

# HOW TO PLAN YOUR MOVE

from Dynamics NAV to  
Dynamics 365 Business Central



BY: **SEAN SOLBERG** 

Principal Solutions Engineer

# Table of Contents

## **PART 1: OVERVIEW**

What to expect in this series .....	3
Relocation.....	4
Selecting the location, size, design and security of your new home.....	4
Determining how much stuff you need to move .....	4
Making remodeling decisions .....	4
Setting up additional services .....	4

## **PART 2: DATA**

Setting up additional services .....	5
Data and the upgrade vs reimplement decision.....	6
Reimplement.....	6
Upgrade.....	7
Custom data and mapping.....	7

## **PART 3: CODE (EXTENSIONS, INTEGRATIONS AND ISVs)**

Extensions.....	8
Paradigm shift.....	8
Carry-forward decisions .....	9
Integrations and third-party applications (ISVs) .....	10

## **PART 4: ADDITIONAL PROJECT VARIABLES**

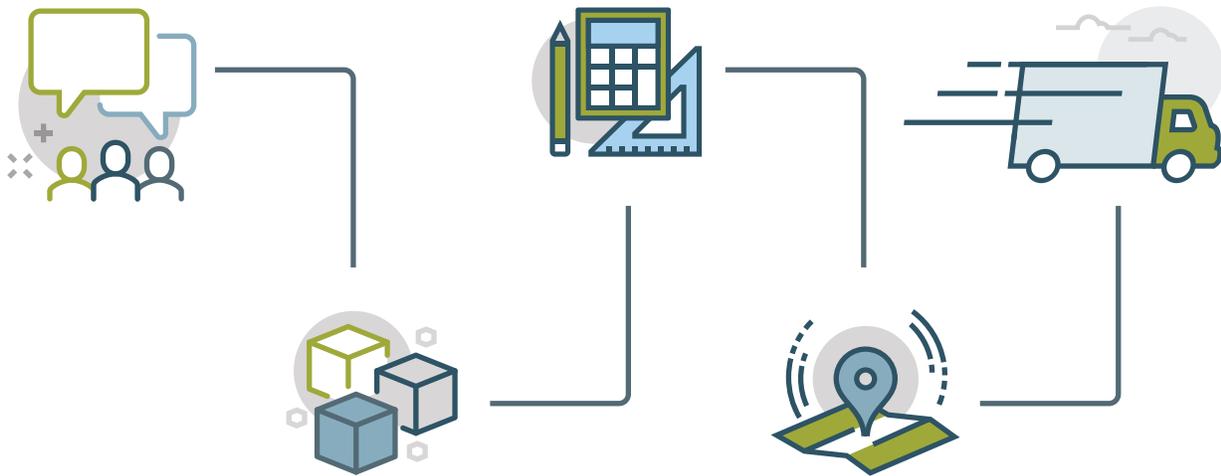
Team dynamics .....	11
Travel .....	11
Workflows .....	11
Security.....	12
Partner .....	12

## **PART 5: BUDGET & TIMELINE**

Estimating art balanced with partnership trust.....	13
Back of the napkin approach .....	14
Top-level estimate tool.....	15

## **DECIDING ON A PARTNER**

About Stoneridge Software .....	16
---------------------------------	----



The reasons to move from NAV to Business Central (BC) have been well documented and debated over the past few years. The mechanics of moving from NAV to BC, less so. In this series, we will work through the various decision points and how those individually impact your project.

---

In Part 1, we will provide an overview of your move, including the main variables that need to be considered. In Parts 2 and 3 of the series, we will dig deeper into data and processes. In Part 4, we will work through some additional project variables. In Part 5, we will cap the series with a tool for determining initial budget and timeline.

## RELOCATION

Consider you were just hired for a new job and need to relocate your family. Let's call your current home "NAV" and your new home "BC". You have NAV just the way you want it and have accumulated a lot of memories there. Unfortunately, your home is outdated and will soon cause headaches related to maintenance and local building code compatibility. BC will be a fresh start, but possibly with a bit of apprehension.

Just remember that people move all the time. While there are certainly horror stories floating around about bad moving services, damaged furniture and poorly planned moves, most moves are successful if you plan appropriately and have the right partner in the process.

