Keep Calm and Qmlativ On: Surviving and Thriving in Implementation

SKYWARD iCon
FEBRUARY 26, 2026
1:40-2:30

TRAVIS DIERKER
NORTHWEST R-1 SCHOOL DISTRICT



Thank you for joining us today! Our hope is that you walk away today just as excited for a Qmlativ switch as we were to launch Qmlativ last year.

INTRODUCTIONS AND BACKGROUND

TRAVIS DIERKER

DIRECTOR OF FINANCE

NORTHWEST R-I SCHOOL DISTRICT

NEAR ST. LOUIS, MO

5,500 STUDENTS

11 BUILDINGS

900+ EMPLOYEES

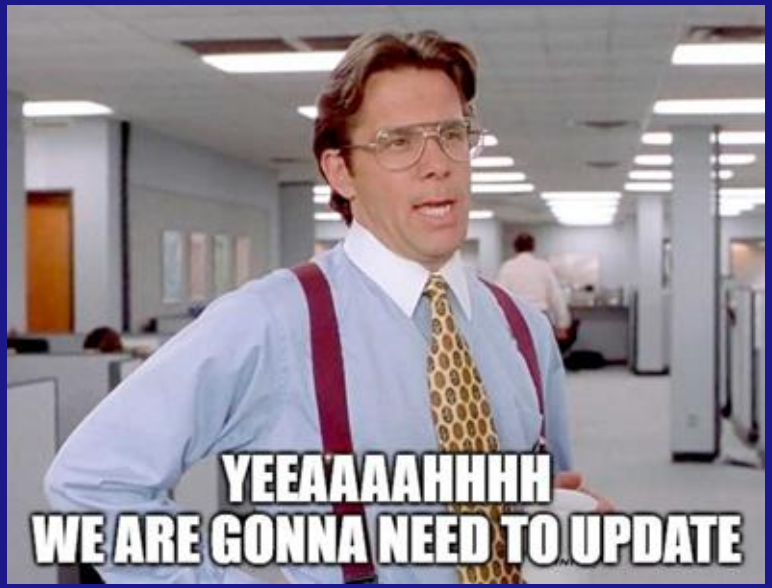
CURRENT ERP SYSTEM SINCE 2001

SISFIN/TYLER TECH TO SKYWARD QMLATIV

NEW SYSTEM GO LIVE DATE: JULY 1, 2025

FIRST OFF, WHY THE CHANGE?

- Same system for 20+ years (SISFIN).
- The need for an all inclusive software that could be a one-stop shop.
- Needed wide range of accessibility (not just static) and on the go (website based).
- There was a need for a software that embraced 21st century thinking.
- A desire to have a system that makes regular updates and progress forward.
- To simplify processes, clean up policies and improve procedures.
- One location for employees for check stubs, entering leave, clock in & out, and change request.



5 Important Steps in Researching
- How we survived & thrived in implementation!



1. Do your research! Talk to Other Schools.
2. See the system in action and in training.
3. Don’t focus on the change, rather focus on the improvements!
4. Get excited! Explain why the change is needed.
5. Don’t rush the process! Seek Buy-In & Get Ready for a Positive Change!

The End Goals of the New System

- Less Data Entry ... More Data Verification
  - Certain data is entered numerous times in different systems
  - Lots of Manual Processes will be eliminated
  - Improved Communication will all stakeholders

- Improve Process & Procedures
  - From start to finish improve the process
  - Creation of workflows for onboarding
  - Simplify operations - Moving to more paperless

- Improve Timely Approvals, Communication, Transparency
  - Easier access for quicker approvals
  - Better communication among all departments and buildings
  - More Access for Employees (All in one place)


CHANGE IS
HARD AT FIRST,
MESSY IN THE
MIDDLE AND
GORGEOUS AT
THE END
ROBIN SHARMA

3 *STEPS IN THE PROCESS*

1 BEFORE (HARD)	2 DURING (MESSY)	3 AFTER (GORGEOUS)
Get the Buy-In & Plan Ahead	Determine Stakeholders	Support Your Team & Others
Follow Recommendations	Do Your Homework	Keep Making Updates
Take Time to Setup Properly	Training: Make the Time	Don’t Stop Training
Make Changes/Clean Up	Learn from the Mistakes	Make it What Works for You
Breathe!	Breathe!	Breathe!

