



EXCEL / GOOGLE SHEETS → SYCAMORE

The Switching Playbook

A decision guide for heads of school and business offices evaluating a move from Excel / Google Sheets to Sycamore. Nine sections, designed to print and forward.

TODAY

Spreadsheets

Excel / Google Sheets

VS

TOMORROW

Sycamore

One platform, one login, one bill
\$4 per student per month, all included

Inside: the decision framework, week-by-week migration timeline, side-by-side cost worksheet, questions to ask Excel / Google Sheets before you cancel, a one-page board summary, and a migration FAQ for your business office.

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Sycamore Leaf Solutions · sycamoreleaf.com · US-based support

1 Why heads of school are switching

Schools using spreadsheets are usually asking three questions: how many admin hours are we spending maintaining files that could update themselves, how many mistakes are getting through because 'Final_v8_REAL_Final.xlsx' is not a good source of truth, and how do we give parents and teachers self-service access without emailing PDF reports every quarter. Sycamore answers all three.

Across the 14 categories that private school leaders score during platform reviews, Sycamore wins on 12. Excel / Google Sheets holds the lead on 1. The majority favors Sycamore on family experience, pricing transparency, support, and platform breadth.

\$4

per student per
month, all modules included

4.8 / 5

parent app rating
(Sycamore + TuitionEP combined)

46+

countries served
on 6 continents

4-8

weeks to switch
and go live

The three reasons that come up in every kickoff call

1. Families want one app. Sycamore's Parent App holds a 4.8-star combined rating with TuitionEP. The parent experience is the most frequent touch point with any school platform.
2. Pricing should be predictable. Sycamore publishes its plan at \$4 per student per month with everything included. Schools that adopt the full competitor suite often carry multiple line items that grow as the school grows.
3. Support should answer when called. Sycamore's support and onboarding teams are based in the United States and pair with Sycamore Academy for on-demand training.

2 When to switch

Schools switch from Excel / Google Sheets at three common moments. Pick the one that fits your school year and contract; Sycamore's onboarding team adapts to all three.

Window	Best for	Watch out for
End of school year	Schools whose Excel / Google Sheets contract renews mid-summer. Plenty of runway for staff training before fall.	Confirm Excel / Google Sheets data exports are available after your contract end date.
Mid-year cutover	Schools that want to be on Sycamore before re-enrollment season opens. Cutover at the start of a term or grading period.	Coordinate the cutover with payroll and tuition draft schedules.
Summer	Schools running summer programs or year-round calendars. Compresses training into July and August.	Plan around staff vacation; lock kickoff before mid-June.

Whichever window you pick, Sycamore typically takes 4 to 8 weeks from kickoff to your first tuition cycle on the new platform.

3 What changes for your families

For most schools, parents are the most frequent users of the platform. Here is what shifts the day Sycamore goes live.

One app instead of many

Families currently install Excel / Google Sheets's parent experience. After the switch, they install the Sycamore Parent App once. Tuition balance, cafeteria balance, grades, attendance alerts, and class announcements live behind the same login.

Payment methods, depending on the processor

Whether saved cards and ACH details transfer depends on Excel / Google Sheets's current payment processor. When secure token portability is supported, families see no change. When it is not, families re-add their payment method through a one-screen flow in the Sycamore Parent App. Sycamore drafts the parent communications either way.

Tuition plans are reset and recreated

Active payment plans are rebuilt in Sycamore at the same amount, cadence, and remaining balance, then reconciled against the prior platform so nothing is double-charged or missed. Families see the same payment schedule they already expected.

Fee handling becomes your choice

On Sycamore, the school decides per transaction type: absorb the fee, pass it through, or split it. Many schools use this flexibility to reduce the friction families feel at checkout.

Communications consolidate

Class messages, school-wide announcements, and teacher-parent threads route through Sycamore.

4 Migration timeline, week by week

Most schools complete a full switch in 4 to 8 weeks. The schedule below assumes a standard Excel / Google Sheets migration; mid-year and summer cutovers compress to the same shape with tighter validation windows.



