

TIPS FROM THE EXPERTS

How to successfully onboard a new solution

Get some expert advice from our Customer Success Managers so you can hit the ground running with your new tool.



Greg Waters



Daniel Zarazua



Tip #1: Understand the problem

Think about your existing processes. Where is it going wrong? How would a new tool help? If you have a clear vision of how this tool could strengthen your current workflows and address existing issues, you will be much more focused in your onboarding approach.

"Your solution is meant to support your existing processes, not create them. Understanding your current systems is a great first step." - Daniel Zarazua

"It is ideal to thoroughly understand why you need the solution. Then, you can more easily push through the initial process changes and learn the new tool." - Greg Waters

Tip #2: Assemble your avengers

Create a group of superhero users who adopt the solution right away and can lead the path to faculty buy-in.

"Start with a small pilot of users to get an immediate win. This small, immediate win will provide a focal point of influence to attract buy-in from other faculty throughout the implementation process." - Daniel Zarazua

"It is always good to have a group of people who are willing to be early adopters of the solution. That can smooth the onboarding process and help other team members adopt the product more easily. Once the early adopters understand the new tool, they can better support the new team members' questions and concerns." - Greg Waters



Tip #3: Get IT on board

IT is the key to long-term success and continued support on your campus. Be sure they're part of the decision-making process early on.

"Communicate with IT leadership as early as you can. In addition, always ask the client services team the exact workload and weeks of work their IT team will need to commit to this project. As early as you can communicate these expectations of work, the better understanding your IT team will onboard to this new solution and ask great questions as they configure anything on their side." - Daniel Zarazua

"IT teams, like all of us, want a clean and easy process. It's good to engage that team in discussing and implementing the new solution. The implementation and technical teams at Watermark do a great job supporting implementation, but having the institution's IT team be involved in the process is key to smooth ongoing use of the solution." - Greg Waters



Tip #4: Teamwork makes the dream work

Communication across departments helps facilitate user adoption and build trust.

"Teamwork and communication amongst all stakeholders is necessary and crucial for any type of new solution. Speaking on future expectations, workload communication, and any specific timeline schedule with your system administrators, IT members, and even executive sponsors is crucial for any successful implementation." - Daniel Zarazua

"It's easy to overlook some of the team members who need to be involved in an implementation. Some of these core roles are vital to the initial and ongoing success of the project. An executive sponsor is someone who has seniority and can help you communicate and get buy-in from other institutional teams. You also want at least 2-3 system administrators. These are people who are thoroughly trained on the tool so you have your bases covered if someone is out sick or leaves the institution. System administrators are also your resident experts who can train other users." - Greg Waters



Start implementation off on the right foot! Learn how Watermark's Educational Impact Suite (EIS) can be a valued partner in your efforts.