

# K-12 Systems Modernization Research Study

Quantitative and qualitative research findings from district stakeholder interviews, pain point analysis, and strategic product direction insights across nutrition, finance, and IT operations.

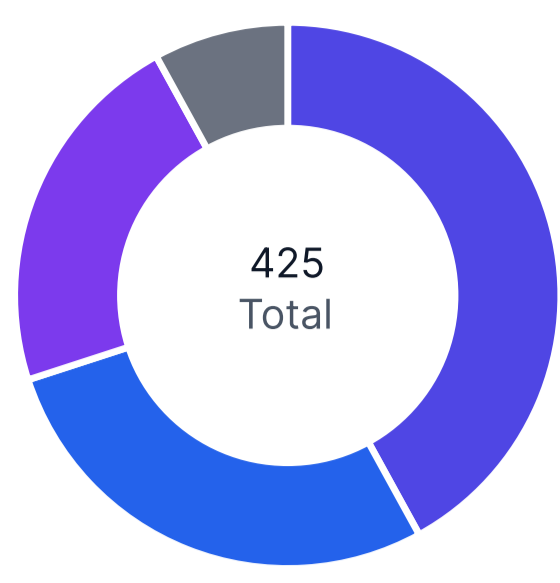
n=420+ respondents • 8 districts analyzed • Q4 2024 – Q1 2025