Phase	Phase name	What happens
Week 1	Discovery	• Kickoff call with the head of school and business office • Inventory of current Excel / Google Sheets modules and contract end dates • Source-of-truth audit for student, family, and tuition data • Switching plan with named dates, owners, and risks
Weeks 2-3	Data + setup	• Joint data extraction from Excel / Google Sheets • Normalize and load into Sycamore staging environment • Side-by-side validation against the source system • Payment processor connect and test transactions
Weeks 4-6	Training	• Role-based courses for admins, teachers, and counselors • Two live working sessions with the client success team • Parent communication drafts, scheduled and approved • Cutover dry-run on a representative subset of data
Weeks 7-8	Go live	• Production cutover and final data reconciliation • Parents install the Sycamore Parent App, one balance live • First tuition cycle on Sycamore, monitored end-to-end • 30-day post-launch review with the school's leadership

5 Side-by-side cost worksheet

Fill the left column with what your school pays Excel / Google Sheets today. Use the right column to capture the Sycamore plan. The bottom row is the annual difference your board will care about.

Line item	Excel / Google Sheets today	Sycamore
Per-student license (annual)	_____ × ____ students = _____	\$4 × students × 12 = _____
Excel / Google Sheets base / SIS module	_____	Included
Tuition / payments module	_____	Included
Admissions / enrollment module	_____	Included
Communications / SMS module	_____	Included
Parent app subscription (if any)	_____	Included
Reporting / analytics module	_____	Standard reporting included
Implementation / customization fees	_____	\$2,500 minimum onboarding
Card convenience fee passed to parents	____% × _____	School chooses; can be \$0 to parents
Other modules in scope	_____	_____
Annual subtotal	_____	_____
Annual difference (Sycamore vs Excel / Google Sheets)		_____

Use your real Excel / Google Sheets invoices in the left column for the most accurate comparison.

6 Questions to ask Spreadsheets

Send this list to your Excel / Google Sheets account manager before submitting cancellation notice. The answers protect your data, your families, and your renewal terms.

#	Question to send	Why it matters
1	What is my exact contract end date for each Excel / Google Sheets module, and what is the cancellation notice window?	Most Excel / Google Sheets contracts auto-renew. Confirm the notice deadline in writing before you set a Sycamore go-live date.
2	Will I retain read or export access to Excel / Google Sheets data after my contract ends, and for how long?	Data export windows vary. You want exports available through the final reconciliation, not just the go-live date.
3	What is the format and field coverage of standard Excel / Google Sheets data exports?	Knowing the export format upfront lets Sycamore's onboarding team plan validation. Ask for sample exports if possible.
4	What happens to in-progress tuition payment plans on the day my contract ends?	Plans, autopay schedules, and saved payment methods need a clean handoff. Confirm whether the platform continues to process or stops.
5	Are there any modules, integrations, or contracts on a different renewal cycle that I should know about?	Family App subscriptions and add-on engagements can run on separate cycles.
6	What is the process for transferring saved payment methods (tokens) to a new payment processor?	Confirm whether tokenized payment data can be transferred securely. This avoids forcing families to re-enter card details.
7	Is there a fee for cancellation, mid-term termination, or data export?	Some contracts include early-termination clauses. Get the exact dollar figure in writing.

7 One-page board summary

Copy or adapt the block below for your next board packet. Replace the bracketed figures with your school's specifics.

BOARD SUMMARY · SWITCHING FROM EXCEL / GOOGLE SHEETS TO SYCAMORE

Recommendation

Adopt Sycamore as the school's K-12 platform of record, replacing Excel / Google Sheets. Sycamore consolidates SIS, gradebook, attendance, admissions, tuition, payments, communications, and the parent mobile app under one license at \$4 per student per month. Sycamore's onboarding team will run the full migration in 4 to 8 weeks, so the school can pick a go-live date that aligns with the start of the next term, the re-enrollment window, or the end of the current contract.

Financial impact (annual)

Current annual cost of Excel / Google Sheets modules in scope: \$_____. Projected annual cost of Sycamore at \$4 per student per month: \$_____. Estimated net annual savings: \$_____. One-time onboarding investment: \$2,500 minimum.

Operational impact

Families move to a single Sycamore Parent App, which today holds a 4.8-star combined rating (Sycamore + TuitionEP). The school gains tuition refund protection (via Vertical Insure), native donations with AI donor intelligence (rolling out 2026), and US-based onboarding and support.

Risk and mitigation

Switching SIS and tuition together at a single cutover is the largest operational risk. Sycamore's standard migration includes side-by-side validation and a 30-day post-launch monitoring window.

