

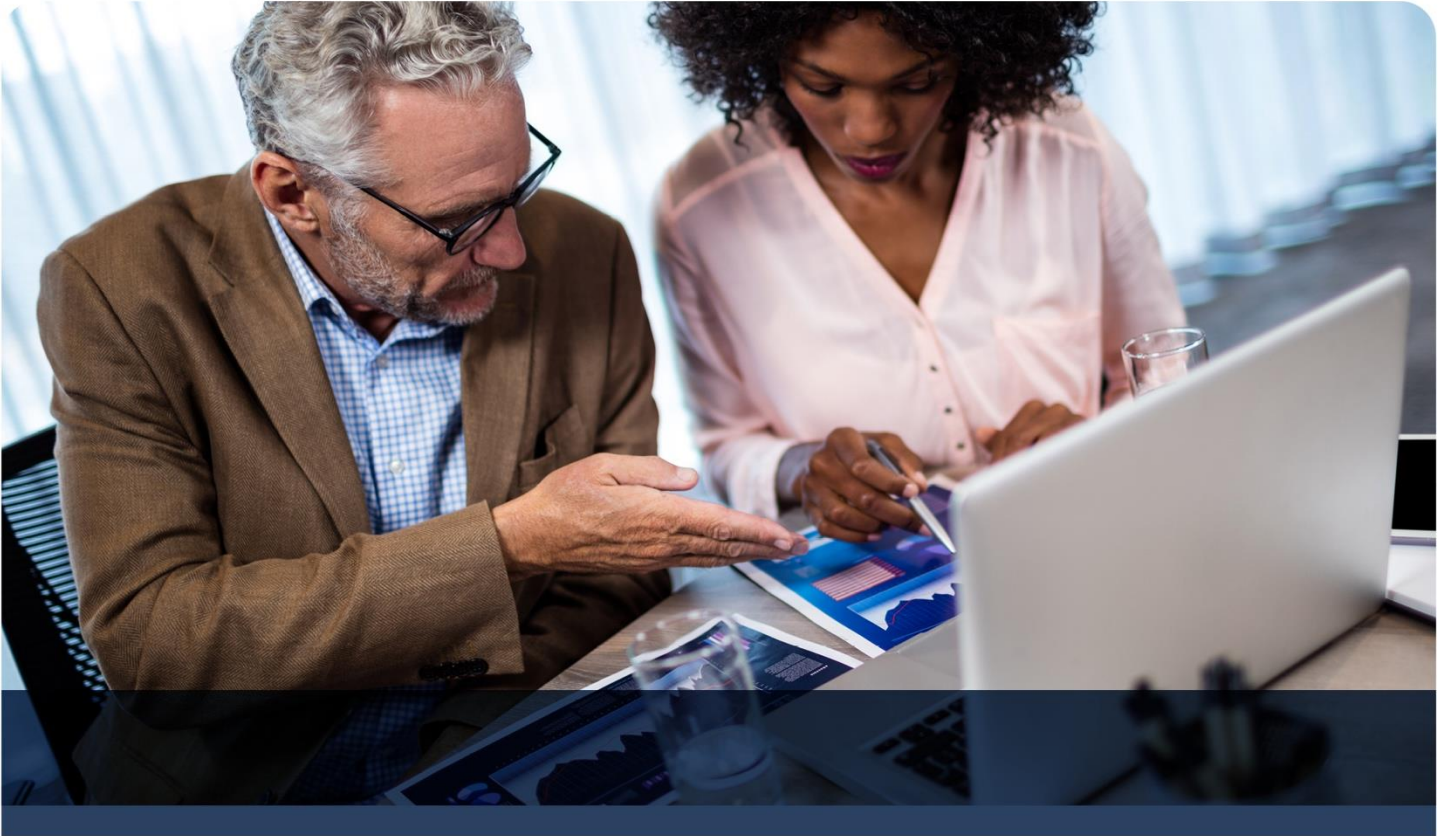
How to Plan, Prepare, and Succeed with Your **ERP MIGRATION**



