

This worksheet is designed to help you plan your transition from Microsoft Dynamics GP to Dynamics 365 Business Central. Use this tool to capture your current state, evaluate migration readiness, and prepare for discussions with your partner.

1. ORGANIZATION OVERVIEW

Organization Name:	
Primary Contact:	
Number of GP Users:	
Key Business Processes:	
Current GP Version:	

2. CURRENT GP ENVIRONMENT

Hosting Environment (On-Prem / Azure):	
ISVs / Add-ons Used:	
Customization / Integrations:	
Reporting Tools (SSRS, Management Reporter, etc.):	
Data Size & Historical Data Considerations:	

3. HOW IS IT CURRENTLY MANAGED FOR YOUR GP ENVIRONMENT?

- ☐ Fully in-house IT team
- ☐ Combination of in-house and outsourced IT
- ☐ Fully outsourced IT provider / MSP
- ☐ Not sure

4. MIGRATION GOALS & BUSINESS DRIVERS

What are your primary reasons for considering a migration to Business Central? (Check all that apply)

- ☐ Lower total cost of ownership
- ☐ Improved scalability and accessibility (Cloud-based)
- ☐ Eliminate server/hardware dependency
- ☐ Better integration with Microsoft 365 / Power Platform
- ☐ Modern reporting and dashboards
- ☐ End of GP support or future concerns
- ☐ Other: _____

5. MIGRATION READINESS CHECKLIST

- ☐ Do you have a clear picture of your current GP customizations and ISVs?
- ☐ Is your chart of accounts streamlined or in need of redesign?
- ☐ Are you planning to bring over historical data or start fresh?
- ☐ Are your team members prepared for process changes and training needs?
- ☐ Do you have a target timeline for your migration?
- ☐ Have you allocated a budget for the migration project?

6. PROJECT PLANNING & BUDGET

Target Go-Live Date:	
Preferred Partner (if known):	
Budget Range for Migration:	
Resources Assigned (Internal PM, SMEs):	
Training Needs Identified:	
Open Questions or Risks:	