## RESEARCH VISUALIZATION 1

### Survey Respondent Breakdown

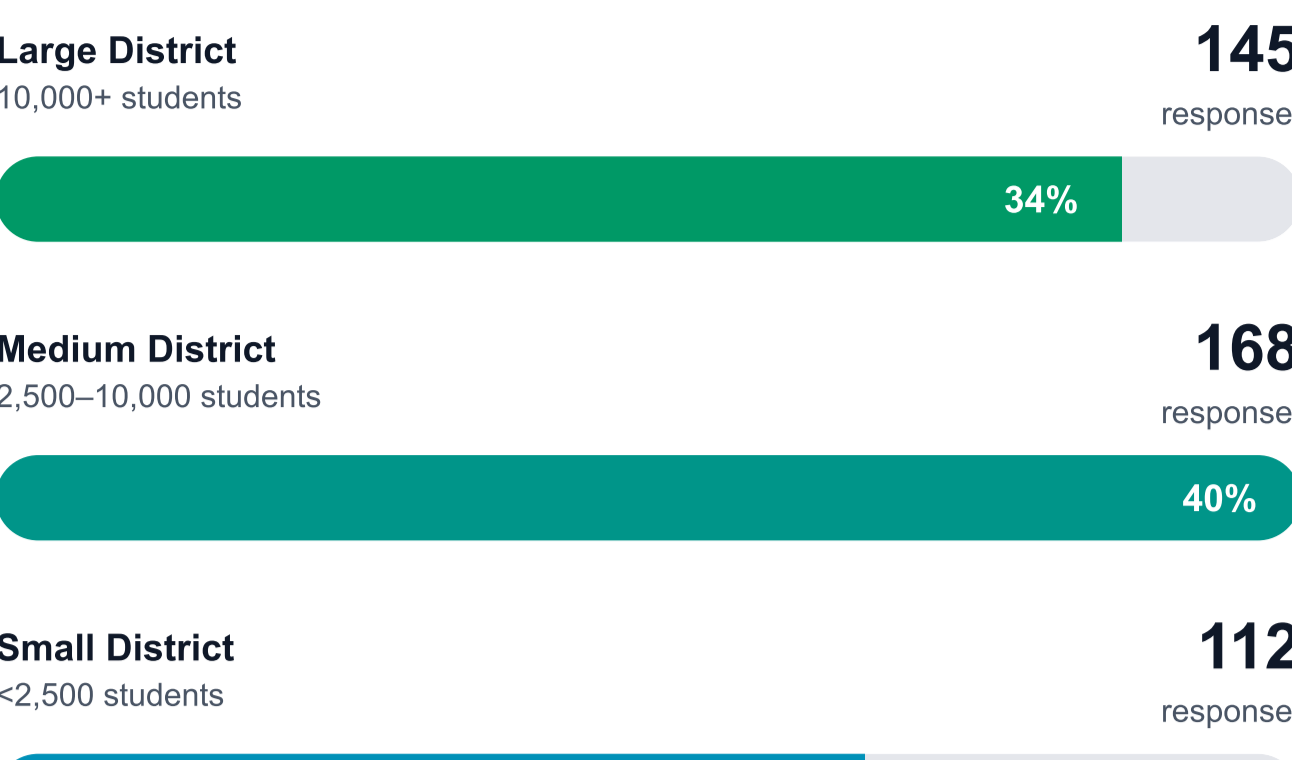
TOTAL SAMPLE