**Business
Automation
Specialists**
of Minnesota, Inc.

TABLE OF CONTENTS

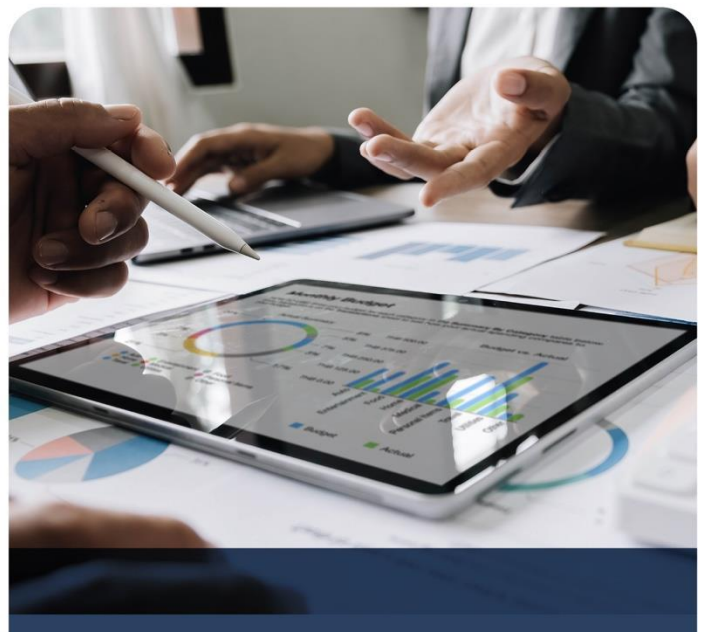
INTRODUCTION	1
● Why Should I Move ERP Systems?	2
● Signs It's Time to Move Your ERP System	2
HOW TO PREPARE FOR AN ERP SYSTEM MIGRATION	3
● Steps to Prepare for Migration	4
● Why User Adoption and Change Management Matter	5
FINAL WORDS	7
● Microsoft Dynamics 365 Business Central	8



INTRODUCTION

ENTERPRISE RESOURCE PLANNING (ERP) SYSTEMS ARE CRITICAL TOOLS THAT HELP BUSINESSES MANAGE CORE PROCESSES, SUCH AS FINANCE, OPERATIONS, AND SUPPLY CHAIN, FROM A CENTRALIZED PLATFORM.

As companies grow, legacy ERP systems can become limiting due to lack of flexibility, scalability, and modern features. Preparing for ERP migration involves evaluating current needs, aligning stakeholders, and choosing a solution that supports long-term goals and digital transformation.



WHY SHOULD I MOVE ERP SYSTEMS?

MIGRATING FROM A LEGACY, ON-PREMISES ERP SYSTEM TO A MODERN, CLOUD-BASED SOLUTION LIKE MICROSOFT DYNAMICS 365 BUSINESS CENTRAL OFFERS SIGNIFICANT ADVANTAGES FOR GROWING BUSINESSES.

