

# SMB leader's guide to moving to the cloud with confidence

How to tackle cloud migration projects and unlock the business insights needed to adapt faster, work smarter, and perform better





# This information is for you if...

- You are a small-to-midsize business (SMB) leader who wants to learn more about the benefits of cloud migration.
- You are an SMB leader looking for a practical approach to cloud migration.
- You are ready to embrace digitization but need a framework to manage the journey.
- You are looking for next steps to drive your organization's digital transformation.



Estimated reading time: <15 minutes





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By late 2020, digitally mature SMBs surveyed by IDC experienced 2x the revenue and productivity compared to their digitally challenged counterparts.<sup>1</sup>

<sup>1</sup>IDC 2020



# Introduction

Are you agile enough to keep pace with the ever-accelerating speed of business?

As a small-to-midsize business leader (SMB), you have multiple priorities, from finding and retaining talented workers, to ensuring business performance, to blazing new trails and delivering on your vision. Given the fast pace of business these days, it's hard to stay ahead. Even more so if your organization is stuck using data and process silos that don't have the visibility or flexibility to predict or adapt to disruption.

**“In our Dynamics 365 cloud environment, we have the flexibility our company needs to handle continuous change.”**

- [Florian Bauer: Project Manager, Design Offices](#)

## The speed of digital business transformation is the new competitive differentiator

Even before 2020, SMBs were beginning to embrace digital transformation. But the pace increased rapidly as a response to the global pandemic. With remote work mandates, supply chain shortages, and consumers turning to online channels during lockdown, SMBs that didn't already have secure digital access and processes in place deployed workable cloud solutions faster than they thought possible.

In fact, a McKinsey Global survey of executives from late 2020 found that companies of all sizes had accelerated their digital transformation by three to four years.<sup>2</sup>

As organizations look to continuously reinvent themselves, they'll need a cloud-based business management solution that goes beyond cost savings and remote work benefits. The next step is to accelerate digital transformation, so business leaders can elevate employee, customer, and vendor experiences and keep up with the competition.

<sup>2</sup> COVID-19 digital transformation & technology | McKinsey





# The cloud advantage

For years the cloud has provided a critical advantage for addressing top business priorities. Now, cloud capabilities are becoming even more important for expanding beyond core business needs and helping organizations move faster, be more resilient and adaptable to change, and strengthen security. Cloud technology is the key to completely reimagining the business model, across customer, employee, and operations experiences.

It's time to look beyond enabling remote work, and take the next step in your digital transformation journey. The cloud enables businesses to:

## Improve security, privacy, and reliability

Sensitive business data is stored in highly secure, state-of-the-art datacenters, where it's available whenever it's needed, with virtually no downtime.

## Enable scalability, flexibility, and easier on-boarding

Businesses that embrace cloud technology can grow without costly changes to IT infrastructure. That includes the ability to quickly activate and deploy new users from nearly anywhere.

## Free up IT resources to work on more strategic tasks

Improve IT productivity by reducing the time and complexity associated with managing hardware and software and providing support. This allows IT to focus on strategic priorities and optimizing business processes rather than repair and maintenance.

## Reduce the cost of maintaining hardware

Reduce time and money spent on infrastructure refreshes, major software and hardware updates, utility costs, and maintenance by shifting to the cloud.

## Always be current and compliant

Cloud-based business software is updated automatically to match the latest global regulatory standards, so cloud-enabled businesses always have the most current version and can maintain the highest standard of compliance.

## Accelerate business insights

With cloud-based business software, companies can unify disparate data sources and bring a richer understanding of their customers, products, and services through data insights and analytics.





# Microsoft Dynamics 365 Business Central is the preferred cloud-based business management solution for thousands of customers

Now more than ever, you need to ensure your people are enabled to deliver on customer expectations, no matter where they are or what comes next.