While you start planning your move, some of the considerations are already determined. These include the city you are moving from, the city you are moving to, the distance in-between, the size of the house you are leaving, and the volume of furniture and belongings you have acquired over the years.

**Other variables are not pre-determined and require some decision-making. These include the following questions:**

- What kind of neighborhood to you want to live in? Services nearby? Association?
- How big does your new house need to be? Rooms? Extended family members?
- How will you move your stuff? Moving truck service or air freight? Move yourself? Multiple trips?
- How much do you leave behind? What do you need? Replacing furniture?
- Will your new house require any improvements before you move in? Remodeling? DIY?
- What utilities need to be set up in advance of your arrival? Same as today?
- Are any other services needed in advance? Security, home monitoring, lawn service?

## SELECTING THE LOCATION, SIZE, DESIGN AND SECURITY OF YOUR NEW HOME

Your new home could be in one of two neighborhoods (Cloud or On-Premises). One neighborhood has easy access to the highway and the other is more secluded. One comes with association fees and benefits, and the other might be cheaper but with more maintenance responsibility required from you.

Once you select your neighborhood, you can focus on the characteristics of the home itself. While all homes start with many of the same basic physical requirements, the size and layout of the home can vary depending on your family's needs. As an example, your mother-in-law or nephew may be living with you. You may also have a current renter willing to move with you. We'll call these people outside of your nuclear family "companies". Companies have their own needs that you will need to consider when selecting the design of your new home. Each one will need their own room and may share some common living spaces. If your current home works well, then you will want your new home to be structured similarly. Alternatively, this could be the right time to consider how your new home could be structured better.

While considering rooms, note that your family may not require the same as your current home. We might call these rooms "functional areas". Again, use your current home as a starting point. If you have a kid's craft room in your current home (ex: basic inventory), but your kids are now teenagers, maybe an additional office in your new home makes sense (ex: advanced warehousing). Other rooms should generally be the same (kitchen, dining room, bathroom -or- "financial management", "accounts receivable", "accounts payable").

You will also want to protect your new home – both from outside intrusions and from inside accidents. This is your security plan and it may differ somewhat from your old home. Good locks on the doors and possibly even some monitoring tools could be in order. If you have infants running around, you will also want to get outlets covered, protect stairs, lock low cupboards and secure fragile things around the house.



### **DETERMINING HOW MUCH STUFF YOU NEED TO MOVE**

The stuff you need to bring with you will be most impactful to the journey itself. Let's call this stuff "data". If you have a lot of data to move, you will almost certainly use a moving service. We'll pick a service called "Upgrade Guys and a Truck." They can load it all up, drive it to your new home, and even get it all set up in the appropriate rooms.

If you plan to leave a lot of data behind, then airfreight may be a better option. The right company for this job is "Reimplement Express". You can elect to handle the shipping, packing and unloading all or most of the boxes yourself. Most have the service do it for them, or some combination in the middle. While it would be considerably more expensive to airfreight ALL your data, if you are willing to really pare it down, then this might be the better approach.

### **MAKING REMODELING DECISIONS**

The remodel decision is the most impactful to budget. Your current home has a lot of customizations you made to it over the years. Your new home will likely have a similar foundation and general structure, but updated. As such, some of the things you did in past remodeling

jobs won't be needed. Other remodeling projects can be mostly done the same as before, using the same blueprints. A final set of potential remodeling projects will be opportunistic – changes you never made in your current home, but always wanted.

In conjunction with this decision, you might elect to make some of the needed improvements yourself. While the DIY approach does not always produce the best result, it can sometimes save you money and be "good enough" – just stay away from electrical and plumbing if possible.

### **SETTING UP ADDITIONAL SERVICES**

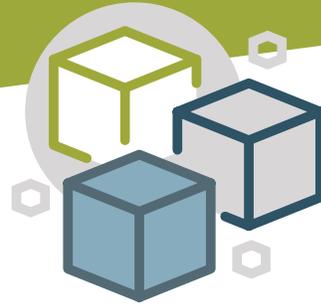
The next group of decisions is related to services. You will want some utilities ready when you move in. We will call these utilities "integrations". If the same power company supplies both your old home and your new home, that setup is relatively easy. Changing internet services might require a bit more effort.

