Crestwood Associates

Adopting AI-powered cloud technology

A small to medium-sized business (SMB) guide to growing faster with Microsoft Dynamics 365 Business Central

Microsoft Dynamics 365

Introduction

AI has become a fundamental tool in the way that people get their work done and how businesses find new ways to stay ahead of the competition. And while 71% of small and medium-sized business (SMB) leaders believe that AI adoption is critical for their company to remain competitive, 61% admit their company lacks a vision for AI implementation.[1]

As the pace of business continues to increase, AI offers growing businesses the support to streamline manual processes, connect teams in a unified solution, and keep pace with evolving organizational needs.

For organizations to thrive in today's business landscape, they will need an AI-powered cloud-based business management solution that enables them to transform operations and connect their team in a single application.

1. "Workers worldwide are embracing AI, especially in small and medium-sized businesses," Microsoft, 2024.

Grow your business with Dynamics 365 Business Central

It's now easier than ever for growing businesses to modernize their tech stack and outpace their competitors with a cloud solution featuring built-in AI capabilities.

As a cloud adoption and transition partner, Crestwood Associates has the expertise to align your finance, sales, service, and operations teams with a single, easy-to-use application: Dynamics 365 Business Central with Copilot.

Dynamics 365 Business Central is a comprehensive business management solution for the SMBs, enhanced with AI-powered utilities. Trusted by more than 45,000 companies worldwide, Business Central connects finance, sales, service, and operations and automates daily processes with AI, allowing forward-thinking businesses to achieve more and scale up without compromise.

45,000+

growing businesses are already benefitting from Dynamics 365 Business Central.

172% ROI in three years[2]

Up to 18% increase in productivity[2]

USD30,000 savings in avoided third-party fees annually[2]

2. "The Total Economic Impact™ of Microsoft Dynamics 365 Business Central," A commissioned study conducted by Forrester Consulting. Results are from a composite organization base don interviewed customers. 2023.

Dynamics 365 Business Central offers a fully integrated, AI-powered stack

Microsoft Dynamics 365 Business Central

Microsoft 365

Developer tools

Power Platform

Microsoft Azure

Identity, security, management, and compliance

Dynamics 365 Business Central is built on the world's most trusted and comprehensive cloud and offers you the ability to:

- **Work effortlessly with the Microsoft applications** you already use and know like Outlook, Teams, and Power Platform.
- Take advantage of built-in AI to **gain continuous insights that accelerate decision-making**.
- **Access everything through a unified system** that supports operations across global locations.
- **Scale confidently** as your business grows and evolves.

Dynamics 365 Business Central offers the flexibility to meet your business needs

Our Microsoft experts can work with your team to transform and grow your business by tailoring Dynamics 365 Business Central to meet your needs today and for years to come.

Increase financial visibility and performance.

Accelerate financial close, improve forecasting, and get timely metrics to enhance financial performance.

Finish projects on time and on budget.

Complete projects successfully and profitability with planning, resourcing, tracking, costing, billing, accounting, and timely intelligence.

Boost sales and improve customer service.

Improve the customer experience by managing the entire sales process within Outlook and delivering better outcomes with connected service operations.

Meet your sustainability goals.

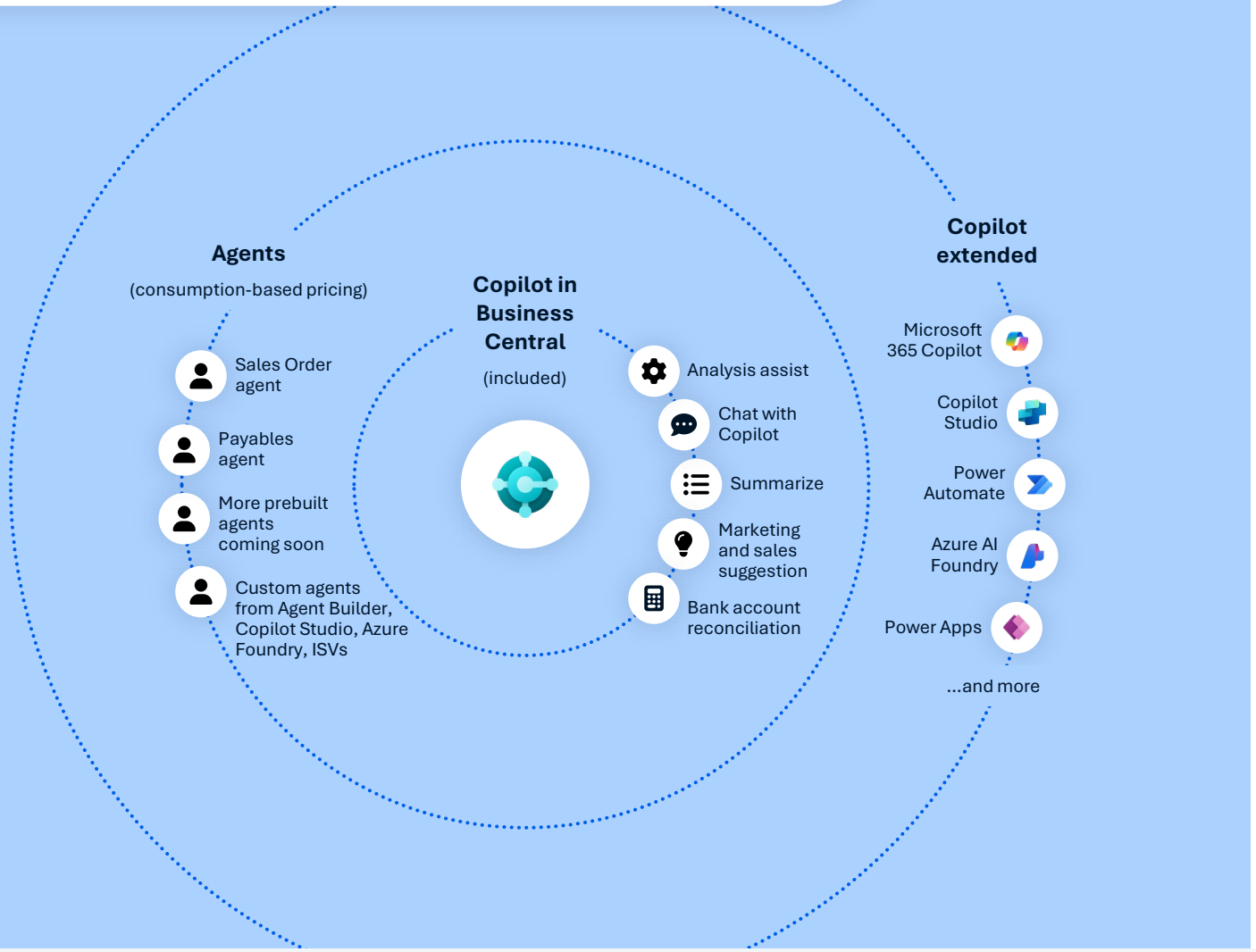
Track and report greenhouse gas emissions with ease and accuracy to manage your environmental impact.

