

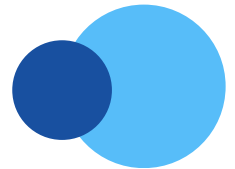
ERP Roadmap Self Assessment

This short assessment helps nonprofits on GP understand:

- How sustainable their current GP environment is
- How ready the organization is for cloud ERP
- Whether Business Central might be a good functional fit

How It Works

1. Answer the 18 questions on the next page.
2. Get a quick snapshot of your readiness and risk.
3. Reach out to a Microsoft partner for a thorough assessment.



Evaluation Includes

Cloud Readiness: Your organization's readiness to move off GP and into the cloud


Business Central Fit: How well Microsoft's cloud ERP aligns with your needs

GP Risk: How risky it might be to stay put another few years

Dive Deeper

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Current GP Environment

- Our current Dynamics GP version is well-aligned with Microsoft support timelines.
1 2 3 4 5
- Our GP deployment (on-prem or hosted) is easy to support and does not strain IT resources.
1 2 3 4 5
- Our GP environment relies on minimal customizations or workarounds.
1 2 3 4 5
- We are not overly dependent on GP-specific third-party add-ons.
1 2 3 4 5

Financial & Operational Complexity

- Our grant and restricted fund accounting is well-structured and manageable.
1 2 3 4 5
- The volume of active grants we manage is reasonable for our current systems.
1 2 3 4 5
- We track programs, funds, locations, and donors in a consistent, standardized way.
1 2 3 4 5
- Intercompany or multi-entity accounting is limited or straightforward.
1 2 3 4 5
- Approval workflows (AP, journals, budgets, grants) are clear and repeatable.
1 2 3 4 5

Reporting, Audit & Risk

- Leadership and the board receive timely, trusted financial reports.
1 2 3 4 5
- Audit preparation is efficient and does not require excessive manual work.
1 2 3 4 5
- We are confident in the security and reliability of our current ERP environment.
1 2 3 4 5
- GP does not limit our ability to operate efficiently or scale programs.
1 2 3 4 5
- Knowledge of GP is well-documented and not concentrated with one or two individuals.
1 2 3 4 5

Future Readiness

- We expect minimal disruption from organizational growth or change over the next 3-5 years.
1 2 3 4 5
- Our organization is open to improving processes rather than replicating current ones.
1 2 3 4 5
- We see value in moving toward modern, cloud-based systems when the time is right.
1 2 3 4 5
- Our ERP timeline is flexible enough to allow thoughtful planning.
1 2 3 4 5