



# The CFO's guide for replacing financial management software in a Not-for-Profit Organisation

Replacing your financial management software is easier and more affordable than you may think. Use this guide to learn about the benefits of a modern technology platform in a not-for-profit setting. Discover the flexibility of a robust reporting platform, better understand the advantages of a cloud-based solution, and know what questions to ask when evaluating your options.



# Keep pace with evolving funding streams, client services and business requirements

As your clients' needs for services change, are your accounting and business management systems able to keep pace with the multiple funding streams and services you offer?

You need a modern technology platform that connects your business and your people like never before. A comprehensive business management solution for businesses that can:

- Automatically pull your systems and processes together so your people don't have to.
- Give you a complete picture from across your business, with reports when and where you need them.
- Get you up and running quickly, so change doesn't get in the way of your day-to-day.

With adaptable applications in the cloud. You can create efficiency across your business processes, help your people make informed decisions, and leverage your funding streams and services to meet the needs of your clients and community.

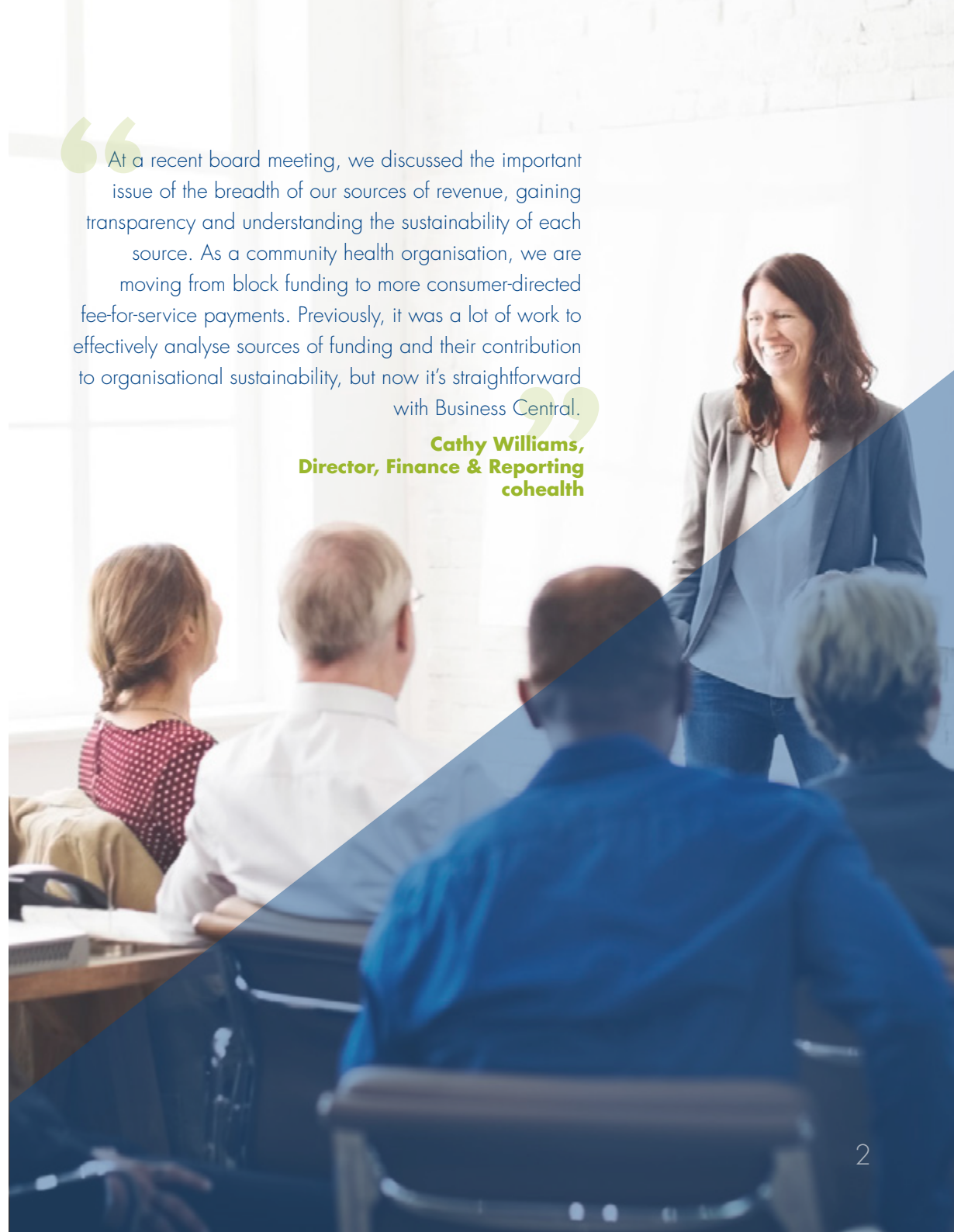
Information silos, disconnected systems, and manual processes keep you from delivering the experience your customers expect and ultimately can put your health organisation at risk. But what kind of solution is right for your business needs today and your goals for future growth? How can you best prepare 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.