In addition to utilities, there may be other services you need. These can be called "ISVs" or "third party solutions". These providers might offer home cleaning, grocery delivery, or lawn maintenance. They operate as an extension of your family and remove primary responsibility of these chores, allowing you to spend more time on other things.

#### **➔ Summary**

If the variables above are considered and planned, the project itself will fall neatly into place. The move will still require a lot of work (planning with contractors, trips to inspect the new home, garage sales, packing, coordinating services, moving weekend), but your new home should be ready for you to move into when you expect – and with the stuff you elected to bring with you.

These decision points will be reviewed in more detail within the next three parts of this series.



Data is the “stuff” you carry with you to your new home in Business Central. Code is the structure of your new home, including any remodeling needed and any services required. These two concepts are not mutually exclusive and the proper order of the conversation around these two points is debatable. More to the point, you can’t put furniture into a room that doesn’t exist and having a room without furniture isn’t very useful.

We will cover data first, in this part, because it more closely influences your decision on whether to upgrade (moving truck) or reimplement (air freight).

### DATA AND THE UPGRADE VS REIMPLEMENT DECISION

Upgrading versus reimplementing is the biggest decision you will make related to the project execution itself, although often not the most impactful decision from a budget perspective. In a nutshell, reimplementing is generally cleaner, but you will make some sacrifices. Most notably, you won’t take all your “stuff” with you.

We will first discuss data within the context of the two project approaches. This discussion excludes the concept of any custom data points (fields and tables) that you have created along the way. We will cover that next.

#### REIMPLEMENT

In a reimplementation, you start clean in an empty database and then add in only those things (data points) that are wanted from NAV. In the moving analogy, you would be flying a small subset of your belongings to your new home and not sending anything along in a moving truck. There is generally less to worry about because there is less to move.

To start, you minimally identify which master records to keep (ex’s: customers, vendors, items) and which open transactions are needed (ex’s: POs, SOs, Prod. Orders). This data will then also be separated into those things

to be loaded into BC through migration code (ex: customers) versus those to be re-entered manually (ex: open production orders).

Records are then ported from NAV to BC, along with limited history, likely including G/L history summarized by month/account/dimension combination, open A/R, open A/P, and item balances. You may also consider other migrations such as stock-keeping units, open bank transactions, fixed assets/balances, and production setups (machine/work centers, BOMs, routers) – as a few examples. Each of these must be shipped independently and unique shipping containers (RapidStart packages or XML Ports) must be built for each.

Most notable in this approach, transaction history is left behind and in-process activities do not port easily (received not invoiced purchases, shipped not invoiced sales, in-process production orders, open jobs). Things you might miss once reimplemented include copying documents from before the conversion, drilling into purchase or sales histories per vendor/customer, general ledger transaction detail for prior periods, change histories to records, and the ability to support an audit without referring back to an archived database.

With this approach, you will arrive at your new home with a kitchen containing some new appliances and dinnerware, but with the cupboards somewhat bare.

## UPGRADE

In an upgrade, all your data comes with you. Because you are moving from “NAV” to “BC”, the data structures are generally the same and the migration of that data is already handled through Microsoft-provided tools. Those tools act like the moving company that has handled hundreds of moves.

If your historical data is not a complete mess (think duplicates in item, customer, vendor lists), or corrupted (think bad inventory valuations), keeping data is generally an advantage. Even in cases where “some” data is bad, that can be mitigated either by introducing map/purge lists or through adjustments to the upgrade process. These activities are the garage sales or furniture repairs of an upgrade.

This process is simpler from a decision perspective, because your data just comes with you. Remaining decisions that can creep into the upgrade project are usually related to “bad” data or data adversely impacted by customizations.

With this approach, many rooms will feel like they did before, for better or for worse, and making your first few meals should be a lot easier.

## CUSTOM DATA AND MAPPING

In addition to the discussion above related to data “out-of-the-box” fields and tables, a significant consideration of any “NAV” to “BC” upgrade or reimplementation is deciding what to do with all of the custom data points accumulated over the years. During the project, whether upgrading or reimplementing, each custom data point (field or table) needs to be considered. Those data points are then broken

into three categories: Keep, Drop, and Other. An example of a custom data point might be “Independent Rep No.” added by your company at some point to the customer card.

