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Careers Education and Future Readiness Software Buyer's Checklist

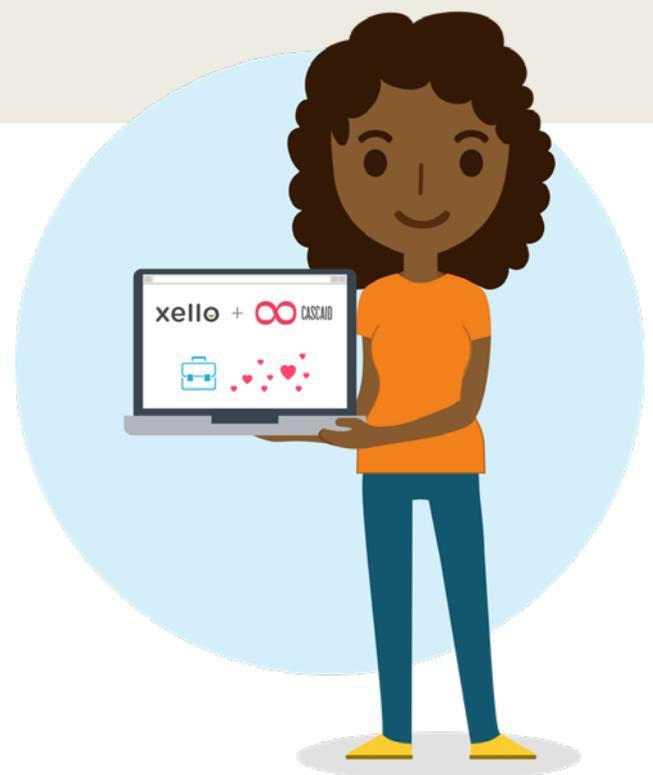
From student to educator experience, front-facing features to back-end reporting, this checklist will help you select the right partner to reliably deliver consistent outcomes.



How to use this checklist to maximum effect

So you're looking for a new online program for academic, career, and future readiness? Maybe the last program you used didn't quite hit the mark. Maybe you're looking for a program to support each and every year group in your school or college? Or, maybe you're not currently using a program at all. Regardless of your situation, one thing is true. You want the evaluation and purchase process to be detailed, simple, and stress-free. When all is said and done, you want to know you've maximised on your budget and chosen the best solution to meet your needs.

CASCAID can help! This handy checklist will ensure your next technology purchase exceeds expectations. Use it as a guide to help you evaluate your options for purchasing careers education programs to support your careers education policy — you'll be sure to arrive at the best outcome.



1. Assemble the right team

When it comes to making purchases for a school or college, whether single or multi-site, it's never just a one- or two-person job. You'll want to loop in a few other people to make sure you're choosing a solution that works for everyone.

Check that you're including the following, or similar, roles on your buying team. We've included a few extra rows for you to fill in other colleagues as necessary.

| ROLE | DESCRIPTION & PURPOSE |
|--|---|
| <input type="checkbox"/> Senior leadership team sponsor | This person might be your Head of Sixth Form, a deputy headteacher, or even your headteacher. Their role is to confirm that the outcomes you're trying to achieve align to the overarching goals of your school or college, which are based on the government's statutory guidance. This person typically also holds the purse strings, ensuring budget and funding availability. |
| <input type="checkbox"/> Curriculum leader | You'll need someone on the team who can look closely at how embedded lessons and activities align to required key stage outcomes and PSHE guidelines. |
| <input type="checkbox"/> Careers leader | <p>A careers education professional's perspective is definitely going to be instrumental in validating the alignment of your careers education policy with desired outcomes.</p> <p>This person will be familiar with the Gatsby Benchmarks and other statutory guidance. The chosen program should be able to provide evidence to support the school or college's careers education policy and deliver personalised guidance at scale.</p> |
| <input type="checkbox"/> IT specialist | Last but far from least, an IT specialist validates the technical implementation and operating considerations. These include ease of integration, system resiliency and security, data migration, and management needs. |
| (Add your own) <input type="checkbox"/> | |
| <input type="checkbox"/> | |
| <input type="checkbox"/> | |

2. Build a budget

Every software company has its own pricing formula. Some are straightforward, but many providers have hidden fees in places you'd never expect. Costs for factors like activation, extra support, training sessions—and so on.

But more than just considering price, think about value. While two or more products might meet the same general requirements, there may be huge gaps in the experience they provide. Here are a few things to have on your list when investigating pricing and comparing value.

