Xperience

Switch... How does it work?

At Xperience we want to take the complexities and often high costs out of changing ERP systems. Our Switch program means that in as little as 8 days you can switch over to Microsoft Dynamics 365 Business Central and start seeing the immediate benefits of the solution.

So exactly what does the Switch base program look like? Below is our implementation approach which takes you across your 8 day project.

Tasks

Day 1
Project Kick Off

System Set-up

Day 2
Data Workshop

Day 3
Core System Training

Day 4
Readiness Workshop &Support

Day 5
Readiness Workshop &Support

Day 6
Advanced Systems Training

Day 7
Go Live Prep

Day 8
Go Live

Ok, so I understand the plan, but tell me more about the tasks? Exactly what is involved?

1 Project Kick Off

It is time to get started and meet your Switch team. During a kick off call using Microsoft Teams technology we will introduce you to the consultants who will take you through your project. There will be time for introductions and who is who. We want to get to know all of your team as much as we want you to know ours! This call will be to walk through your requirements and project expectations. We like to set measurable goals which are reviewed throughout your project. Alongside your expectations and objectives we aim to ensure these are reviewed at the end of the project, that way you know the project has been a success for your business. We will talk you through how the program will work and ensure you are fully aware of all tasks ahead and who needs to do what. Getting this all set at the start will be key to success!

2 System Set-up

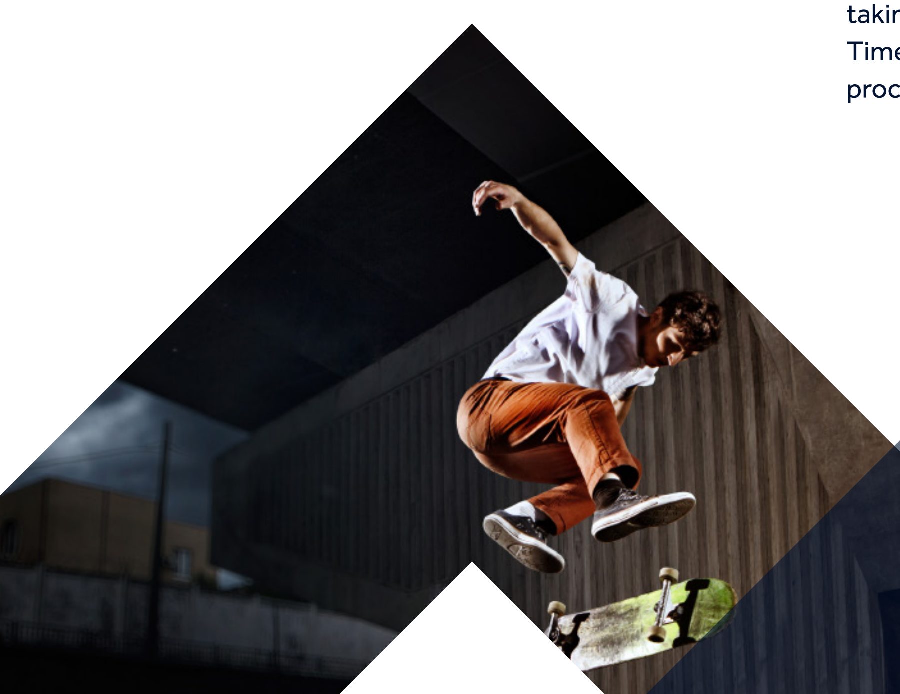
Step 2 is for Xperience. So, you can sit back, relax and start thinking about all the great things you will get from your new solution! In the background we will be working to set-up your system. We will need a few pieces of information on your business and users to get us started and we will cover that at project kick off.

3 Data Workshop

This is where you come in! In order to ensure you have the information you need we will require your system to have your data. During the workshop we will walk you through the data migration templates and what information is needed to get your system off to a good start. We will explain all the tables making it as easy as possible for you to work through. Your team will then prepare the templates with your data ready for Xperience to import. We do know this part can be quite daunting and we can provide extra assistance here if you need. Our team are happy to chat through our data migration bundles and the benefit these could bring to your project.

4 Core System Training

It's time to get training! Get your key team members together for your first training session. During this session, we will be going through the Business Central basics and introductions focusing on the look, feel and general system navigation. Once the system overview is complete it will be on to the core financials with a focus on your customer and vendor records and taking you through order and invoice processing. Time will also be spent on reviewing cash processing and bank transactions.



5 Readiness Workshop & Support

It is over to your team to take some time to review everything which has been covered in the core system training. Familarise yourself with the solution and start testing some things out. Put the system through its paces with our Switch Consultants on hand for all your questions and needs.

6 Advanced Systems Training

Now it's time for your second training session. We will make sure to start with any queries you had during your readiness workshop and will move on to more advanced areas including bank reconciliations and VAT. During this session we will also cover off core system reporting with your teams.

7 Go Live Prep

It is almost time to “hit the button” so we want to make sure everything is set for success, We will cover any final questions and training with your team and walk you through how to bring across your opening balances. Finally, we will spend time reviewing the data you have been prepping to ensure it's all set for your transition to the live system.

8 Go Live

This is it, time to ‘Switch” over. We are there for those last minute questions and to “hold your hand” through your first day of processing on your new solution. Once finished we will get you ready for hand-over to our dedicated support team. Walking you through the support desk process and making sure you have access to the tools you need to efficiently log and monitor any support queries you have.

Once you are live your Switch program will include one further session for you to use when you need. This could be to cover some further staff training with your team or to walk you through your next month end. The day is there for you to use as you and your team need it.

Xperience

Contact Details:

W: www.**xperience-group**.com
E: enquiries@xperience-group.com