Microsoft Dynamics

Grow Your Business with Confidence

A Guide for Businesses
Outgrowing QuickBooks

Ready, Set, Grow Your Business

No matter what type of business you own, your business depends on the people who run it. Equip them with the information and tools they need to work efficiently and watch your business thrive.

Every growing organization reaches a tipping point where the very tools that supported their initial growth begin to hinder their ability to act with agility and insight. Is your entry-level accounting software holding your people and your business back?

When your business begins to diversify and grow in complexity, you need more than basic bookkeeping, inventory management, and backward looking reporting. You need efficiency and accuracy from your desk to the front desk. You need a complete business management solution.

Evaluating new business management solutions may seem daunting. But the options and resources available for small to midsized businesses have never been better—or more affordable.

Use this guide and supporting resources to:

→ Identify the signs your business has outgrown its QuickBooks solution.

→ Understand the questions you should ask during the evaluation process.

→ Learn how a business solution from Microsoft can help you grow your business with confidence.

Signs your QuickBooks Accounting Software May Be Hindering Your Growth

Are the people in your office wasting valuable time doing double data entry or trying to configure QuickBooks to do things it wasn't designed to do? You can apply workarounds in the short-term, but the longer you wait, the more traction you lose.

If you identify with any of these scenarios, it's time to graduate from QuickBooks to a more complete business management solution.

You can't keep up with demand even as you add headcount. As you expand product lines and enter new markets, your business processes become more complex. With basic accounting software, even the simplest processes, like invoicing and month-end closing can take hours...even days to complete. You need business process automation to handle growth without adding to your payroll.

You can't wrap your arms (or your head) around the business anymore. There used to be a one-to-one correspondence between your employees and the business functions they managed. Now data moves from desk to desk, and you don't have the controls in place to ensure a detailed and accurate audit trail. If multiple users can make changes to financial entries in entry-level accounting software, it's difficult to trace who has done what. Protect yourself with a business management solution that supports and enforces well-defined roles and processes and gives you tighter control over critical functions like payments, purchasing, and inventory management.

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Is your business ready?

Read the following white paper from Focus Research to understand the benefits of Enterprise Resource Management (ERP), evaluate if your business is ready for ERP, and learn how you can improve business performance by deploying the right solution.

Download now ⟶

Signs Your QuickBooks Accounting Software May Be Hindering Your Growth

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You can't scale operations to support business growth. A growing business typically requires more people, more productivity, and more collaboration across departments to keep up with demand. If your business is stifled by the number of people who can access information, transaction limits, or the size of your database, it's time to find a solution that can scale with your business.

You are reactive when you need to be proactive. Sure QuickBooks can give you a snapshot of your sales performance for the past quarter, but do you know which products produce the highest margins and which customers are likely to purchase the highest volume of those products? Instead of looking at reports of past performance, you need insight into current activities and developing trends to move your business forward. The right business management solution can give you full visibility into what drives your profitability and the ability to turn those profits into the cash flow that will support your future growth.

You can't meet customer expectations. Are you using QuickBooks to manage your finances and a whole different set of tools to administrate contracts, track customer interactions, or manage delivery systems? If you don't have the right systems in place to track customer interactions and forecast demand, and those systems don't talk to each other, you may find yourself unable to meet customer expectations. To compete in an increasingly competitive global economy, you need a well-tuned supply chain and the ability to manage customer and vendor requirements.

The signs are clear, now what? →

Evaluate Your Options

As you begin your research process, you'll find there are many Enterprise Resource Management (ERP) or *business management* systems to consider. In fact, from a functionality perspective it may even be hard to tell many of them apart.

Most solutions offer financial management and reporting, supply chain management, and some level of project, service, and customer relationship management capabilities. Some vendors also offer advanced analytic capabilities and functionality targeted for specific vertical industries.

You'll need to determine the basic functionality you require. But if 90% of functionality is consistent across vendor systems, you also need to think *beyond the basics*. Consider key differentiators like the user experience, collaborative capabilities, deployment options, and, of course, whether the solution is at a price point that your business can afford.

Questions to Ask During the Evaluation Process

Here are five questions you can ask to push past the basics.

① How easy is the system to learn and use?

Your employees know how to use QuickBooks. You don't want to lose momentum training them on a new system while business is booming. And you don't have to. Make sure you select a vendor who offers a solution with:

- **A simple, intuitive user experience.** Nothing increases user productivity more than a role specific interface, personalized dashboards, and clear workflows.

- **Built-in productivity tools.** If it's familiar, it's easy. The best systems work like and with your Microsoft Office applications like Word, Excel, Outlook and Lync, and collaboration and analytics tools like Microsoft SharePoint and SQL Server.
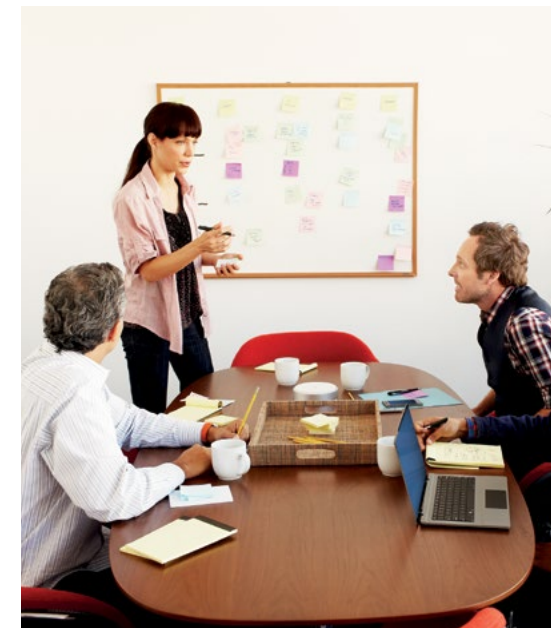
Read the Microsoft Dynamics ERP Deployment Guide to learn which deployment options would best fit your business.

