

# The business owner's guide for replacing accounting software

Replacing your accounting software is easier and more affordable than you may think. Use this guide to learn about the benefits of a modern technology platform, better understand the advantages of a cloud-based solution, and know what questions to ask when evaluating your options.



# Keep pace with evolving customer demands and business requirements



Your customers' needs and expectations have evolved, but your accounting and business management systems aren't able to keep pace with increasing demands. You need a technology platform that improves team productivity, increases sales, drives customer loyalty, and supports your growth ambitions.

Today's customers and tomorrow's workforce are increasingly accustomed to instant access, self-service, and a myriad of buying options. Failure to meet these expectations often means your competition ends up the winner. More than ever before, businesses need to give their people tools that put information at their fingertips so they can delight customers, grow sales, and keep customers coming back for more.

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More than 90 percent of consumers said they would consider taking their business elsewhere rather than work with a company that uses outdated technology.

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A recent study found that more than 90 percent of consumers said they would consider taking their business elsewhere rather than work with a company that uses outdated technology.\*

Information silos, disconnected systems, and manual processes keep you from delivering the experience your customers expect and ultimately can put your business at risk. But what kind of solution is right for your business needs today and your goals for future growth? How can you best prepare for change, and how will you know if you're ready to move your systems to the cloud?

This guide will help you evaluate the current state of your accounting and business management systems and processes, and outline considerations you should keep in mind when exploring new solutions.

*\* Source: Microsoft-commissioned research among 1,405 consumers, 2013.*

# Signs your accounting software is putting your business at risk

As your business grows in size and complexity, and your customers expect better and faster service, the tools that once supported you may now be standing in your way. For small and midsize businesses (SMBs), deciding to overhaul your accounting software or business management systems may seem like a daunting task.

But what is the real cost of trying to maintain a system that is no longer keeping up with demands? Whether the result is lost sales, customer dissatisfaction, or compliance risks, failing to update your technology can be a costly decision.

If you recognize any of these warning signs, the time has come to make a change:

- ❗ Manual processes can't keep up with increasing demand despite added headcount.
- ❗ Sales drop due to out-of-stocks or production delays.
- ❗ Manual reporting creates tedious, month-end close procedures that strain your staff.
- ❗ Unreliable data keeps you from confidently investing in new products, locations, or lines of business.
- ❗ Increasingly stringent compliance and security concerns keep you up at night.
- ❗ Valuable employees or prospective hires go elsewhere because they expect modern devices for better productivity.

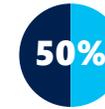


Read the *15 Red Flags: Is Your Accounting Software Hurting Your Business?* white paper for more information.

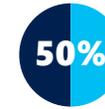
## Why SMBs adopt new business management solutions:



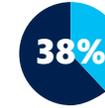
Process integration



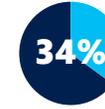
Resolve order processing issues



Replace outdated hardware and software



Resolve data duplication/errors



Reduce excess inventory

Source: Nucleus Research: Microsoft Dynamics Enterprise Applications for SMBs

# The signs are clear, now what?

There's never been a better time for SMBs to modernize their technology. The cloud has opened up new avenues for companies of all sizes to expand capabilities, create greater productivity and mobility, and efficiently expand their growing businesses.

Companies looking to move to the cloud need to understand what options will best suit their business needs today and support where they want to go tomorrow. With so many technology vendors providing similar products and services, it can be tricky to differentiate between options to find the right fit.

Here are a few key characteristics to look for in order to narrow down your list to the top contenders:

**Connects your entire business.** Provides a complete solution for business beyond accounting and/or ERP capabilities by bringing back-office business processes together with customer service and sales processes for one connected customer experience.

**Understands the power of mobility.** Empowers a mobile workforce by delivering the same experience across devices, regardless of their location.

**Familiar user experience.** Delivers an easy-to-learn solution that people just intuitively know how to use.

**Brings people and technology together.** Brings together your business applications directly with your personal productivity tools like your calendar, documents, and data to deliver an end-to-end solution to manage your business.

**Trusted technology provider.** Creates security as a trusted, leading technology provider for businesses of all sizes around the world.

**Empowers a network of local solution providers.** Provides a technology platform used by a global network of reselling partners to build and deliver industry-specific solutions, local service and support, and expertise.



## You recognize the signs, now get ready to explore your options

Beyond evaluating the technical capabilities, here are a few questions to ask when meeting with potential solution providers.

- » How easy is the solution to learn and use?
- » How will it integrate with our existing systems and applications?
- » If we deploy in the cloud, do we retain control over our data?
- » What will my price be after the initial contract expires?
- » How easily can I add or remove users, and how is that reflected in my pricing?
- » How often do you provide product updates and can we control when the updates are deployed?
- » What is your track record for service after the sale?
- » Who do you have locally that can help us with implementation and ongoing support when needed?

