Your first 30 days

A step-by-step guide to getting your district up and running with Impact Suite, from meeting your Customer Success Manager to going live.

> Most districts follow this path, and your Customer Success Manager adjusts it to fit your school calendar.
>
> **Your Customer Success Manager schedules each meeting with you.**

WHO TO BRING IN

The person leading your rollout, your IT contact for the SIS connection, and the leaders who will join your kickoff call.

TRACK YOUR PROGRESS

Your onboarding checklist in Impact Suite (Settings → Onboarding) lists each of these steps and shows how close you are to going live.

WEEK 1

Get connected

1 Meet your Customer Success Manager

Your Customer Success Manager is your single point of contact from setup through launch and after it. They schedule each meeting in this guide with you and follow your progress alongside you.

2 Connect your SIS

Connecting your Student Information System brings in your students, staff and guardians, so no one is entered by hand, and keeps them in sync from then on.

BRINGS IN	Student profiles, Staff directory, Guardian contacts, School assignments, Grade levels
HAVE READY	Your IT contact, with administrator access to your SIS.
IN IMPACT SUITE	Settings → Integrations → SIS

Needed before you give staff access.

WEEK 2

Kickoff & roles

1 Schedule your kickoff call

Your Customer Success Manager walks your team through the platform and plans your rollout with you: who does what, which schools come first, and your launch date.

HAVE READY A target launch date, and the leaders who will guide the rollout.

2 Assign staff roles

Each role determines which features a person can use and which student data they can see.

IN IMPACT SUITE People → Staff

Needed before you give staff access.

3 Make staff assignments

Name the staff who own each workflow, including Wellness, HR, MTSS Review, 504 Plans and SPED Team, so escalations reach the right person.

IN IMPACT SUITE People → Staff Assignments

Needed before you give staff access, or skipped if it doesn't apply yet.

4 Create teams

Group staff by school, department or role, for example a threat assessment team for each school, so trainings and assignments reach the whole team at once.

IN IMPACT SUITE People → Staff Teams

5 Set up attendance and academic data

If it's included in your plan, you meet with our data team to set up attendance, academic and discipline data, so it comes together on each student's record and in your workflows and reports.

IN IMPACT SUITE Scheduled from your onboarding checklist

WEEK 3

Set up your workflows

1. **Review concern and outcome types**

   Review the default concern and outcome types, rename them to match your district's language, and map common concerns to the outcomes you recommend.

   IN IMPACT SUITE Settings → Concern & Outcome Types

2. **Choose who gets safety alerts**

   Decide which roles and people are notified when a safety alert comes in, and how they are notified.

   IN IMPACT SUITE Settings → Safety Alerts

3. **Add your policies and procedures**

   Start from our templates or upload your own. Staff acknowledge each policy, and Impact Suite tracks who has acknowledged the current version.

   IN IMPACT SUITE Policies → Policies & Procedures

4. **Assign your first training**

   Browse the training library and assign trainings to individuals, teams, schools or your whole district.

   IN IMPACT SUITE Training → Training Management

WEEK 4

Train & launch

1. **Train your core team**

   Your Customer Success Manager trains your admins, counselors and the person leading your rollout, so they can support staff once you launch.

2. **Go live**

   Once your SIS is connected and roles and staff assignments are done, Give Staff Access unlocks in your onboarding checklist. Each person gets a welcome email. You can invite a few schools or teams first, or everyone at once.

AFTER LAUNCH

After you go live

Your Customer Success Manager checks in during your first weeks live and stays with you for ongoing training and support.

Questions? Contact your Customer Success Manager, or email support@impactsuite.com.