

# How to **Move Your Campus** *to a Cloud ERP/SIS*

Your guide to taking ownership of your institution's SIS implementation from start to finish.

*Let us introduce ourselves*



**Kristina Kelpé,**  
Founding CEO,  
Principal Consultant



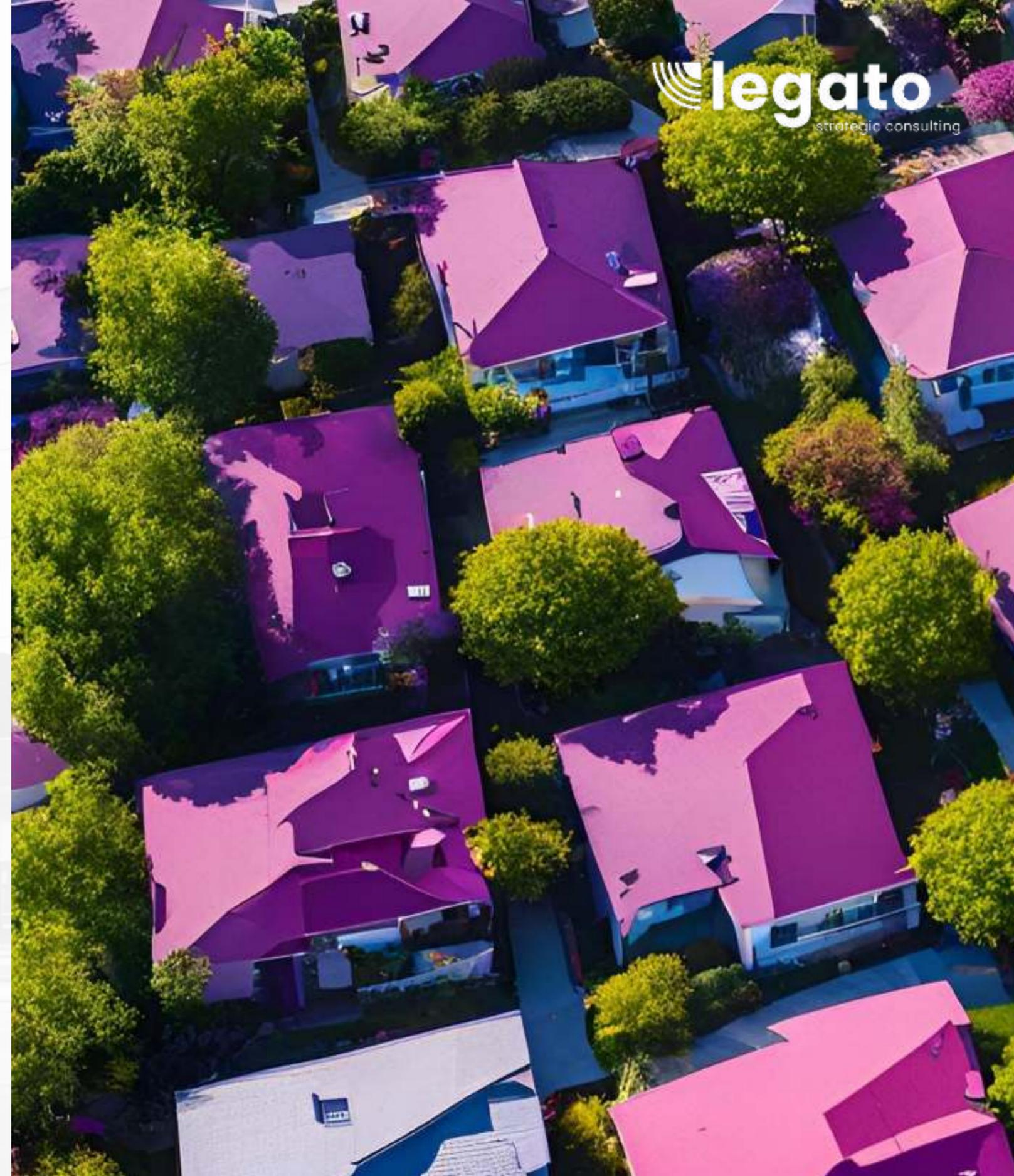
**Katrina Holland**  
Head of Operations and Growth,  
Consultant

**Pleased  
to meet you**



Think about the  
last time you  
moved.