#### Role Distribution



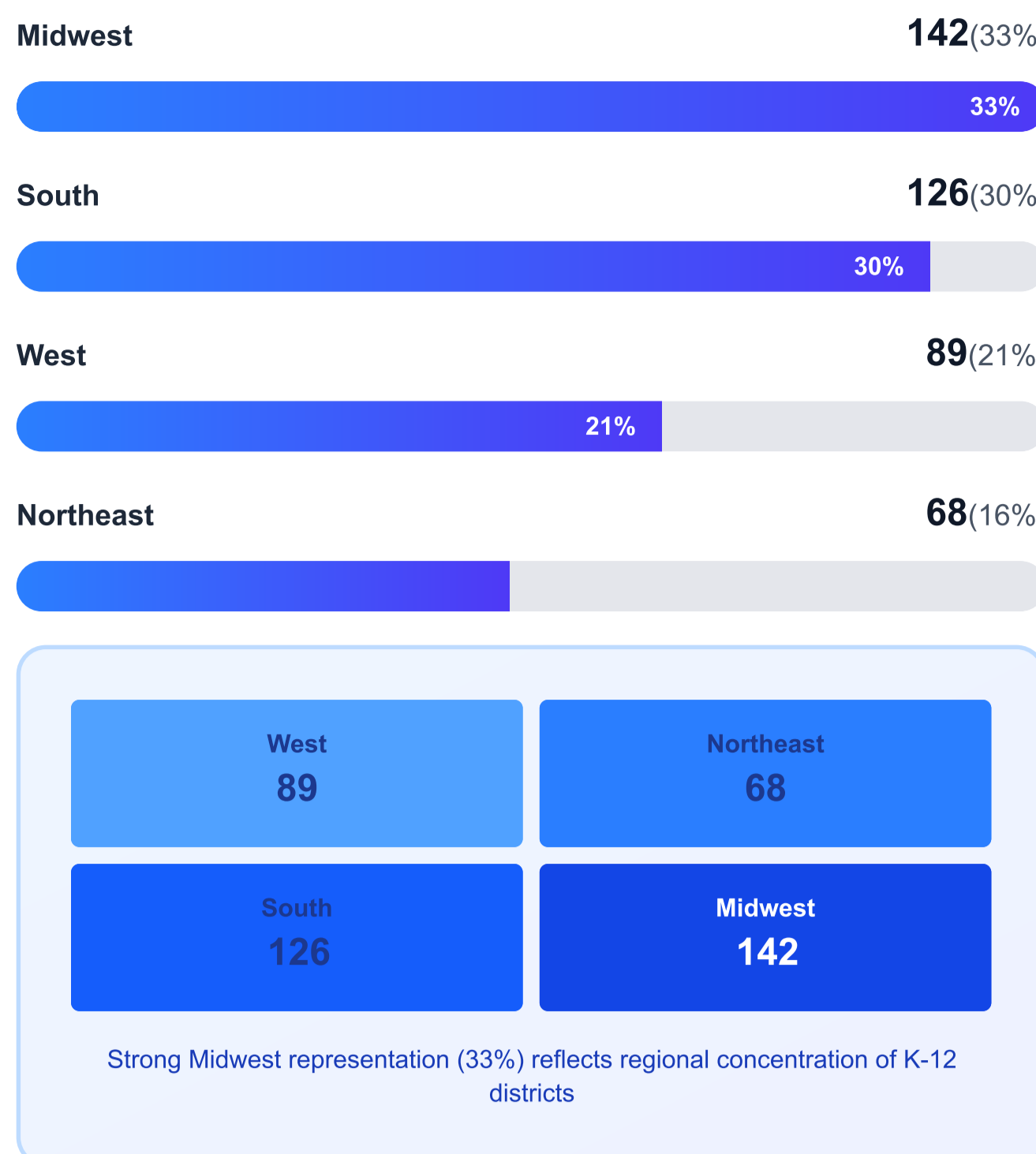
Nutrition Director	42%
CFO / Finance Director	28%
IT Administrator	22%
Other	8%