65%

of companies interested in ERP software chose cloud-based

Panorama Consulting Group

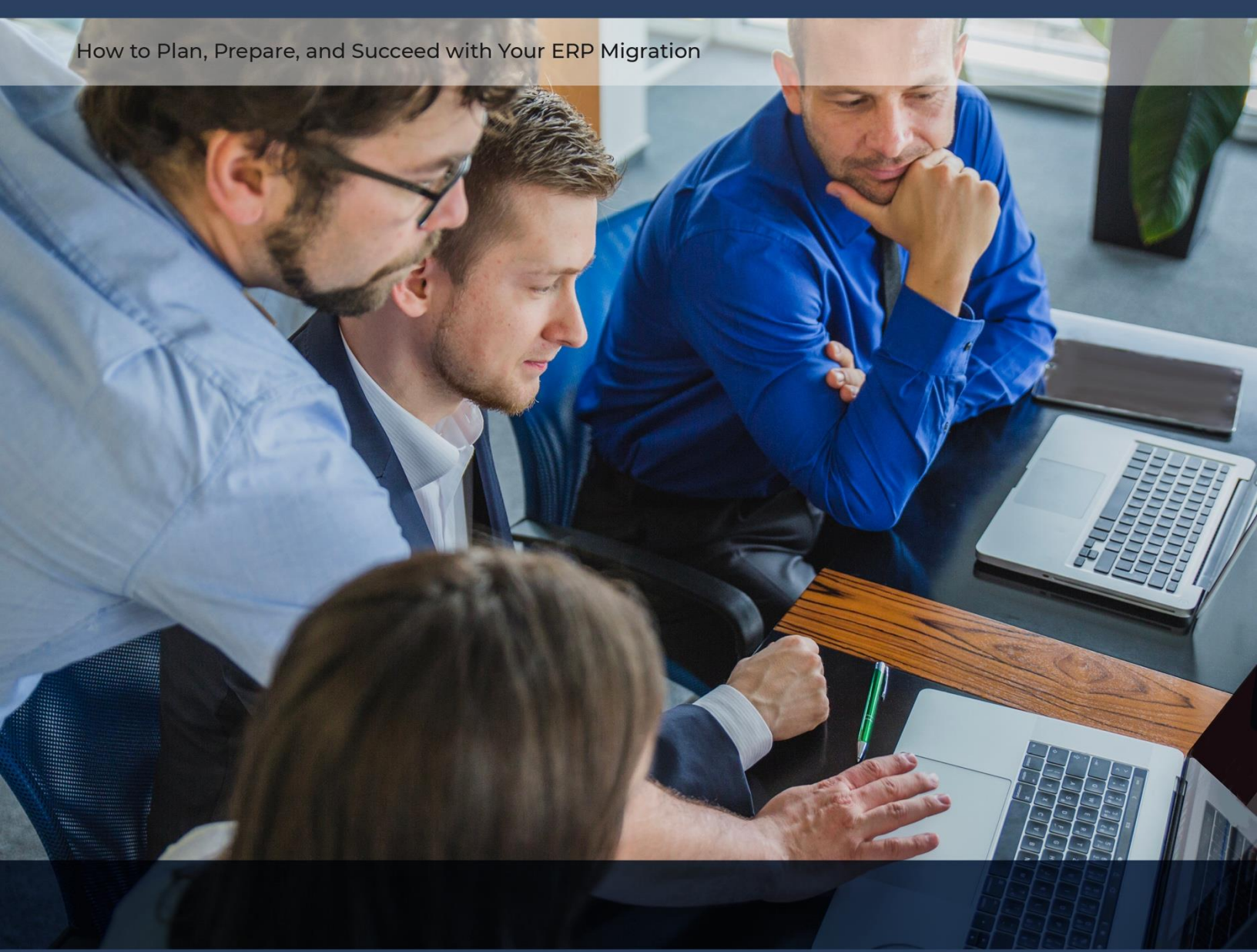
Cloud ERPs reduce IT and overhead costs by eliminating the need for physical infrastructure and simplifying maintenance through automatic updates. They provide greater flexibility and scalability, allowing access from anywhere and easy adaptation as business needs evolve. With real-time data, advanced analytics, and seamless integration with tools like Excel and Power BI, companies can make faster, more informed decisions. Cloud solutions also offer enhanced security, built-in compliance, and support for remote collaboration while positioning the business to adopt future innovations like AI and automation with ease.

SIGNS IT'S TIME TO MOVE YOUR ERP SYSTEM



THERE ARE MANY REASONS BUSINESSES MAY CHOOSE TO MIGRATE TO A NEWER, MORE MODERN ERP SYSTEM, INCLUDING:

- Outdated technology, difficulty integrating with essential tools, and security concerns.
- Business expansion into new markets, increased data complexity, or changing regulatory requirements.
- Rising IT and maintenance costs associated with on-premises systems, such as hardware, technical costs, etc.
- Low user adoption, lack of customization, and user frustration.
- Lack of scalability for growing organizations needing a more flexible ERP solution.
- Too many separate systems and custom modifications that become overwhelming and can be replaced with native cloud features.