**What words  
come to mind?**



# Cloud Implementations are Like Moving

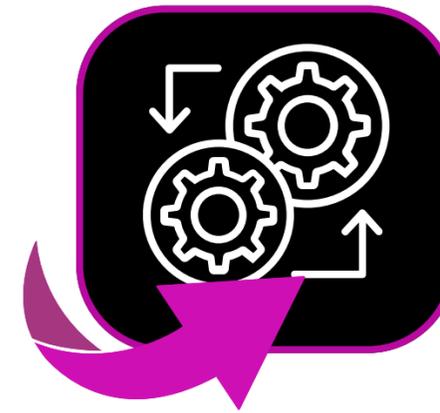


The background is a grayscale image of a man shouting with his hand to his mouth, and a megaphone to the right. The scene is set in front of a modern building with a van parked in front. A large purple curved shape is in the bottom right corner.

Implementing a Cloud ERP/SIS  
is a similar process  
**just amplified.**



## MOVING HOUSES



## MOVING DATA SYSTEMS



Declutter your stuff



Clean data and simplify workflows



Pack your boxes



Create comprehensive project plans



Design and build your house



Configure your system



Conduct property inspection



Perform quality assurance



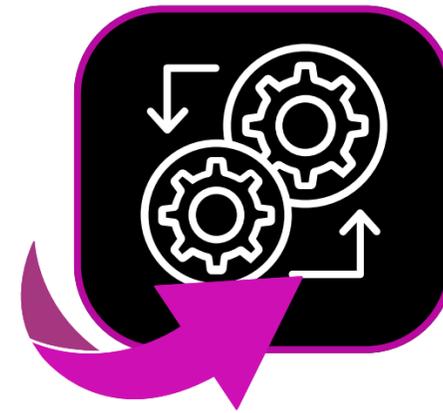
Transport boxes



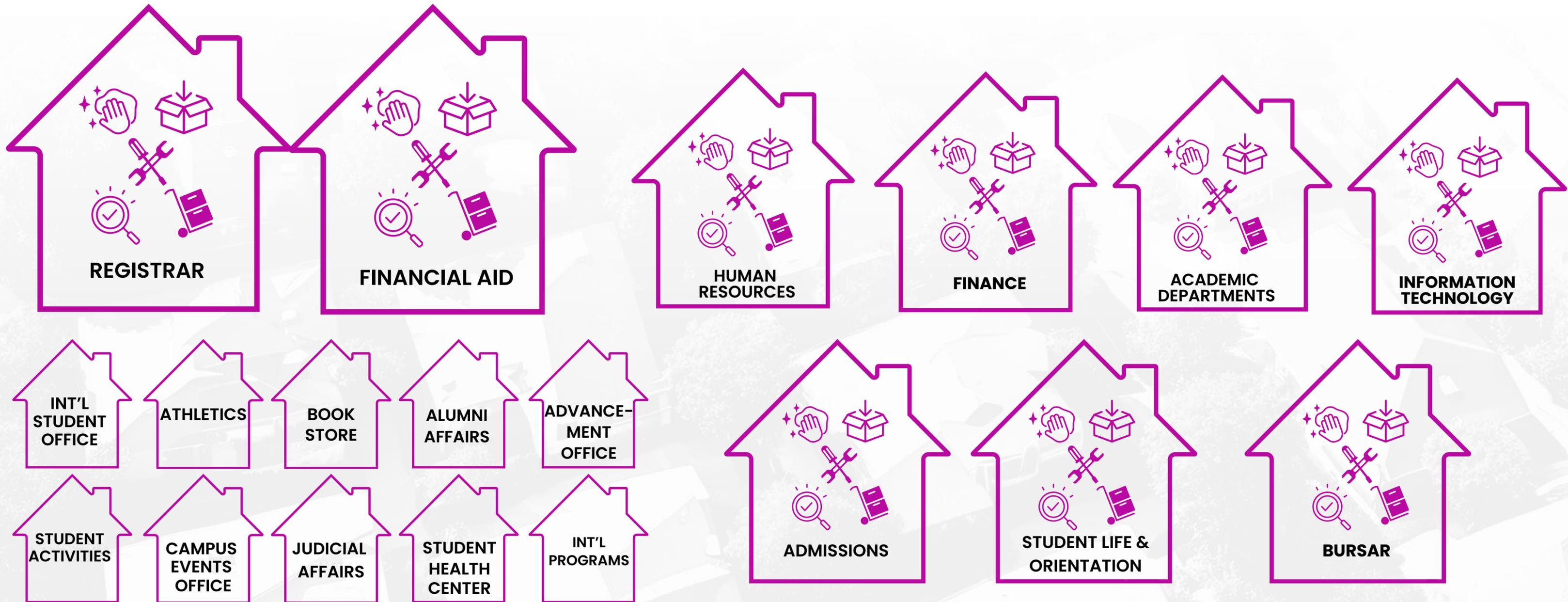
Translate to new data model



# MOVING HOUSES



# MOVING DATA SYSTEMS



# The Role of Implementation Partners



Help organize and integrate  
your data



Provide timeline, checklists,  
tools and methodologies

# Institutional Responsibilities



**Campus  
Readiness**



**Data  
Quality**



**Testing**



**Reports &  
Integrations**



**User  
Experience**



**Training &  
Coaching**



**Change  
Management**



*A school's executive leadership should look beyond the high costs of the implementation partner. Instead, they should focus on providing the necessary support for their employees, **who will be doing much of the work.***

*ERP/SIS Implementation Project Team Leader*

# The Real Cost of Delays

Line Item	Cost
Extended legacy hosting/licensing and 3rd party integrations	\$2M
Implementation Partner extension	\$1M
Staff turnover and 3rd party support	\$500K
<b>TOTAL</b>	<b>\$3.5M</b>

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*You need to strategically spend money and social capital before, during, and after the implementation project **to avoid spending so much more after the project is over.***

*ERP/SIS Implementation Project Team Leader*

1

# Campus Readiness

Campus readiness is like understanding the homeowner's needs before house hunting begins.





*Modernization is not just about technology; the more important work is rethinking how work gets done... **One of the first steps for institutions desiring modernization should be re-evaluating business processes...** These efforts not only have technical benefits but...can lead to significant improvements in efficiency and effectiveness.*