#### District Size Segmentation



**Sample Distribution**  
Balanced representation across district sizes ensures findings reflect diverse operational contexts and resource constraints.

#### Geographic Distribution



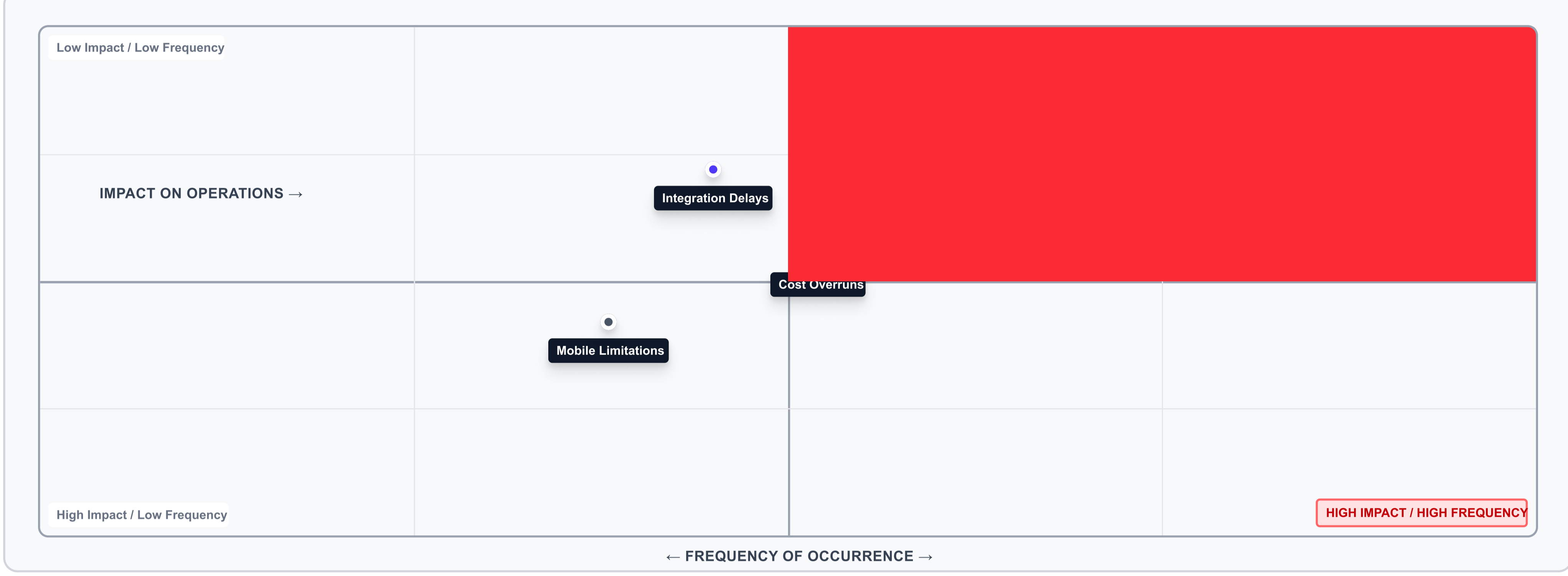
Strong Midwest representation (33%) reflects regional concentration of K-12 districts

#### SAMPLE CHARACTERISTICS

42% Nutrition Directors (largest stakeholder group)	168 Medium districts (highest response count)	33% Midwest respondents (regional leader)	95% Statistical confidence interval ±4.7%
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## RESEARCH VISUALIZATION 2