We can think of these as more important, smaller items we ship to our new home, but with special care and shipping instructions needed. There are probably a good number of these that might be considered keepsakes and another group that simply seemed worth keeping at the time.

The fields and tables to be dropped are the easiest. We simply leave those behind. Those fields and tables to be kept are also relatively straight-forward. The custom data points are included in the Rapid Start packages or in migration code we build within BC – depending on how our other data is getting there (upgrade v reimplement).

The third category (“other”) is where we can spend some time. While a goal of any project is to deprecate as much custom data and processing code as possible, it is not always clear where to draw the line. The data points that end up in the “other” bucket include those things we are not completely sure if we should keep, those things where we believe a new stock field might suffice, and those things where a larger mapping exercise is needed.

As mentioned above, migration scripts for non-custom data might also be desired. As a first example, your payment terms list has grown exponentially (think collection of empty wine bottles here). You want to reduce this list to only the ones that have real meaning. As a second example, you may also realize you have several items no longer in use that slow down the lookup process and aren’t needed for historical lookups.

### ➔ Summary

There is no one “right” answer to data and the migration path. The answer is dependent upon specific goals, existing data and timeline. An upgrade is usually a bit more expensive than a reimplementation, but this can also vary from project to project depending on specific factors.

The result should be the same from a to-be workflow perspective. The key difference between these approaches is how much of your “stuff” you take with you.

In Part 3 of this series, we will cover extensions, integrations and ISVs - and how they impact your upgrade or reimplementation project.

You've decided on the type of project to employ to get to Business Central (Upgrade v Reimplementation), and you have started to consider your custom data. Concurrent with that latter exercise, you will also reevaluate your customizations - which to leave behind and how to reintroduce those that survive into the BC extension model. Likewise, this is the appropriate time to consider which integrations are needed and which ISVs to add to your installation. In other words, we are no longer focused on what we are taking with us, but how our new house will look and operate.

These decisions will typically represent around half of the overall project budget.

## EXTENSIONS

First, we will consider how remodeling has changed since we updated the master bathroom in our current home.

### PARADIGM SHIFT

Extensions are the new customizations. These include fields added to tables and pages, new tables and lookups, posting changes, (some) new reports and report changes, (some) workflow changes, and (some) integrations to external systems. In Business Central, all coded changes needed to the application are created as extensions. These live outside the base application and are layered on top as you open a page, run a report, or execute a process.

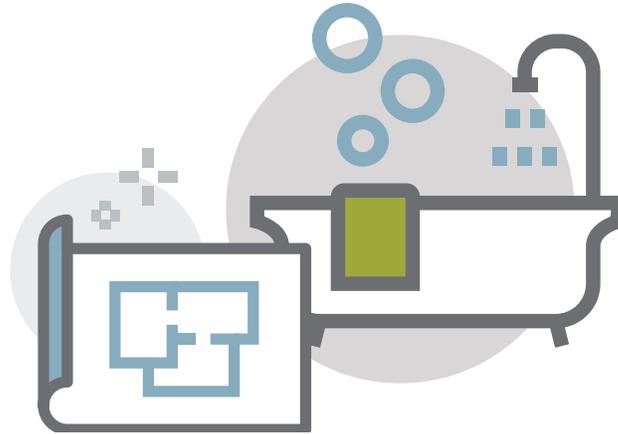
This distinction is important because it means the move to Business Central will be the last traditional upgrade or reimplementation project you should expect. Like the past jump to (or through) NAV2009, the jump to BC is a paradigm shift for the product and many customizations will need to be reimagined.

The BC shift is most clearly understood when we discuss and think about extensions. While we will need to rearchitect many existing customizations, those changes also force us to decouple that custom code from the base application. We cannot just build a new shower into the bathroom like we did before. Our new shower will now come with us the next time we move, so we must approach the new installation differently. This is the paradigm shift - all remodeling stays with us in our next move, or we can optionally leave it behind.