Optimize inventory and supply chain management.

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

The power of AI in Business Central

Copilot and the agentic ecosystem



Realize more value with Copilot in Dynamics 365 Business Central

Whether your business is in the early stages of AI adoption or ready to further integrate AI into your company's processes, Business Central offers the AI capabilities to meet you at every AI maturity phase.

Copilot capabilities in Business Central offer three levels of AI capabilities to meet you where you are:

- **Copilot in Business Central:** Enhance personal productivity.
- **Agents:** Improve business productivity with prebuilt and custom agents.
- **Copilot extended:** Connect to the workflows and AI tools in the applications you use every day, and build synergies to save time and uncover new insights.

What Copilot in Business Central can do for you

The Copilot and agentic ecosystem is designed to get you started with AI and scale to meet your business needs.

Use Copilot in Business Central to:

Guide and explain concepts to help you learn new skills.

Find and locate records, pages, and matching products based on natural language inquiries or similar products.

Compare bank statements and incoming e-documents for reconciliation.

Analyze and organize data to help you get to insights faster.

Suggest numbering pattern setup for records and draft product descriptions.

Take automation further with agents built for Business Central.

Sales Order Taker*

- Communicates with customers.
- Interprets customer requests.
- Send quotes.

Payables Agent*

- Receives vendor invoices.
- Captures invoice information.
- Registers invoices according to company policy, preference, and history.

Any individual, regardless of skill level, can build their own agent to create automated workflows that enable them to work smarter.

Seamlessly connect Business Central and Microsoft 365 while harnessing the power of Copilot.

Collaborate in the apps you already use like Outlook, Excel, and Teams.

Stay in the flow of work by accessing the data in the tools you prefer without switching applications.

Work between apps with greater continuity guided by AI to get help drafting emails, summarizing information, and more.

Build your own agents in Microsoft Copilot Studio to optimize business processes and enhance productivity.

*In preview

Dynamics 365 Business Central transition checklist

Crestwood Associates makes switching to Dynamics 365 Business Central easy.

Our expert guidance during the decision-making, planning, and execution stages of the cloud migration process not only minimizes potential downtime but also ensures your employees adapt to Dynamics 365 Business Central quickly and with ease.

Use this checklist to help plan for success:

- [ ] **Set up an initial consultation with Crestwood Associates.**

  Our experts will meet with you to understand your challenges, goals, and current solutions and how to modernize and optimize your business best.

- [ ] **Analyze the IT ecosystem.**

  We will work with your IT team and business leaders to document existing IT infrastructure and apps, including dependencies, security needs, usage, and the business content for each app.

- [ ] **Define and prioritize.**

  Identify the business platforms you want to address and the outcomes you aim to achieve in detail. Outline the benefits that can impact the entire organization.

- [ ] **Plan migration.**

  We will create a comprehensive plan for which apps to migrate, how, and in what order to avoid business disruptions. We can also outline the total cost of ownership of the proposed plan and get buy-in from additional company leadership.

AI Readiness & Strategic Advisory

AI Readiness and Deployment Strategy

Many organizations see the potential of AI but struggle with where to start and how to scale responsibly. Our team works alongside you to evaluate your current systems, data readiness, and business priorities to determine where AI can deliver real operational impact.

Through a structured AI readiness assessment, we help you identify practical use cases, define a phased deployment plan, and align technology decisions with business outcomes. The result is a clear path forward that balances innovation with governance, security, and long-term value.

Take the next steps

The time to move to the cloud and embrace AI is now. To avoid falling behind in today's competitive business landscape, Crestwood can guide you throughout the entire journey for a smooth transition and get the most out of Dynamics 365 Business Central with Copilot so you can:

Adapt faster

Transform business operations with the security, flexibility, and scalability of a Microsoft Cloud solution that grows with your business.

Work smarter

Empower people with Copilot capabilities and connectivity to Microsoft 365 so your team can be more productive, collaborative, and effective.

Perform better

Access guided workflows and timely data that drives continuous process optimization, accelerates financial close, and improves decision-making.

Contact us to get started today.

Talk to an Expert