www.arbor-education.com

The Arbor Customer Experience for MATs

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

Arbor

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 400 trusts and 4,500 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 MIS systems, to make sure Arbor really works for your MAT 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 schools and trusts works for the better. It's the best part of our job, and we're extremely passionate about making Arbor a success — 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.

We've seen that MATs that think about this early and put together a clear communication plan get up to speed with Arbor faster. This approach also makes schools and staff feel ready, supported, and more involved in the process.

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

Transparency brings trust and support

Let your central team and your schools 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?

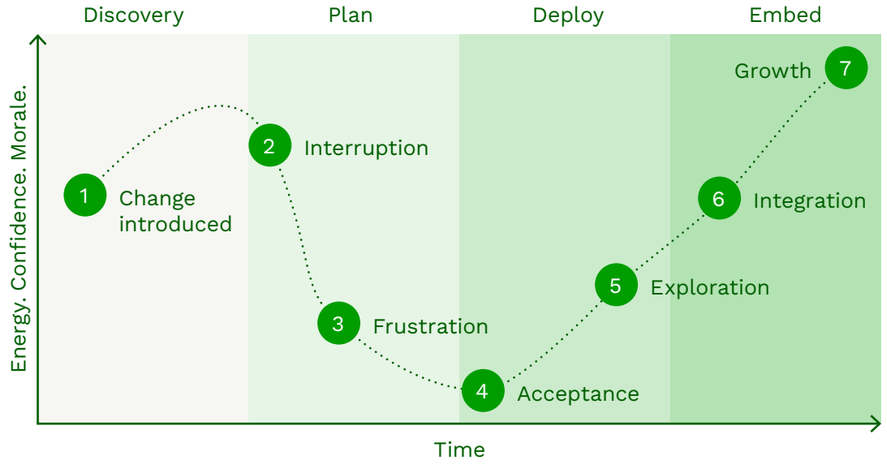
Make sure everyone knows how to get the latest information, whether it's regular emails, a shared place online like Teams or SharePoint, or regular meetings.

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.



The Kübler-Ross Change Curve*

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

Work with your school leaders: Depending on your MAT's makeup, your schools might need different ways to get the message across. Planning together with your school leaders can go a long way.

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.

Show that you're in this together: Encourage schools and your central team to share their experiences with Arbor. This reinforces the idea that you're all learning and growing together.

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

During your onboarding you'll receive a MAT support pack which includes communications templates, to get you started.

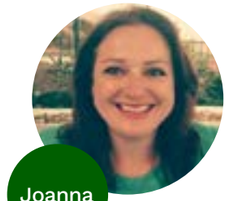
*Source: www.ekrfoundation.org

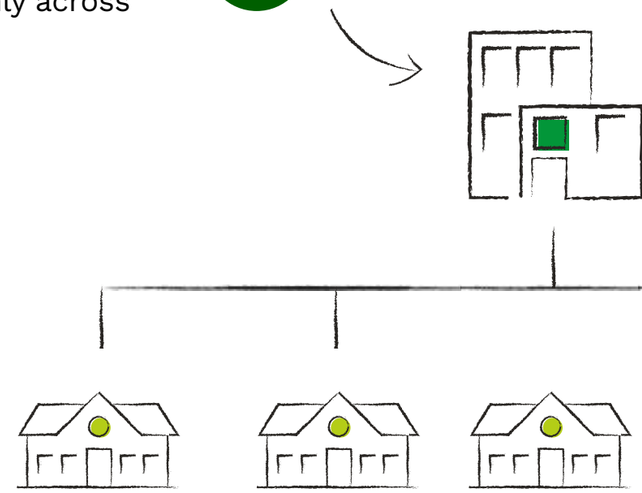
A dedicated team to ensure success

Your Programme Manager

Your Programme Manager is your dedicated point of contact whilst your schools are onboarding, working with you to make sure your Arbor rollout goes smoothly across your trust.

For example, Joanna. With over 10 years experience in project management across different sectors, Joanna works with MATs to coordinate the rollout of Arbor, taking care of all admin and keeping progress on track.

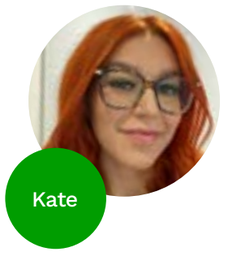




Primary School Onboarding Team

The team is on-hand to support your primary schools through the transition to Arbor.