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At a recent board meeting, we discussed the important issue of the breadth of our sources of revenue, gaining transparency and understanding the sustainability of each source. As a community health organisation, we are moving from block funding to more consumer-directed fee-for-service payments. Previously, it was a lot of work to effectively analyse sources of funding and their contribution to organisational sustainability, but now it's straightforward with Business Central.

**Cathy Williams,**  
**Director, Finance & Reporting**  
**cohealth**

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# Signs your basic accounting software or legacy systems are putting your business at risk

As your organisation grows in size and complexity, and your clients expect better and faster service, the tools that once supported you may now be standing in your way. For growing organisations, 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 hours in manual processing, customer dissatisfaction, or compliance risks, failing to update your technology can be a costly decision.

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

- We waste too much time dealing with multiple systems that can't talk to each other.
- Manual processes are error prone and can't keep up with increasing demand despite added headcount.
- Creating and configuring reports is too complicated, and often doesn't give us the information we need.
- Incomplete or incorrect information creates customer dissatisfaction and impacts services.
- Increasingly stringent compliance and security concerns keep you up at night.
- Productivity is lost spending valuable time switching back and forth between multiple applications and disconnected systems.

Why growing organisations 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 not-for-profit organisations to update their systems. The cloud has opened up new avenues to affordably expand capabilities, create greater efficiency and mobility, provide the services that matter to your community and be prepared for ever-changing business conditions.

With so many technology vendors competing for your business, it can be tricky to differentiate between solutions and find the best fit for your business.

Characteristics of a modern technology platform like Microsoft Dynamics 365 Business Central include:

**Comprehensive integration.** Deploy one solution to manage your financials, sales, service, and operations with the ability to connect applications like online payments, budgeting and forecasting, banking apps, CRM systems, payroll or custom APIs.

**Connects your entire business.** Automatically pulls your systems and processes together so your people don't have to.

**Automates and secures business processes.** Improve productivity and get more done with easy-to-create workflows, audit trails, and enterprise-level security—features that basic accounting software can't provide.

"Business Central saves us time on so many different levels including faster bank reconciliation and payroll processing."

**Nancy Binotto, Financial Controller,  
Ramahyuck District Aboriginal Corporation**

**Provide an end-to-end view of your business.** Centralise your data from accounting, sales, purchasing, inventory, and customer interactions to get an accurate end-to-end view of your business. All data stays up to date so you can spot trends, prevent issues, and deliver great customer experiences.

"We will always have multiple funding streams, including grant-funding and consumer-directed care, and fee for service. Now have much better financial information, which supports strategic decisions about which funding streams to pursue. Getting that richness of analysis was essential."

**Cathy Williams, Director, Finance & Reporting, cohealth**

**Reporting that enables quicker decision making.** Month-end reports that can be delivered to the board in days not weeks. Making decisions based on the correct information for one 'source of truth'.

"As soon as month end's done, it's really a five-minute job for the reports to just appear, so that's been a big benefit for us."

**Mark Terry, General Manager, Finance & IT  
Carrington Health & healthAbility**

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

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

**Fast from the start.** Delivers an easy-to-learn solution that people just intuitively know how to use.

# You recognise 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?





## The dollars and sense of business applications in the cloud

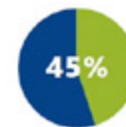
Not-for-profit organisations of all sizes are making the move to the cloud to modernise their technology platform, gain overall system efficiency, and enable their teams to stay connected to the data they need in order to meet customer demands from virtually anywhere. Here are the top business benefits that are driving not-for-profit organisations to move to the cloud.

### Why should businesses move to the cloud?



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

*Source: Microsoft commissioned survey*



**45% of businesses 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 businesses 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.

**Virtualisation.** Virtualisation creates a layer of abstraction between hardware and software, enabling entire datacentres 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.



# Why choose Microsoft Dynamics 365 to run your business

Microsoft Dynamics 365 Business Central is a business management solution that's connecting people and processes like never before. From day one, it makes managing your financials, sales, service, and operations easier and faster.