### Pain Point Prioritization Matrix



#### Ranked Pain Points

1. Data Migration (Critical switching barrier)	I: 92% F: 85%
2. System Fragmentation (Cross-platform inefficiency)	I: 88% F: 72%
3. Training Gaps (Staff capability limitations)	I: 65% F: 78%
4. Vendor Lock-in (Contractual constraints)	I: 82% F: 58%
5. Reporting Complexity (Manual reconciliation needs)	I: 70% F: 68%

#### Strategic Implications

- Highest Priority:** Data Migration represents the highest urgency opportunity. 92% impact + 85% frequency = critical switching barrier requiring white-glove support.
- System Fragmentation:** 72% frequency across districts indicates widespread pain. Platform consolidation could address this high-impact, high-frequency challenge.
- Training Investment Need:** 78% frequency but moderate impact suggests training is persistent but manageable with better onboarding resources.
- Product Strategy Recommendation:** Focus implementation support and migration tooling on high-high quadrant issues. These represent both greatest pain and highest ROI for customer success initiatives.

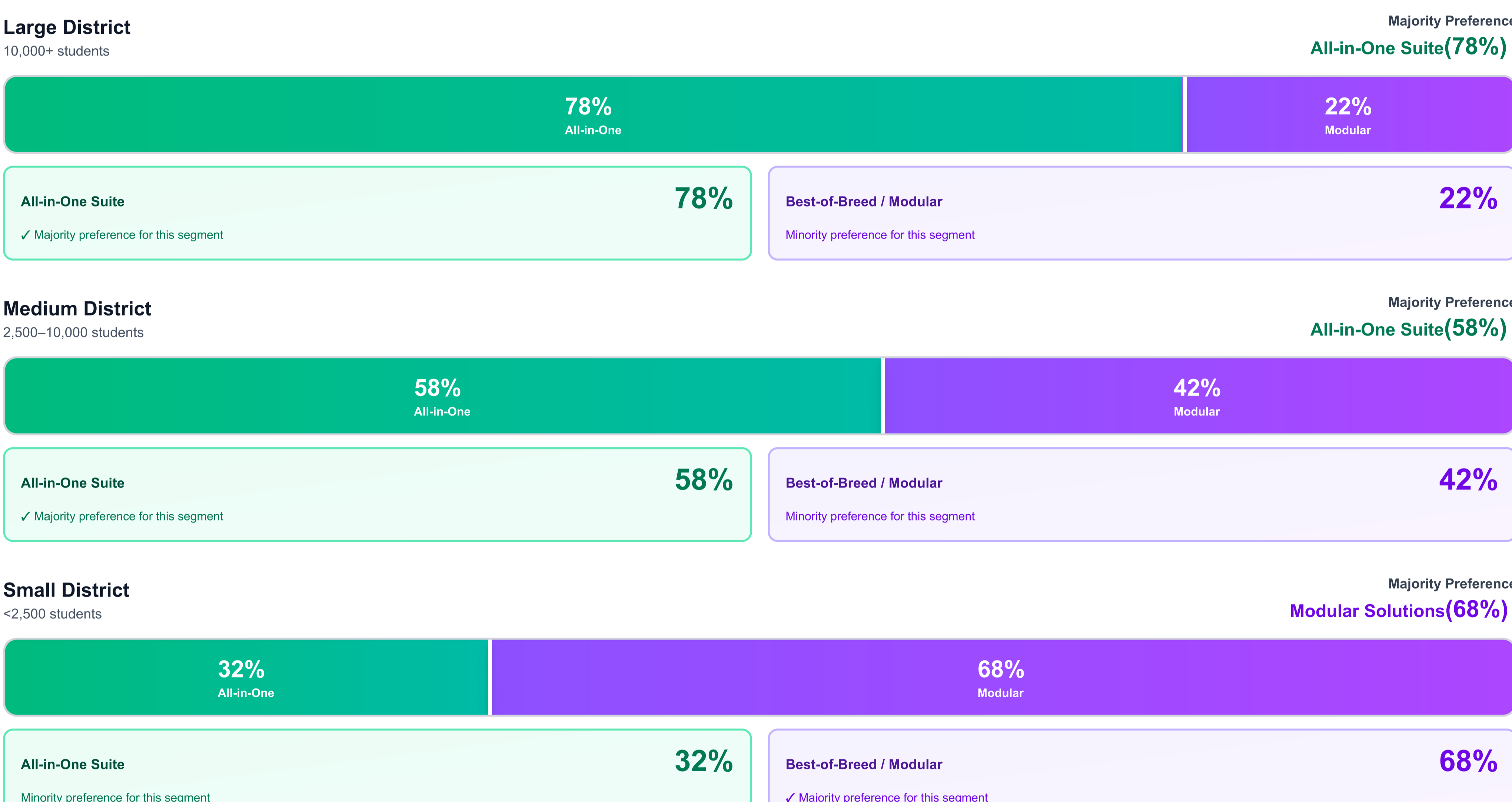
#### Methodology

Pain points rated on two dimensions: **Impact** (operational disruption severity) and **Frequency** (occurrence across respondents). Bubble size represents aggregate priority score. Data collected through structured interviews and validated via follow-up surveys (n=420).