*Matthew Winn, Tambellini Group, 2025*

# Campus Readiness



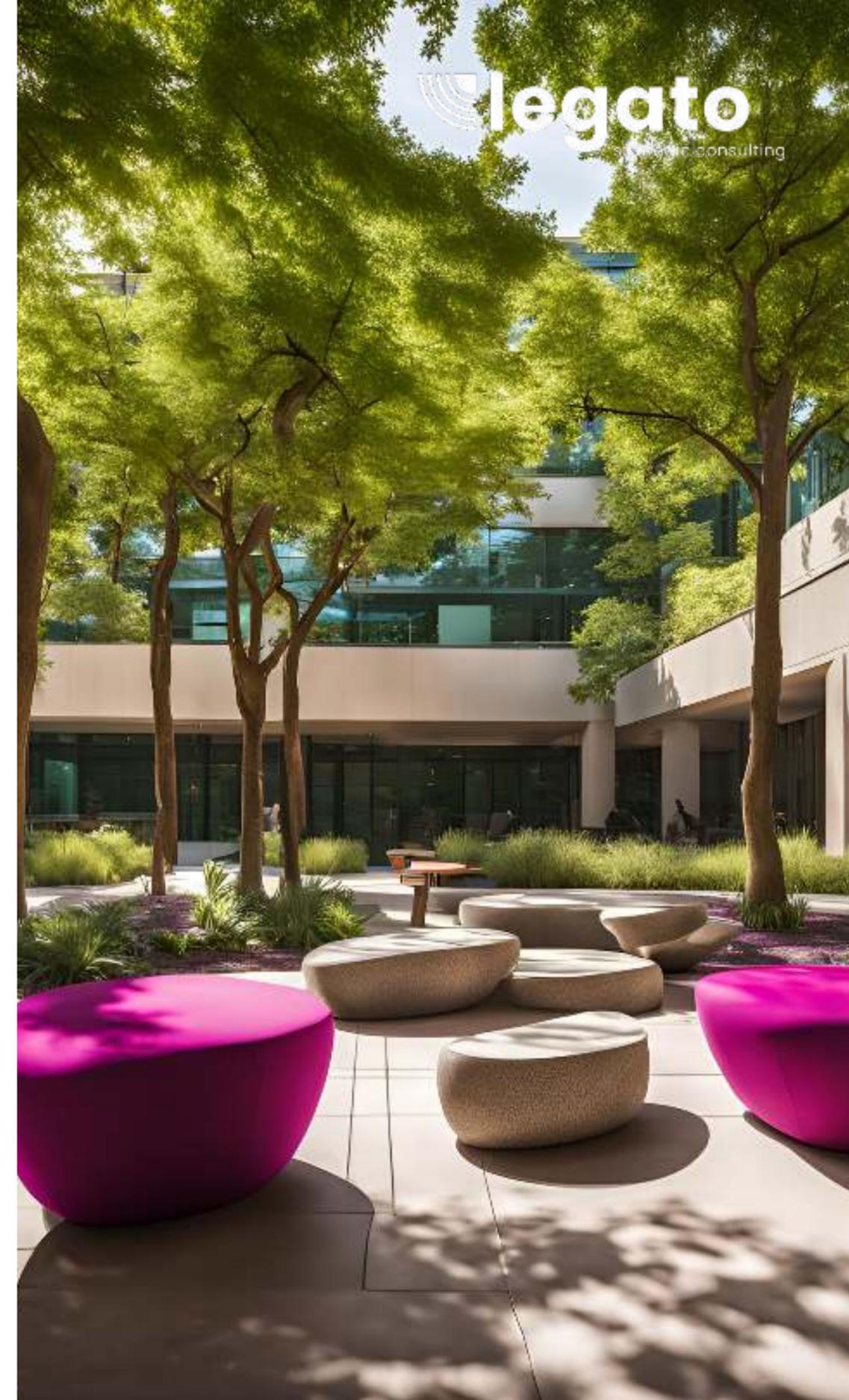
## *Implementation Partner's Responsibilities*

- Set up product lines



## *Institution's Responsibilities*

- **Streamline and document** all institution operations
- Map system requirements
- Create a project plan and roadmap for **each department**



“

*Plan, plan, plan. **Do not wait for the project plan you will get from your implementation partner.**  
That is too late.*

*Project Manager at Public University*

“

*It's **critical for you to have your own internal project plan** irregardless of what the vendor has in place. **The vendor doesn't know** what steps may be necessary within your organization to make a project happen.*