HOW TO PREPARE FOR AN ERP SYSTEM MIGRATION

THE DECISION TO MIGRATE TO A NEW ERP SYSTEM IS NOT MADE LIGHTLY. AT THE END OF THE DAY, WHILE COMMONLY REFERRED TO AS AN “UPGRADE” OR “MIGRATION,” IT IS MORE THAN THAT. IT IS A COMPLETE REIMPLEMENTATION THAT OFTEN INVOLVES BUILDING A NEW SOLUTION FROM THE GROUND UP.

STEPS TO PREPARE FOR AN ERP SYSTEM MIGRATION

1. WORK WITH YOUR ERP PARTNER

If you haven't yet seen your new cloud ERP in action, book a demo with your ERP partner. They can show you exactly how the solution could work for your business and highlight some top features that may be important to you.

3. REVIEW & COMPARE THIRD-PARTY SOLUTIONS

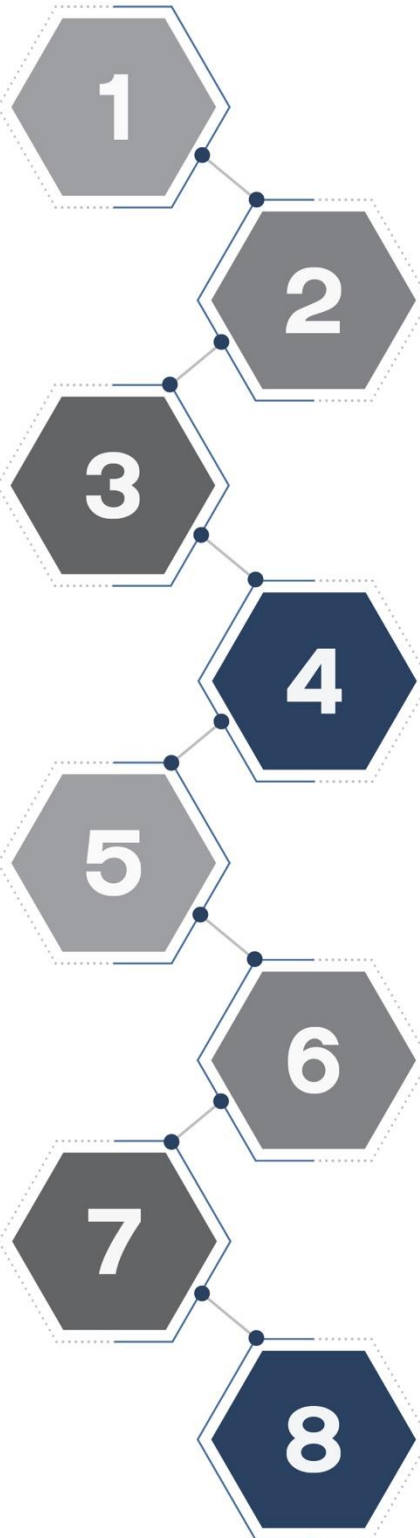
Determine which of your ISV solutions can be replaced with native ERP features, as well as which ones offer support for your new ERP. Make a plan for necessary alternatives.

5. DEFINE CORE REPORTING REQUIREMENTS

Document essential reports, dashboards, and analytics required post-migration. If needed, research third-party reporting tools for additional reporting and analytics capabilities.

7. ESTIMATE & BUDGET FOR COSTS

Allocate funds for migration, training, implementation, and ongoing support.



2. SET PROJECT GOALS & DELIVERABLES

Clearly define your business requirements and goals for the migration. Document the current solution's functionality, including workflows, customizations, and integrations, as well as the must-have features for your new ERP. Identify any additional functionalities needed.