BEFORE (HARD)
Get the Buy-In & Plan Ahead
Follow Recommendations

- Take the time to have demos.
- Be sure to share videos outlining the system.
- Gather support and understanding as to why the change is needed.
- Took me around 1 year from start to final board approval.
- Follow any recommendations provided.
- Give yourself time (12-15 months before Go Live.)

- Our employees shared they were not happy with our existing product.
- Changing Student Informations Systems presented a natural transition.
- Understand the commitment needed to transition.
- You reap what you sow.
- Mindset is everything.

BEFORE (HARD)

Take Time to Setup Properly

Make Changes/Clean Up

- Establish a main point of contact.
- Have one additional person be the backup and sit in on all the discussions.
- Plan time to setup the right way Don't rush or skip the process.
- Begin doing clean up in your current system.
- Consider Reviewing your Processes & Procedures and Making Updates.

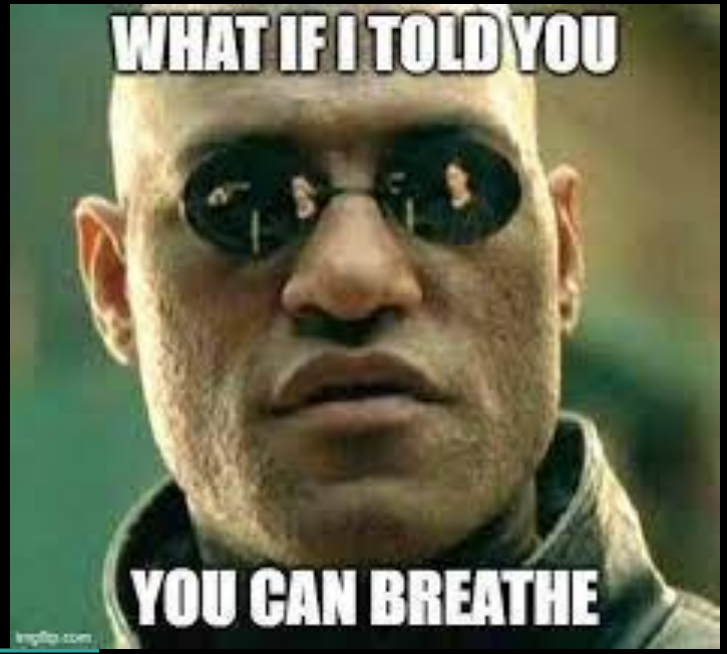
- Involve as many staff as you can who are impacted.
- Plan you current work and your transition work.
- Clean data out equals clean data in.
- Identify what aspects you are implementing and in what order.
- Determine how each change is going to impact each staff group.

BEFORE (HARD)

As silly as it sounds...

Breathe!





DURING (MESSY)
Determine Stakeholders
Do Your Homework

- Figure out who needs to be involved.
- A lot of calls and set up, don’t need everyone there.
- Make sure, the right people are at the table during setup.
- Do any homework, as busy as you might be, make the time.
- It helps you practice in the system and helps for a smooth process.

- Don't leave anyone behind. All finance staff must be involved.
- How Skyward breaks up the transition matters immensely.
- All tasks matter.
- Share what you are learning.
- Keep your eye on the prize.

DURING (MESSY)
Training: Make the Time
Learn from Mistakes

- Prepare a training schedule for staff.
- Groupthink/Discussions are important and effective.
- Mistakes and errors will happen, learn from them and make notes.
- Wear your Flexible Pants!
- Keep a positive and calm attitude throughout the process.
- Work Together
  - "Hair is not on Fire"