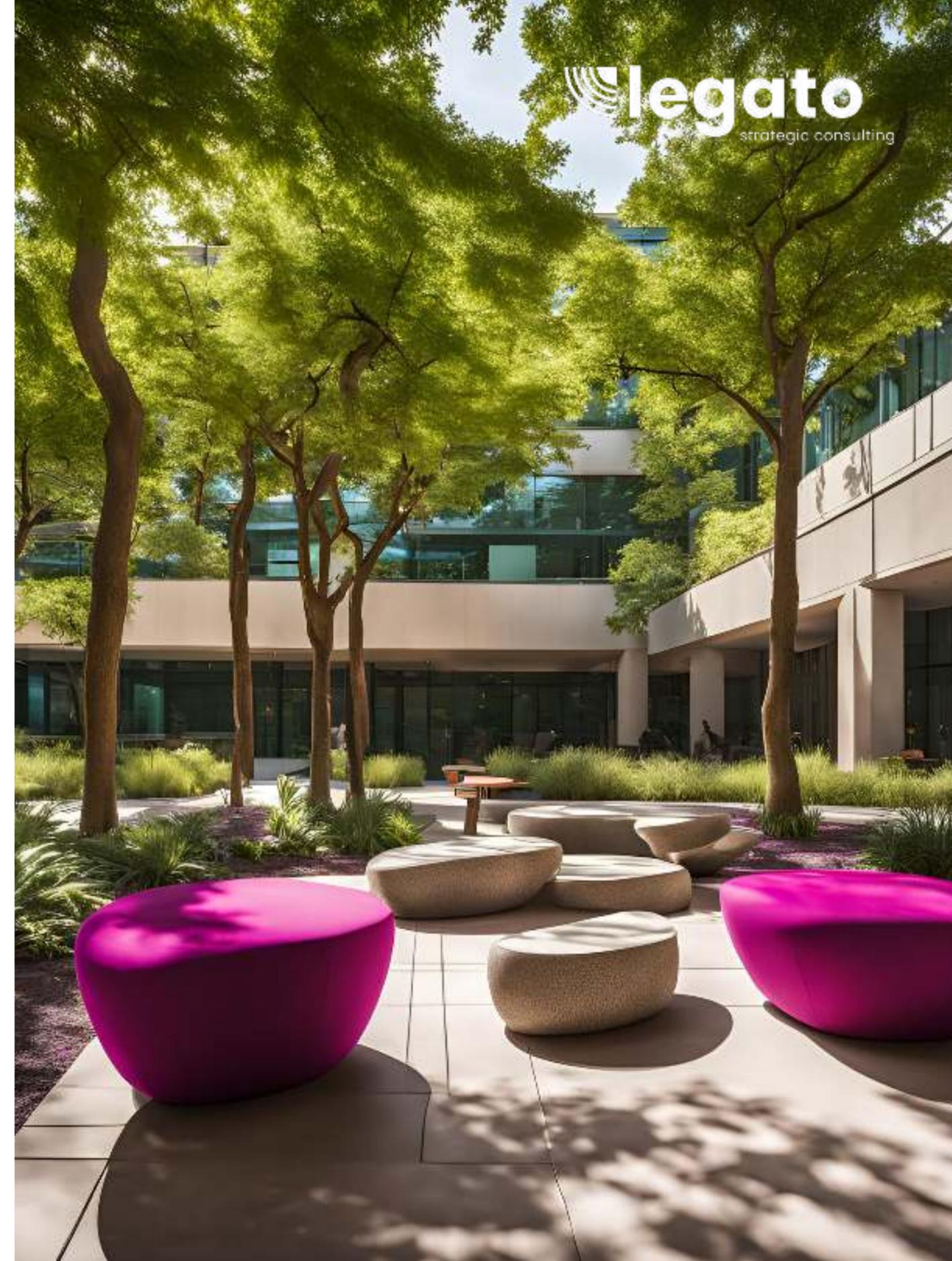
*IT Director at Private University*

2

# Data Quality

Movers transport boxes.

Outside of getting the boxes there safely, they do not take responsibility for what's inside.



# Data Quality



## ***Implementation Partners' Responsibilities***

- Confirm correct formatting
- Upload data into new system



## ***Institution's Responsibilities***

- Select and retrieve data from legacy system
- Ensure the data is accurate (data validation)





***Clean up your legacy data as much as possible ahead of time.*** This will ensure those movers don't need to take extra time to sort your closets before they can pack and transfer!

*Senior Director at Workday*



*The proactive planning by our data migration lead ensured the necessary work was **completed on time**. In contrast, a similar school, **despite having five people on the task, couldn't meet the same deadline.***

*ERP/SIS Implementation Project Team  
Leader at 4-year public university*



*...**We assumed we would mainly be required to “provide data”.** But, that was maybe 1/3 of what the actual project turned out to be.*

*ERP/SIS Analyst at a Community College*



*Many times I hear schools speak of one of the major goals of modernizing is to create a **data driven culture**..The more you accomplish in pre planning the **less you will need to do during implementation** and beyond.*

