



Case Study: *Beech Brook*

Modernizing Operations and Empowering Growth with a Seamless Migration to Dynamics 365 Business Central

Executive Summary

Beech Brook, a Cleveland-based leader providing critical behavioral health services to children and families, faced a significant operational challenge: their legacy ERP system, Microsoft Dynamics GP, was approaching end-of-support. This threatened their financial processes, reporting capabilities, and future scalability. Partnering with **Cambay Solutions**, a Microsoft Solutions Partner, Beech Brook embarked on a strategic migration to **Microsoft Dynamics 365 Business Central**. The project streamlined their financial management, inventory, and payroll processes, embedding them into a modern, cloud-based ecosystem for enhanced efficiency and data-driven decision-making.

The Result: A future-proof platform that enhances operational efficiency, provides real-time insights, and supports Beech Brook's vital mission of helping children and families thrive.

The Challenge:

Navigating End-of-Support with a Mission-Critical System

Beech Brook's reliance on Dynamics GP presented several pressing issues as the end-of-support date loomed:

- **System Vulnerability:** The approaching end-of-support meant increased security risks and a growing reliance on hard-to-find external contractors for maintenance.
- **Inefficient Reporting:** Generating timely, customized financial reports was a cumbersome process, hindering swift strategic decision-making.
- **Disconnected Data:** Financial, inventory, and project data lived in silos, preventing a unified view of operations crucial for a complex nonprofit.

- **Lack of Scalability:** The existing infrastructure was not built to support the organization's ambitious growth plans, creating a barrier to future expansion.

Beech Brook needed a cohesive, integrated solution that would not only replace their outdated system but also empower their teams and support their complex healthcare operations.

The Solution:

A Strategic Partnership for Cloud Transformation

Cambay Solutions designed and executed a comprehensive migration strategy to Dynamics 365 Business Central, chosen for its deep integration with the Microsoft ecosystem and its robust feature set for nonprofits.

The Cambay Approach Included:

- **Phased Migration:** A meticulous, multi-phase plan ensuring minimal disruption to Beech Brook's critical daily operations.
- **Data Integrity Focus:** Secure migration of essential historical data, including Chart of Accounts, Customer/Vendor Masters, GL records, and opening balances, with an emphasis on accuracy and validation.
- **Configuration Over Customization:** Leveraging out-of-the-box functionality of Business Central for financial management, inventory, and payroll setups to ensure best practices, ease of use, and lower long-term costs.
- **Seamless Integration:** Ensuring the new ERP worked harmoniously with Beech Brook's existing Microsoft environment, including Power BI for advanced reporting and real-time analytics.
- **Comprehensive Training & Support:** End-user training and dedicated post go-live "hypercare" support to ensure smooth adoption across the organization.

Key Project Highlights

- **Platform:** Microsoft Dynamics 365 Business Central
- **Scope:** Full-scale migration from Microsoft Dynamics GP
- **Project Hours:** 506 hours
- **Timeline:** Phased execution over a defined project schedule
- **Team:** Dedicated Cambay team including a Project Manager, Senior Consultant, and Offshore Solution Architect.



The Results:

Enhanced Efficiency and a Foundation for the Future

The successful implementation of Dynamics 365 Business Central delivered immediate and long-term value to Beech Brook:

- **Operational Efficiency:** Streamlined financial, inventory, and payroll processes eliminated manual tasks, freeing up staff to focus on mission-critical work.
- **Real-Time Insights:** Integrated Power BI reporting provides leadership with immediate access to key performance indicators and financial data, enabling proactive decision-making.
- **Improved Compliance & Security:** A modern, cloud-based platform with robust governance features ensures data integrity and compliance with industry regulations.
- **Scalability for Growth:** The new system is built to adapt and grow with Beech Brook, easily supporting new users, entities, and evolving operational needs.
- **Cost Predictability:** Moving to a cloud-based subscription model eliminated the hidden costs of maintaining an aging on-premise system.

Why Cambay Solutions?

As a **Microsoft Solutions Partner** with designations in Modern Work and Azure, Cambay Solutions provided more than just technical expertise. We provided a partnership built on:

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| <p>Proven Methodology: A structured delivery model using Azure DevOps for transparency and collaboration.</p> | <p>Deep Industry Knowledge: Understanding the unique challenges and compliance needs of the nonprofit and healthcare sectors.</p> |
| <p>Commitment to Success: A dedicated team focused on Beech Brook's goals, ensuring the project was delivered on time and on budget.</p> | |

"Cambay Solutions understood our mission from day one. They didn't just migrate our system; they provided us with a strategic platform that enhances our ability to serve our community. Their structured approach and expertise made this critical transition smooth and successful."

– **Jennifer Albanese**, Chief Financial Officer at Beech Brook

About Cambay Solutions

Cambay Solutions LLC is a leading Microsoft Solutions Partner specializing in digital transformation through Microsoft Azure, Dynamics 365, and Microsoft 365. With a focus on people, process, and technology, Cambay helps customers overcome disruption and achieve their strategic goals. Our services include Managed Delivery, Project Management, and Change Management to ensure successful outcomes.

Ready to write your next chapter?

Contact Cambay Solutions to discuss your digital transformation journey.