![Partner in Publishing logo]

CASE STUDY

Customer Onboarding

The Partners

Partner in Publishing (PIP) works with leading providers of educational content, technology, and services for K-12, higher education, and the professional and library markets. Offering a range of products, from print and digital textbooks to supplemental teaching materials and online platforms, these companies serve millions of educators and students worldwide.

The Challenge

As the demand for virtual learning tools continues to grow, so does the need for detailed onboarding support for educators. With a vast array of digital products and platforms, countless K-12 and higher education instructors require training services each year to effectively integrate these tools into their teaching.

To address the high volume of educators looking for guidance on navigating educational technology products, PIP facilitates an ongoing, detailed year-round customer onboarding process. PIP provides tailored, one-on-one sessions, guiding educators in effectively using digital educational platforms while offering ongoing support and communication, strengthening the crucial relationship between publishers and educators.

The Solution

To meet this need, PIP developed a customized, ongoing customer onboarding process. PIP's dedicated team of trainers provides one-on-one virtual training sessions, guiding instructors through everything from course setup and Learning Management System (LMS) integration to product navigation and troubleshooting.

Leveraging video chat and screen-sharing technology, PIP offers educators immersive, personalized support to help them master these products. Each session is tailored to the instructor's unique needs, ensuring they can effectively incorporate these tools into their teaching.

The Process

Working closely with the partner organizations that designed these products, PIP developed a seamless year-round onboarding program that ensures every instructor receives the training they need. The process includes:

Personalized Training Sessions: Each session is customized to the specific needs of the educator, covering everything from basic product functionality to advanced course design.

Comprehensive Product Overviews: Instructors receive in-depth tutorials on digital educational products and platforms.

Course Shell Creation & Management: PIP trainers assist educators with creating new textbook course shells, copying existing ones, and integrating them into LMS platforms like Blackboard, Canvas, Brightspace, and Moodle.

LMS Integration & Gradebook Sync: We guide instructors through the complex process of syncing gradebooks and linking assignments between their LMS and educational technology products.

Ongoing Support: Beyond the initial training, we connect educators with a network of ongoing support to ensure their continued success.

By catering to the unique needs of each instructor, PIP's goal was to help them feel confident in using educational technology products to improve classroom engagement and learning outcomes.
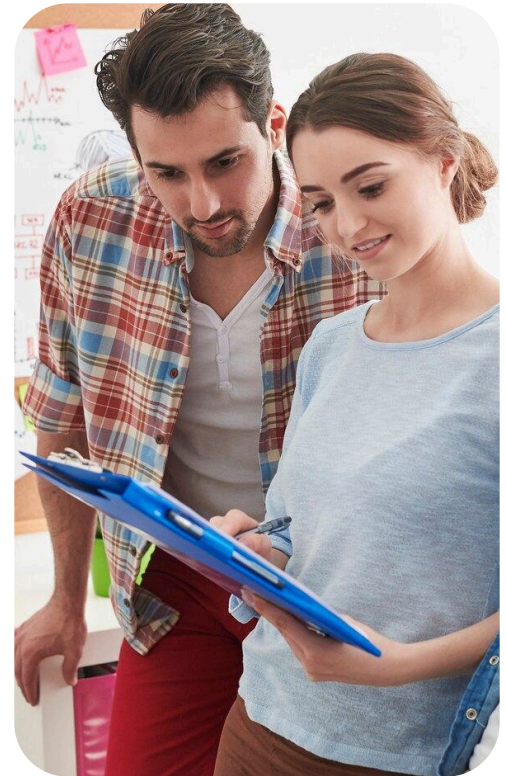
Results/Outcomes

The onboarding initiative has yielded impressive results, particularly during the busy back-to-school period:

1,097 training sessions were scheduled in the four weeks covering back to school.

895 successful sessions were completed without any technical issues or follow-up troubleshooting.

Responses included **325 positive surveys from satisfied customers**, reflecting a **36% response rate** from instructors who voluntarily chose to provide feedback on the optional surveys sent by PIP trainers.

Results/Outcomes

> *"My trainer was absolutely FANTASTIC. So cheery, so helpful, answered all my questions, and made me feel like I could take the reins all by myself. We were scheduled for an hour and she didn't rush me, and even watched me walk through loading quizzes into my Canvas course. The detail at which she knew her stuff and was able to easily convey that to me was phenomenal!! Thank you for helping me get set up for this semester!"*

Professor Shelly Grunsted, University of Oklahoma

> *"My trainer was awesome. She was patient and answered all my questions. She was very thorough in her training too. Super kind and very easy to talk to. I'm very excited to implement the product into my course this upcoming semester. It's going to make my life easier and allow me to spend time working on other projects that need my attention since my course prep time will be reduced."*

Professor Ali Shokouhbakhsh, College of San Mateo

"My trainer was excellent. I'm a new faculty member and new to the product AND Canvas. She walked me through the steps, answered all my questions and was patient with my level of tech savvy-ness. Excellent experience!"

Professor Jonathan Canger, University of Tampa

"My trainer was awesome during the training today. Professional, patient, and understanding. Several technical difficulties that I was having logging in and using Microsoft Teams were worked through and her bright attitude, eagerness to help, and knowledge base sped up the speed bumps. She displayed excellent customer service skills as well and was great at highlighting the important features I would be using daily. I hope I get her for the second part of my training because I know it will be smooth and a great experience."

Professor Aaron Abernethy, Catawba Valley Community College

"My trainer was extremely helpful. I am more confident with the product, and I appreciate his great attitude. He did not mind going back to certain parts when I needed him to do so. This fall will be my first time actually using the product, but from the introduction with my trainer, I can tell that the product is an excellent tool. There were so many features that will help both the instructor and the students. Thanks, again!"

Professor Vanessa Dukes, Alabama A&M University

The Benefits of Partnering with PIP

The partnership between PIP and its partner organizations that pioneered these products has revolutionized customer onboarding, providing instructors with the personalized, hands-on training they need to confidently adopt digital tools. The partnership ensures that educators are empowered to integrate these resources into their teaching, ultimately enhancing student learning experiences and driving long-term success for both educators and institutions.

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