Microsoft Dynamics 365 Business Central is a comprehensive business management solution that helps small and midsize companies connect their finance, sales, service, and operations teams within a single easy-to-use application. Instead of maintaining siloed data within financial, operational, and organizational systems, Business Central connects your business, offering actionable insights from real-time visibility across teams and departments.

Business Central also interacts seamlessly with the familiar Microsoft 365 productivity apps—Microsoft Word, Excel, PowerPoint, Teams, Outlook, and more. Sales professionals can go from quote to cash, all directly within Microsoft Outlook—without switching applications. Workers can set up customers or vendors, create quotes, and submit invoices without leaving their inbox. That means less training, faster adoption, and a quicker return on investment.

What's more, Business Central can be easily adapted and extended with available apps on the Microsoft AppSource or by using the Microsoft Power Platform. We built on our rich history in ERP solutions, evolving to Business Central from Dynamics NAV, GP, and SL.

<sup>3</sup> [The ingredients: Recipes from the past, IT for tomorrow](#)

## With Microsoft Dynamics 365 Business Central, businesses can:

### Adapt to growth and changing business landscape

Adopt new business models faster with flexible deployment, reliability, security, and an adaptable solution that grows with you.

- **Take your business on the go**  
Work wherever your business takes you, with full capabilities on desktop, tablet, or mobile, on premises or in the cloud, across Windows, Android and iOS devices.
- **Unify your data**  
Remove organizational silos with one comprehensive solution that runs where you need it, offering the same user experience no matter how you deploy.
- **Be ready for growth**  
Scale and perform as you grow using modern technologies built on the Microsoft cloud, such as machine learning, IoT, and mixed reality, to help you adapt to market dynamics.
- **Access built-in world-class security**  
Take control of your mission-critical business data and help protect it from unauthorized access with automatic Microsoft datacenter encryption.

“ I really liked Business Central as a pure cloud solution. I don't have to worry about the technology, I can work from anywhere, and I'm well set up for the future.<sup>3</sup>”

- Florian Fickenschner  
CEO, Fickenschers Backhaus GmbH





## Unlock productivity and business insights

Connect people, processes, and insights to make better decisions faster with embedded guidance, dashboards, and interoperability with familiar, business-class productivity tools.

- **Get insights within the flow of business**  
Access business intelligence when and where you need it, with real-time dashboards and KPI's for each user role.
- **Automate workflows and processes**  
Optimize performance using easy-to-create workflows, audit trails, enterprise-level security, and AI.
- **Enhance productivity with familiar apps**  
Interoperability with Microsoft 365 means people can work directly within Microsoft Outlook, Excel, Teams, and Word, using familiar tools to get their work done. Merge business data into Word, edit data in Excel, and complete quotes and invoicing directly from Outlook.
- **Respond at the speed of business**  
Get access to Business Central operations data directly within Microsoft Teams and Outlook. Easily share business data and quickly address issues while you are meeting, messaging, and working.

## Increase financial visibility and performance

Accelerate financial close, improve forecasting, and get real-time performance metrics while fostering compliance and security across global subsidiaries.

- **Take control of financial data**  
Better manage cash flow, bank reconciliations, fixed assets, budgeting, and project costing while shortening cycle times with the late payment-prediction extension.
- **Accelerate financial closing and reporting**  
Reduce month- and year-end closing times with connected general ledger, accounts receivable, payables, and fixed assets data. Streamline approval workflows using Power Automate.
- **Monitor financial performance**  
Use built-in reports, Excel, or Microsoft Power BI and unlimited data dimensions to get real-time cash flow, identify financial patterns, analyze trends, and improve business planning and decision-making.
- **Make more profitable financial decisions**  
Connect reports, charts, and Power BI data from across accounting, sales, purchasing, and inventory teams to get accurate insights and make financial decisions with confidence.

