

PARTNER SUCCESS STORY:

Bartels Lutheran Retirement Community

**Faster Migration to Dynamics 365 Business Central
with Enavate Xcelerate™**

Bartels Lutheran Retirement Community is a forward-thinking nonprofit organization that provides a full continuum of senior living and care services, including nursing care, skilled nursing and rehabilitation, Alzheimer's and dementia care, assisted living, and two communities of independent living, on its 20-acre campus in Iowa.

As the organization grew to serve 350 residents, so did the complexity of its financial and operational processes, prompting leadership to seek modern technology solutions that could provide scalability, efficiency, and better data visibility.

**PRODUCTS AND SERVICES:**

Microsoft Dynamics 365 Business Central
Enavate Xcelerate™

INDUSTRY:

Healthcare

ORGANIZATION SIZE:

350 residents, 250 employees

COUNTRY:

United States



Aging Technology and Growing Demands Drive the Shift to Modern ERP

For years, Bartels relied on Microsoft Dynamics Great Plains (GP) to manage its financial operations. When Peggy Zumbach joined the organization as CFO, the organization needed a single source of truth for data and inventory, a way to efficiently pull reports based on their needs, and she wanted to update several processes, including inventory management. She began modifying the process in GP, but soon realized they would need to purchase additional licenses.

- **System Limitations:** Bartels had only five GP licenses, causing frequent login delays and access issues for staff.
- **Fragmented Processes:** Their inventory management relied on an external, aging system that did not integrate with GP, making it difficult to manage healthcare supplies efficiently.
- **Scalability Issues:** As the organization grew, GP's lack of modern capabilities, such as integrated workflows and invoice scanning, hindered their ability to keep pace with operational demands.

It was clear to Zumbach that continuing on GP was no longer sustainable, and spending money on an old system didn't seem wise.

They needed a modern, cloud-based ERP solution that could be implemented efficiently without overwhelming their team.

"We had started looking at upgrading our accounting software and looked at several packages, but Business Central seemed to be the best way to go to accomplish the things that we needed to accomplish," said Peggy Zumbach, CFO.



Xcelerate Delivers a Fast, Seamless Migration

Bartels selected Microsoft Dynamics 365 Business Central as their new ERP platform and partnered with Enavate using [Xcelerate](#) to fast-track the migration.

Xcelerate is Enavate's structured, accelerated implementation approach designed to move organizations from Dynamics GP to Business Central quickly, efficiently, and cost-effectively. For Bartels, this meant:

- **A Phased Implementation:** Phase one focused on core financials (general ledger, accounts payable, and accounts receivable), while phase two will bring inventory and budgeting functions online.
- **Migration Made Simple:** Enavate leveraged its proprietary GP-to-BC migration and diagnostic tools to accurately assess the existing system, migrate historical financial data, and recreate critical reports in the new environment.
- **Collaborative Execution:** Bartels' finance team embraced the structured Xcelerate process, completing e-learning modules early, staying responsive, and working closely with Enavate's project team to meet milestones.



The Bartels team's readiness and Enavate's one-of-a-kind implementation methodology allowed for a smooth, on-time implementation.

"Enavate offers services that you don't get from other people. Its team was very knowledgeable on the product and what it could do and how it would fit into our needs," said Zumbach.

Rapid ERP Modernization Fuels Future Growth

With Enavate's Xcelerate program, Bartels completed their phase one migration to Business Central in just 12 weeks, a process that typically takes six to seven months using traditional methods. Key outcomes include:

- **Rapid Cloud Adoption:** Bartels moved from an on-premises system to a modern, cloud-based ERP platform in under three months.
- **Reduced Costs and Complexity:** The structured Xcelerate model delivered a predictable budget and timeline, avoiding the inflated hours and costs often associated with custom migrations.
- **Minimal Disruption:** The Xcelerate approach required a manageable time investment from staff, allowing them to continue daily operations while advancing the project.

- **Strong Foundation for Growth:** With their financials live in Business Central, Bartels is positioned to integrate their healthcare inventory management system in phase two, bringing all core operations into a single, modern platform.

"It has been a smooth transition. We're really getting to know the system well, still working out some kinks here and there, but I do know that if we run into huge problems, we can go back to Enavate and get some more training on it," said Zumbach.





Bartels Builds a Future-Ready Foundation with Enavate

By pairing Microsoft Dynamics 365 Business Central with Enavate's Xcelerate methodology, Bartels Lutheran Retirement Community achieved a faster, smoother, and more affordable ERP modernization, laying the groundwork for long-term operational efficiency.

ENAVATE™

Visit [Enavate.com/talk-to-an-expert](https://enavate.com/talk-to-an-expert) to learn more

LEARN MORE