

FUTUREFOCUS

Understanding the education technology purchase process

From who makes and influences decisions to what products and services schools prioritize in their budgets, everything you need to know about the education buy cycle and purchase process.

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Introduction

Technology is reshaping classrooms, and the pace of adoption – propelled in recent years by the coronavirus pandemic – is likely to accelerate as schools adopt AI and the rapid growth of curriculum and assessment tools continues.

Technology can provide students with vast amounts of information and resources, and education professionals are increasingly turning to technology tools to improve learning outcomes and ease the burden on teachers and administrative staff. However, schools are becoming more selective with technology spending as the number of technology tools available continues to increase.

Education leaders are under more pressure than ever to make smart purchasing decisions that address the challenges of teaching and learning, and technology vendors are facing fierce competition for the limited funds schools are allocating to upgrade technology. Districts are soliciting input from a wide range of stakeholders for their education technology decisions, and schools are identifying needs and evaluating products throughout the year.

This FutureFocus on Education Purchasing, sponsored by SmartBrief Education and Tech & Learning, aims to detail the purchase process and outline the priorities schools have identified for the coming years. Read on to understand what educators are looking for, how they learn about new products, who ultimately influences and makes decisions, when those decisions are made, and the best ways to market your products and services to them.



Understanding purchasing and evaluation timelines

School budgeting processes occur on a predictable schedule year after year, but education buyers evaluate purchases and plan throughout the year. A recent survey of educators by SmartBrief Education and Tech & Learning revealed that schools and districts update technology and engage with the buying process continuously. Education services vendors who better understand the year-round buyer journey have a competitive advantage when executing purchase orders.

2,803

educators in the
United States



The survey gathered results from 2,803 educators in the United States who read SmartBrief Education and Tech & Learning email newsletters. The survey aimed to identify stakeholders involved in the decision-making process for technology purchases and pinpoint when stakeholders are buying products and services, what their purchase priorities are, and the best ways to communicate and market to them.

Nearly one-third of those surveyed, 32.7%, said identifying purchase needs is an ongoing, year-round process. Around one-quarter of respondents reported winter/spring (25.2%) and spring/summer (23.2%) as the time of year purchasing needs are identified. The least likely time to identify purchasing needs was fall/winter, but 19% of respondents still said purchasing needs were identified in that timeframe, highlighting the year-round nature of decision-making.



When are products evaluated?

Products are evaluated on an ongoing basis

34.5%

Products are evaluated in winter/spring

23.5%

Products are evaluated in spring/summer

23.3%

Products are evaluated in fall/winter

18.7%

More than one-third of respondents (34.5%) said products are evaluated on an ongoing basis. About one-quarter of educators (23.5%) say products are reviewed in winter/spring and 23.3% evaluate products in spring/summer. Just 18.7% of respondents say they evaluate products during the fall/winter season.

Final buying decisions are also ongoing in many districts, according to 31.6% of respondents. Spring/summer was the most likely timeframe for final purchasing decisions, with 28.3% of respondents identifying the timeframe. Just 18.5% of respondents said final buying decisions were made in fall/winter, with a slight uptick in winter/spring at 21.6%.

Products and services planned for purchase in the next 12 to 24 months

Software and curriculum tools came in as the top purchasing priority, but infrastructure and hardware still remain an important category for more than a third of our respondents. Nearly half of respondents said they were likely to spend on software and curricula and/or educator professional development in the near future, at 48.6% and 48.4%, respectively. Hardware such as laptops, tablets and other devices and equipment came in slightly lower at 47.3%. Infrastructure technologies, such as networking and servers, and mental health tools were identified by 32.6% and 32%, respectively. AI tools were identified by 28% of respondents, with just 17.7% of respondents planning to spend on cybersecurity tools.