The decoupling of customizations from the base application is a very big win. This allows future upgrades of the product to happen cleanly at the "base" layer, with the extensions dropped back into the resulting database after the base layer is migrated. While occasional adjustments to the extensions might still be needed from time-to-time as new releases of BC add, deprecate or "appify" some functionality, new product versions and periodic build changes are normally non-events. After our move to BC, subsequent moves will allow us to just "snap in" all our previous remodeling.



**While occasional adjustments to the extensions might still be needed from time-to-time as new releases of BC add, deprecate or "appify" some functionality, new product versions and periodic build changes are normally non-events.**



### CARRY-FORWARD DECISIONS

As part of the effort to get your company to Business Central, you will need to decide which of your past customizations in Dynamics NAV need to be rebuilt as extensions for BC. Because most customizations to NAV do not port directly to BC extensions, some degree of work is needed to get these changes rewritten. Remember, we're not in BC yet, so the bathroom remodel job we did before needs to be done again – even if we can generally use the same blueprint.

This is where it is helpful to reassess the current workflows utilized in NAV and determine which of those could be handled with “out-of-the-box” features in BC, or through integrated applications such as PowerBI, PowerApps, and Dynamics CE. Often these new features and tools can replace an old customization. Maybe your old custom walk-in shower is no better than the one already in your new home.

For those areas where a unique field or behavior is still needed in BC, the old customization is evaluated and ultimately rewritten as an extension in BC. New changes may also be introduced as extensions in order to improve workflow efficiency where the old process wasn't optimal, and the new process in BC is not an exact fit for your business. Maybe the new shower is great, but you still want to add a different shower head.

As a rule of thumb, a typical move to BC with a joint review of existing processes should target a 33% customization survival rate. This means two-thirds of the customizations that have been introduced over the years in the NAV application should be left behind. As a related rule of thumb, an initial target of 33% will often end up being 50% when the project is complete. This is because users will often push back on initial management decisions and a balance will need to be struck.

As surviving customizations are gathered, this list is then compared against the custom data points “keep” list from the decision exercise described in Part 2 of this series.



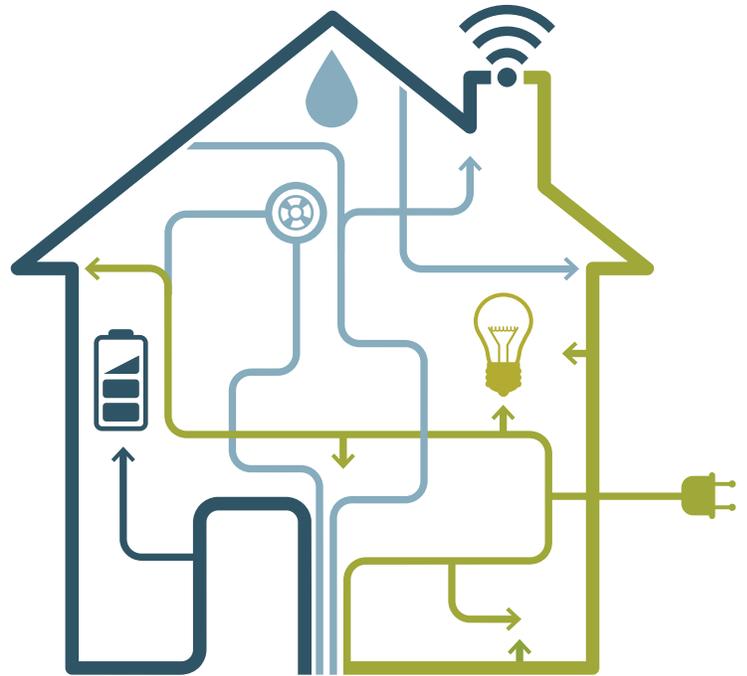
**As a rule of thumb, a typical move to BC with a joint review of existing processes should target a 33% customization survival rate.**

### INTEGRATIONS AND THIRD-PARTY APPLICATIONS (ISVs)

Integrations are the utilities of your home. Your electricity, gas and water feed into your home and waste goes out. Similarly, you may have payroll, expense, and exchange rate services feeding BC, while BC passes back out reporting data or other data and metrics to a reporting tool.

To the extent that the data needs to be kept in sync, and is not handled through a purchased third-party integrated solution, these “hooks” require some development and management.