*Retired University CIO*

# Timeline

Implementation Partner timeline

*Total = about 30 months*



# Timeline

## Implementation Partner timeline

Total = about 30 months



# Timeline

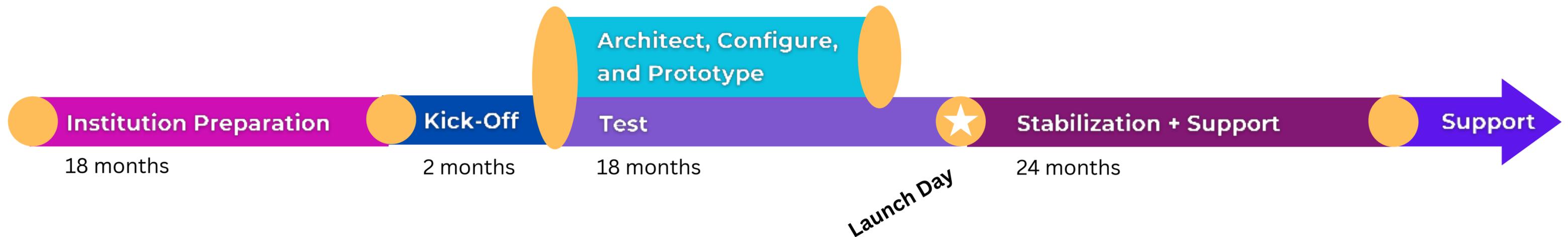
## Implementation Partner timeline

Total = about 30 months



## Best Practice timeline

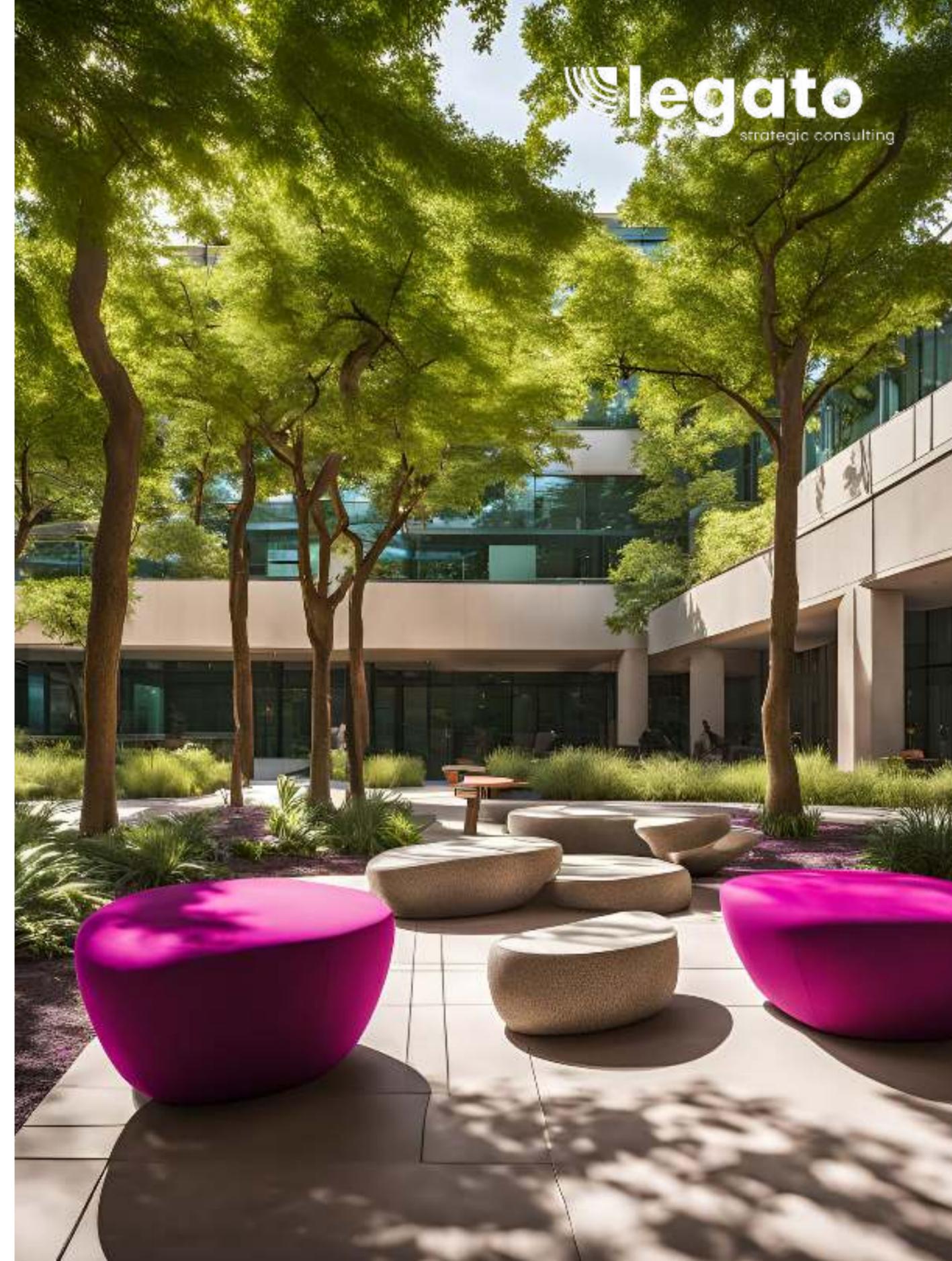
Total = about 62+ months (5+ years)