# The dollars and sense of business applications in the cloud



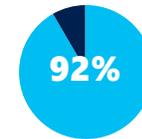
Businesses of all sizes, including an increasing number of SMBs, are making the move to the cloud to modernize their technology platform, gain overall system efficiency, and enable their teams to stay connected to the data they need in order to meet customer demands from virtually anywhere. Here are the top business benefits that are driving SMBs to move to the cloud now.

## Why should SMBs move to the cloud?



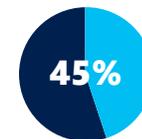
**90%** of consumers said they would stop doing business with a company using outdated technology.

*Source: Microsoft commissioned survey*



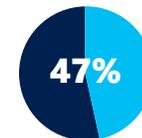
**92%** of SMBs are using at least one cloud business solution.

*Source: SMB Group*



**45%** of SMBs said their employees get more done in the same amount of time thanks to cloud and mobile technologies.

*Source: The Boston Consulting Group*



**47%** of SMBs said technology is critical to their company's future.

*Source: The Boston Consulting Group*

# Demystify the cloud

While the business benefits of moving technology to the cloud are clear, some of the technical jargon that surrounds cloud computing can be confusing. Here are a few terms that will increase your cloud IQ and help you understand the various options for deploying your solution in the cloud.

## Cloud Jargon Translator

**SaaS—software as a service.** Specific applications delivered through the cloud, typically for scenarios such as email, office productivity, customer relationship management, marketing analytics, and so on.

**IaaS—infrastructure as a service.** IaaS enables businesses to move their entire datacenter, including storage, servers, and software, to the cloud, essentially outsourcing management, security, and maintenance to the cloud provider.

**PaaS—platform as a service.** PaaS provides a complete operating system environment in the cloud where customers can develop and deploy software, applications, and services. The advantage is that PaaS systems scale seamlessly to provide consistent quality of service.

**Virtualization.** Virtualization creates a layer of abstraction between hardware and software, enabling entire datacenters full of servers and microprocessors to operate as a shared pool of resources.

**Public cloud.** Public cloud refers to services offered to multiple users (or “tenants”) in a single datacenter.

**Private cloud.** Private cloud is a dedicated datacenter or server environment to deliver cloud services for a single customer or tenant.

**Hybrid cloud.** Hybrid cloud is an enterprise IT environment combining some private cloud services, some public cloud services, and some on-premises computing resources.

There’s a lot to learn about moving to the cloud and what business owners should consider when evaluating what’s right for their business. Review the following resources for a more in-depth look at the key benefits of moving your business systems to the cloud.



### Cloud as a Platform e-book

As the cloud evolves from basic online software tools to a full platform for business, it can provide ways for your business to do more, grow faster, and leave IT complexity behind.



### Cloud for Insights e-book

As the volume of data grows, businesses are using the power of the cloud to gather, analyze, and visualize data from internal and external sources to improve overall business.