A third-party solution may alternatively be employed to supplement processing within BC or to integrate BC to another system. These are more like services that keep your home functioning and take some burden off the homeowner. Examples include lawn services or grocery delivery, and for BC include shipping tools and credit card management.



#### ➔ Summary

Decisions related to customizations represent the biggest factor in project scope. Getting your “stock” data to BC in an upgrade, or reintroducing a subset of your stock data in a reimplementation, is mostly a known quantity and repeatable across projects. Likewise, the stages of the project are repeatable. The volume and nature of remodeling to carry forward, utilities to hook up and services to engage, together represent the biggest cost variable.

In Part 4 of the series, we will walk through remaining project variables including workflow (re)engineering, security decisions and project teams.



In the previous three parts in this series, we have highlighted the more objective variables in any migration project from NAV to BC. Unfortunately, when estimating scope, budget and timeline for your project, the most elusive variables remain. These are both harder to quantify up front and can permeate all other aspects of the project. In rough terms, these variables typically influence about 30% of the timeline and budget.

Some examples of these variables include project team makeup, decentralization of decision-making, travel requirements, security requirements, to-be workflow changes, to-be company structures within the application, partner familiarity with your business and database, and partner capability overall. If the data and code decisions described in the previous parts of this series are the science of the project, these variables represent the art. We'll hit on five of these areas here, starting with team dynamics.

---

### **TEAM DYNAMICS**

This is where you get your family excited about the move and all committing to their respective roles. The aspects of team dynamics you can best control are 1) team makeup and 2) flexibility of decision making. Put together a good core team of functional area experts with sufficient time allotted to the project and a good attitude toward change. In conjunction with the functional area representatives, make sure someone with authority to make small-to-medium scope and customization decisions is always in the room. The less back-and-forth needed to get answers to “can we” and “should we”, the more fluidly the project will progress.

### **TRAVEL**

Travel seems more straight-forward, but can sometimes cause tension if not defined properly up front. If you and your partner don't happen to reside in the same city, work together to put together a clear plan for how many on-site visits you expect and at what points throughout the project – and then try to stick closely to that plan.

With the use of MS Teams and remote connectivity, it is much less important than it was even just a few years ago to be in the same location for every stage of

the project. In fact, many projects can be completed effectively without your partner making a single visit.

Technology aside, there is sometimes value in being able to work through an aspect of the project face-to-face. The most typical areas where this can be warranted are the more intense process review sessions, initial testing and training, final user acceptance, and at go-live. Spend some time with your partner considering how you measure cost / benefit of face-to-face time and get those preferences applied to the project from the start.

### **WORKFLOWS**

Two of the main benefits of moving to Business Central are the improved processes and integrations afforded in the solution. While you will certainly want to take advantage of those, you may also see the project as an opportunity to improve other workflows less influenced by the move to BC.

This is a healthy approach, but can throw a timeline and budget off-track if not understood at the outset. Make sure you and your partner have gone over any areas where you will be looking for improvement. They can help identify if each of those improvement areas will be a natural byproduct of the move, or if some additional reengineering might be necessary.

## SECURITY

Security is not fun; there is really no way around it. Of all activities on the project, the time spent defining security, executing permission assignments, and testing access will be the least rewarding. Think about how you child-proof a home. You need to really stop and reflect on every way your family could get themselves into trouble or damage your home. Likewise, you will want to consider how many locks you are comfortable with on the doors and whether a full-on surveillance system is needed.

You could take a shortcut and assign “super” rights to all users, but you will likely instead want to control and manage data access and rights throughout the application. Minimally, consider some typical areas to protect or lock down, including the general ledger, payment processing, credit card information, and social security numbers. Worth noting, these are the regular targets and things can get more nuanced once we move beyond this first layer.

Your current security configurations will likely not port directly to BC and adjustments (minimally) or restructuring (more likely) of your security configurations will be needed. If you have spent some time considering what you want to protect and what investment is justified, you should be all set when you get to BC.

## PARTNER

In any move, if you don't like and trust your movers, you are adding risk to your journey. Likewise, if you are not communicating effectively with your movers, things can get forgotten, misplaced, or delivered to the wrong rooms – if not to the wrong address.