4. EVALUATE SYSTEM COMPATIBILITY

Review existing integrations and determine whether they need to be rebuilt or replaced with modern technology.

6. ASSEMBLE AN IMPLEMENTATION TEAM

Assign a champion leader and involve key users early to ensure a successful adoption. Executive commitment is crucial. Involving key stakeholders and end-users in the planning process will help keep everyone on the same page and guarantee needs are met.

8. CLEAN & PREPARE DATA

Review your data, determine what to migrate, and establish a plan for storing or archiving historical data.

WHY USER ADOPTION AND CHANGE MANAGEMENT MATTER

USER ADOPTION AND CHANGE MANAGEMENT ARE CRITICAL WHEN IMPLEMENTING NEW ERP SYSTEMS.

The success of the implementation depends far more on people and processes than on the technology itself. Even the most powerful and feature-rich ERP system can fail if users resist it, don't understand how to use it, or revert to old workflows.

HERE ARE A FEW REASONS WHY USER ADOPTION AND CHANGE MANAGEMENT SHOULD BE TOP OF MIND WHEN MIGRATING FROM ONE ERP SYSTEM TO ANOTHER:

1 MINIMIZES RESISTANCE

ERP systems often drastically change workflows. Without proactive change management, users may resist the system, reducing ROI and system effectiveness.

2 ENSURES DATA INTEGRITY

Poor adoption often results in incomplete or incorrect data entry, which undermines the ERP's core value.

3 MAXIMIZES ROI

The organization achieves a return on investment only when the system is fully and properly utilized.

4 REDUCES DOWNTIME

Well-managed change reduces disruptions to business operations during the transition.



