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 you can switch over to Microsoft Dynamics 365 Business Central quickly and efficiently so you can start seeing the immediate benefits and return on your solution.

So exactly what does the Switch base program look like?
Below is our implementation approach which takes you through our steps.

Steps

Day 1
Project Kick-Off

Day 2
System Set up

Day 3
Data Workshop

Day 4
Core System Training

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

The kick-off session is a remote meeting conducted via Microsoft Teams, designed to guide you through the core steps of your project. During this session, you will meet the consultants who will support you throughout the implementation process. This is not an opportunity to customize or tailor the system but rather to follow our proven, standardized implementation methodology for a rapid return on investment. We will walk you through the structured project plan, outlining key milestones, responsibilities, and timelines to ensure a smooth deployment. This session will provide clear guidance on what needs to be done, when it needs to happen, and who is responsible. Setting these expectations from the outset is essential for a successful implementation. It's time to get started and meet your Switch team!

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 of 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. If you're migrating from Sage 50 and have purchased our BC Switch migration plan, you won't need to worry about filling out any templates. We'll handle the entire data migration for you, including historical information, ensuring everything is ready to use within the Business Central solution.

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 our 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. If you're migrating from Sage 50 and have purchased our BC Switch migration plan, we'll import your data and historical information again ready for go live. After a few final checks from you - we will transition you to live.

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.

Customer Responsibilities

To ensure a smooth and easy transition with Business Central Switch, there are a few customer prerequisites we would like to make you aware of. Completing the below checklist is essential to ensure a smooth and timely implementation.

1. Data Preparation & Migration

- Provide clean, structured data in the required format (e.g., chart of accounts, customers, vendors, items).
- Validate and approve migrated data before test migration and go-live.

2. Process Alignment & Decisions

- Understand that a Switch implementation follows standard Business Central best practices with standard configuration and no customisation.
- Make quick and informed decisions on configurations (e.g., financial dimensions, posting groups, workflows).

3. Users, Roles & Security Setup

- Assign internal owners for defining user, user roles and permissions.
- Ensure key users are available for setup, testing, and validation.

4. Testing & Validation

- Conduct UAT (User Acceptance Testing) within the agreed timeframe.
- Report issues promptly and test fixes provided.

5. Training & Adoption

- Ensure users complete training sessions.
- Drive internal buy-in and process adoption.

6. Change Management & Communication

- Set expectations internally that some processes may need to change.
- Assign an internal project sponsor to facilitate communication.

7. Go -Live Readiness

- Perform final data reconciliation.
- Assign support contacts for immediate post-go-live trouble shooting.

Contact Details:
www.xperience-group.com
enquiries@xperience-group.com

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