By 2023, organizations with modern business platforms will outperform their competitors in IT agility<sup>4</sup> by **40%**

## Boost sales and improve customer service

Take better care of customers by managing the entire sales process from within Microsoft Outlook and deliver better outcomes with connected service operations.

- **Prioritize leads based on revenue potential**  
Keep track of customer interactions and get guidance on the best upsell, cross-sell, and renewal opportunities throughout your sales cycle.
- **Deliver on promised customer outcomes**  
Track customer agreements to quickly access details about prices, discounts, delivery dates, product availability, and fulfillment status.
- **Ensure a smooth transition from sales to service**  
Automatically register shipped goods as service items and keep the required details in one place, so both sales and service teams can respond quickly to inquiries.
- **Live up to your service promises**  
Effectively assign personnel to work orders and get an overview of service tasks and workloads. Keep track of service agreements to deliver reliable service to your customers.

<sup>4</sup> Magic Quadrant for Cloud ERP for Product-Centric Enterprises. Gartner, 2021.





## Facilitate project success

Ensure successful project execution and profitability with planning, resourcing, tracking, costing, billing, accounting, and real-time intelligence.

- **Improve project costing and accounting**  
Better manage projects using timesheets and advanced job costing and reporting. Develop and modify detailed budgets to help ensure project profitability.
- **Optimize resource levels**  
Manage resource utilization by planning capacity and sales. Track customer invoicing against planned or actual costs on orders and quotes.
- **Drive profitability with project insights**  
Get real-time business intelligence on project status, profitability, and resource utilization metrics.

“ Not only did [Dynamics 365] cover accounting but also sales, purchasing, inventory, production management—everything—and it linked with other Microsoft products, such as Excel.<sup>5</sup>”

- Nobuyuki Kumada, *Head of General Affairs and Supervisor of Systems Management, Tanaka Scientific Limited*

## Optimize inventory and supply chain management

Deliver products on time and adapt to changing business models with visibility across purchasing, manufacturing, inventory, and warehouses.

- **Get a holistic view of your inventory**  
Use the same costing method or different ones for inventory items and easily move items between locations to control the quantity on hand using cycling counting.
- **Predict stock replenishment**  
Replenish inventory based on actuals, demand, and availability using built-in intelligence, sales forecasts, and expected stock-outs to automatically create purchase orders.
- **Improve organization within storage facilities**  
Set up bins and zones in Business Central to reflect the layout of your warehouse, including its racks and shelves.
- **Produce within supply and capacity constraints**  
Implement manufacturing processes according to plan, even in agile and complex environments.

<sup>5</sup> Installing Dynamics 365 Business Central to unify accounting, sales, purchasing, and inventory.





# Transform with the Microsoft Cloud?

Microsoft is uniquely positioned to help SMBs maximize business visibility and profitability using the benefits of cloud services. We have unmatched experience, having invested in building Azure over a decade, and business applications even longer, so our customers can quickly unlock the benefits of the cloud. Transform with the Microsoft Cloud—the most trusted and comprehensive cloud, so you put your people first and create impact faster than ever before. .

## Get collaborative with native Microsoft 365 interoperability

The entire **infrastructure you need** to run a digital business is within the Microsoft cloud. In fact, Dynamics 365 is the only business platform that natively integrates with **Microsoft 365**—including Microsoft Word, Excel, PowerPoint, and Teams—Microsoft Azure, Azure Cloud Services, and Microsoft Power Platform, giving you **unparalleled integration** across systems and processes. What's this mean for your business? Collaborative applications deliver a new generation of ERP that will transform the way work gets done. Productivity, collaboration, and process optimization all in one solution.

<sup>6</sup> [Eco-friendly Singaporean builder modernizes through eco-friendly cloud](#)

## World-class security

With security a top priority, SMBs are looking to the cloud to help protect valuable data, apps, and infrastructure. Azure offers a secure cloud foundation with multilayered, built-in security controls as well as unique threat intelligence, so businesses are **always up to date with the latest security** to protect against evolving threats. Trusted by enterprises, governments, and startups, Microsoft Azure has been named a **leader in five Gartner Magic Quadrants** for security—delivering world-class identity protection, role-based access, encryption; and auditing and logging.