| ITEM | CONSIDERATIONS |
|--|--|
| <input type="checkbox"/> Straightforward subscription fee structure | <p>Subscription fees are often priced on a per-student or site basis. Pricing also often varies for primary, secondary and post-secondary licences, with secondary school programs being more complex and costly, and primary programs usually less so.</p> <p>The key here is to have a clear and transparent understanding of how the price is quantified in order to use this as a point of comparison with other programs.</p> |
| <input type="checkbox"/> Training | <p>Be sure to ask how the program charges for training. Some suppliers price training, or various elements of training, separately from the subscription fee. A good partner, on the other hand, will include a level of training with the overall subscription costs, as well as free resources and ongoing support.</p> <p>Also consider who needs to be trained and what type of training they need, as well as how frequently training for new users might be necessary.</p> |
| <input type="checkbox"/> MIS integration | <p>Ask whether this feature is covered by your subscription fee and, if not, how it's priced.</p> |
| <input type="checkbox"/> Data migration | <p>Depending on your implementation, you may need to migrate and incorporate data from outside your school's Management Information System (MIS). If this is the case, enquire about whether this work will incur an extra charge. At CASCAID, for example, all basic data migration requirements are included with your initial subscription fee.</p> |
| <input type="checkbox"/> Offers non-standard reports | <p>Hopefully, any program you're considering offers standard reporting to meet most, if not all, of your needs. But a good partner should offer the ability to report at multiple levels.</p> <p>Look for a solution that goes beyond just standard aggregate reports to offer tracking at a student, school and multi-site level without costing extra money.</p> |



Contingency planning - Whether it's a training session you didn't expect or a non-standard report Ofsted is now requiring you to provide, stuff happens! Leave a little extra in the budget to make sure you're covered, regardless of the situation. Typically, 8% is a conservative figure to work around.

3. Use Demos to validate requirements

Companies that stand behind their software don't keep it a secret from buyers. Like buying a car, you want to see how it drives. Whether you're just starting the buying process, or you are close to the end, here are some tips for making the most out of demos.

| REQUIREMENT | DESCRIPTION |
|---|---|
| <input type="checkbox"/> Meets the needs of the buying team | <p>Think about your current approach or online program: both what you really like about it and areas of particular weakness. Work with the buying team to list out what's needed, then create an evaluation rubric and go through each program point by point.</p> |
| <input type="checkbox"/> Aligns to statutory guidance | <p>Whether you have specific statutory guidance to meet or more general goals as part of your careers education policy, during the demo, ask the supplier to show you how their system aligns with your curriculum and the data points you need to report against.</p> <p>Most importantly, check that reporting processes are logical and that the function is easy for assigned educators to access, run, and share.</p> |
| <input type="checkbox"/> Strong educator and student user experience | <p>Think about how using the product makes you feel. From the mindset of a student, do you find it visually engaging? Do you feel curious and/or inspired as you proceed through lessons and activities?</p> <p>Now, look at the educator experience. Think about the student management and reporting capabilities you need. How are these presented? Do they give you everything you need? Are they easy to access and use?</p> |
| <input type="checkbox"/> Meets or exceeds accessibility requirements | <p>The program you choose needs to work for all your students. Beyond checking that any solution you're considering meets accessibility standards, ask to see it in action.</p> <p>Test font sizes, contrast ratios, keyboard navigation, captions, and screen readers. Also, demand to see the interface in action across a range of devices. With a wide variety of devices in use today, the solution you choose needs to work well on each one.</p> |

 **Demo, demo, demo...** You'll need to demo more than one product to get a sense of how your feelings compare across programs. Take your time on this step. This is arguably the most important part of the process.

4. Ensure post-purchase success

Regardless of how easy an online program is for students to use, initial school- or college-wide implementations can be complex. Strong communication and collaboration with your chosen supplier is essential. You need a partner, not just a software provider — so here are some post-purchase considerations to check off your list.

| REQUIREMENT | DESCRIPTION |
|---|--|
| <input type="checkbox"/> Time to implement | <p>There's nothing worse than buying something and not getting the value out of it right away. Find out how soon onboarding and training can happen after buying, and who on your team needs to, or should be, involved.</p> |
| <input type="checkbox"/> Comprehensive training and onboarding plans | <p>Make sure that an onboarding plan and accompanying training from a dedicated customer success expert are part of the package you're buying. Typically, your success manager will work with you to define your careers education goals and create a personalised plan to help you use the software to meet them. Ask about regular check-in calls and advice for measuring usage as well as tracking outcomes.</p> |
| <input type="checkbox"/> Dedicated success management team | <p>In a perfect world, any piece of software you buy will be flawless and so easy to use that you'll never need to access outside support. In reality, we all know that sometimes we can get tripped up and need a hand. Check if potential suppliers have a dedicated success management team that's ready to jump in and answer your questions.</p> |
| <input type="checkbox"/> Unlimited, free support services | <p>A good partner will always make themselves available, be it by email or phone, and be there for you any time. In addition to your dedicated success manager, check what other free support services are offered.</p> <p>Is there an online knowledge database? What resources does it contain—webinars, tutorials, service guides? A good service will include a robust mix of free, self-help support options so that when you need help, you're never left in the dark.</p> |

Final Thoughts

Much of what you're trying to accomplish starts and ends with your buying team. Building the broadest possible base of purchase considerations adds certainty to your decisions, and the simple act of working together up front is bound to result in better downstream alignment for eventual implementation and use.

Aside from the team buying aspect, one of the most valuable things we can offer is for you to feel empowered to ask lots of questions throughout the process. Lean on your sales consultant heavily. Any organisation whose solution is worth considering won't mind working hard to earn your business.

Remember: it's you who's in charge. Best of luck and happy buying!

Looking to learn more about what to look for in an academic, career and future readiness partner? Reach out anytime to one of our [Sales Consultants](#).