Teaching and learning products and services planned for purchase in the next 12 to 24 months

Survey respondents showed interest in purchasing a wide range of teaching products and services in the near future. Reading curriculum was the top response, with 41.1% of respondents indicating interest, followed by math curriculum at 36.9%, cybersecurity and safety products at 35.2%, career and technical education at 34.3%, assessment tools at 33.4% and STEM curriculum at 32%. About one-quarter, 25.6%, of respondents plan to purchase social-emotional learning curriculum.

The top five responses were tightly clustered between 33% and 41% and mirror market trends — driving achievement in reading and math, expanding CTE programming, rethinking grading and assessment systems, and better protecting data privacy.



48.6%

indicated interest in purchasing software and curricula in the near future

Calling the shots: decision-makers and decision-influencers

Many people are involved in making an education procurement decision. Vendors are likely to have contact with several parties before inking a contract, and decision-makers include everyone from superintendents and administrative staff to parents and board members.

Getting to know the people with budget approval and allocation power (decision-makers) and those who evaluate and recommend products (influencers) makes it easier for vendors to work the buying process, target content marketing and close deals more efficiently. SmartBrief Education and Tech & Learning's newsletters are an excellent way to target decision-makers and influencers at all levels of the education ecosystem.

DON'T IGNORE TEACHERS IN THE SALES PROCESS

Education technology firms would be remiss to ignore teachers in the sales process, as more than half of survey respondents indicated teachers, curriculum designers, and other first-line educators are influential in the purchasing process. Additionally, more than 55% of respondents said they learned about products and vendors from teachers and educator peers. Teachers may be the first to hear about a new product or service and point it out to peers and building-level administrators.

Teachers are often the main users and beneficiaries of education technology, and buyers – at the site and district level – are keen to solicit their input. They can also be powerful advocates in selling products and services to school boards and other bodies that control spending.

55%

said they learned about products and vendors from teachers and educator peers.



Who is involved in the purchase process?

Superintendents, assistant superintendents

41.5%

District administrators

47.3%

Building-level administrators: principals, assistant principals and the like

53.3%

Instructional staff: teachers, curriculum designers, instructional coaches, teacher-on-special-assignment and the like

52.4%

School board members

40.6%

School technology managers and leaders

50.2%

Parents

35.4%

How decision-makers learn about products

Educators learn about products and services through various avenues, with teachers and other educators being the most likely sources of knowledge about technology tools. More than half of respondents (55.2%) learn from teachers and educators. Education publications, trade shows and conferences were also reported as valuable for 49.1% and 48.7% of buyers, respectively. Vendors are a source for more than 42% of decision-makers. Fewer than 20% turn to parents, school boards, and community members for information.

When it comes to information sources, decision-makers favored webinars above other types of content, with 38% reporting them as useful for learning about products and services. Case studies came in second, at 24.8%, followed by infographics and white papers, at 17.3% and 16.2% respectively. Many respondents said all of the above were useful, showing that vendors should use multiple content channels to reach their targets.

Respondents said webinars were most useful if they contained presentations by educators that detail how they are using a product. More than 62% of survey respondents favored webinars with presentations from other educators. Presentations by vendors that show how a product can be used were also useful, according to 43.5% of respondents, and 42.6% of respondents find panel discussions with vendors and educators useful.



38%

reported webinars as
useful for learning
about products
and services



Build relationships with content marketing

Content marketing gives you multiple ways to position your message, spotlight your successes and build relationships with stakeholders. Here are the ones you should have in your marketing arsenal.

Webinars can mimic classroom and learning settings, appealing to educators' identities as life-long learners. The survey data show that education leaders and teachers strongly prefer webinars with presentations by other educators sharing how a product is used. Presentations from vendors and panel discussions between vendors and educators are also useful, but be sure to keep webinars short and concise. Webinars can be used for lead generation and to support buyers with problem identification and post-purchase service and support.



Pro tip: Boost the impact of webinars by publishing an executive summary with links to product pages, other content marketing assets and a recording of the session.