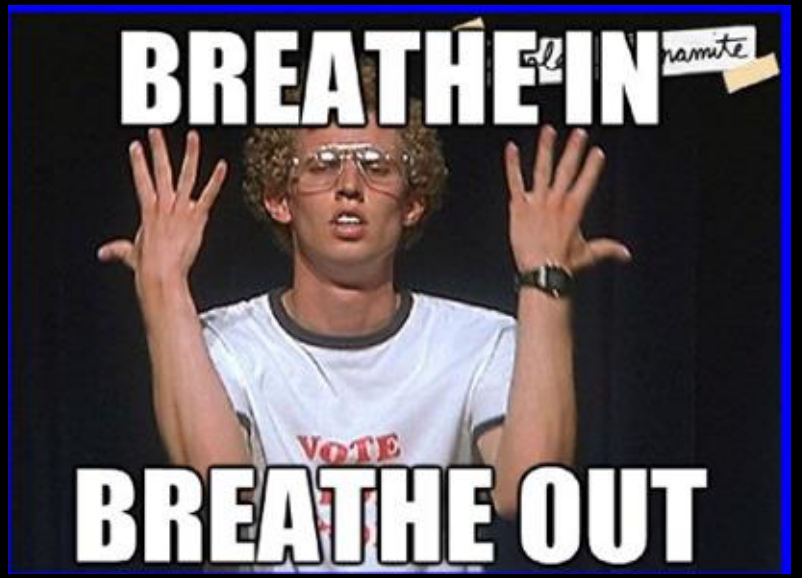
- We met with each employee group individually and trained them on the functions of the system that mattered to them.
- Most new systems are very flexible; mistakes are easily fixed.
- There is no way to know how each element of Skyward will function before making a selection, so don't stress!

DURING (MESSY)

Again as silly as it sounds....

Breathe!





AFTER (GORGEOUS)
Support Your Team & Others
Keep Making Updates

While we are not to the After Stage here is what I can already tell from the setup and preliminary databases.

- You will need to rely on your whole team and help each other.
- Share new things you learn with others!
- Rely on the Experts (Skyward Staff) for Assistance.
- Continue to Improve and Clean the data.

- There is a calm after the storm.
- Remember everything is still new. Show grace and forgive yourself for mistakes.
- After 3-4 months of being live everything falls into place.
- Review practices for efficiency.

AFTER (GORGEOUS)
Don't Stop Training
Make it What Works for You

- Find a program that offers ongoing training.
- Video Libraries are your friend.
- Rely on other districts who have moved to the same system.
- Customize it and make it work for you and your district.
- Celebrate all the little successes!
- Grow with each challenge!

- Training should not stop after your implementation.
- Attend various trainings to keep growing.
- Build relationships with other districts.
- Help staff by sharing a new tip or trick every month.
- Check in to make sure that everyone has what they need.

AFTER (GORGEOUS)

And lastly…Breathe!





Do's and Don't List

Do...

- ★ Make the change & Try New Things
- ★ Take Time Getting Buy-In
- ★ Study the Product
- ★ Spend Time on Development
- ★ Make Time to make changes
- ★ Review and Update Policies and Procedures
- ★ Move away from that mentality of
  - "We've always done it that way!"
  - It's the *Insert School Name,* Way!
- ★ Watch Videos & Do Your Homework
- ★ Train, Train, Train (Practice Helps)
- ★ Work as a Team
- ★ Keep a Positive Attitude
- ★ Wear those Flexible Pants!
- ★ Celebrate all the Successes
- ★ Remember your "why"

Don't...

- ★ Keep the Status Quo
- ★ Don't Rush the Process/Implementation
- ★ Choose One because it is the cheapest
- ★ Just keep the same data
- ★ Not take the time to make changes
- ★ Let the negative attitude win
- ★ Don't let the fear of change stop you
- ★ Just send the training to everyone and expect them to do it! They won't!
- ★ Let the mentality be focused on
  - "I could do it in the old system."
- ★ Not Celebrate all the wins, even the small
- ★ Work Alone - Problem Solve Together
- ★ Forget to Breathe - It can be fixed!
- ★ Be afraid to ask for help

Here are some practical samples and examples of what we used to help ensure a successful transition.



Training and Materials will help you not just survive but thrive during implementation.

Setup a Timeline and Implementation Plan

- To ensure success and tackle this project it will be phased in over the next 9-12 months.
- Two major parts - Finance & Human Resources
- **Phase 1: Summer 2025: Finance (AP,AR, Position, Payroll), HR (Employee, Demographics), Time Off, & Time Tracking**
  - *******This means on July 1 the ONLY changes are:***
    - ***Parallels/SISFIN: Accounts, Purchase Orders***
    - ***Time Clock Plus: Clocking In/Out, Timesheets & Request TIme Off***
    - ***Willsub: Remains as Sub System (Slight Change in how requested)***

