such as complicated spreadsheets.

Democratise data across the school. Give staff easy and quick access to the pupil data they need. Especially for SEN students who have complex needs.

Give office staff time back that was previously spent pulling data for teachers and support staff.

Save money by consolidating most of their back office tools in Arbor.

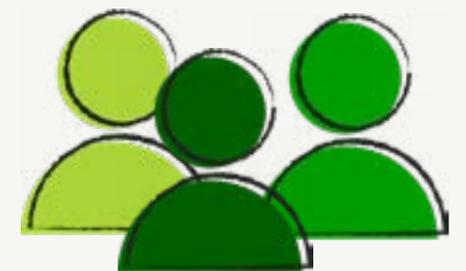
Learning from others

We're big believers in the power of peer support and knowledge sharing.

Your Account Management team will also connect you with other similar schools to share best practices and ways of working. Plus, you'll have access to a community of fellow Arbor users.

"Arbor is where we can evidence core learning and the effectiveness of our policies around attendance, behaviour etc. We can get the data we need rapidly to show where we are, how things have changed over time, and which students are behind the trends, which is vital in Ofsted conversations."

MONKEN HADLEY & ST PAUL'S
PRIMARIES



Friendly, expert support in a format that's right for you

At Arbor, we've built a multi-channel support team to make sure you get the help you need quickly and conveniently, and in a way that suits you best.

We also offer help that's tailor-made for different roles.

Fun fact: we follow the ITIL (Information Technology Infrastructure Library) best practice framework and aim to give you the same kind of seamless experience you're accustomed to when doing things like phone banking or online shopping.

Our support team have a customer satisfaction score of

95%

Supported by your

Customer Support Team

Our support team prepares for major milestones in the school calendar so we're always ready and fully equipped for things like the census, setting up the new school year, and the exam period.



“What is most amazing is the customer service for school staff. The combination of their many tutorials, active community portal, their genuine desire to receive and action feedback, and their commitment to quickly resolving any glitches and queries put to them, means I have been able to get to grips with much of the system very quickly.”

MARK ELLIS, EXAMS AND DATA MANAGER AT GOESBROOK SCHOOL

Support options to suit

Our support system for schools has three main building blocks:

- Direct support via phone, email and web chat from 8am to 5pm, Monday to Friday
- An easy-to-navigate online Help Centre that's packed with information
- Regular, seasonal webinars to get you ready for key dates, like the census

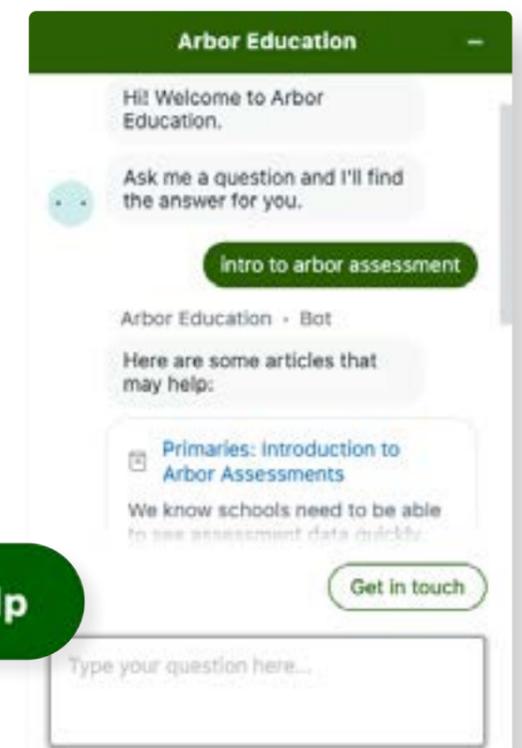
Advanced Support

We also offer an advanced support service where you can work with a Success Analyst who understands your unique set-up, helping you resolve your issues in half the time.

Our helpful chatbot

Sometimes, you just need a quick answer and don't want to go digging through the Help Centre.

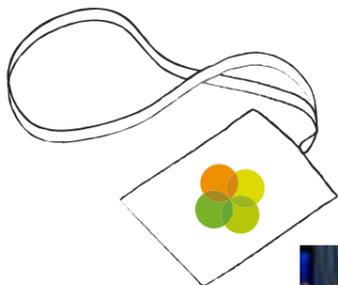
That's where our AI-powered chatbot comes in handy. Try it out the next time you have a question and let us know how it works for you!



A community dedicated to long-term success

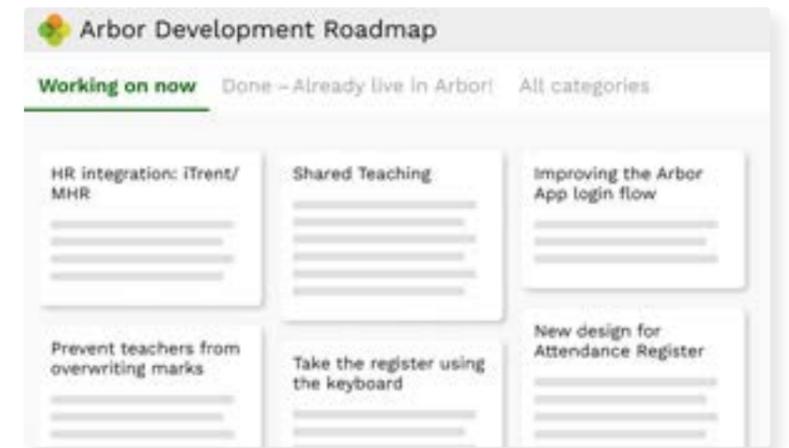
Arbor is the most popular cloud-MIS in the UK today, with more schools making the switch to us than to any other MIS. We're incredibly proud of the community and connections we continue to build with our customers.

Discover and share top tips with schools like yours through our Community, Product User Groups, and ArborFest — our flagship conference dedicated to our schools. We offer both in-person and online editions.



We're always evolving, just like you

We're constantly looking for new ways to help schools work smarter. Our [Product Roadmap](#) is where we plan out the features we'll develop next. We always appreciate feedback from schools about the features that make your everyday work life better. Plus, every term we send out a quick survey to all our schools to help us understand the wider impact Arbor is having.



“Whilst already a brilliant MIS, we have been impressed with the pace at which Arbor are adding new features and improvements. Feedback from end users is actively encouraged and it is obvious that updates are based on this feedback.”

TIM MOORE, DATA MANAGER
AT HYNDBURN ACADEMY



The Arbor Change Log

We're continually working on and rolling out new products and features. You can stay current with all the updates in the [Change Log](#), which we refresh every two weeks.

Arbor HQ

Our online customer community is a space to network with fellow Arbor users, share top tips and learn from each other. You can also access exclusive events, product updates, and much more.

We'd love to
hear from you.
Get in touch

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