Turn your multiple disconnected systems into one. Boost efficiency with automated tasks and workflows—all from within familiar Office tools like Outlook, Word, and Excel. Get a complete picture of your business and make better business decisions, with built-in intelligence when and where you need it.

With your business running in the cloud, it's easy to change and adapt at your own pace without IT. Start with what you need, quickly and easily, then be ready for growth.

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:

"We now have a finance system that aligns strategically with our Microsoft software stack and its functionality is better,"

**Eddie McFall, Strategic Projects Lead, cohealth**

## Connect your business

### **Bring your systems and processes together**

Unify your business from finance and operations to sales and marketing with a comprehensive and modern solution. Easily integrate to applications like payroll, banking apps, or custom APIs.

Get the same consistent and secure experience whether on a desktop, laptop, tablet or phone. Access customer information, create sales orders, review and approve quotes and purchase orders—wherever business takes you.

### **Streamline quote to cash, all within Office 365**

Shorten the time from quote to cash when you can set up customers or vendors, create quotes, process orders, and submit invoices without leaving Outlook. Send your invoices as PDF attachments that include a payment link to expedite payments.

Use familiar Office 365 tools to work together and connect with colleagues and customers. Create professional-looking business documents using customisable Microsoft Word templates. Easily export and update data in Microsoft Excel.

### **Automate and secure your processes**

Improve productivity and get more done with easy-to-create workflows, audit trails, and enterprise-level security.

Connect workflows across sales and accounting to automatically track cash flow. Secure purchasing, credit authorisation, and vendor payment processes with pre-defined alerts and approval workflows.

# Make smarter business decisions

## Get an end-to-end view

Centralise your data from finance, sales, service, and operations to get an accurate end-to-end view of your business. All data stays up to date, so you can spot trends, prevent issues, and deliver great customer experiences.

## Sell smarter and improve client service

Configurable dashboards and multidimensional reports help you analyse key performance indicators (KPIs), inventory, sales, and order status. Easily track ongoing sales performance and leverage actionable insights to focus on customers that have the greatest potential for long-term growth.

Gain a comprehensive overview of your service tasks, workloads, and employee skills to effectively assign resources and accelerate case resolution.

## Guide employees to optimal outcomes

Use built-in intelligence to predict which clients are more likely to pay late based on historical payment records and leverage this information to reach out before services may be cancelled.

Get built-in recommendations on when to pay vendors to take advantage of vendor discounts or avoid overdue penalties.

Manage budgets and monitor progress with real-time data on available resources.

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Having the visibility, to see the dashboard as soon as you enter the home screen of Business Central. You can see the Total Sales, and what Invoices are overdue. I also know how many invoices we've got to pay, so in an instant you can get a mental picture of your cash requirements which is so critical for a not-for-profit.

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**Narelle Lowe,**  
**Finance Manager**  
**The Australian Childhood Foundation**



# Start and grow easily

## Tailor to your needs

Customise and adapt applications to support your unique business needs. With a simple drag-and-drop interface, you can rearrange fields, rename groups, and reposition elements.

Manage budgets and monitor progress with real-time data on available resources.

## Add industry or business extensions

By working with Evolution Business Systems your Dynamics 365 Business Central partner you can leverage pre-built applications to easily and cost effectively extend Dynamics 365 to fit your community health organisations' needs. Combine with Microsoft PowerApps to compose new applications and extend existing business processes.

## Be ready for growth

Start with what you need and grow at your own pace to run your entire business in the cloud. Easily import data from other solutions using data migration wizards and assisted setup. Get contextual guidance with in-product tutorials, when and where you need it. Handle the most common business processes from day one, like quotes, orders, invoicing, purchasing, cash management, and reporting. It's built in the cloud, so it's easy to set up, manage and scale.

"Business Central offers us a system that can scale up as we expand."

**Lakshmi Narayanan, Head Of Operations,  
Connecting Home Limited**

“Data is the new oil. The more information you can provide about the success of what's going on, the more governments can demonstrate why they have invested in that area. Providing evidence-based reporting that demonstrates the value of projects funded by the money we receive, proving to both governments and our membership that we have advocated for the right projects.”

**Peter Mitchell, Executive Manager RTO  
VACCHO**

# Take the next steps for your business

There's never been a better time to update your systems and take advantage of all the benefits of cloud-based business applications. Learn more about the capabilities of Microsoft Dynamics 365 Business Central, and see it in action.

**evolution**  
business systems®  
*'making it happen'*

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