For the move to BC, your partner's experience with the tools, access to additional internal resources, general expertise with the application, and familiarity with you and your business will all contribute to a successful project. If you are working with a new partner, make sure you spend time familiarizing them with your processes, current pain-points, and your team. Whether you are working with a long-time partner or a new partner, also be sure to walk through the project in detail before the kick-off so you are sure that your assumptions are their assumptions.

Finally, there will be documents intended to define the project (SOW, project estimate, project plan, etc...). Do not assume these ensure 100% clarity and consistency in vision. All documentation will lack, at some level, a sense of goals or more abstract nuances in various areas of the project. If you and your partner are in sync from the beginning, the documents should rarely need to be referenced after the project starts.

### ➔ Summary

The variables that were discussed in Part 4 should be clearly understood by you and your partner, despite their somewhat subjective nature. Consideration of these points before you start, and a strong relationship with your partner, will ensure success - even when small surprises arise throughout the project. If you and your partner share the same vision, there is almost always room to shift things around slightly and stay on-time and on-budget.

A successful move means everyone knows what's important, where everything goes, and how to get there – as well as the flexibility to work together in the event the moving truck gets the inevitable flat tire at some point along the way.

The previous four parts in this series have hopefully helped shape your vision of the project scope. At this point, if not earlier, you have probably thought past how your new home will look and how you will get all of your stuff there. You are now concerned with how much this will all cost and how long it will take to execute. Moving is never free after all.

If you skipped straight to this entry, the analogy here may not make sense and you could have some difficulties using the tool. If this is the case, it would be recommended to first read the initial part of this series – if not all four.

---

### ESTIMATING ART BALANCED WITH PARTNERSHIP TRUST

To start, a confession is in order. All upgrade and reimplementation project estimates are imperfect. A moderate component of any approach includes some subjectivity and speculation. Anyone who tells you otherwise is either a fortune teller or misleading you (or themselves).

The two offsets to this are flexibility in the project and a strong relationship. We sometimes reference “horse-trading” within a project, but it really represents some amount of flexibility in the estimate, smaller scope items, and the ability to appreciate that both sides of the project are acting in each other’s best interests.

This, combined with scoping and planning the project responsibly at the start, will limit the small, inevitable, surprises from impacting the overall success.

Put another way, your movers have assumptions about distance and volume and the general contractors have some assumptions about what they’ll find when they get into your new home. Additionally, you have not talked to the utilities or other service providers in the area at this point.

If you have good partnerships with the movers and general contractor, and have worked with them before, then you can start to feel a little easier about how it will go when surprises do arise.



## BACK OF THE NAPKIN APPROACH

With all of that out of the way, let's try to apply some napkin math to the project. This is the discussion where you and your partner are sitting at lunch and you ask how much it will cost. And where they might choke on their sandwich while formulating an answer.

The table below represents a tool allowing you to measure your project scope on a scale of 1 to 100. For each of the six variables, you will rank the area with a value of 0 to 10. Then, on each line, multiply that measure against the weight for the category – getting you a weighted result for the category. Finally, add the six weighted results together. Most should find themselves in the 9-24 range when they're all done. It's not perfect, but is a pretty good starting point for discussion.

### → Customizations

Think about the volume of objects (tables, pages, etc...) you have modified or added to your current version of NAV and how many of those you will carry to BC. All objects are not created equal and all modifications are not created equal. As such, we have a better tool we use for this step, but just assume every 50 objects adds 1 to the project measure for now.

### → ISVs and Integrations

These are also a little nuanced, but just assume that each third-party application that you will carry to BC, or integrate with BC, adds a measure of 1. You can exclude small impact solutions that touch only one or two tables.

### → Data Migration

This is more straight-forward. If you think you want to reimplement, start at 1, assuming you will only be carrying forward master records (customers, vendors, etc...) and minimal open documents/balances. If you think you are going to keep all of your data via an upgrade, enter a 3 if you are moving from Role Tailored Client, or assign an 6 if you are coming from the classic client. This is napkin math – we can fine-tune this later for the specifics of your version and approach.

### → Data Cleanup and Mapping

This is based on the custom fields you are carrying forward and master table cleanups you wish to address. Assume a 1 in the measure column for every 50 custom fields you are carrying and another 1 for every few master tables (again, think customers, vendors, items here). Also, if you are going to restructure your chart of accounts or a specific dimension category, add 1 for each.