## RESEARCH VISUALIZATION 3

### Feature Preference by District Size

#### Solution Preference Distribution



#### Preference Trend by District Size



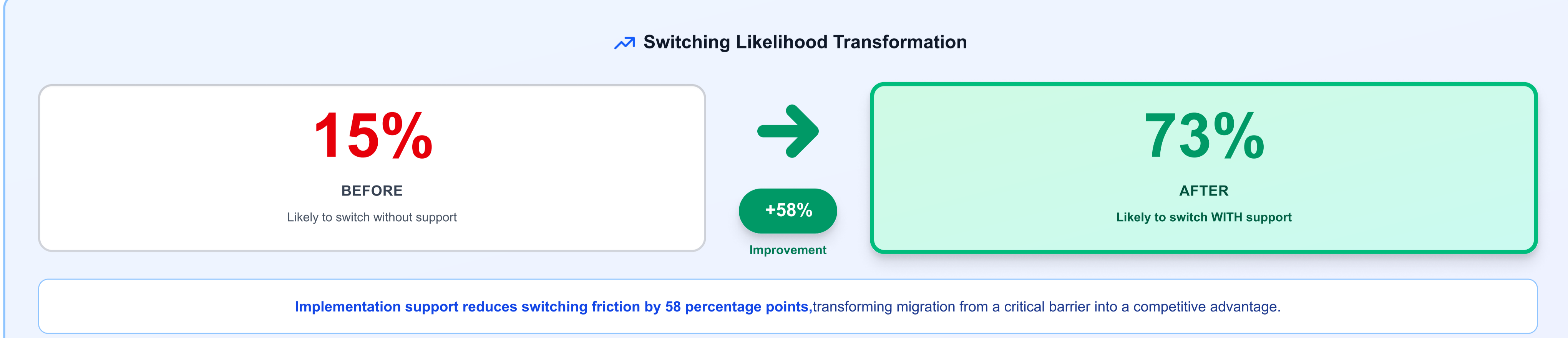
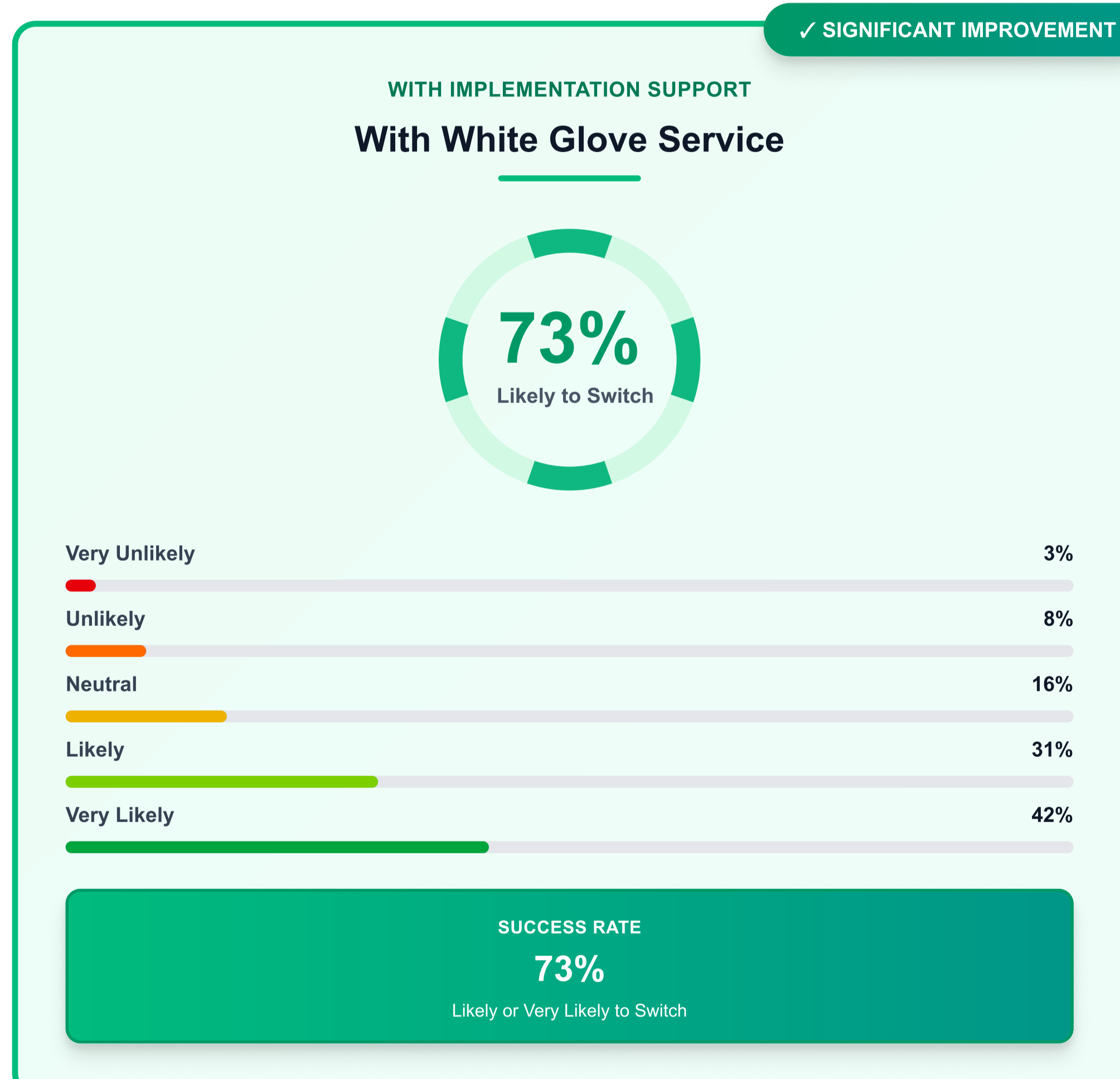
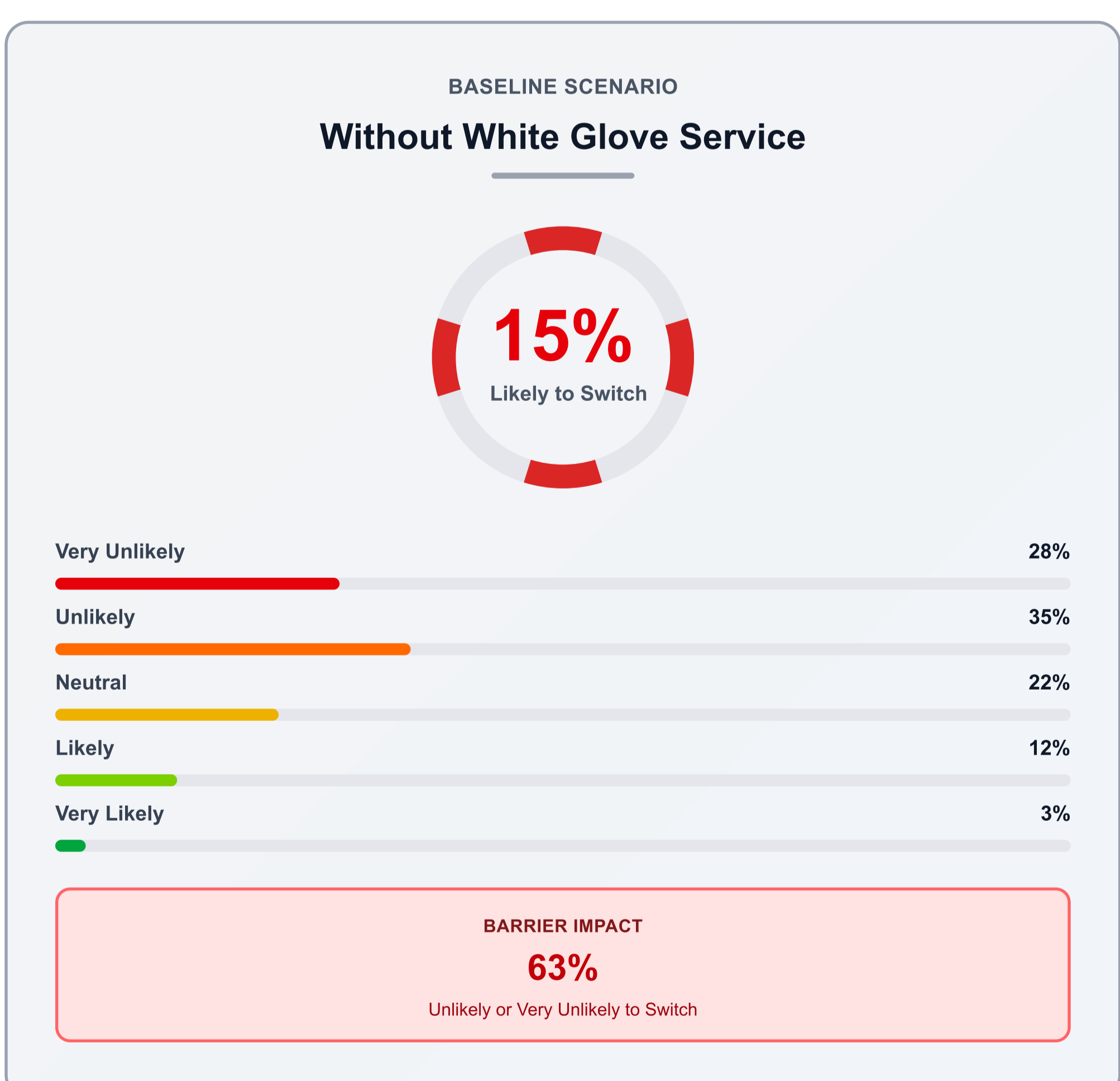
- 78% Large Districts:** Prefer all-in-one suites for operational simplicity and centralized vendor management. Complex multi-site operations benefit from unified platforms.
- 68% Small Districts:** Favor lighter, modular solutions to avoid paying for unused features. Limited IT capacity makes focused tools more manageable than enterprise suites.
- Product Implication:** Preference shifts based on operational complexity and IT capacity. Product strategy should offer tiered deployment models to address both segments.

**Key Finding: Inverse Preference Correlation**  
Clear inverse relationship between district size and solution preference. Large districts (78% suite preference) value integration and vendor consolidation, while small districts (68% modular preference) prioritize affordability and simplicity. Medium districts show balanced split (58/42), suggesting this segment may benefit from flexible deployment options.

## RESEARCH VISUALIZATION 4

### Impact of Implementation Support on Vendor Switching

KEY METRIC: Likelihood Increase



- Critical Barrier:** Without support, 63% of respondents are unlikely to switch vendors. Migration complexity = #1 switching deterrent.
- White Glove Impact:** With dedicated support, 42% become "very likely" to switch (14x increase from 3%). Implementation support = competitive differentiator.
- Go-to-Market Strategy:** White-glove migration services should be a core component of sales strategy and pricing model. Recommendation: Bundle support in all enterprise deals.

**Research Finding: Implementation Support as Strategic Lever**  
White-glove implementation support demonstrates a 387% increase in "very likely to switch" responses (from 3% to 42%). This data validates that migration barriers—not product features—are the primary switching deterrent in the K-12 enterprise software market.