Crestwood Associates
ERP Solution Experts

Microsoft

Adopting AI-powered cloud technology

An SMB's guide to growing faster with Microsoft Dynamics 365 Business Central

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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

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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 the first comprehensive business management solution that uses Copilot to boost productivity, spark creativity, and improve business performance with next-generation AI. It also allows users to work seamlessly with familiar Microsoft 365 apps like Outlook, Excel, and Teams to reduce app switching while offering world-class security, flexibility, and scalability only available in the Microsoft cloud.

2. "The Total Economic Impact™ of Microsoft Dynamics 365 Business Central," Forrester, 2023

40,000+

growing businesses are already benefitting from Dynamics 365 Business Central.

172% ROI in three years.[2]

Up to 18% increase in productivity.[2]

$30,000 savings in avoided third-party fees annually.[2]

The Microsoft Cloud difference

For years, we have seen cloud technologies provide a critical advantage for addressing the top business priorities and enabling businesses to:

- **Adapt to new technologies.**
- **Improve security, privacy, and reliability.**
- **Enable scalability, flexibility, and easier onboarding.**
- **Free up IT resources to focus on high-value work.**
- **Accelerate business insights.**
- **Remain current and compliant.**

The Microsoft Cloud takes these benefits a step further so you can run your entire digital infrastructure within the cloud. In fact, Dynamics 365 is the only business management platform that natively integrates with Microsoft 365, giving you unparalleled integration across systems and processes for better productivity and collaboration in one solution.

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 performance metrics to enhance financial performance.

Meet your sustainability goals.

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

Finish projects on time and on budget.

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

Optimize inventory and supply chain management.

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

Boost sales and improve customer service.

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

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Realize more value with Copilot in Dynamics 365 Business Central

Copilot capabilities are natively available in Dynamics 365 Business Central and Microsoft 365 applications, so users can take advantage of leading AI to accelerate productivity and enable a whole new way to work.

The ability to access Copilot within the tools they work best enables users to improve the end-to-end customer experience, reduce costs, and boost financial success. Additionally, Copilot can automate repetitive tasks, analyze data, and provide personalized recommendations for more efficient business operations that support growth goals.

Unlock more possibilities with Copilot

Crestwood Associates can train your employees on how to put Copilot to work for them across the use cases that are most relevant to their functions.

Copilot as an assistant

Stay organized, collaborate better, and improve communications with the AI capabilities in Copilot to stay focused on the most impactful work.

Hold more productive meetings.

> Provide a list of all the action items from this meeting and send it to all invitees.

Summarize conversations quickly.

> Summarize all the Teams threads regarding the new product update and highlight any key takeaways.

Copilot as an advisor

Analyze complex data sets and get clear, actionable recommendations from Copilot to navigate challenges, predict trends, and make more informed decisions to drive optimal business outcomes.

Maximize untapped insights.

> Review our latest water and electricity consumption data. Provide an update on how it aligns with our annual sustainability goals.

Draft story-driven presentations in seconds.

> Build a PowerPoint presentation for a company update on last quarter's financial performance.

Copilot as an orchestrator

Benefit from continuous process optimization for smooth operations across your entire business with Copilot.

Coordinate data, privacy, and security.

> Summarize the latest compliance update document. List out any changes that could impact our data and security protocols.

Unlock improvement opportunities.

> Identify bottlenecks in our current month-end close process. Recommend ways to streamline reconciliations and automate routine tasks for faster completion.

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Dynamics 365 Business Central with Copilot 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 [Partner Name].

  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.

Microsoft 365

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 Associates 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 impactful.

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