### → Workflows and Security

Add 1 to the measure for every few workflows you plan to reengineer, add 3 if you have jobs and are on version 5.X or prior, add 1 if you have manufacturing or service prior to version 5.X, and add 0 to 4 depending on the granularity of your security requirements (best guess, but we typically see a 1 or 2 here).

### → Other Variables

Finally, and most nuanced, we have the “other” category. This might be more difficult, and we can help you through this one later. For now, consider your last upgrade of NAV (if there was one) and rank the “headache” factor from 1 to 10. Then subtract 50% from that number. This is not a perfect parallel in best cases, and can be worse than crude in other cases, but you will want some number here to start.

**TOP-LEVEL ESTIMATE TOOL**

Project Variables	Weight	Project Measure (0-10)	Weighted Result (Wgt x Meas)	Description
Customizations	3	0.0	0.0	Target Volume, Complexity
ISV's and Integrations	2	0.0	0.0	Target Volume, Complexity
Data Migration	1	0.0	0.0	Upgrade or Reimplement Data Migration Effort
Data Cleanup and Mapping	1	0.0	0.0	Volume Complexity, Including Custom Data Points
Workflows and Security	1	0.0	0.0	Functional Areas, Reengineering Volume, Security Reqs
Other Variables	2	0.0	0.0	Project Team Dynamics, Travel, Company Structures, Partner

Add them all up. If you are over 25, you may have a moderate-to-large project ahead of you, but we can help you consider ways to trim that back down. If you are under 8, you have a much smaller customization need and probably have a very clean path to BC. For everyone in-between 9 and 24, you are in good company. This is where we typically find a mature NAV installation with a relatively aggressive approach to minimizing customizations and no overriding industry-specific need causing suites of functionality to be added.

For budget purposes, multiple your resulting number by 100. This is the starting point for hours, from which you and your partner can work the actual estimate downward. As an example, you come up with a score of 15, resulting in 1500 hours. Deep breaths – this is the starting point. This number will likely shrink as you talk through the options with your partner.

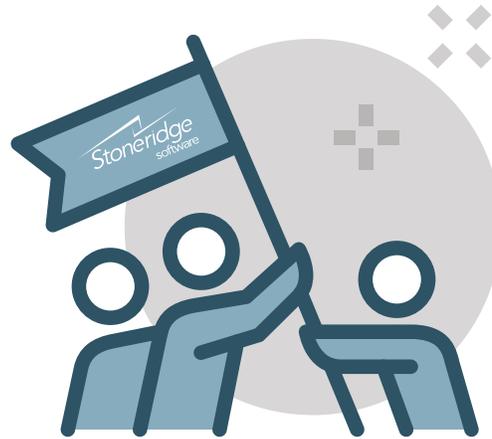
Finally, your timeline will be a function of those hours and the freedom of your core NAV team to participate in the

project. If the project is ultimately 1000 hours, assume 6-8 months as a potential timeline. This will allow breathing room for your group as well as a couple resources from your partner's side to be primarily dedicated. As the numbers go up, the timeline is somewhat linear.



**Give the tool a shot, talk to your partner, and then start to plan your move. You're going to like your new home once you arrive.**

# Contact us



## DECIDING ON A PARTNER

One of the most important aspects of your move is choosing the right partner to guide you. Be sure your partner has experience with both NAV and Business Central as well as experience in integrating ISV solutions. You should expect a project plan, the tenacity to execute on it, opportunities for training and the resources and community to support you long-term. Moving from NAV to BC isn't the easiest thing you'll do. But, choosing the right partner will make all the difference in a successful move to your new neighborhood.

## ABOUT STONERIDGE SOFTWARE

At Stoneridge Software we've developed a proven process to guide clients along the journey to success. The Stoneridge team accomplishes successful projects through brainpower, grit and a proven process for implementation. Our client community is cared for and supported through thoughtful, intentional outreach and educational opportunities. We're with you every step of the way, and we keep working to help you transform your business.



**Contact us to learn more about how we can help move you Dynamics 365**

☎ 612.354.4966

➔ [solutions@stoneridgesoftware.com](mailto:solutions@stoneridgesoftware.com)