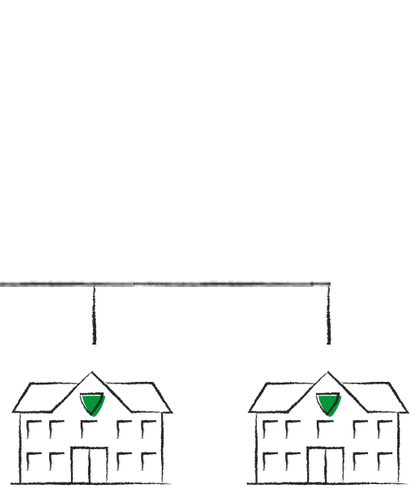
Meet Kate, who before joining Arbor worked in implementing healthcare systems in GP practices and hospitals. Kate leads our Primary School Onboarding Team.



Your Account Manager

Once your schools are onboarded, you'll meet your Account Manager. They'll partner with you to transform the way your schools work in the long-term.

For example, Harpreet supports you with your contract and upgrades, checks in every term, and carries out a deep dive into your performance and satisfaction each year.



Secondary School Onboarding Team

They work with each of your secondary schools to support them through the move.

Meet Eva, who has over 10 years experience in customer service in a range of industries, including corporate and hospitality. Eva leads our Secondary School Onboarding Team.

Plus support from our:

Customer Education Team

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

Customer Success Analysts

Provide ongoing support for your staff, with the option to book a dedicated MAT support slot.

Customer Support

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

Your trust's journey with Arbor at a glance

> "You get the feeling with Arbor that you all clearly want us to be getting the best from the system. From start to finish, conversations we've had with everyone, whether it was the people that started the project with us, account managers or frontline support, have made us feel like Arbor understands the needs of our organisation. Moving MIS as a trust wasn't a decision to be taken lightly, but we're really pleased with the process and the outcome."
>
> ASPIRE ACADEMIES TRUST

Contract signed

Phase 1
Data migration and onboarding training begins

We understand that each trust is one of a kind — with varying school compositions, sizes, challenges, and management styles. So, the first thing we'll do is get a good understanding of your goals and get to know you and your trust inside and out.

> "We moved all 57 schools within our MAT to Arbor. Switching was done in a short timeframe and we were fully supported throughout, all of which ensured our schools have seen a positive impact in using the system from day one. We would recommend Arbor to anyone looking for an intuitive and powerful MIS for primary, secondary or special schools."
>
> JAMES BROWNING, COO AT ACADEMIES ENTERPRISE TRUST

Arbor goes live

Phase 2
Set up Arbor in your schools and get to grips with how to use it

Together, we'll map out a phased onboarding of Arbor across your trust. We'll guide each of your schools through the process, providing plenty of training and time to test their data and build staff confidence before Arbor goes live.

Onboarding complete

Phase 3
Ongoing usage and long term success

Our dedicated team will be with you throughout your onboarding and long after migration, helping to make sure that Arbor is a lasting success across your trust.

Support and guidance, every step of the way

At the beginning of Phase 1, your Programme Manager will hold a Discovery Session to get to know your Central Team and key stakeholders, and to plan your onboarding programme together around what you want to achieve with Arbor.

Together, you'll formulate plans for staff training, handling third-party systems, and a "Shared Success" plan to agree on how to collaborate with Arbor. They'll oversee your schools' data migration and work closely with our school onboarding teams to make sure everything's on track.

Primary school onboarding timeline

Your primaries will have access to our expert Onboarding Team to help guide them through implementation.

Primary school onboarding typically takes **8 weeks**

Phase 1

Kick off and data migration
School data will be migrated to Arbor from the previous MIS safely and securely. Staff will also start learning the basics of Arbor.

Phase 2

Go live and continued training
Arbor is now live! Staff will finish basic training and meet the account management team for ongoing support.

Phase 3

Ongoing usage and long-term success

Weeks 1 and 2

- **Welcome video**
  You'll watch an onboarding welcome video where we'll walk you through what to expect on your journey
- **Training starts**
  Staff receive details for the Arbor Training Hub, where they can complete onboarding training at their own pace with other schools

Weeks 3 and 4

- **Data upload**
  Primaries receive clear instructions on how to upload and thoroughly check their data
- **Data migration**
  School data gets migrated over the course of one weekend

Weeks 5 and 6

- **Arbor goes live!**
  Staff can use it to take daily registers and send comms
- **Continued training**
  Further training on other areas of Arbor begins, such as a personalised assessment session or payments training

Weeks 7 and 8

- **Hand over to Account Management team**
  Onboarding is complete and the school will be introduced to the Account Management team to support them with Phase 3 — ongoing usage and long-term success

Secondary school onboarding timeline

Your secondaries will have a dedicated Onboarding Manager to guide them through implementation.