3

# User Experience

Movers deliver furniture but they don't design the guest experience.



# User Experience



## ***Implementation Partners' Responsibilities***

- Provide standardized hubs and dashboards



## ***Institution's Responsibilities***

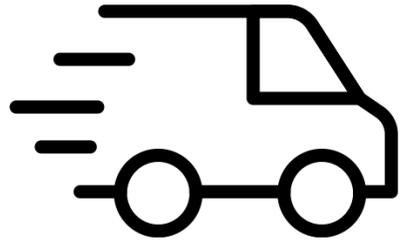
- Design and optimize workflows
- Customize dashboards
- Identify access management
- Ease-of-use





*Your implementation partner is going to implement software. **The customer needs a plan to ensure transformation.***

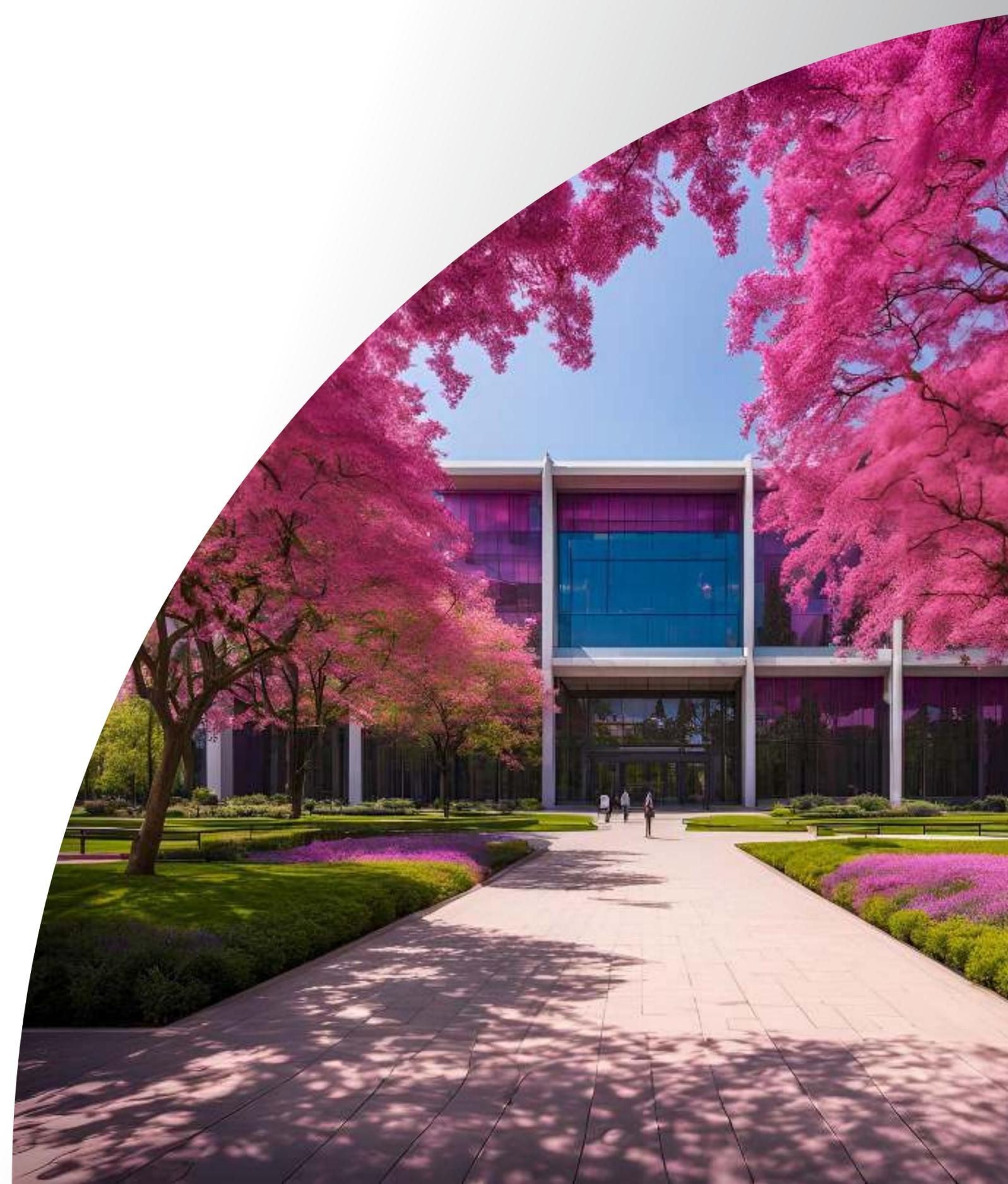
*Director, IT Strategy and Enterprise Architecture*



