EXECUTIVE SUMMARY

Higher education is under pressure...

Enrollment challenges, shifting demographics, regulatory complexity, and rising demands for efficiency.

In response, many institutions have invested in modern HR, Finance, and Student systems.

The Expectation: These systems will solve long-standing problems and support strategic success.

The Reality: ROI often falls short. Reports don't align, staff revert to workarounds, compliance risks emerge, and trust erodes.

THE GAP

The issue isn't the technology itself.

It's the *gap* between what leaders believe they purchased and what it actually takes to sustain these systems after go-live.

Closing that gap doesn't require a major overhaul.

It starts with clarity around **five essential truths** that protect ROI, reduce risk, and turn implementation into long-term institutional advantage.

1 DOCUMENTATION

Leaders depend on consistent, accurate information for accreditation, compliance, and strategy. Yet in many institutions, the "how" of producing that information lives only in staff knowledge. As experienced employees retire and legacy systems are discontinued, institutions face a silent crisis: the loss of undocumented expertise.

Why It Matters →

- A Registrar may know how to fix a recurring error, but that knowledge ends when they retire.

- Financial aid staff understand legacy packaging workarounds, but it isn't captured anywhere.

- IT teams manage scripts and integrations no one else can explain.

Risks to Leaders →

- Vulnerability in audits and accreditation reviews.

- Service disruptions when processes stop with departing staff.

- Loss of continuity across leadership transitions.

ROI for Leaders →

Treating documentation as a strategic asset ensures that institutional knowledge survives turnover.

Embedding guidance into systems:
- reduces dependency on individuals
- strengthens compliance
- creates reliable data for executive decision-making

2 MAINTENANCE

Cloud systems are sold as modern and "low maintenance," but unlike legacy systems with occasional upgrades, today's platforms evolve constantly. Updates are released weekly or monthly. Without structured maintenance, institutions quickly lose alignment, compliance, and efficiency.

Why It Matters

- **Workday Student has around 1,000 system fixes and features released every year.**

- Many updates are mandatory, not optional.

- Each release can impact registration, payroll, financial aid, or reporting.

Risks to Leaders

- Compliance failures in aid and reporting.

- Enrollment disruption if registration breaks.

- Reputational damage with students and families.

ROI for Leaders

Budgeting for maintenance isn't a cost. It's protection.

Institutions that treat system care as routine:
- avoid emergencies
- sustain compliance
- ensure technology continues to serve strategic goals like retention and student success.

2 MAINTENANCE

Why Student Systems are Different...

HR/Finance are standardized.
Payroll and accounting follow global rules; businesses across industries rely on them.

Faculty-driven complexity.
Academic freedom means curriculum changes must be executed in the system, regardless of technical feasibility.

Student systems are institution-specific.
Grading scales, prerequisites, credit policies, and aid rules differ everywhere.

The Result?
Student systems demand constant attention and cross-office coordination.

3 USER EXPERIENCE

Executives may assume staff will use systems whether they like them or not. But poor user experience drives employees into shadow systems (spreadsheets, external trackers, etc.) that duplicate effort and erode data integrity. UX is not cosmetic; it's foundational to adoption.

Why It Matters →

- Advisors track degree progress in spreadsheets when dashboards confuse them.

- HR staff build outside workflows to manage hiring tasks.

- Faculty keep grades offline, undermining system accuracy.

Risks to Leaders →

- Shadow systems create compliance gaps.

- Duplicated processes waste time and money.

- Leadership dashboards lose credibility when underlying data is inconsistent.

ROI for Leaders →

Investing in intuitive dashboards, role-based design, and training eliminates shadow systems and restores trust in institutional reporting.

Strong UX:
- accelerates adoption
- ensures that leaders get reliable insights needed to make strategic decisions

4 SETTING REALISTIC EXPECTATIONS

Demos are designed to inspire. They show what is possible but not what will be delivered on day one. Leaders often believe they are buying a turnkey solution, but what institutions actually receive is a foundation that requires additional work to reach its potential.