Secondary school onboarding typically takes **12 weeks**

Sign contract

Phase 1

Arbor goes live

Phase 2

Onboarding complete

Phase 3

Kick off and data migration
School data will be migrated to Arbor from the previous MIS safely and securely. Staff will also start learning the basics of Arbor.

Go live and set-up of foundational modules
Arbor is now live! Staff will finish onboarding and meet the account management team for ongoing support.

Ongoing usage and long-term success

Weeks 1 to 2

- **Kick Off meeting**
  Staff meet their dedicated Onboarding Manager who'll be supporting them throughout their Arbor roll-out
- **First data upload**
  They'll upload their data to our secure online portal

Weeks 3 to 5

- **Practice migration**
  We'll import a 'dummy data' site together
- **Preparing your data**
  They'll start data cleansing and checking to prepare for migration
- **Training starts**
  Staff receive details for the Arbor Training Hub, where they can complete onboarding training at their own pace with other schools

Weeks 6 to 10

From week 6, we'll focus on getting ready to go live on Arbor, including:

- Complete data cleansing and any final checks
- Complete onboarding training
- **Final data migration**
  Once the school's data is signed off, the final migration to Arbor takes place!

Weeks 11 to 12

- **Arbor goes live!**
- Staff are using Arbor to take daily registers and send comms
- They'll set-up foundational modules, like attendance, timetabling, and comms
- Turn on API integrations for any external apps
- **Hand over to Account Management team**
  Onboarding is complete and the school will be introduced to the Account Management team to support them with Phase 3 — ongoing usage and long-term success

Life after migration

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

Staying on track

To make sure you're making progress towards your goals with Arbor, you'll have regular check-ins with your Account Manager. These sessions are your opportunity to discuss how you're using Arbor and how you can get the most out of your MIS.

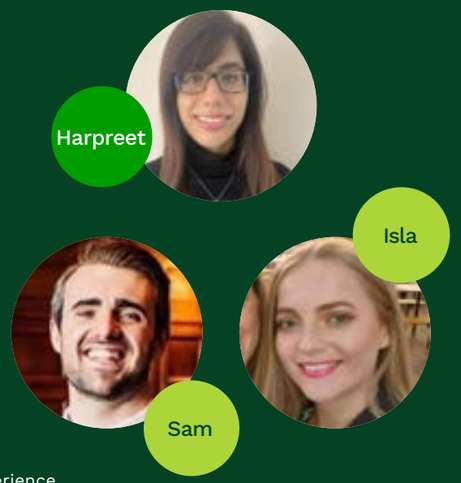
These catch-ups are a chance to review how Arbor is working across your schools, looking at usage, adoption, and staff satisfaction.

> "It's intuitive and easy-to-use and it gives the people in our trust back the ownership over the data that they need. Now, we can easily access key bits of data in a few clicks, whereas before, we had to ask someone to run a report to get basic bits of information"
>
> PETER BRADBURN,
> DIRECTOR OF IT & COMMUNICATIONS
> AT ASPIRE ACADEMIES TRUST

Supported by your

Account Manager

Your Account Manager 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.



Understanding your goals

Every trust is unique, with its own challenges. When you first join Arbor, we'll work with you to identify 3-4 goals you want to achieve.

Here are some areas where we've often helped trusts make big changes:

Aligning schools and central teams

Lots of trusts want their schools to keep their independence. But they also see the need for some standard practices so they can understand what's happening across the trust and support the schools better. Arbor can help with that.

Reducing systems count

If your schools are juggling lots of different third party systems, it can be expensive, hard to manage and hinders alignment and consistency. We can recommend ways to consolidate things.

Preparing for growth

Many trusts have plans for expansion in the next few years. Arbor is built to scale with your trust, so you can onboard new schools easily, establish a cohesive culture, and make data-driven decisions from day one.

Learning from peers

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

Your Account Manager 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.

Training at Arbor

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

Our training team have a customer satisfaction score of

98%

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 Exam Officers.

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 several 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 trust or schools 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.

Once your schools have completed their onboarding training, we offer three training sessions specifically designed for Central Teams:

- **Getting Started**
- **People and HR**
- **Operational Reporting and Analytics**

Each 1:1 training session will help you drive impact and work more collaboratively across your MAT.

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.

