Xpedition
Not for Profit

World Animal Protection

A smooth migration to the cloud for World Animal Protection

Summary:

- Migrated NAV and Prophix reporting to Business Central

- Maintained all finance functions in the cloud

- Easy, secure user access and better performance from global locations

- Flexible project approach

- Excellent planning to deliver on time and budget

The Challenge:
Low risk, like-for-like migration to the cloud

Kate Brown, Systems Project Manager, explains: "All but one of our global offices were using the same NAV 2015 system, located on a physical server in our London office. Colleagues had to access it via Citrix if they were not in London. The main driver for this project was the need to renew Citrix soon – we were looking for a better value solution and to avoid replacing hardware. We have a cloud first strategy, so we wanted a modern cloud solution that would fit with the rest of our IT estate."

The finance team was happy with the NAV functionality, using it largely for transaction capture. They also used Prophix to produce reports; there was no immediate need to increase functionality in the new system. The project was driven by the IT team – the business goal was to make sure the new cloud-based solution would deliver all the same core capabilities, with no disruption to operations in World Animal Protection's international offices.

Kate adds, "We were looking for long-term cost savings and to achieve our company strategy of cloud-first. With Business Central in the cloud, we won't have to do any more costly and time-consuming upgrade projects – this was a key point in the business case from an IT perspective."

The Solution:
Proven sector and technology experience

World Animal Protection selected Xpedition after a full procurement process. Kate says, "We were impressed with the Xpedition team because of their proactive approach. Their presentations and demonstrations were convincing and showed proof of their experience. We were confident we were putting our trust in a partner who had successfully delivered everything we wanted – on- premise to cloud and NAV to Business Central migration. Because they had worked with many charities before, we knew they had a clear understanding of our sector-specific needs."

Kate and the team at World Animal Protection particularly valued Xpedition's flexibility in adapting the project to meet emerging needs. As well as migrating to Business Central, Xpedition helped to bring across the Prophix reporting solution that the finance team used. This took less time than expected, so the team could devote more time to migrating data from the different countries.

World Animal Protection also needed to migrate historic data from NAV, so it was accessible from Business Central for future reference. Kate says, "We asked Xpedition to recommend the best approach to data migration – they came up with various options for us to choose from and we added it to the spec." Xpedition helped them extract the data from the existing system and trained World Animal Protection's staff on how to migrate their own opening balances, for each country office.

The central UK office was the first to migrate, then three to four countries followed each week, until the roll-out was complete. Xpedition supported World Animal Protection from behind the scenes. "Business Central wasn't a massive leap for us from NAV, we understood the data and its structure already. That's one reason why this project ran very smoothly," Kate says.

"Another reason was the resourcing. I'd advise other organisations embarking on a project like this to make sure they dedicate a project manager if possible. I was able to develop a great working relationship with Xpedition and exploit all their knowledge and experience because I was focused on the project throughout."

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WORLD ANIMAL PROTECTION

World Animal Protection's mission is to create a better world for wild and domestic animals. The charity works to end needless animal suffering and seeks to influence the global agenda for animal protection, raising awareness of animals' importance in our world. Established for over 55 years, World Animal Protection operates from 14 global offices and has hundreds of thousands of supporters who campaign, raise awareness, donate and raise over $58m every year for the cause.

WORLD ANIMAL PROTECTION

The Results:
Migration delivers efficiency and a better user experience

With the old NAV system, most users had to go in through Citrix, with a cumbersome login process. "Using Business Central in the cloud, that problem has completely gone away," says Kate. "We don't have to worry about backups and disaster recovery anymore. Costly and disruptive major upgrade projects have been replaced by regular incremental updates – they're far easier to manage as part of our day-to-day work, and they don't cost anything."

"Several users have said – unprompted - how much they like the system and like using it. It's much easier to access, it's faster to export and move data and you don't have to use Excel on a remote server. The solution is much more streamlined for users as well as in technology terms.

"We're very pleased that we have delivered all the same functionality as we had before with no issues. While we didn't move to Business Central to access extra capabilities, it does give us a solid base for future finance improvements and innovation. The apps are potentially interesting and we'll likely explore them in the coming months. Making changes will be much easier than with the old infrastructure."

Xpedition delivered the project on time and slightly under budget. Some aspects of the original scope were taken out, but World Animal Protection was pleased to be able to accommodate other requirements instead. Kate adds, "The lead consultant and project manager were excellent. They listened to what we wanted and made expert recommendations – we always felt in control and that we weren't having a generic approach imposed on us.

Everything was done to suit the way we work."

"We really enjoyed working with the Xpedition team – they were good at explaining things and very responsive. The project was very well managed and it made me feel confident and comfortable that we were in good hands. We changed our minds about a few minor things and we then used that time for other things – the flexibility was really helpful. It went to plan, to time and to budget – you can't really ask for more!"

Kate Brown, Systems Project Manager, World Animal Protection

About Xpedition
a trusted partner to charities worldwide

With 20 years' experience as a Microsoft Gold Partner and hundreds of projects successfully delivered, Xpedition is one of the UK's leading and trusted Microsoft Dynamics 365 implementation partners serving the charity sector.

Our Microsoft certified consultants have deep experience of implementing powerful Dynamics 365 Business Central all-in-one finance and accounting software for many different charity and non-profit organisations. Our team helps charities with their financial management challenges through innovative technology software solutions, helping to meet cost-saving objectives and improve efficiency and agility.

Fast track your journey to financial management success with Xpedition

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