

Implementing Xello: The roadmap to success

Congratulations! You're on your way to making every student future-ready with Xello. Every journey is more successful with a clear roadmap, so here's an at-a-glance guide to help you navigate these next few steps to get Xello up and running.

Meet your Xello team

Every Xello client has a dedicated success management team. This includes an Onboarding Manager, Success Manager, and Training Specialist. As a first step, you'll be introduced to these team members. They'll work in lockstep to set-up Xello and ensure you're prepared to start using it with your students.



Prepare for your kick-off meeting

After introductions, expect an invite to a kick-off call. Get the most out of this meeting by preparing beforehand. Identify key participants - like your technical and student data management staff, and district champions. Give them a heads up about what's to come so they're ready.

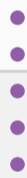


Complete your kick-off meeting

Once you receive your kick-off meeting invite, add it to your calendar. Your kick-off will include you, your Xello implementation team, key district leaders (like your IT staff), and anyone critical for your success. You'll get an agenda beforehand to know what's being covered.

You will talk about:

- Goals
- Key roles and team members
- Critical dates



Technical set-up

Some of the key stops along the road to becoming technically ready to use Xello.



Package up data for integration

Prepare your student data to share with the team at Xello. We'll align on data definitions and you'll get guidance on the files we need to ensure it's the right format.



Data integration configuration

Your Onboarding Manager will load your student, educator, and other relevant data into Xello and work with your IT lead to make sure things are configured properly. You'll be notified once this work is complete.

Launch preparation

The major milestones towards getting ready to introduce your staff and students to Xello.



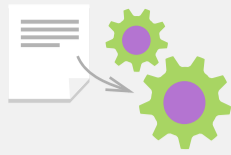
Review launch plan

Take a look at your launch plan. Share any changes you'd like to see, feedback you might have, or questions. Your Success Manager will make adjustments and clarify details.



Update calendar with key meetings

Be sure to add any key dates outlined in your launch plan to your calendar. Invite other relevant people on your team to help keep everyone on the same page.



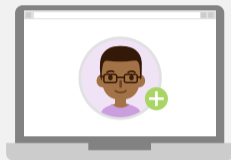
Single sign on (SSO) set-up

If you're planning on having your students and staff log in using SSO, your Onboarding Manager will work to set this up once data integration is complete.



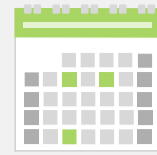
Account verification

With data integration and SSO complete, you can now spot check the data in Xello and invite educators to activate their Xello accounts. You'll also receive instructions on how to share student login information.



Feature configurations

If you're using Xello's college planning tools or other partner integrations, we'll turn these on in your account and walk you through how they work. And if you're rolling out Course Planning or Work-based Learning, we'll configure the information in Xello, guide you through the process, and ensure the set-up is accurate.



Become familiar with key resources

Visit our online Xello Support portal at help.xello.world. You'll find articles, videos and FAQs to help you get started and expertly navigate the program with your staff and students.



Strategic planning

Based on your goals and agreed upon launch plan, your Success Manager will configure Xello's Lessons to your curriculum goals. Work with your designated Training Specialist to build a comprehensive professional development plan for your first year of implementation.



Complete introductory training

Learn at your own pace and on your own schedule with Xello Academy. Invite your team to complete introductory training and collect their completion certificates. Share help.xello.world with your educators so they can access help and resources whenever they need it.



Rollout Xello to your students and families!

With templated emails, videos, promotional posters, and other resources, you'll have everything you need to get the word out about Xello in your schools.



First day with students!

With set-up complete, Xello is now ready to be introduced to students. Free resources are available at help.xello.world to help you and your staff build students' excitement and make sure that first day is a success!



Additional training as necessary

If you've purchased additional in-person or online training, your designated Training Specialist will work with you to schedule, tailor, promote, and deliver these sessions to your district. Refer to your custom professional development plan for all the details and resources related to Xello training.



Ongoing support and optimization

Unlimited support is just a call or email away. Your Success Manager will schedule regular check-ins to see how things are going and make sure you get the most out of your subscription. You can also reach out anytime with questions by contacting our Client Solutions team at 1.800.965.8541, or via email at help@xello.world.



Visit help.xello.world to download free resources for introducing Xello to your students and community.

You'll find:

- Parent Letters
- Printable Posters
- Brochures & Flyers
- Videos