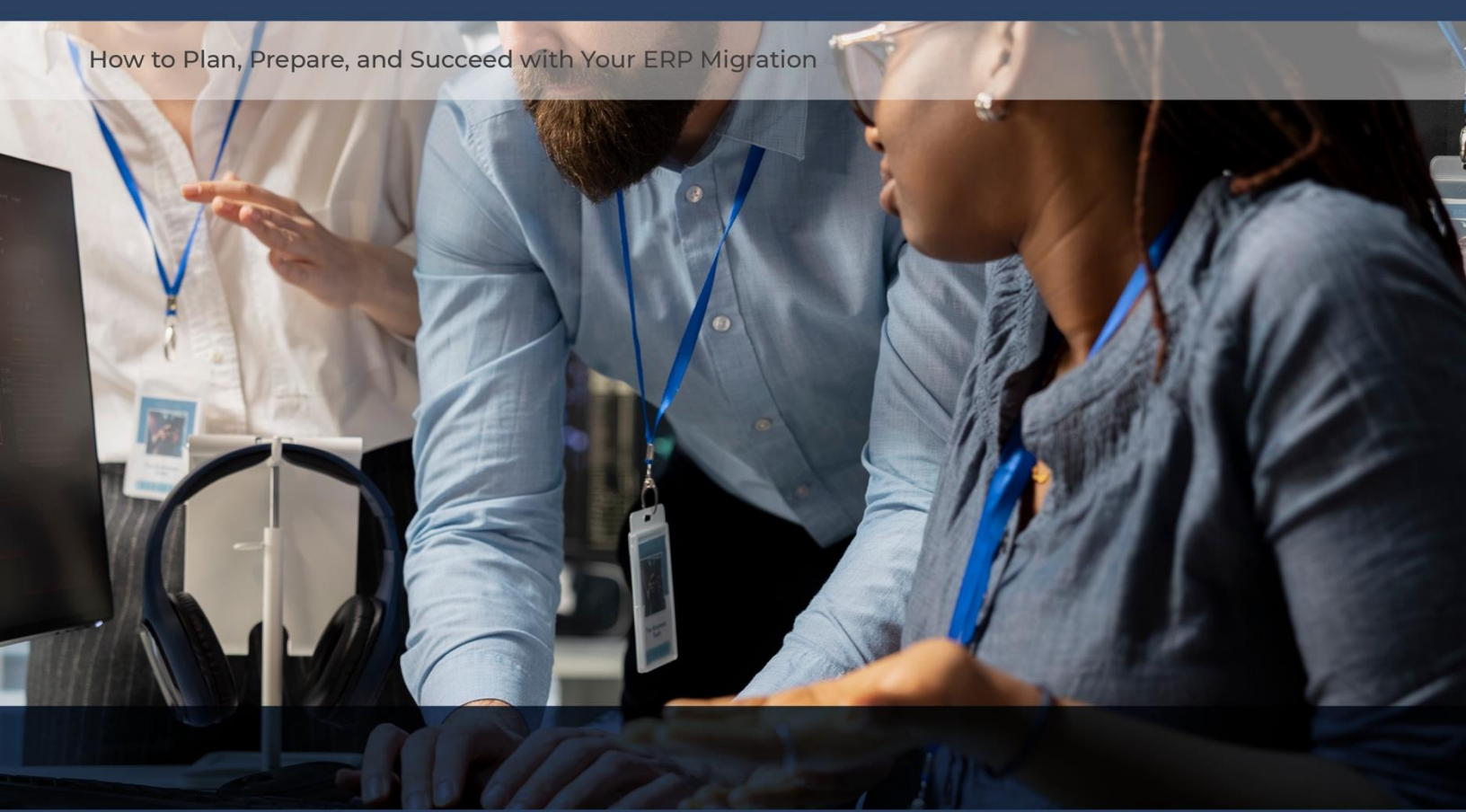
77%

Among recent companies that completed an ERP implementation, 77% said the most critical success factor was institutional leadership support.

Educause

WHILE ASSEMBLING AN IMPLEMENTATION TEAM AND TECHNOLOGY “CHAMPIONS” DURING THE ERP MIGRATION IS A GOOD PLACE TO START IN ENSURING A SUCCESSFUL IMPLEMENTATION AND ADOPTION, HERE ARE A FEW MORE BEST PRACTICES.

- Secure strong support from executive leadership. Management should champion the process and actively communicate the “why” behind the new ERP change.
- Use multiple channels (emails, meetings, etc) to clearly explain the benefits, impacts, and timeline to all those affected.
- Offer different forms of hands-on training before, during, and after go-live.
- Utilize dashboards to track usage rates, data accuracy, process completion, and training participation to show progress.
- Establish a forum for employee feedback and be patient with the learning curve; it can take time to learn a new system.



FINAL WORDS

A RECENT REPORT BY TECHNOLOGY EVALUATION CENTERS STATES THAT THE TOP THREE REASONS BUSINESSES CITE FOR BUYING NEW ERP SYSTEMS ARE:

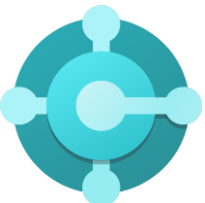
- Replacing outdated legacy systems
- Consolidating disparate applications
- Updating to more recent technologies

For expanding businesses who need better visibility across operations and are tired of costly, time-consuming upgrades and patching cycles, moving to a cloud ERP system can help ensure future business growth and success. Access to native AI, automation, and cloud capabilities is a game changer for those who struggle to make data-driven decisions or are burdened with manual workflows.