- **Phase 2: Fall 2025: Online Forms & Expense Reimbursement**
- **Phase 3: Winter 2026: Accounts Payable Updates (E-Commerce and Credit Cards)**
- **Phase 4: Spring 2026: HR (Applicant Tracking, Onboarding, Staff Planning, Workflow)**



TRAINING, TIPS, TRICKS & TUESDAYS WITH TRAVIS

★ CONTINUED TIPS AND TRICKS WILL BE E-MAILED OUT ON TUESDAY - INCLUDING DETAILS FOR FUTURE ROLLOUTS

★ PROFESSIONAL DEVELOPMENT CENTER (PDC)

- Now that you have a login - I will send out trainings on occasion via the PDC

★ FUTURE TRAINING/WORKSHOP

- Administrators - July 30 (All Admin Meeting)
- Admin Assistants - August 8 (During Admin Asst P

★ HELP CENTER, KNOWLEDGE HUB, SKYW



Encouragement for all here today!

- Let's work together to keep a positive rhetoric.
- Some changes will be different, some may not agree with all the updates, however a successful rollout can only happen with key individuals like all of you helping to promote the positivity about the key changes!
- Decisions were made to do what is best for all departments overall, please encourage everyone to try it before they "knock it".
- Move away from the idea of "We've always done it that way!"
- Trust me when I say this is a positive change however different.
- There will be mistakes and challenges, let us know so we can make improvements!



OTHER MAJOR UPDATES TO PROCESS, POLICY OR PROCEDURE

- ➔ Purchasing/Accounts Payable
  - Working towards Paperless = More Scanning Less Printing
- ➔ Payroll/Time Frame for Pay Weeks
  - Timeframe between End of Pay Period & Date Paid is one week shorter
  - Must have quicker turnaround on Time Keeping and Time Off
- ➔ Activity Accounting
  - Will look different in system
  - Working on Solution (Equity Account)
  - Determine which Accounts to Combine
- ➔ Finance/Accounts (Coming Soon)
  - Expense Reimbursements - Electronically
  - E-Commerce Purchasing & Credit Card Transactions
- ➔ Employee Demographics and Payroll Forms (Coming Soon)
  - Submitting Online Forms (Demographics, ACH Accounts, W-4 Fed/State)
  - Addition of Pictures and Emergency Contacts within Skyward



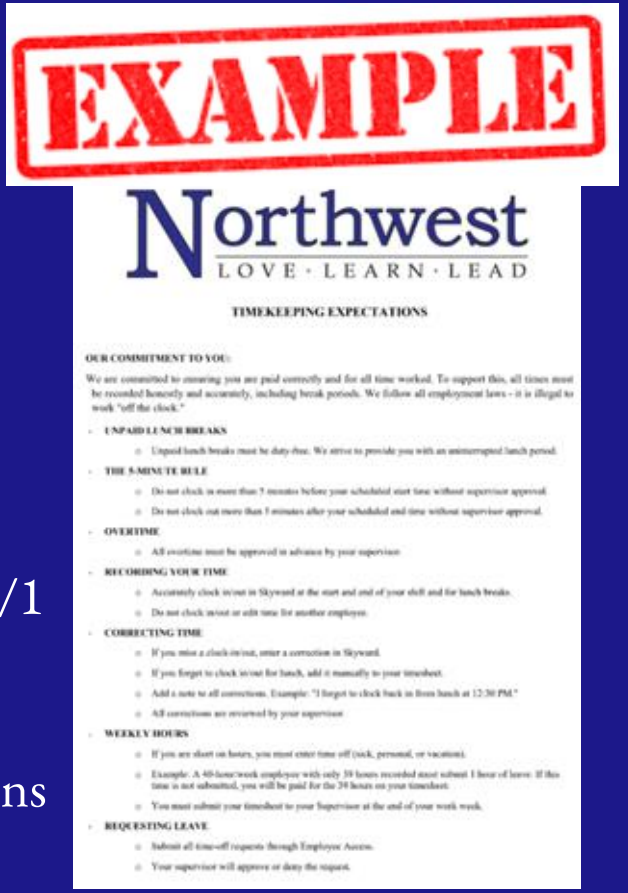
OTHER MAJOR UPDATES TO PROCESS, POLICY OR PROCEDURE

➔ Time Keeping

- No more rounding of time
- Paid for exact time worked
- Clock In/Out linked to District IP Address
- Timekeeping Expectations - Handout #9