### Cloud for Productivity and Mobility e-book

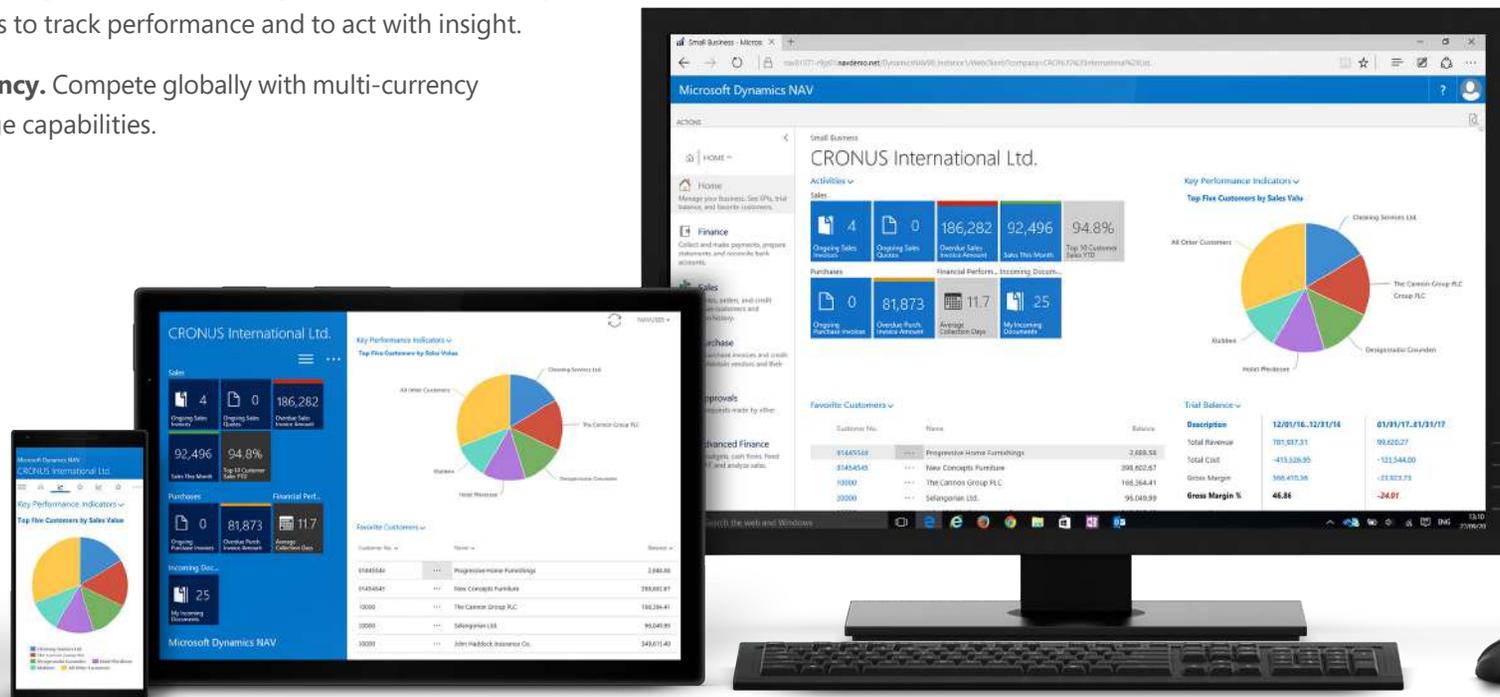
As mobile work becomes the norm, businesses can turn to cloud-based solutions to extend productivity and collaboration tools to employees on the go.

# A complete, familiar, and trusted solution for your business

Run your business and delight your customers with the tools you need to increase insight, grow sales, manage your financials, and stay compliant. Microsoft Dynamics customer relationship management (CRM) and enterprise resource planning (ERP) solutions go beyond simple integration with Microsoft productivity tools like Outlook, Word, and Excel. With a single sign-on you can access your business applications from within Office and share data across solutions, making your tasks easier and your people more productive.

With Microsoft Dynamics and the Microsoft Cloud, you're free to work anywhere, anytime, across your devices. It's quick to deploy, easy to use, and has the power to support your growth ambitions. Start with what you need today and easily adapt as your needs change.

- **Financial management and accounting.** Manage cash, assets, and banking.
- **Supply chain, manufacturing, and operations.** Track and manage production, inventory, orders, and vendors.
- **Marketing, sales, and service.** Manage campaigns, sales opportunities, contacts, and service contracts.
- **Project management.** Create estimates, track projects, and manage capacity.
- **Business intelligence and reporting.** Get real-time visibility and analytics to track performance and to act with insight.
- **Multi-currency.** Compete globally with multi-currency and language capabilities.



# Why to choose a business solution from Microsoft

Only Microsoft delivers a connected technology platform bringing together business applications with tools for productivity, communication, and collaboration. Microsoft business solutions deliver insight across your devices, all while helping you:



## Grow efficiently

Don't let technology limitations stand in the way of growth. Microsoft business solutions efficiently and cost-effectively scale as your needs change or your organization grows.

### **Automate and easily adapt business processes.**

Simplify your finances, streamline your supply chain, manage your sales teams, and make confident decisions that expand your business, not your budget. Be productive from the start with a familiar and role-based user experience to support growth without added headcount.

### **Manage your business, not your servers.**

Running your business applications in the cloud means reduced upfront software costs and no costly on-site servers to manage, plus you can add or remove users as your team changes. Rather than dedicating operational headcount to manual tasks, grow capabilities by automating business processes and repurpose your team to focus on more strategic projects.



## Connect with customers

What if you could anticipate what your customers want? Microsoft business solutions help you gain deeper customer insights, manage and grow sales, and maintain profitable, loyal customer relationships.

### **Manage opportunities and increase sales.**

Zero in on the most promising leads with data-rich, interactive dashboards that help track your most active customers and uncover new sales and service opportunities. Guide your team to stay on track with role-specific workflows and familiar processes built around sales best practices.

### **Get a 360-degree customer view.**

You've been compiling years of data on your customers, even without realizing it. When you can see and analyze all your customer data in one view, you can spot winning sales tactics and fix the broken processes.



## Do business anywhere

Get more done in the office or on the go, with security-enhanced access to your tools and data across all your devices.

