



## Migrating IAA to modern day financials management with Microsoft Dynamics 365 Business Central

*Helping Insuranceadvisernet Adopt Dynamics 365 Business Central  
and Increase Productivity, Efficiency, Reliability and Insights into  
Financial and Operational Data.*

Insuranceadvisernet (<https://insuranceadviser.net>) is a leading insurance brokerage firm that offers a range of services to businesses and individuals across Australia and New Zealand. With over 1,000 employees and a wide network of over 170 insurance brokers, the company needed to streamline its operations to improve productivity and stay competitive in the market.

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## The Challenge

Insuranceadvisernet were looking to implement and modern-day cloud financials and operations management system. to move away from disparate legacy systems, including a traditional Great Plains application that made it difficult to manage its financials, fixed assets, purchasing, and sales processes. The Financial team was struggling to automate core business processes, and finding it challenging to gain insight into critical financial and operational data. Furthermore, the company was facing difficulties in choosing a path forward and required guidance in choosing a best fit approach and solution.

## The Solution

To address the challenges faced by Insuranceadvisernet, we worked with the company to understand their business processes and internal skills objectives, working together in a collaborative approach, both end-users and technical staff gained visibility into the project and technology. We delivered online training sessions to help end-users understand how to implement and work with Financials, Fixed Assets, Purchasing and Sales modules. We also provided training to the IT team on how to automate core business processes using Microsoft Power Automate and gain insights into critical financial and operational data using Microsoft Power BI. By conducting iterative workshop sessions, which included live demonstrations, hands-on activities, and Q&A sessions, we lifted internal visibility and confidence. Working as a collective team, we ensured that the employees were well-equipped to work with the new system. We also provided post-implementation support to help the employees overcome any challenges they faced while working with the new system.

Specific project highlights included:

1. Working with internal stakeholders and technical teams ensured visibility and

## The Results

As a result of our efforts, Insuranceadvisernet was able to streamline its operations and improve productivity significantly. The financial team was able to gain better insights into critical financial and operational data, and the IT team was able to automate core business processes. The employees were able to work more efficiently with the new system, which led to a significant increase in productivity.

Our collaboration with Insuranceadvisernet helped the company achieve its goals of streamlining operations, improving productivity, and gaining better insights into critical financial and operational data.

To meet the requests specified by Insuranceadvisernet, the following strategy, technologies and services were implemented:

### **Microsoft Business Central**

Migration of COA from Great Plains, AR, AP Processes, Fixed Assets, Custom Insurance Broker Payment System built as BC Extension.

### **Microsoft Power BI:**

Power BI Premium Dashboards integrated with Business Central Data.

### **Microsoft Power Automate:**

Automations and integration with third party systems through Business Central Web Services.

### **Project Services**

Execution of agile project implementation methodology incorporating an iterative approach that promotes on going collaboration with internal key stakeholders.

### **Governance Center of Excellence, User Adoption Strategy**

Implementation of Best Practice Change Management Processes, Monitoring Tools and Ongoing

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on-project knowledge transfer.

Support of End-Users and Technical Users.

2. Implementation of a Microsoft Dynamics 365 Center of Excellence and Learning, including best practice methodologies and processes for Microsoft Dynamics Business Central.
3. Working with the Financial team to ensure optimized migration from Great Planes to Business Central.
4. Devise and implement organizational Governance Strategy to ensure processes are in place for change management,
5. Implement an ongoing Support framework to ensure smooth operation and process and technical expertise on-hand.

Visit [www.ttsolutions.com.au](http://www.ttsolutions.com.au) to read our full case studies, or call **1300 667 577** for further information.

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