CASE STUDY: Heart & Stroke Foundation

Addressing foundational challenges in a hybrid work environment by upgrading Dynamics GP to Dynamics 365 Business Central.

AT A GLANCE

Challenges

- Outdated version of Microsoft Dynamics
- Transition to a new, hybrid work model
- Employees dispersed across Canada
- Hindered operational efficiency and security

Benefits

- Prioritized user experience
- New solution accessible from anywhere to accommodate new hybrid environment
- More efficient and user-friendly financial ecosystem

"360 Visibility's experience, expert knowledge, and collaborative approach ensured the successful implementation of a cloud-based solution that addressed our challenges, generated operational efficiencies, and improved reporting capabilities.

The implementation of additional modules also contributed to automating payables, streamlining this process, and creating a significantly more user-friendly experience."

Senior Manager, Finance



OBJECTIVE

One of Canada's largest non-prfit organizations was using an outdated Microsoft Dynamics GP while transitioning to a new hybrid work model. Employees were dispersed across Canada and encompassed remote and in-office work setups. As a result, the organization required a cloud-based option to foster collaboration, enhance accessibility, streamline financial operations, and deliver accurate budget and analytics reports for core and non-core activities.

SOLUTION

The initial phase involved a comprehensive Business Impact Assessment. We analyzed their financial processes, workflow inefficiencies, and issues with their existing setup. We collaborated to craft a tailored solution and selected Microsoft Dynamics 365 Business Central. We complemented it with additional modules such as 360 Canadian EFT, Document Capture and Expense Management from Continia, to streamline operations and ensure a successful transition to a hybrid work environment.

BENEFITS

Reduced Costs and Enhanced Security

By automating payables and eliminating third-party services, The organization significantly reduced operational costs while enhancing security through the integration of Business Central permissions and Microsoft 365 features.

Future Growth

The transition to Microsoft Dynamics 365 prepared for scaling operations, and incorporating other Microsoft solutions, such as Copilot Artificial Intelligence, in the future.

Thorough Reporting

The flexible and granular reporting structure resulted in more thorough financial data and improved reporting capabilities. This aligned with the organization's need for enhanced analytics.

Improved Efficiency

By automating and simplifying various processes, such as purchasing, payables, electronic fund transfers, expenses, and journal approvals, we created a more efficient and user-friendly financial ecosystem.