[Download now →]

② Does the solution support the new ways people want to work?

The consumerization of technology has blurred the line between personal and work computing. Users expect that the software they use, whether designed for business or for fun, will be intuitive, accessible from any type of device, and always available.

Inventory the devices—laptops, notepads, smart phones—in your environment, and then assess how well each vendor solution can support those devices and the key applications used by your employees. A best in class solution will provide your team with access on the devices that make them the most productive whether they're in the office, at home, or working from a remote location.

③ Does the vendor offer deployment options that fit my business?

As you evaluate a new business management solution you may also want to evaluate the IT model needed to support it. If you're running an online version of an entry-level accounting solution, do you plan to invest in the infrastructure to maintain your new solution in-house? Or do you want to maintain a cloud-based solution? If you are using an outdated legacy system do you want to move to an outsourced or cloud-based deployment?

The best vendors offer the option of a cloud-based or partner-hosted deployment, in addition to the standard on-premises options. There are advantages to each option. Cloud-based solutions, for example, can eliminate the large upfront hardware investments and reduce staffing needs, while you have more immediate control over an onsite deployment.

Look for a vendor who offers choice and flexibility to support the model that's best for you.

4   What is the vendor's service model after the sale?

Most companies don't go solo through the deployment process. To ensure the consistency and predictability of your operations, you may require implementation assistance, system integration, or ongoing support. Does the vendor have a service and implementation ecosystem with providers in your local area?

And will the vendor provide innovative solutions to help you adapt to new market complexities? As a business owner, you know better than most how important it is to deliver value to your customers. Does the vendor demonstrate an ongoing commitment to technology advancement?

Finally, don't forget about pricing fluctuations beyond the first year. Providers can offer low monthly payments that dramatically increase after your first contract expires. If they are holding your data, that can leave you at risk.

5   Does the vendor understand and focus on the needs of small and midsized businesses?

Ideally, when you deploy a business management system, you'll achieve benefits that go beyond mere automation of manual processes. New business management software can help an organization:

- Increase sales with fewer sales discounts
- Improve sales force effectiveness and the average order size
- Increase inventory turns while reducing stock-outs
- Reduce production costs

As you evaluate vendors, consider their track record for helping businesses like yours achieve the results you want. Ask for customer case studies and be sure to call references. It's a big decision. Do your homework.

More than three million users from a wide range of industries count on Microsoft Dynamics to drive their business forward. Read a collection of case studies to the right and learn how Microsoft Dynamics is helping these small and mid-sized businesses gain greater control, drive bottom line results, and stay ahead of the competition.

Read how companies like yours have successfully transitioned from QuickBooks to Microsoft Dynamics.

→ Manufacturer Outgrows QuickBooks and Triples Growth with Microsoft Dynamics

→ Performing-Arts Center Moves to the Cloud to Streamline Finance and Focus on Its Goals

→ Technology Provider Supports Customers Worldwide and Saves $5M in Service Delivery Costs

→ Semiconductor Maker Implements ERP Solution in Six Weeks, Gains a Firm Grasp on Its Business

Read the top reasons to purchase a business solution from Microsoft

Download now ⊙→

Grow without Growing Pains with a Business Solution from Microsoft

The best solutions for business are simple, usable, and flexible—and they're also from Microsoft. Microsoft Dynamics gives small and mid-sized businesses like yours complete control over your core business processes. Our business management solutions are easy to use and easy to deploy, so you can quickly, simply, and finally transcend the limits of your overworked and undersized accounting software.

- **People get it.** Microsoft Dynamics solutions look and work like Microsoft Office. That means everyone can jump right in and get to work.

- **It works the way you do.** Because it's role-tailored to give your people relevant insights for their day-to-day work, and with the right information at their fingertips, they can not only solve today's problems, but also plan for tomorrow.

- **It's on your terms.** With Microsoft Dynamics, your team can work when and where it works best—at the office, at home, or on the road. Cloud and on-premises deployments give you the flexibility to choose what's best for your business.

- **It reduces your risk.** After decades of experience and thousands of successful projects, our local implementation partners are there with you every step of the way. With RapidStart Services, implementations can take less time and less money than going through a manual setup. And you can import data from your legacy accounting system, so you can be up and running in fewer hours and with less risk.

Get Started with Microsoft Dynamics

Visit us to chat online with a Microsoft representative, take a product test drive, or learn more about our solutions and pricing packages for small and mid-sized businesses.

Call 1-888-477-7989 to speak directly to a Microsoft Representative.