



# **Ready for Business Central? Here's How to Make the Switch the Right Way**



## How to Prepare Your Organization for a Successful Move to Business Central

Switching your business management system is no small task — it's one of the most important steps you can take to give your company the strength to grow, work smarter, and stay resilient for the future.

With Microsoft Dynamics 365 Business Central, you get a modern, flexible system that brings everything together in one place—finance, sales, purchasing, inventory, and projects. No more duplicate work, manual errors, or wasting valuable time.

Still, we know an ERP transition can feel like a big step—maybe even overwhelming. That's why we want to share the insights we've gained from more than 20 years of experience in the industry.

Here are our top 10 tips for a smooth transition—without unnecessary pitfalls or stress.

### CONTENTS

- Tip 1: Set a Clear Vision
- Tip 2: Build the Right Project Team
- Tip 3: Map Your Processes
- Tip 4: Define Your Requirements
- Tip 5: Prepare Thoroughly
- Tip 6: Clean Up Your Data
- Tip 7: Create a Realistic Timeline
- Tip 8: Choose the Right Partner
- Tip 9: Test Before You Go Live
- Tip 10: Think Long-Term

## Tip 1: Start with Why – Set a Clear Vision

**A new ERP isn't just about technology - it's about giving your business greater opportunities.**

- Automate manual tasks
- Get real-time data to strengthen your decisions
- Work anywhere, anytime—thanks to the cloud
- Connect systems, apps, and analytics tools

Anchor the vision with leadership and communicate it across the entire organization. When everyone understands WHY you're making this change, engagement naturally grows.

## Tip 2: Build a Strong Project Team

**A move to Business Central impacts every part of the company - from the finance team to the sales floor.**

- Appoint a dedicated project owner
- Have an internal project manager to keep things moving
- Involve key people from different departments
- Assign “super users” — your internal Business Central champions!

When the right people are involved from the start, the chances increase that the system truly supports your day-to-day reality.

## Tip 3: Map Today's Processes— Then Envision Something Better

**Business Central is powerful because it can adapt to the way you want to work. But first, you need to know:**

- What's working well today?
- Which tasks are eating up unnecessary time?
- Where are duplicate systems—or an overreliance on Excel—slowing you down?

Do a current-state analysis—but also dare to look ahead: How do we want to work five years from now?

## Tip 4: Define Clear Requirements

**Business Central is flexible - but you need to set the priorities:**

- Which features are must-haves?
- Which are nice-to-haves?
- Which integrations are mission-critical for your business?

A solid requirements specification is the foundation for a smooth implementation!

## Tip 5: Prepare Your Organization for Change

**A new ERP changes everyday work. For some, it means the end of unnecessary double entries - for others, it introduces new ways of working. Prepare by:**

- Clear communication — what's happening and when
- Defined roles — who is responsible for what
- Training — Business Central is user-friendly, but knowledge makes all the difference!

Of course, we'll help you learn your new system—but it's just as important that the information reaches everyone in your organization!

## Tip 6: Clean Up Your Data

**Cleaning up is never fun, but moving to Business Central is the perfect opportunity to:**

- Remove outdated customers and vendors
- Review item records and pricing
- Eliminate unnecessary or obsolete information

A clean database gives you a flying start!

## Tip 7: Create a Realistic Plan

**Time is a success factor - not an enemy!**

- Set a realistic timeline
- Plan for testing and user training
- Expect some steps to take longer than you think

The goal is a stable, confident transition where everyone keeps up!

## Tip 8: Choose a Partner That Elevates Your Business

**Business Central is a powerful platform—but the key lies in how it's implemented. Choose a partner who:**

- Knows your industry
- Understands your processes
- Trains and supports you even after go-live

A great partner is a long-term advisor—not just a vendor. Curious what it's like to work with NAB? Take a look at some of our customer stories on our website!

## Tip 9: Test, Test, and Test Again!

**Once the system is configured - it's time for real testing:**

- Verify that accounting, reports, taxes, and integrations work properly
- Have end users test real-life scenarios
- Make adjustments early - so you can avoid unpleasant surprises

## Tip 10: Think Long-Term

**With Business Central, you get an ERP that's constantly evolving. That's why you should:**

- Follow up after go-live—what's working well, what can be improved?
- Continuously train new users
- Explore new features and apps in Microsoft's ecosystem



## Ready to take the next step toward smarter ways of working?

We're here to support you every step of the way—from the very first analysis of how you work today, to a secure go-live in Business Central that gives you full control and less day-to-day chaos. We'll guide you step by step through the entire process: analysis, planning, migration, and training your team.

### So, what's next?

Start by reaching out to us through our website. The first meeting is free—but it could be the beginning of a journey that saves you money, time, and sleepless nights!