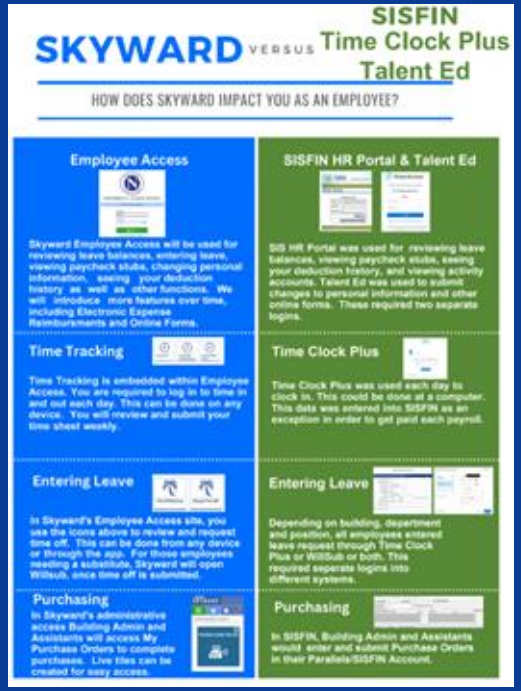
➔ Time Off

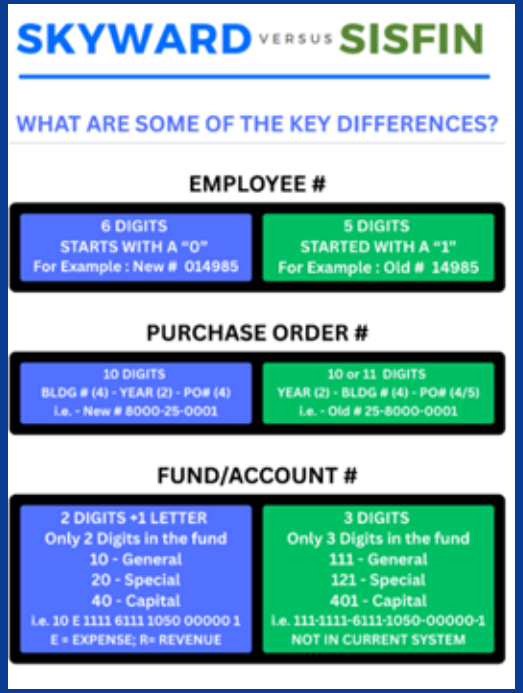
- ALL LEAVE will be entered in Skyward
- Flex, Vacation, Personal, Sick Awarded
- ALL Employees Leave Awarded Annually on 7/1
  - New for Classified Employees
  - This year will be between 7/15 - 8/1
  - Based on year of service entering Regulations
  - 4330 & 4331 Updated
- Teachers & Paras needing subs will enter in both Skyward & Willsub

