

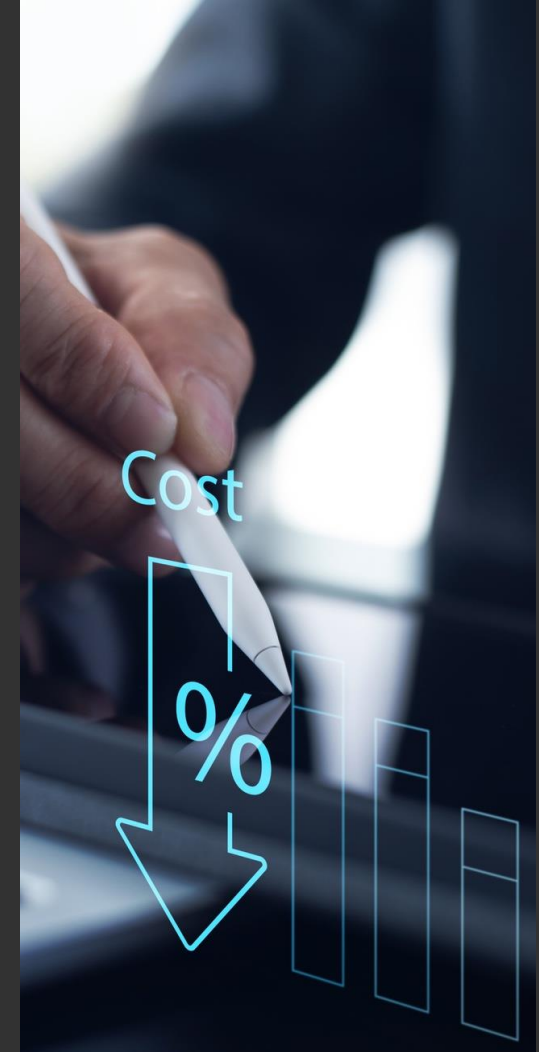
# Quickbooks to Business Central Financials Migration

# Quickbooks to Microsoft Dynamics 365

## Business Central Financials

### DEFINITION

Citrin Cooperman will help you migrate off of Quickbooks financials and unlock the power of a modern platform. Role-based experiences drive efficiency while automation and even AI (artificial intelligence) augment your team to support your firm's growth. You will move to a new platform with your legacy data ready to manage your business with new tools.





# Value Proposition

## WHY CITRIN COOPERMAN?

- Holistic approach to improving your business providing new perspectives on long- and short-term strategies
- Comprehensive business consulting firm with practices designed to serve every one of your business needs
  - Digital Services
  - Advisory
  - Assurance
  - Tax
- Experienced professionals driven by focused industry verticals
- Finding innovative solutions drives our professionals and helps you succeed



# Digital Services Works

## Differentiator

- ✓ Proprietary value delivery system
- ✓ Repeatable method for digital transformation
- ✓ 14 stages
- ✓ All stages aim to provide lasting value
- ✓ System creation starts with client engagement
- ✓ Provides long-term support
- ✓ Offers connected support systems





# Key Problems/Challenges

## WHY NOW?

- “Quickbooks’ limited capabilities are forcing my team to use Excel for the calculations for manual journal entries.”
- “All of our reporting is in Excel because QB’s out-of-the-box options did not fit our business. I am concerned about accuracy and security.”
- “We are hitting the data limit for QB’s on top of all the storage of our Excel records. This is getting expensive and inefficient.”
- “We are growing pretty fast. Sometimes performance isn’t great.”
- “Closing any accounting period takes way too long. Last month we didn’t close until the 15<sup>th</sup>.”
- “Deferred expenses don’t ever seem to be accurate. The dates are usually off and I always have to check the amounts.”
- “I want to explore tracking my financials based on cash and accruals. Quickbooks is not letting me maneuver very easily.”
- “Even though I am focused on financials today, my business is going to need an integrated environment, so my team uses all of our data.”





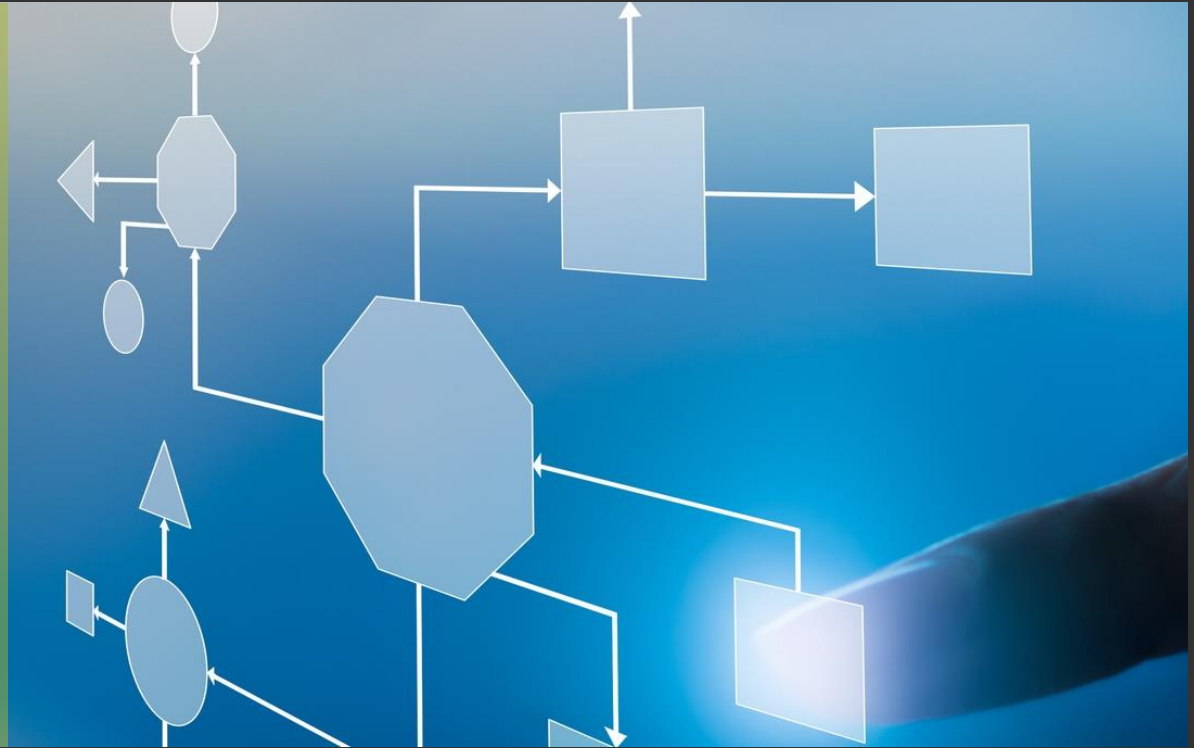
# Migration to Business Central Tiers



\*Starting price. Pricing may vary based on complexity. Discovery will provide the details to price each process accurately.



# What is Our Digital Transformation Maturity Model?



- Citrin Cooperman's Digital Transformation Maturity Model (DMTT) is for companies that need modern, secure technologies to manage the evolving needs of a growing company.

- The Digital Transformation Maturity Model's progressive levels are based on leading practices and solutions that are sized for your business today and form the foundation for tomorrow.



# Digital Transformation Maturity Model

- Proprietary customer lifetime management program
- Four holistic levels reaching beyond financials and operations systems
- All stages aim to deliver lasting value
- Industry specific leading practices increase speed to value for your company







# Thank You

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