

## What to Consider Before Choosing a School Management System

This list is designed to guide school administrators, founders, or IT decision-makers through the most critical evaluations before shortlisting or demoing any platform. It's segmented by the type of decision — not by feature — to help you think holistically and strategically.

<ul> <li>Strategy &amp; Planning</li> <li>Define your school's top 3 operational pain points</li> <li>List all tools you're currently using (Excel, ClassDojo, payment systems, etc.)</li> <li>Identify key stakeholders who will use the system (e.g., principal, admin staff, teachers, parents)</li> <li>Estimate your annual student and staff headcount for the next 3 years</li> <li>Clarify your goals: automation, compliance, parent engagement, scalability?</li> </ul>
Core Needs & Priorities  Rank your top 5 must-have features (e.g., attendance, billing, gradebook) Decide if you need an all-in-one solution or modular tools Define your ideal user experience (UI simplicity, mobile access, low learning curve)
<ul> <li>Determine whether real-time data access (live dashboards, alerts) is essential</li> <li>Specify how student data should flow across your school (e.g., integrated with LMS or CRM)</li> </ul>
Evaluation Criteria
<ul> <li>Develop a scoring rubric for evaluating vendors (e.g., ease of use, support, pricing, features)</li> </ul>
☐ Schedule demos with at least 3 different providers
<ul><li>Prepare a demo script: real tasks you want to simulate during demos</li><li>Interview references or read unbiased user reviews</li></ul>
☐ Include staff in the demo process (teachers, office admin)



<ul> <li>■ Technical &amp; Integration Requirements</li> <li>□ Check for existing integrations with your LMS, email, or billing systems</li> <li>□ Ask about import/export formats (e.g., CSV, PDF, Excel)</li> <li>□ Confirm browser and device compatibility (especially mobile use)</li> <li>□ Inquire about data migration support from current systems</li> <li>□ Check for Single Sign-On (SSO), two-factor authentication, and user access levels</li> </ul>	
& Budget & Pricing Structure	
<ul> <li>Set a realistic monthly or annual budget range</li> <li>Clarify if pricing is per student, per feature, or flat-rate</li> <li>Ask about additional charges: setup, training, add-ons, support tiers</li> <li>Request sample invoices or a pricing calculator</li> <li>Verify flexibility in billing (e.g., monthly vs. annual, tier upgrades)</li> </ul>	
Compliance & Security	
<ul> <li>Ask about data encryption, cloud hosting location, and ownership</li> <li>Understand the vendor's data retention, backup, and recovery policy</li> <li>Verify if administrators can control role-based access and permissions</li> <li>Review their incident response plan (what happens during a breach)</li> </ul>	
<ul> <li>□ Clarify what onboarding assistance is included (manuals, sessions, walkthroughs)</li> <li>□ Ask how long a typical setup takes for your size/type of school</li> <li>□ Check support hours and channels (chat, email, phone, in-app)</li> <li>□ Look for video tutorials or searchable help center</li> <li>□ Ask if you get a dedicated success manager or rep</li> </ul>	



	Determine if the platform can scale with your school growth (users, campuses, data)
	Confirm if product updates are frequent and well-communicated
	Check if there's a roadmap and customer feedback mechanism
	Ask about exit strategy: how easily can you leave or export data?
П	Look for active user communities or peer forums