White papers are detailed reports written for a specific audience that detail solutions to problems or share new ideas from recognized experts. They are a valuable touchpoint in the purchase process. They can help build credibility and relationships. Use them for thought leadership, brand awareness, and lead generation.



Pro Tip: White papers are most successful when they are written by or include insights from experts such as educators and administrators who use the product/ solution and researchers whose work establishes the effectiveness of your solution.

Infographics and other visual content are effective ways to catch buyers' eyes. They let readers quickly digest and retain information. Use them to drive engagement on social media, and develop leads at the start of the buying cycle.



Pro Tip: Demonstrate your market prowess. Share tips, trends, research findings and other important data that you know is important to your customer base.

Case studies draw your audience in. Buyers trust them. They want to see how their peers use and address issues with your solution and services.



Pro Tip: Your customers are your best advocates; let them tell their own unvarnished stories. Don't gloss over challenges and messiness. Show how you can tackle issues and truly partner with your customers. Also, include links to additional content and a direct contact so readers can continue with self-service research or talk to a rep about their specific questions.

62%

of respondents favored webinars with presentations from other educators.



The biggest challenges educators face

In recent years, districts invested heavily in distance learning and the infrastructure necessary to instruct students remotely. Some of those infrastructure investments continue, with nearly half of respondents expecting to spend on hardware such as laptops and tablets in the next 12 to 24 months, but even more, buyers anticipate spending on software and curriculum and educator professional development.

REAL TALK: WHAT DECISION-MAKERS WISH VENDORS UNDERSTOOD

Understanding the year-round nature of the buying cycle and the ways you can support customers throughout can be key to sales success, but how you approach stakeholders and build relationships can also profoundly affect the way decision-makers view you and your product.

Survey respondents opened up about a wide range of other issues they wished marketers better understood.

Budgets are tight. Limited funds and budget constraints topped the list of what decision-makers wish marketers knew. Identifying potential funding streams can also boost the likelihood of a sale. “[I love] when the vendors have done the work to identify funding sources and opportunities that are relevant to my school,” one respondent said. Marketers should also try to understand teachers’ needs and learn about the districts and their cultures.

Time is valuable. One thing educators repeatedly said was they are short on time. Be conscientious of decision-makers’ schedules, ask for a good time to pitch your product, and keep that first pitch short and sweet. “We want something quick and to the point, and if it piques our interest, we can do more investigation,” one respondent said.

Use cases matter. Respondents said seeing case studies and the product at work is far more valuable than fancy marketing materials. “Highlight the technology at work, not just the colorful marketing,” one respondent said.

The procurement process is not simple. School districts may have large budgets, but funding allocated to technology is likely limited in scope and may have strings attached. There is also a long list of state and local procurement policies that must be followed. Understand that selling to a school district is not like selling to a company or individual. Not only is there a wide range of stakeholders, but even if everyone is on the same page and committed to a product or service, it may take some time to complete a transaction.

Educators said marketers need to understand that it’s difficult to get everyone on board and gather approvals on their end, and the sales process may be years long, from initial contact to budget allocation and implementation.

When asked about the biggest challenges they face now, decision-makers frequently cited navigating AI and cybersecurity and developing policies related to the technologies. Survey respondents also cited rising prices and budgetary constraints – particularly as pandemic-era subsidies dry up – and reported a disconnect between leadership and front-line educators. The disconnect between leaders and educators further highlights the need for vendors to seek buy-in from a variety of stakeholders to ensure decision-makers are on the same page about product needs and available funding.

Be a partner, not just a salesperson

Top-notch customer service, responsiveness, and product support are critical components of a good vendor relationship. Survey respondents frequently cited communication and a single, responsive point of contact as the most necessary piece of a good vendor partnership, and this doesn't end at the point of sale. Educators want to be able to reach out and feel supported. Connecting users with other school districts using the products and offering follow-up and support to ensure products and services are being used to their full extent is crucial for continuing relationships.

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