

# Dynamics GP Hosting Risk Check

## What This Is

A focused checklist to help nonprofit finance and IT leaders understand which risks remain even when Dynamics GP is hosted in the cloud.

Hosting improves access and infrastructure stability, but it does not address product evolution, reporting expectations, automation opportunities, or long-term operational efficiency.

## Who It's For

Nonprofit organizations currently using Dynamics GP in a hosted or cloud environment that want to understand what risks hosting does not mitigate.

Key participants typically include the CFO or VP of Finance, Controller, IT leadership, and compliance or audit stakeholders.

## What It Means

This checklist is designed to surface:

- Risks that hosting does not eliminate
- Areas requiring planning rather than just monitoring
- Gaps between perceived safety and actual exposure
- Readiness for deeper evaluation or roadmap planning

*This self-evaluation is designed to help you determine whether a hosted Dynamics GP environment is still supporting your organization's operational, reporting, and growth needs or if it is increasingly limiting progress. Statements identified as false might highlight risks that hosting hasn't resolved.*

## Instructions

Determine whether each statement is true or false for your organization.

### 1) Hosting & Platform Value

- Hosting has reduced not only downtime, but also the overall effort required to manage and support GP.
- Our IT team spends less time troubleshooting or maintaining GP than they did prior to hosting.
- Hosting has enabled meaningful new capabilities for finance or operations, not just remote access.
- If we were evaluating ERP options today, hosting alone would still make GP a strong long-term choice.
- Hosting feels like a strategic platform decision, not simply a way to extend GP's lifespan.

### 2) Product Lifecycle & Strategic Fit

- We clearly understand Microsoft's Dynamics GP lifecycle and how it aligns with our organizational timeline.
- Leadership understands not only support timelines, but what innovations and capabilities GP will not receive going forward.
- We are comfortable continuing to invest time and money in a system with a shrinking innovation roadmap.
- We believe GP will continue to meet our reporting, compliance, and operational needs three to five years from now.
- The board or executive team understands the business trade-offs of staying on GP versus modernizing earlier.

### 3) Financial Close, Reporting & Visibility

- Month-end close meets leadership expectations for speed, accuracy, and confidence.
- Finance spends more time analyzing results than preparing and reconciling data.
- Leadership can get timely answers without waiting for manual reports or spreadsheet consolidation.
- Reporting across entities, programs, or funding sources does not require extensive Excel work.
- We trust that everyone is working from the same numbers without needing offline validation.
- GP enables real-time or near-real-time visibility, not just historical reporting.
- Reporting limitations do not slow decision-making or strategic discussions.

### 4) Audit, Compliance & Controls

- Audit preparation does not rely heavily on spreadsheets or manual workarounds.
- Auditors rely primarily on system-generated reports rather than custom extracts.
- Approval workflows, audit trails, and segregation of duties are easy to demonstrate and defend.
- Compliance requirements are met without explaining exceptions or system limitations.
- We would feel comfortable defending our current ERP posture to auditors two to three years from now if requirements increased.

## 5) Integration, Automation & Innovation Readiness

- Our ERP supports automation initiatives we want to pursue in the next 12–24 months.
- GP does not limit our ability to modernize workflows or streamline operations.
- Integrations are stable, easy to maintain, and not fragile or person-dependent.
- Reporting and data access are handled within the system, not increasingly outside of it.
- Our ERP can reasonably support emerging capabilities such as AI-assisted processing, automation, or advanced analytics.
- We are not delaying innovation because GP cannot support it effectively.

## 6) Talent, Support & Dependency Risk

- We are not reliant on one or two individuals for critical GP knowledge.
- If our primary GP expert left, operations would continue with minimal disruption.
- GP expertise is easy and cost-effective to source when needed.
- Support costs have remained stable and predictable over time.
- Key processes are well documented and not dependent on custom code or tribal knowledge.
- System limitations are not preventing staff from improving or streamlining processes.

## 7) Operational Impact & Future Readiness

- We understand the time and efficiency cost of staying on GP today, not just in the future.
- We can clearly articulate which limitations we are tolerating versus which are actively holding us back.
- Waiting to modernize is a deliberate decision, not simply the path of least resistance.
- Earlier planning would likely reduce disruption compared to a delayed, reactive transition.
- If we were selecting an ERP for the first time today, GP would still be a finalist.

## 8) Overall Readiness & Next Steps

- We have identified which risks and limitations are acceptable short-term and which are not.
- We know whether hosting is buying time strategically or simply postponing change.
- We have alignment on whether continued investment in GP supports our long-term goals.
- We are prepared to take a proactive planning step rather than waiting for urgency to force action.

## Understanding Your Results

A high number of “false” statements could indicate that GP is no longer just a system risk, but is also becoming a constraint on your organization’s visibility, efficiency, and innovation. For an in-depth risk assessment, contact Cara Franklin, Boyer’s Nonprofit Business Development Director.