



CASE STUDY

How TruNorth Dynamics Helped FCCS Migrate from SL to Business Central

THE CUSTOMER



FCCS is a professional services firm that has supported financial institutions, cooperatives, and corporate clients nationwide since 1975. They specialize in leadership development, governance, risk management, talent, and insurance consulting—helping organizations strengthen their people, boards, and operations.

FCCS relied on Microsoft SL for years, optimizing it as much as possible, but with SL reaching end-of-life, they knew it was time to move forward. FCCS knew they wanted to remain on the Microsoft platform while preparing their business for the future.

THE CHALLENGE

While FCCS had maximized what SL could do for their business operations, limitations were still holding them back:

- Reporting was cumbersome and unreliable.
- Custom apps were tied to SL adding complexity to a migration.
- FCCS was a small, conservative team in terms of process changes and they needed ample time to adapt to new systems.
- With SL end-of-life approaching, they did not want to wait until the last minute to move assuming many additional challenges would come with that delayed decision.

“We knew SL was going away and didn’t want to wait until the last minute to move. We knew we wanted to stay with a Microsoft solution and were looking for the modern version.” - Lolita Hayes, Director of Information Technology



THE SOLUTION

FCCS’s managed service provider (MSP) recommended TruNorth Dynamics as the trusted partner to lead the migration. While starting a potentially challenging business change with an unknown partner, FCCS quickly realized TruNorth’s experience and knowledge would help them navigate an uncomfortable but necessary transition.

Together, TruNorth and FCCS delivered:

- A migration from SL to Microsoft Dynamics 365 Business Central
- Jet Reports implementation to deliver easy-to-use reporting
- Customized layouts to eliminate manual tasks
- One-on-one training sessions with a TruNorth consultant who seamlessly translated IT concepts into accounting language for the FCCS team to easily understand

“This was not TruNorth’s first rodeo - it was obvious from day one. Their team made us feel so comfortable and confident with our decision to migrate,” - Brad Langan, CFO

THE IMPLEMENTATION

The project was scoped as a six-month effort, but FCCS found that wasn't long enough to fully prepare their teams. Some staff were hesitant about change, while others pushed to adopt new ways of working quickly. TruNorth emphasized that implementation required participation—testing, training, and engagement—to find the right balance.

One-on-ones with the designated TruNorth consultant proved invaluable. Her accounting background, paired with her ability to translate technical concepts into practical guidance, gave the FCCS team confidence. Sessions were recorded so staff could revisit them as needed which was a major perk.



THE RESULTS

- ✓ **Improved Reporting:** Jet Reports transformed their reporting process, making it clear, accurate, and easy.
- ✓ **Team Efficiency:** Tasks that once required additional manual processes and team participation are now automated.
- ✓ **Process Improvements:** Customized layouts and streamlined workflows reduced manual work as well, and boosted overall team productivity.
- ✓ **Team Embrace:** After two years, the FCCS team has not only fully adapted, but is proactively innovating and improving.

“The team has truly embraced BC and all it has to offer. Even those team members who were hesitant to change at first now appreciate the efficiencies it has brought to the team.” - Lolita Hayes, Director of Information Technology

LESSONS LEARNED

1. A longer runway - more than six months - is needed to prepare teams for a major transition.
2. Testing is critical: the more transactions and customizations that are able to be validated over and over before go-live, the better.
3. Active engagement is key. Implementation is not and should not be hands off for the customer.

WHAT'S NEXT

FCCS plans to:



Continue streaming and automating workflows



Explore additional efficiencies in BC



Keep innovating as a lean, high-performing team

FINAL WORD

“Overall, it was a very positive experience. TruNorth was very professional, timely, and collaborative. They spoke our language, not just technology, and helped us move to a modern platform with confidence.” Brad Langan, CFO

Get in touch with TruNorth Dynamics!

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