



A CFO's Guide to Strategic Modernization

How to Make the Right ERP/SIS Decision for Your Institution

For higher education CFOs, few decisions carry as much long-term financial, operational, and cultural impact as choosing how to modernize your institution's enterprise resource planning (ERP) or student information system (SIS). With mounting pressure to improve data-informed decision-making, streamline operations, and enhance student and employee experiences, today's finance leaders are being called to the forefront of these transformational decisions.

But ERP/SIS modernization isn't one-size-fits-all. It can take many forms—from optimizing your current system, to moving it off-premise, to adopting a SaaS version, or even selecting an entirely new platform. No matter the path, your role as CFO is to ensure that every step maximizes institutional resources, minimizes risk, and delivers the return on investment your institution needs.

FIVE STEPS TO SUCCESS

START WITH STRATEGY, NOT SOFTWARE

UNDERSTAND YOUR TOTAL COST OF OWNERSHIP (TCO)

DON'T GO IT ALONE—BUILD INCLUSIVE GOVERNANCE

ASSESS READINESS BEFORE YOU INVEST

MAKE ROOM FOR INNOVATION AND IMPACT

Modernize Your ERP/SIS with Confidence

Here's what CFOs need to know to lead effectively—and how CampusWorks can help you make the right move.

1 START WITH STRATEGY, NOT SOFTWARE

Too often, ERP and SIS decisions are framed as technology upgrades. In reality, these systems form the operational core of your institution. They influence nearly every workflow, employee experience, and student interaction.

TIP: *Begin by identifying your institution's strategic priorities—such as enrollment growth, student success, or operational efficiency—then align your ERP/SIS approach accordingly. That might mean modernizing what you have, rather than replacing it.*

How CampusWorks Helps: We guide institutions through a strategic discovery process that maps ERP/SIS decisions to institutional goals. We help you determine the right modernization path—whether it's optimizing, hosting, migrating to SaaS, or buying new—so your investment aligns with both mission and capacity.

2 UNDERSTAND YOUR TOTAL COST OF OWNERSHIP (TCO)

An ERP/SIS investment is far more complex than a line item in the budget. Whether you're transitioning to the cloud or implementing a new solution, understanding the full spectrum of costs—financial, staffing, resource, security, and long-term ROI—is critical.

TIP: *Build a holistic financial model that evaluates short- and long-term costs, required internal resources, data security implications, and the impact on business continuity. Factor in hidden costs like change management, retraining, and business process redesign.*

How CampusWorks Helps: Our detailed cost modeling and industry benchmarks help CFOs make data-informed decisions that balance institutional capacity with strategic goals—ensuring you get the most from every dollar spent.

3 DON'T GO IT ALONE—BUILD INCLUSIVE GOVERNANCE

ERP/SIS decisions affect every corner of your campus. While the CFO often provides the financial lens, success hinges on building a cross-functional coalition that shares responsibility for decisions and outcomes.

TIP: *Form an inclusive governance team early on. Engage leaders from finance, academics, student services, HR, and IT to define success, evaluate trade-offs, and manage change collaboratively.*

How CampusWorks Helps: We facilitate structured, transparent governance models that create alignment and accountability—helping institutions avoid internal silos and gain community-wide support.

4 ASSESS READINESS BEFORE YOU INVEST

Before making any system decision, it's essential to assess whether your institution is ready—organizationally, operationally, and culturally. Without the right people, processes, and data governance in place, even the best technology can fall short.

TIP: *Conduct a thorough readiness assessment to identify process inefficiencies, data quality issues, staffing gaps, and change management barriers. Use these insights to build a strong foundation for success—regardless of the modernization path you choose.*

How CampusWorks Helps: Our [ERP Readiness Assessment](#) gives CFOs a clear picture of where the institution stands today and our change management services ensure a smooth and successful modernization effort.

5 MAKE ROOM FOR INNOVATION AND IMPACT

Whether you're optimizing an existing system or implementing something new, your ERP/SIS modernization is an opportunity to rethink how work gets done. The most successful projects improve not only technology—but also the experience of working and learning at your institution.

TIP: Use this moment to streamline processes, reduce manual tasks, and introduce automation and workflows that enhance both the employee and student experience. Let data—not tradition—guide your transformation.

How CampusWorks Helps: Our [Process Reimagine & Redesign](#) transforms ERP/SIS from a back-office system to a strategic asset.

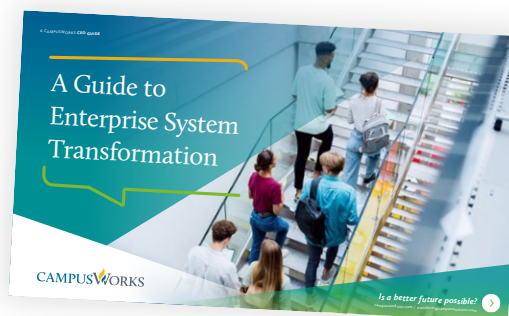
The CFO's Role in Securing the Future

CFOs play a central role in one of higher education's most consequential decisions. By taking a strategic, inclusive, and data-informed approach, you can ensure your ERP/SIS investment delivers long-term value—supporting institutional resilience, modernization, and mission-driven outcomes.

Partner with CampusWorks

For more than 25 years, CampusWorks has helped colleges and universities modernize their ERP and SIS systems with clarity, confidence, and strategic alignment. From readiness assessments and cost modeling to system selection and implementation, we're a trusted partner in helping institutions unlock the full potential of their enterprise systems.

Learn More: Read our [Guide to Enterprise System Transformation](#)



Let's get started.

Contact CampusWorks for a [Readiness Consultation](#)

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