Why It Matters →

- Demo dashboards are prototypes, not included deliverables.

- Go-live reports are usually "lift and shift," not reimagined for new data models.

- Documentation, governance, and user training are rarely part of vendor scope.

Risks to Leaders →

- Misaligned expectations erode trust in leadership and vendors.

- Staff morale drops when promised functionality doesn't appear.

- Strategic projects stall while "missing" features are rebuilt internally.

ROI for Leaders →

Asking clear questions upfront creates alignment.

- What's included? What's not?
- How is stabilization supported?

Leaders who set realistic expectations reduce hidden costs and ensure institutional priorities drive post-go-live investments.

5 WORKLOAD SHIFTS

Modern systems don't eliminate work; they redistribute it. Where IT once carried the technical load, functional offices (HR, Finance, Registrar, Financial Aid) now own many system responsibilities. These shifts often go unrecognized by leadership until staff are overwhelmed.

Why It Matters →

- Registrars now configure degree audits and curriculum updates.

- Financial Aid manages compliance rules and aid packaging logic.

- HR must oversee recruiting workflows and role-based security.

Risks to Leaders →

- Staff burnout when workload expands with no added resources.

- Errors in compliance and reporting as untrained staff take on technical duties.

- Shadow systems reemerge when functional staff feel unsupported.

ROI for Leaders →

By acknowledging workload shifts, leaders can act strategically:

- embed IT in functional offices
- fund hybrid "techno-functional" roles
- invest in advanced training

Supporting staff ensures sustainability and reduces risk of system failure.

6 THE PORSCHE PROBLEM: PERFORMANCE REQUIRES CARE

When institutions invest in top-tier systems, they expect transformation. It's like buying a Porsche: powerful, reliable, prestigious. But just as a Porsche requires oil changes and maintenance, enterprise systems require ongoing care.

Why It Matters →

- Leaders assume go-live is the finish line, but it's only the starting point.

- Vendors don't always emphasize the scope of ongoing upkeep.

- Without maintenance, institutions drift into inefficiency, compliance risk, and reputational damage.

Risks to Leaders →

- Emergency consulting bills when neglected systems break.

- Student dissatisfaction when errors delay progress or billing.

- Board frustration when promised ROI never materializes.

ROI for Leaders →

Proactive investment in system care (i.e. release testing, documentation, training, and governance) unlocks the full potential of the investment.

In short: "The institution pays for a Porsche but drives it like a 20-year-old sedan."

Leaders must ensure their Porsche performs like one.

STRATEGIC RECOMMENDATIONS FOR EXECUTIVES

Shift the Mindset.
Treat go-live as the beginning of continuous improvement.

Protect the Investment.
Budget for ongoing maintenance and stabilization.

Support Functional Offices.
Reallocate IT into embedded roles and invest in hybrid staff.

Elevate Governance.
Build cross-functional bodies to manage updates and align with strategy.

Measure ROI Differently.
Define success by adoption, compliance, and outcomes, not just "system live."

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Legato Strategic Consulting helps institutions turn enterprise systems into lasting assets by:

☑ Delivering independent, vendor-agnostic guidance aligned with strategy.

☑ Designing governance and support models to protect ROI.

☑ Mapping workload shifts so staff are supported, not overwhelmed.

☑ Providing ongoing release management, training, and documentation.

HOW LEGATO STRATEGIC CONSULTING SUPPORTS LEADERS

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About **Us**

We're one of the few independent firms specializing in Workday Student.

We are dedicated to supporting your institution's smooth transition and with minimal disruption. Think of us as your decluttering service, friendly neighbor, architect and interior designer—handling the details others overlook. In addition to our core team, we maintain a curated network of specialists to do the heavy lifting. With our deep roots in higher education, we understand the unique challenges institutions face, bridging the gap between Workday expertise and operational needs.

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**

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Let's continue the conversation—reach me at

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Happy travels on your modernization journey,

Katrina Holland
Consultant / Director of Business Development
Legato Strategic Consulting

Let's explore how to prepare your campus to move.

Schedule a discovery call

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