# Final Thoughts

**This is not an exhaustive list of tasks**

that fall outside the implementation partners' responsibilities, but you get the idea - full-service movers can't handle everything.



# Institutional Responsibilities



**Campus  
Readiness**



**Data  
Quality**



**Testing**



**Reports &  
Integrations**



**User  
Experience**



**Training &  
Coaching**



**Change  
Management**



*“They [executive leadership] are the deciders for whether you barely cross the finish line or **break the tape and win the race.**”*

*ERP/SIS Implementation Project Team Leader*

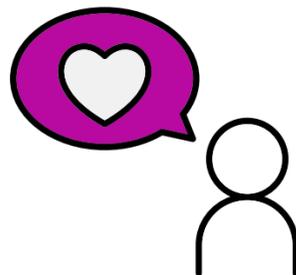
# Benefits of boutique, independent firms



Loyal to the client, not the vendor



Adapts to clients' changing needs with nimble, personalized services



Motivated by institution satisfaction, not vendor approval



Offers practitioner-level perspective



***I would have hired a client advocate much sooner in the process...***

*Pick a partner that has made the journey you plan to take. We did this well after we started, and it was a game changer. I can't imagine **how much better it would have been had they been on board day 1.***

*Project Manager at Public University*



*I wish schools would **work with a vendor agnostic partner before choosing a direction.** The cost of a bad choice or quick “get it done” implementation are huge.*

*ERP/SIS Senior Leader at R1 University*

# About Us

**We're one of the few independent firms specializing in ERP/SIS implementations.**



Dedicated to higher education



Curated network of specialists



Workday expertise



Cost conscious

# Offerings

- Pre-Implementation Planning
- Implementation Support & Advocacy
- Quality Assurance
- Staff Augmentation
- Training & Documentation
- Transition Coaching
- Change Management Leadership
- Project Management
- Data Conversion and Validation
- User Experience Support



*Legato's deep experience for the process of implementing something complicated, like an ERP or SIS, can help your institution see around corners and tackle things **that your implementation partner may not think to mention to you.***

*Stacy Pennington*

*Director of Infrastructure and Enterprise Applications*

*Rhodes College*



***Legato actually cares about how things work beyond the implementation...They operate with a goal of not just dealing with the current issue but to also **help prevent future ones.** They excel at providing documentation for what they do and build, and they are ready to sit side by side with your staff to **coach, train, and correct until your staff is ready to drive.*****

*Stacy Pennington*

*Director of Infrastructure and Enterprise Applications*

*Rhodes College*



*Legato was an extension of our team. They worked to understand our goals, correct us where they may not be achievable or in our best interests, provided solutions and work arounds as needed. **Legato team members have made this journey more than once.** We simply would not have met our deadlines without their help and guidance.*

*Aaron MacLennan  
Workday Project Manager,  
Western Colorado University*



Let's continue the conversation,

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Consultant

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