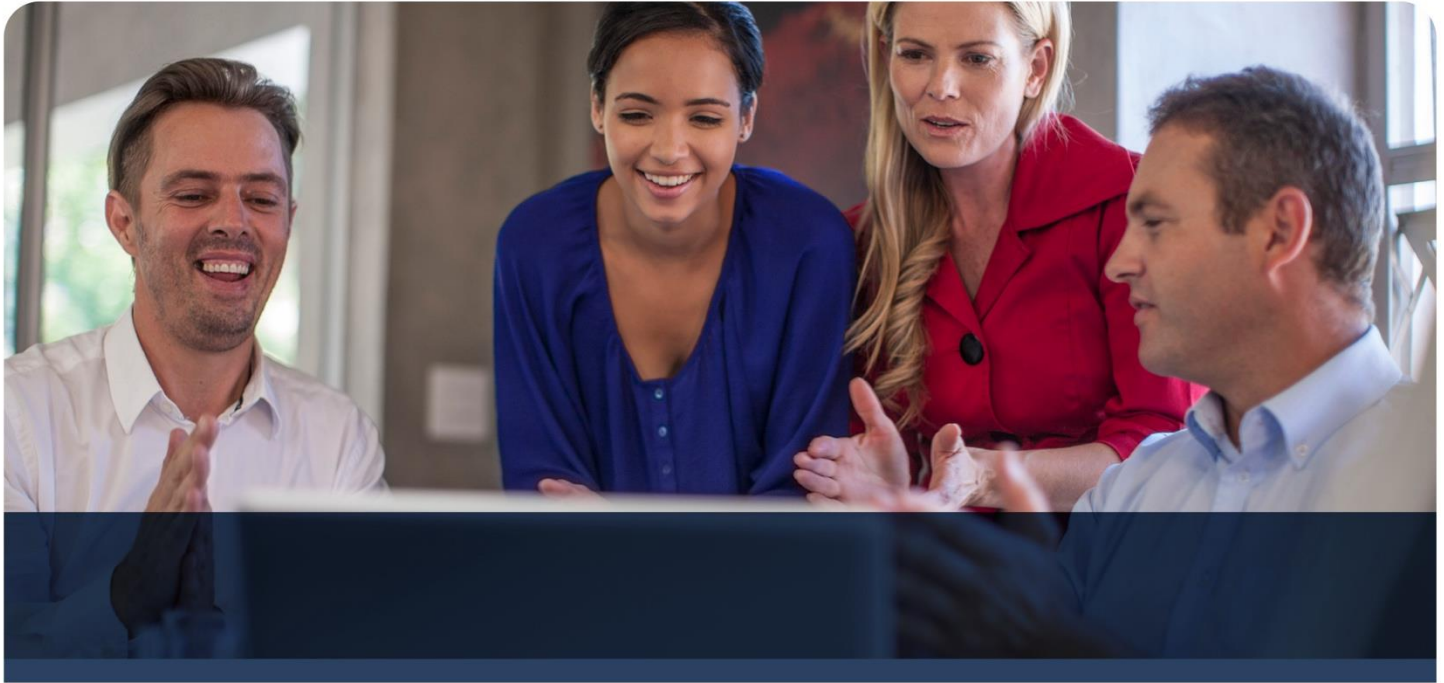
However, planning a move to a new ERP system is a massive undertaking for any business, no matter the size. When choosing a new ERP system, it's important to, first and foremost, work with a knowledgeable ERP partner who can guide your business through every step of the way and is invested in making the decisions that work best for your business. Your ERP partner can help you decide which ERP is ideal for your business needs, as well as help you through preparation steps such as data preparation and change management.

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

Microsoft Dynamics 365 Business Central is often considered an ideal solution for businesses moving off a legacy, on-premises ERP system for several strategic and operational reasons. It balances the familiarity of Microsoft tools with the scalability of modern cloud-based solutions, making it especially appealing for small to mid-sized, growing businesses.



- Financial Management
- Supply Chain Management
- Sales
- Customer Service
- Inventory Management
- Project Management
- Operations



BUSINESS AUTOMATION SPECIALISTS OF MINNESOTA, INC.

BASM has provided implementation, consultation, customization and support for Microsoft Dynamics 365 Business Central (NAV) since 2009. We help small and medium sized businesses streamline business processes and enhance data visibility, in order to become more effective and profitable.

READY TO TRANSFORM YOUR BUSINESS?

Don't let outdated processes hold you back. Our team is here to help you streamline operations, optimize your supply chain, and drive growth with the right solutions.

Contact us today to learn how we can support your success.



877-571-8580



info@bautomation.com



bautomation.com