### **Bring your office with you wherever you go.**

No matter what devices your team uses or where they need to work, they can stay connected to key business data like customer details, product information, and order status to deliver better customer service. And with a consistent user experience and single sign-on across calendars, email, files, collaboration tools, and business applications, getting to the data you need quickly is simple and intuitive.

### **Respond at the speed of business.**

With virtually anywhere, anytime access and the ability to track presence and instantly message team members, you can connect, share, and collaborate in real time and get answers right when you need them.



## Safeguard your business

Your customers trust you with their data. Make sure you earn it by keeping all your systems safe, centralized, and protected, while simplifying compliance, audits, and reporting.

### **Prepare for the unexpected and mitigate risk.**

A proven business system from Microsoft has built-in controls and role-based business workflows that can provide structured access to sensitive information. Plus, with both physical and virtual security including access control, encryption, and authentication, you can help protect your data on all your devices.

### **Rely on guaranteed uptime and data backup.**

Microsoft cloud solutions are reliable, scalable, and come with a guaranteed 99.9 percent uptime, so your team and customers can access information anytime.

# SOLUTION IN ACTION: World Animal Protection

*Connected cloud solution helps nonprofit manage programs and engage with worldwide donors*

World Animal Protection is an international animal welfare organization that has been in operation for more than 30 years, providing aid, education, and government outreach to help put an end to animal cruelty. The nonprofit, headquartered in London, has regional hubs in Africa, Asia, Europe, Latin America, and North America, and offices in 15 countries.

To get the most out of its resources and streamline management of global finances, operations, and sponsorships, World Animal Protection uses Microsoft Dynamics and Office 365 for a complete, trusted, connected, cloud-based solution.



**Consistency and consolidation.** With Microsoft Dynamics, the organization has consolidated geographically disparate finance and operations processes, and no longer relies on a disconnected network of spreadsheets.



**Better visibility for better aid.** Microsoft Dynamics solutions provide better visibility into donors, budgets, and projects, helping the charity make sure funds are being properly managed and put to good use helping animals across the globe. Simeon Lewis, international head of IT at World Animal Protection, said the Microsoft cloud solution “enables us to use our resources in a more effective way.” And, it helps the organization stay accountable to its funders.



**Helping others take action.** World Animal Protection supporters have helped make life better for billions of animals. To ensure continued support, the organization uses Microsoft Dynamics to better understand and engage with supporters, stakeholders, and sponsors, without compromising security or personal data.

[Learn more](#) about how World Animal Protection is using a Microsoft cloud-based solution to streamline charity operations and connect with supporters.



“Microsoft solutions enable this organization to deliver its animal welfare work in a way that maximizes impact for animals and delivers our resources in the most cost-effective way.”

— **Simeon Lewis**  
**International head of IT**  
**World Animal Protection**

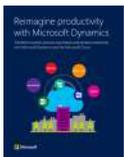
Make the most of your scarce resources with a quick-to-implement, easy-to-use business solution from Microsoft.

## Make a change without disrupting your business or your cash flow

Deploy on the Microsoft cloud for increased flexibility, lower up-front costs, enterprise-grade infrastructure and support, and increased mobility. Moving your business systems to the cloud means you can reduce IT dependency and focus on what matters most—running your business.

With Microsoft Dynamics and the Microsoft Cloud you can:

- **Get up and running quickly.** Feel confident from the start with a familiar, intuitive, role-relevant user experience.
- **Do business anywhere.** Access your data and stay connected on virtually any device so you can be productive on the go.
- **Grow efficiently.** Reduce your infrastructure, hardware, and IT management costs and easily scale up or down with demand.
- **Focus on what matters most.** Refocus IT from managing infrastructure to working on strategic projects.
- **Help reduce risk.** Rely on a flexible and trusted Microsoft platform that spans your entire IT ecosystem.



Read the *Reimagine Productivity with Microsoft Dynamics* e-book to learn how to transform your business processes and help your people do and achieve more.



## Take the next steps for your business

Microsoft Dynamics is sold, implemented, and supported by a global network of solution consultants called partners. These local partners will meet with you to discuss your requirements, schedule a personalized demonstration, and then create a price quote based upon your industry and business needs.

Start with what you need today and easily extend services as your needs evolve—in the Microsoft cloud, on your servers, or hosted by a Microsoft Dynamics partner. Regardless of your requirements, choice of deployment, or desired payment terms (up-front purchase or a monthly subscription) our Microsoft Dynamics partners will have you up and running quickly, with less disruption to your business.

[Visit us online](#) to take a guided tour of our solutions, chat with a Microsoft solution consultant, or to find a local Microsoft Dynamics partner who can schedule a personalized demo and provide more information about buying and deploying.





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