



# Grow Your Business with Confidence

A Guide for Businesses  
Outgrowing QuickBooks




# Keep Your Business Going and Growing

Whether you make widgets, sell services, or move merchandise, you depend on your people, and your people depend on the tools you give them to manage your key business processes. Many companies reach a tipping point where the very tools and systems that supported their initial growth begin to hinder their ability to act with agility and insight.

As your business diversifies and grows in complexity, you need more than basic bookkeeping, inventory management, and backward-looking reporting. You need a complete business management solution that takes advantage of the latest innovations, from cloud computing to mobility and social connectivity—delivered without a burden to your people and risk to your cash flow.

Evaluating new business management solutions may seem daunting. But the options and resources available for small to mid-sized 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.

# Five Signs QuickBooks May Be Hindering Your Growth

Are the people in your office wasting valuable time duplicating 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 scale operations to support business growth.** If your business is stifled by the number of people who can access information, transaction limits, or the size restrictions of your database, it's time to find a solution that can scale to support your growth. 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 your business.** There used to be a one-to-one correspondence between your employees and the business functions they managed. Now 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 without proper tracking, it's difficult to trace who has done what. Protect your business with a 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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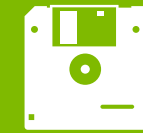
## Why companies adopt new business management solutions



54%  
Process integration



50%  
Resolve order processing issues



50%  
Hardware & software obsolescence



38%  
Resolve data duplication/errors



35%  
Reduce excess inventory

# Five Signs QuickBooks May Be Hindering Your Growth

**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 support a mobile workforce.** The traditional workplace isn't so traditional anymore, and business doesn't stop because you're on the road or working from home. Keep your people connected, productive, and happy with systems that support the mobility and flexibility they expect.

**You can't meet customer expectations.** Are you using QuickBooks to manage your finances and other systems to track customer interactions, or manage delivery? If you don't have an end-to-end view of your business to track customer interactions, forecast demand, and manage your finances, and if those systems don't talk to each other, you may find yourself unable to meet customer expectations. To succeed in an increasingly competitive 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 Planning (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 industries.

You'll need to determine the basic functionality you require. But if 90 percent 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 the trustworthiness and stability of the provider.



# 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. Make sure you select a vendor who offers a solution with:

- **A simple, intuitive user experience.** Nothing increases user adoption and lowers training costs more than a role-specific interface, personalized tasks and reports, and clear workflows.
- **Built-in productivity tools.** Managing your business is much easier when your calendar, email, and business management software work together—and are delivered by one trusted source. A solution that can connect and integrate the system used to manage your finances, supply chain, and operations with the productivity tools in Microsoft® Office with one single sign-on will simplify tasks and increase efficiency.



## Why businesses move to the cloud

64%

Lets us experiment more easily and at low cost

61%

Enables deeper collaboration with business partners

60%

Frees up IT resources to work on more strategic things

57%

Is a source of competitive advantage for early adopters

Source: "SMB Business in the Cloud 2012." How the Cloud Looks from the Top: Achieving Competitive Advantage in the Age of Cloud Computing. A Harvard Business Review Analytic Services Report.

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—desktops, laptops, tablets, and smartphones—your people use to be productive, and then determine how the solutions you are evaluating can support those devices and the key applications used by your employees. A best-in-class solution will be accessible on the devices they use most, 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 would you prefer to maintain a cloud-based solution? If you're using an outdated legacy system, do you want to move to an outsourced or a cloud-based deployment?

A cloud-based solution, for example, can eliminate large, upfront hardware investments and reduce staffing needs, while an on-premises deployment may give you greater control of where your data resides and future upgrades. The best solutions provide choice for cloud-based, on-premises, and hybrid deployments to accommodate the unique needs and demands of your business.

## 4

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

Most companies don't fly 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 understand the importance of delivering 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 hostage in a long-term contract, they could be putting your business at risk.

## 5

### Does the vendor understand and focus on the needs of small and mid-sized 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 efficacy and average order size
- Increase inventory turns while reducing stock-outs
- Reduce production costs

As you evaluate vendors, consider their track records for helping businesses like yours achieve the results you want. Ask for case studies that represent customers of similar size and industry focus and be sure to verify references. It's a big decision. Do your homework.

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



Test drive a  
business solution  
from Microsoft.

Try it now



## Grow Without Growing Pains with a Business Solution from Microsoft

The best business solutions are powerful, easy to use, and flexible—and they're also from Microsoft. Our business management solutions are easy to learn and use and quick to implement, so you can transcend the limits of your overworked and undersized accounting software. With a business solution from Microsoft, you can:

### **Connect people, processes, and systems all from one place**

Managing your business is much easier when your calendar, email, and business management systems work together—and are delivered from one trusted source. A business solution from Microsoft brings the business management capabilities of Microsoft Dynamics together with Office 365™ to break down the walls between data and how people get work done. With one unified user experience and a single sign-on, you get the tools you need to manage your finances, supply chain, and operations, to keep your people productive.

### **Get everything you need to work where you're needed most**

Business doesn't stop because you're on the road or working from home. Monitor your business and enable people to work where and when they're needed most. Using Microsoft Dynamics and Office 365, you can monitor your business, collaborate on documents, and enter and approve transactions from your desktop, tablet, or phone—wherever you may be.

### **Support your growth ambitions**

A global network of Microsoft Dynamics Certified Partners with industry expertise and a wide range of packaged and customized solutions sell and implement our solutions. RapidStart tools enable faster, lower-risk implementations and migration of existing data, so you get up and running in hours or days instead of weeks or months. In the cloud or on your servers, start with what you need now and add capabilities and users as your business grows.

## Get Started with Microsoft Dynamics

**Visit us** to speak with a Microsoft representative, view a demo, or learn more about our solutions for small and mid-sized businesses.

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

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