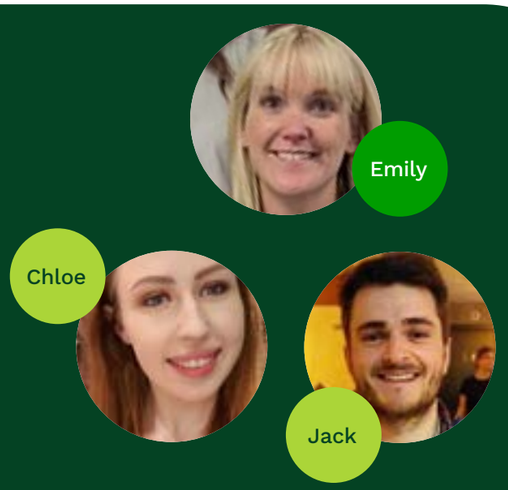
Our support team have a customer satisfaction score of

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.



> "Working with Arbor is a pleasure in every way. It is an exceptional tool, but the people make the real difference with their friendly but professional manner, clear knowledge of the system, and most of all, a strong passion and desire for delivering the desired outcomes and improving features and functionality. They listen and act."
>
> STEPHANIE BASS, BUSINESS MANAGER AT BRIDGE SCHOOLS TRUST

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

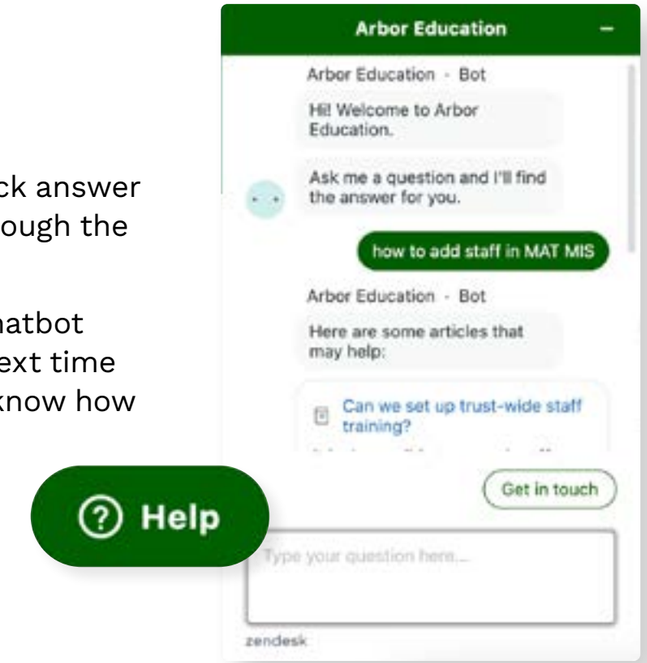
Advanced Support

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.

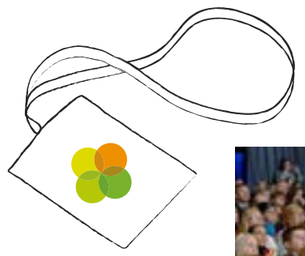
That's where our AI-powered chatbot comes in handy. Try it out the next time you have a question and let us know how it works for you!



A community dedicated to long-term success

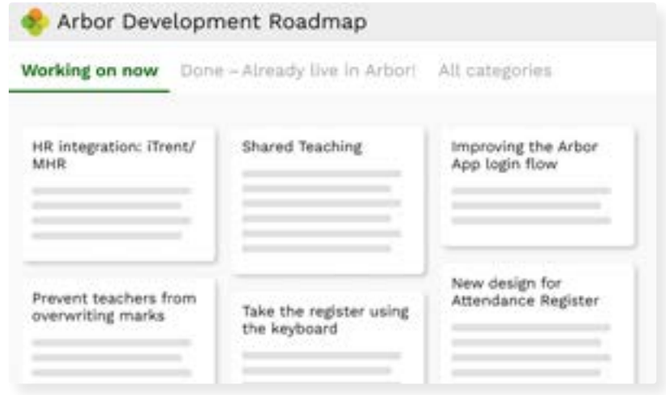
Arbor is the most popular cloud-MIS in the UK today, with more schools making the switch to us than to any other MIS. We're incredibly proud of the community and connections we continue to build with our customers.

Discover and share top tips with trusts like yours through our Community, Product User Groups, and ArborFest — our flagship conference dedicated to our schools and trusts. 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 and trusts work smarter. Our Product Roadmap is where we plan out the features we'll develop next. We always appreciate feedback from our customers 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.

Notes

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

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Arbor