## Advanced technology

Additionally, Microsoft spends billions on **cutting-edge technologies**, such as AI, ML, and IoT. The benefits of that advanced research and development ends up in the technology inside Microsoft Dynamics 365 Business Central as well as the familiar Microsoft 365 productivity apps.

” Many of us were already using Microsoft 365 tools, and Dynamics 365 works with Microsoft 365 seamlessly.<sup>6</sup>”

- Chong Hui Fong  
*Operations Manager, Eco Builder*

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**>95%** of Fortune 500 companies use Microsoft Azure for their cloud services.

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# Checklist for success

Evaluating new cloud technology may seem overwhelming, but it doesn't have to be. The key is pinpointing your critical workforce needs and making sure that any solution you select contains 80 percent of the functionality you require, right out of the box.

It's also important to choose a system that is compatible with your existing technology and tools. This minimizes costly customizations and potential downtime, and it ensures that your workers can get up to speed quickly and easily. A qualified partner can offer expert guidance during the decision-making, planning, and execution stages of any cloud migration initiative.

**Use this checklist to help plan for success:**

## → Define and prioritize

Take time to identify the business problems you want to address and the outcomes you aim to achieve. Consider the benefits across your organization.

## → Assign key roles

Be sure to get buy-in from an executive sponsor to lead the initiative and assign key roles and clear responsibilities to everyone involved.

## → Select a qualified partner

The right partner can help plan and implement your digital transformation to get maximum benefit with minimal downtime.

## → Analyze IT ecosystem

Document existing IT infrastructure and apps, including dependencies, security needs, usage, and the business context for each app. This is one area where an experienced partner can help.

## → Plan migration

Create a gameplan for which applications to migrate, how, and in what order. Calculate the total cost of ownership of the proposed plan and get buy-in from company leadership.

## → Start small

Many organizations begin with "lift and shift" projects, which are simpler, cheaper, and easier to complete. Cost savings can be rolled into more comprehensive transformations over time.

## → Modernize apps

To get the full benefit of cloud-based business apps, organizations need to upgrade to cloud-native applications and architectures. This includes automatic updates for security and compliance.

## → Optimize and manage

Monitor and right-size usage to manage costs and optimize services over time.





## Take the next steps

Don't risk falling behind because of siloed data or cumbersome, on-premises infrastructure and software. With a modern, cloud-based business management solution, you can bring together your finance, sales, services, and operations teams within a single application to get the insights needed to drive your business forward and be prepared for what's next.

### Adapt faster

Innovate and adopt new business models faster with flexible deployment models, mobility, reliability, security, and an adaptable Microsoft cloud solution that grows with your business.

### Work smarter

Empower people to be more collaborative, more productive, and more impactful with actionable insights and interoperability to Microsoft 365, including Teams, Word, Excel, and Outlook.

### Perform better

Enable high performance with guided workflows, governance, and real-time metrics that drive continuous process optimization, accelerates financial closes, and improves cycle times.



Microsoft Dynamics 365 Business Central is a collaborative business management solution that helps small and mid-sized companies connect their finance, sales, service, and operations teams within a single easy-to-use application.

The power of Dynamics 365 is the way it connects data from within and beyond the Microsoft cloud and transforms it into actionable insights for your organization to drive more impactful results. Equipped with the right digital capabilities, you get agility in the face of change, so you can pivot complex operations nimbly and quickly to keep your operations on track and your customers subscribed for life.

Whether you are moving from Dynamics GP, NAV, SL or another traditional ERP solution, we can help you confidently move to the cloud to optimize digital workforce processes, enable remote work, and unlock the insights needed for an agile, high-performance organization.



[Request a live demo](#)