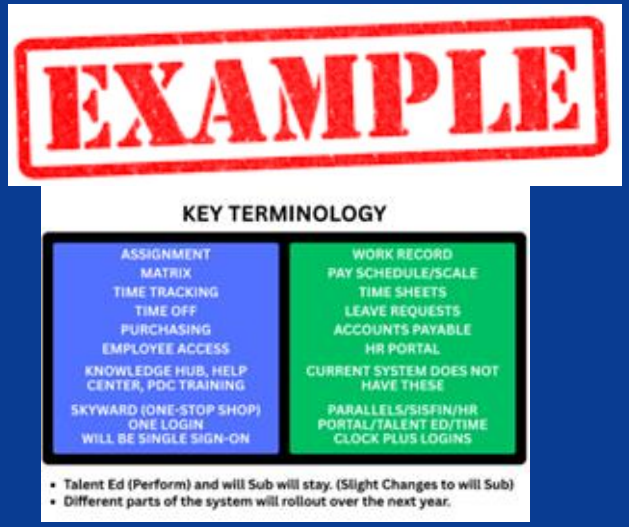


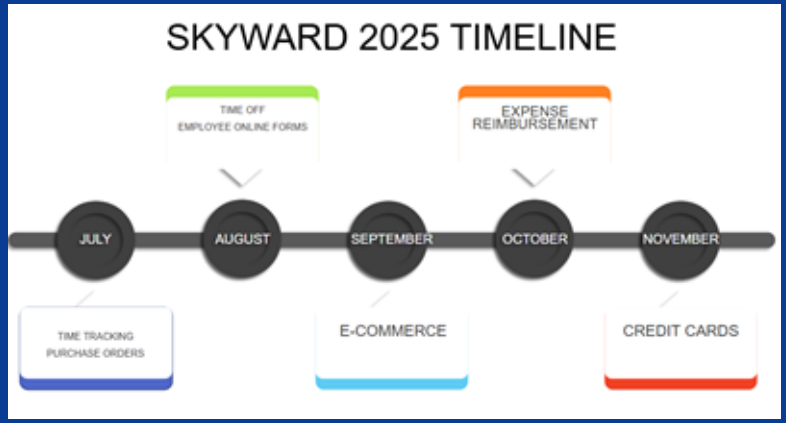
HANDOUT REVIEW

Discussion around Handouts



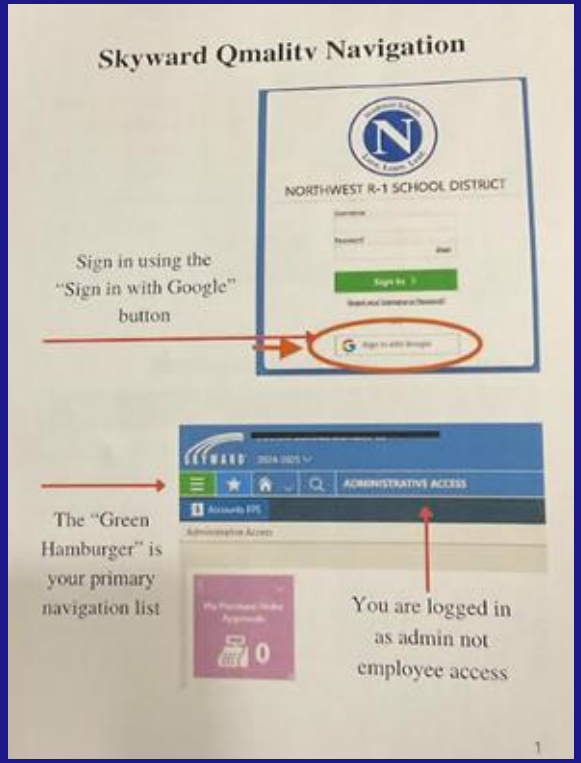


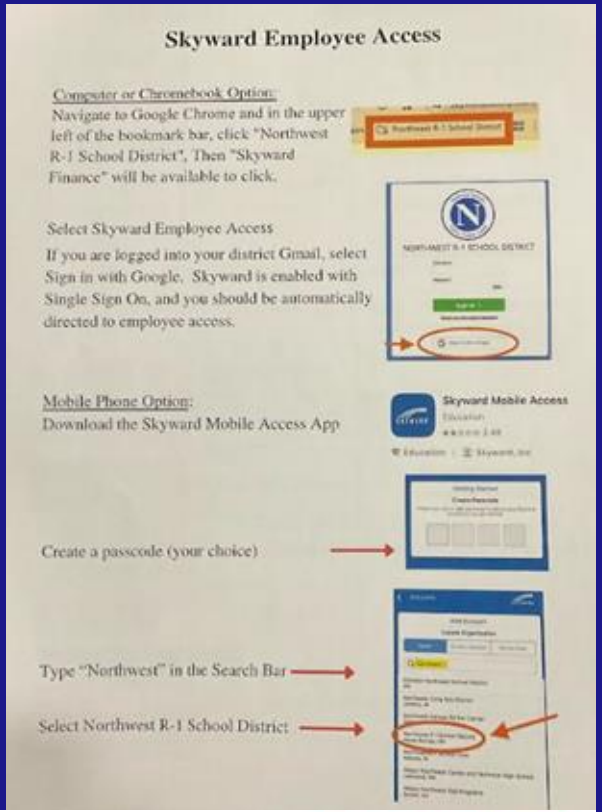




HANDOUT REVIEW
Discussion around Handouts







EXAMPLE

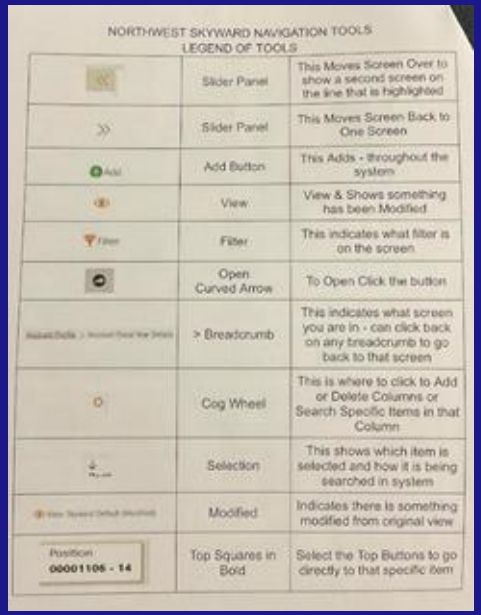
HANDOUT REVIEW
Discussion General Navigation

EXAMPLE



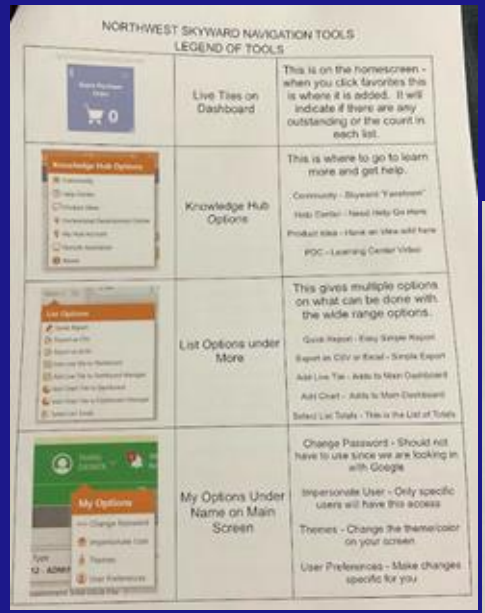
NORTHWEST SKYWARD NAVIGATION TOOLS
LEGEND OF TOOLS

Picture of Navigation Tool	Name of Tool	What it is Used For
	Home Button	Takes Back to Main Dashboard
	Main Menu "Hamburger"	Main Menu to navigate between Modules
	Favorite	Mark Pages as favorites to add to dashboard
	Home - Access	Moves back to Home Screen & Switch Between Access Options
	Global Search	Search something Globally on Skyward
ADMINISTRATOR ACCESS	Administrative Access	This indicates you are in the Admin Access
EMPLOYEE ACCESS	Employee Access	This indicates you are in Employee Access
	New Window	You can have multiple windows open in the system - this opens a new one
	Print Screen	You can print screen a specific page you are on
