

CLIENT SUCCESS STORY:

International Risk Management Institute (IRMI)

IRMI Sheds the Limitations of their On-premises Systems with Enavate Partnership

International Risk Management Institute (IRMI) was established in 1978 and has cemented a reputation as the go-to resource in the Property and Casualty (P&C) space for research, education and complex issue management. The company began as a print publisher producing reference manuals and books. Today, IRMI's resources are provided entirely online, including a library of educational materials, continued education certifications and conferences that focus on property and casualty insurance education and reference materials.

Their services include:

- Risk management research and educational materials
- Property and casualty insurance research and educational resources
- Continuing education insurance certifications
- Property and casualty insurance conferences

IRMI leadership was considering migrating to the Cloud even before the COVID-19 pandemic. They were on Microsoft Dynamics GP and wanted more seamless system upgrades, better reporting, improved connectivity and mobility. These have become essential capabilities for most businesses since the pandemic began. For IRMI, Microsoft Dynamics 365 Business Central was the clear next step from Dynamics GP.

**CLIENT:**

International Risk Management Institute (IRMI)

PRODUCTS AND SERVICES:

Microsoft Dynamics 365 Business Central
Migration from Dynamics GP

INDUSTRY:

Insurance and Risk Management

ORGANIZATION SIZE:

165 – 175

COUNTRY:

United States



Challenges IRMI Faced with Microsoft Dynamics GP

Costly Maintenance of On-premises Systems

Maintaining their on-premises infrastructure required significant time and effort, taking valuable resources away from more strategic projects.

Complexity of Upgrades

Upgrading their on-premises systems was an arduous, time-consuming process that the internal team could not complete on their own.

Lack of Seamless Connectivity

Dynamics GP did not enable the IRMI team to easily connect, collaborate and work remotely. This limited their productivity, response time, efficiency and effectiveness.

Limitations of Reporting Capabilities

The IRMI team lacked access to timely, accurate data when and where they needed it to make informed decisions.

“Everybody wants to move to the Cloud. You’re getting updated more frequently than with on-premises systems, it’s mobile-friendly and it’s user-friendly. Once we learned how to marry our work and the system, it was very easy to jump into our processes.”



Ron Allen

Chief Financial Officer



How Migrating to Microsoft Dynamics 365 Business Central Made a Big Difference

Successfully Reduced Reliance on On-premises Servers

By migrating to the Cloud with Business Central, IRMI has reduced on-premises server requirements and freed up their IT staff, so they can pursue more value-add projects. Upgrades now happen automatically and without business disruption, so IRMI has the latest technology and capabilities without the hassle of upgrading manually.

Dramatically Improved Reporting Processes

Thanks to Business Central and Solver BI, reporting is much more efficient and timely. IRMI can now run budget to actual reports that used to require a lot of manual work with just the click of a button. Having timely data at their fingertips empowers IRMI to keep a consistent pulse on their business and make more informed decisions.

Enabled Seamless Remote Work and Mobility

Connectivity is greatly improved with Business Central. Employees don't need to remote desktop into the servers, they can simply and securely access the system from anywhere. This is critical for IRMI, where they are only in the office one day a week. Business Central also allows users to access the system from their phones, giving them the flexibility to get things done no matter where they are.



Why Did IRMI Choose to Work with Enavate?

When IRMI was ready to migrate, Enavate was the first and only partner on their list, since the team had a great experience working with Enavate on a previous integration project.

"We were really impressed with their consultants and resources," Allen said. "When we decided we needed a bigger partner with more resources, we went with Enavate because of that experience."

IRMI was impressed by Enavate's:

- Skillful resources
- Proactive research, advice and guidance around other solutions
- Ability to provide a main, trusted point of contact as part of the partnership
- Strong relationship management

"We had a relationship with our main consultant and I talked to her probably every day, multiple times a day during the migration. Enavate is very good at supporting you, understanding what you need and building relationships."



Ron Allen

Chief Financial Officer





The Implementation Process

IRMI leadership aimed for a migration window of August 2020 to November 2020. Though implementation was delayed by one month and the launch occurred in December 2020, it was well worth the additional training they conducted to ensure the company could launch smoothly. The IRMI team worked with a project manager and several other experts at Enavate to migrate.

Data Migration

At the time of the migration, a new Microsoft automated migration tool allowed IRMI to automatically migrate their data as opposed to manually downloading files from Dynamics GP to upload into Business Central. Enavate consultants who were familiar with the tool worked with IRMI's project manager to manage the data migration, troubleshoot and resolve any errors. The IRMI team was responsible for cleaning up older data in GP and determining how much they would bring across to Business Central.

Project Management

Throughout the migration process, there were many meetings and trainings happening at once, covering all the components involved in the implementation. *"There were daily Teams meetings that involved different people at different times,"* Allen said. *"It was a big project for us. They kept us on track."* There were meetings to discuss and manage

data migration, weekly project management calls, meetings scheduled to address specific components, training and configurations.

Training & Change Management

The IRMI team had to manage a learning curve going from Dynamics GP to Business Central. It was a mindset which they discovered had more similarities to Microsoft NAV than their existing system. It was a mindset shift, as they'd have to learn a new way to do their work.

"When we realized our processes were going to change even more than we thought, we had to determine if we were ready to learn all new processes and systems," Allen said. *"We decided we were. Everybody had to learn new processes, but we've improved through that. It's been good for us."*

Enavate training helped significantly with change management. The training program was tailored to the IRMI team and business requirements, and IRMI recorded the training sessions for future reference.

An unexpected benefit is that they created a lot of documentation with their implementation consultant for their processes, which has made it easier to transition their teams in recent months to different roles and responsibilities. *"Those helped us a lot recently when we had those staffing changes and people learning new things,"* Allen said. *"They went to those documents and it helped a ton. It took a lot of work, but it pays dividends later."*



A Partnership Built on Trust

The team at IRMI appreciated the availability and trustworthiness of their project manager and others from Enavate. This made the migration journey more manageable for them. Today, working in Business Central is like second nature for the employees, thanks to thorough training and documentation. They're even able to manage restructuring roles with more confidence.

Allen says it all comes back to the solid relationship with Enavate:

“We built a relationship with our Enavate consultant in those months we worked with her and she pushed us. The relationship side from Enavate is excellent.”



Ron Allen

Chief Financial Officer

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