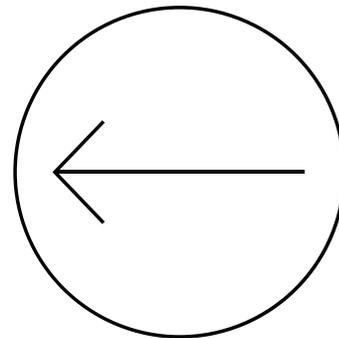# A 60-DAY MOVE TO MOMENTUM WORKSHEET

Turning ERP/SIS Projects into Strategic Wins: 5 ROI Essentials

This worksheet is about learning to maximize your ROI confidently and intentionally by choosing one ROI Essential to start a 60-day momentum project.

START HERE

1. Read through the five ROI Essentials
2. Pick one that feels most relevant right now
3. Commit to one 60-day move
4. Start small, learn fast, adjust as you go

✦ MOVING FASTER WITH AI ACCELERATION

When applied with clear guardrails, AI can help teams move faster on this work while keeping leadership and oversight exactly where they belong.

Scan to schedule:

WANT TO EXPLORE THIS FURTHER?

To schedule a conversation with Legato **click here.** We'll help you:

Identify pilots best suited for AI acceleration

Explore low-risk, practical use cases

Review guardrails, governance, and change impacts

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VISIT US AT THE BOOTH OR CONNECT AFTER THE SESSION

ROI Essential #1: Institutional Knowledge

Leaders rely on accurate, consistent information, but when the undocumented know-how behind it lives only in staff knowledge, retirements and discontinued systems put it at risk.

One-Process Survival Guide

- ☐ Pick 1 high-risk or commonly asked-about process
- ☐ Document current steps and decision points
- ☐ Validate with one experienced staff member
- ☐ Publish in a shared, discoverable location

New-Hire Walkthrough Test

- ☐ Choose one role or process
- ☐ Ask someone unfamiliar to follow existing documentation
- ☐ Capture gaps or confusion
- ☐ Update documentation based on real use

Tribal Knowledge Capture Sprint

- ☐ Identify one "go-to" expert
- ☐ Conduct two short interviews
- ☐ Capture key nuances, workarounds
- ☐ Store and tag for team access

ROI Essential #2: System Maintenance

Cloud systems promise low maintenance, but with constant updates, institutions without structured upkeep quickly lose alignment, compliance, and efficiency.

Single-Release Ownership Pilot

- ☐ Assign clear ownership for one monthly release
- ☐ Review release notes for relevance
- ☐ Identify impacted areas
- ☐ Communicate a short summary

Lightweight Testing Calendar

- ☐ Select one functional area
- ☐ Define a simple testing checklist
- ☐ Schedule pre-production testing
- ☐ Document lessons learned

Release Impact Log

- ☐ Track priority updates in last 60 days
- ☐ Note outcomes
- ☐ Share short recap with leadership
- ☐ Refine future review practices

ROI Essential #3: User Experience & Adoption

Poor user experience pushes employees into shadow systems that duplicate effort and erode data integrity. UX is foundational, not cosmetic.

One-Role UX Review

- ☐ Select one role
- ☐ Interview 3–5 users
- ☐ Identify top friction points
- ☐ Make small, targeted improvements

Dashboard Clean-Up Pilot

- ☐ Identify one frequently used dashboard
- ☐ Remove confusing elements
- ☐ Rename/reorder for clarity
- ☐ Validate changes with users

Shadow System Inventory

- ☐ List spreadsheets or side tools in use
- ☐ Identify one candidate for elimination
- ☐ Adjust the system to absorb that need

ROI Essential #4: Workload Shift

Modern systems don't eliminate work. They redistribute it, shifting many system responsibilities from IT to functional offices like HR, Finance, and the Registrar.

Post-Go-Live Role Snapshot

- ☐ Select one functional role
- ☐ Document responsibilities added post-go-live
- ☐ Identify skills required
- ☐ Share findings with
- ☐ leadership

Hybrid Role Mapping

- ☐ Identify tasks spanning IT and functional teams
- ☐ Map current ownership
- ☐ Highlight overloads or gaps
- ☐ Propose clearer responsibility

Skill Gap Mini-Assessment

- ☐ Survey one team on confidence levels
- ☐ Identify priority skill gaps
- ☐ Align training or peer support
- ☐ Track improvement

ROI Essential #5: Continuous Optimization

"Are we optimizing after delivery?" This shows up a year or two after go-live when small frustrations pile up and optimization keeps getting postponed.

One Frustration Fix

- ☐ Identify one recurring pain point
- ☐ Define a success metric
- ☐ Implement a small change
- ☐ Measure impact

Post-Go-Live Review Session

- ☐ Convene a small cross-functional group
- ☐ Review what's working and what's not
- ☐ Select one improvement
- ☐ Assign ownership and timeline

ROI Story Capture

- ☐ Identify one post-go-live improvement
- ☐ Document before-and-after impact
- ☐ Share with leadership
- ☐ Use to support continued investment

LET'S TALK OVER COFFEE

Grab a free 20-minute working session focused on your campus' next steps.

Scan to schedule

YOUR 60-DAY FOCUS

ROI Essential chosen:_____

Move selected:_____

Start date:_____

Target completion:_____