Add to Dock	Add to Dock	This adds an item as a bookmark within Skyward
What's New / My Messages	Other Main Menu	Reminders of What is New - Specific My Message Notifications



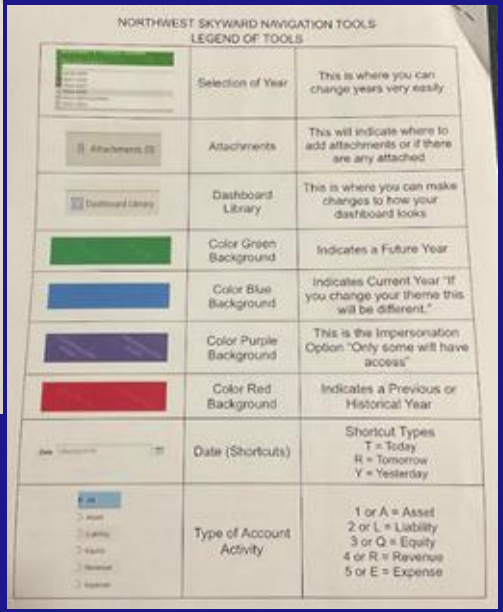
NORTHWEST SKYWARD NAVIGATION TOOLS
LEGEND OF TOOLS

	Slider Panel	This Moves Screen Over to show a second screen on the line that is highlighted
	Slider Panel	This Moves Screen Back to One Screen
Add	Add Button	This Adds - throughout the system
	View	View & Shows something has been Modified
	Filter	This indicates what filter is on the screen
	Open Curved Arrow	To Open Click the button
	> Breadcrumb	This indicates what screen you are in - can click back on any breadcrumb to go back to that screen
	Cog Wheel	This is where to click to Add or Delete Columns or Search Specific Items in that Column
	Selection	This shows which item is selected and how it is being searched in system
	Modified	Indicates there is something modified from original view
Position 00001105 - 14	Top Squares in Bold	Select the Top Buttons to go directly to that specific item