Timeline

4 to 8 weeks from kickoff to first tuition cycle on Sycamore. The school selects the go-live date that fits the calendar, and Sycamore plans backward from it.

8 Migration FAQ for the business office

Why not just keep using Excel or Google Sheets?

For a very small school with a handful of students, spreadsheets can be sufficient. As enrollment grows, the time spent maintaining multiple versions of the same information (roster, attendance, grades, contacts, tuition, schedules) increases rapidly. Every time a student changes classes or a phone number changes, someone has to update multiple files. Sycamore replaces that with one platform where the information is entered once and automatically flows everywhere it is needed.

Isn't Sycamore more expensive than spreadsheets?

On the raw software line, yes. Excel and Google Sheets are included in Microsoft 365 and Google Workspace, both of which schools typically already pay for. The hidden costs are administrative hours (multiple people maintaining separate files), human error (incorrect formulas, deleted rows, duplicate records), and the absence of built-in workflows (report cards, tuition billing, parent communications). Sycamore's \$4 per student per month is designed to buy back those hours.

What do parents lose when we use spreadsheets?

Self-service access. In a spreadsheet-based school, parents call or email the front office to check grades, attendance, tuition balances, and forms. Sycamore's native iOS and Android Parent App (4.8-star combined rating) lets families view grades, check attendance, read announcements, pay tuition, complete forms, and access report cards on their phone without contacting the office.

How does Sycamore reduce human error?

One structured database instead of many free-form spreadsheets. Attendance, grades, contacts, and tuition are entered once and validated by the platform. Audit logs record who changed what. Role-based permissions prevent accidental exposure. Common spreadsheet errors (incorrect formulas, deleted rows, duplicate records, version conflicts) do not have equivalent failure modes in an SIS.

What about security and FERPA?

Spreadsheet sharing permissions are notoriously difficult to manage; a single share link, or a copy that ended up in the wrong Google Drive folder, can expose sensitive student information. Sycamore provides role-based permissions, FERPA-focused controls, audit logs, secure cloud backups, encrypted data, and controlled access for teachers, parents, and administrators.

What do teachers do differently in Sycamore versus a gradebook spreadsheet?

Teachers take attendance in seconds, enter grades once, get averages calculated automatically, share assignments, generate report cards, and message parents from inside the platform. There is no separate spreadsheet per class, no version conflicts across teachers, and no manual assembly of report cards at the end of each term.

How long does it take to switch from spreadsheets to Sycamore?

Most schools complete a full migration in 4 to 8 weeks. The biggest variable is data cleanup: consolidating multiple versions of the same information (roster, contacts, tuition history) into a single source of truth. Sycamore's US-based onboarding team walks the school through the consolidation, imports from CSV, and validates the imported records against the source files.

What about compliance and state reporting?

Spreadsheet-based schools handle state reporting, transcript generation, and audit responses manually. Sycamore includes state reporting workflows, transcript generation, and standard tax-compliant invoice formats. FERPA-focused controls and audit logs make audit responses substantially faster.

9 Next steps

Three ways to move forward, ordered by how ready you are. Pick the one that fits where you are in the decision.

Get a switch-now quote

Send Sycamore your current Excel / Google Sheets modules and student count. We return a tailored Sycamore quote, a switching timeline, and a line-item comparison against what you pay Excel / Google Sheets today, typically within two business days. This is the fastest path if you already know you want to move and you need a number to take to the board.

sycamoreleaf.com/switch-now/

View testimonials

Read what heads of school and business offices say about Sycamore after switching. Real schools, real outcomes, real implementation timelines, not curated marketing soundbites.

sycamoreleaf.com/testimonials/

Send your account executive a data export

Send your Sycamore account executive a sanitized export of your Excel / Google Sheets data. We will run it through staging and walk you through exactly how easy it is to get going on Sycamore. No commitment required.

Reach out to your assigned Sycamore AE directly.

\$4

per student per
month, all modules included

4-8

weeks to first
tuition cycle on Sycamore

\$2.5K

minimum onboarding,
dedicated migration lead

100%

US-based onboarding
and support

Companion to this Playbook: the live comparison page at sycamoreleaf.com/compare/spreadsheets-vs-sycamore.

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