NORTHWEST SKYWARD NAVIGATION TOOLS
LEGEND OF TOOLS

	Live Tiles on Dashboard	This is on the homescreen - when you click favorites this is where it is added. It will indicate if there are any outstanding or the count in each list.
	Knowledge Hub Options	This is where to go to learn more and get help.
	List Options under More	This gives multiple options on what can be done with the wide range options.
My Options	My Options Under Name on Main Screen	Change Password - Should not have to use since we are looking in with Google Impersonate User - Only specific users will have this access Themes - Change the theme/color on your screen User Preferences - Make changes specific for you



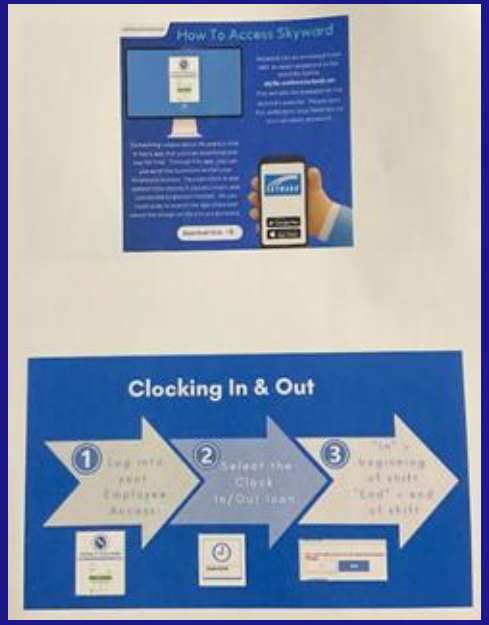
NORTHWEST SKYWARD NAVIGATION TOOLS
LEGEND OF TOOLS

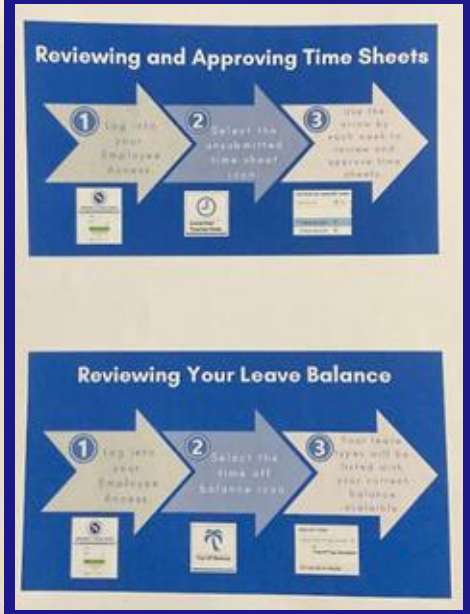
	Selection of Year	This is where you can change years very easily
	Attachments	This will indicate where to add attachments or if there are any attached
	Dashboard Library	This is where you can make changes to how your dashboard looks
	Color Green Background	Indicates a Future Year
	Color Blue Background	Indicates Current Year "If you change your theme this will be different."
	Color Purple Background	This is the Impersonation Option "Only some will have access"
	Color Red Background	Indicates a Previous or Historical Year
	Date (Shortcuts)	Shortcut Types T = Today R = Tomorrow Y = Yesterday
	Type of Account Activity	1 or A = Asset 2 or L = Liability 3 or Q = Equity 4 or R = Revenue 5 or E = Expense

HANDOUT REVIEW
Discussion Simplified Presentation

EXAMPLE









Leaning & Growing Together
Working Together
Problem Solving Together



New System….
= Better Access for Everyone
= Less Manual Entry & Room for Error
= More Time To Spend on Other Things
= More to Review Data, not just input data
= Improved Communication and Collaboration

HOPEFULLY YOU ARE NOW PREPARED TO SURVIVE, BETTER YET THRIVE IN THE IMPLEMENTATION PROCESS!!!

Questions?

Thank you for attending this session, I hope you enjoy the rest of the conference.

Travis Dierker - Northwest