Philip Massey, CPA
Software Services Director

Dale Stratton
Software Services Manager

PHIL & DALE'S
LEGACY
ADVENTURE

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Agenda

1. Meet the time travelers
2. Flash back – a brief history of Microsoft GP
3. Trapped in time
4. Bogus pitfalls of on-prem
5. Party on in the cloud
6. Next steps

Meet the Time Travelers
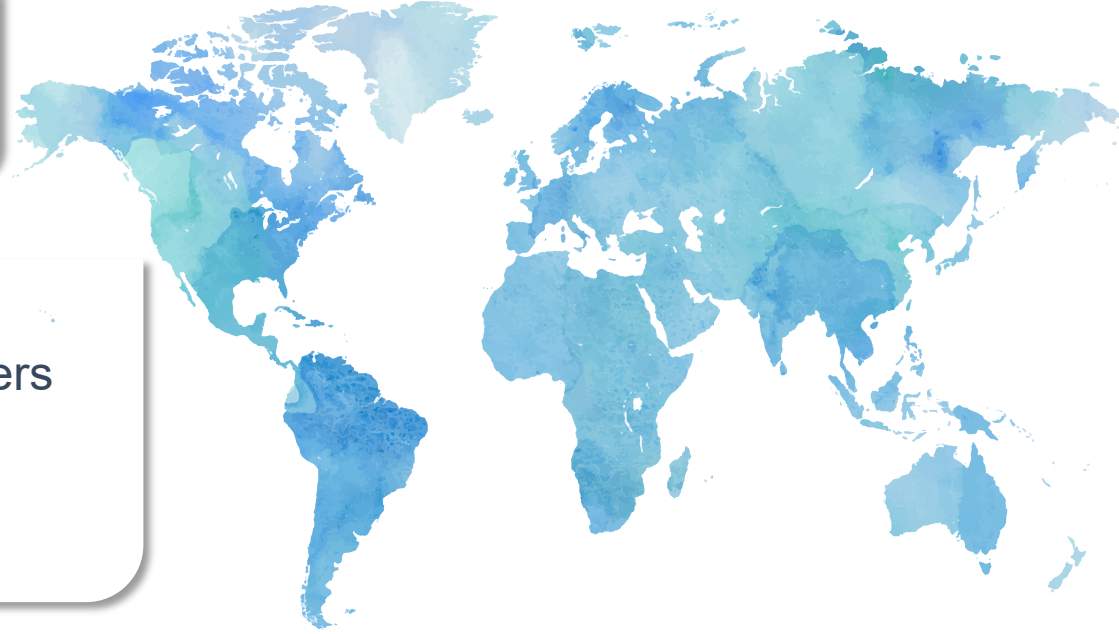
Dean Dorton Allen Ford, PLLC

542
TEAM MEMBERS

OFFICES
Indiana
Kentucky
North Carolina
Ohio

EXPERTISE
- Managed Service Providers
- Data Analytics
- IT Audit Services
- Construction

NATIONAL RESOURCES

An independently owned member
RSM US Alliance

RSM

CLIENTS
- Privately held businesses and related individuals
- Public companies
- Nonprofit and governmental entities

INSIDE
public accounting
TOP 100 FIRMS
2023

GEOGRAPHIC REACH
- Throughout the United States
- Internationally including Japan, Brazil, Canada, China, throughout Europe and Australia

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Philip D. Massey, CPA

- North Carolina native (Tar Heels Fan!)
- CPA since 1994
- 25+ years of experience with Dynamics
- 100+ Dynamics GP clients
- Sage Intacct Partner since 2011
- Blogs for NCACPA, Sage, Microsoft and others
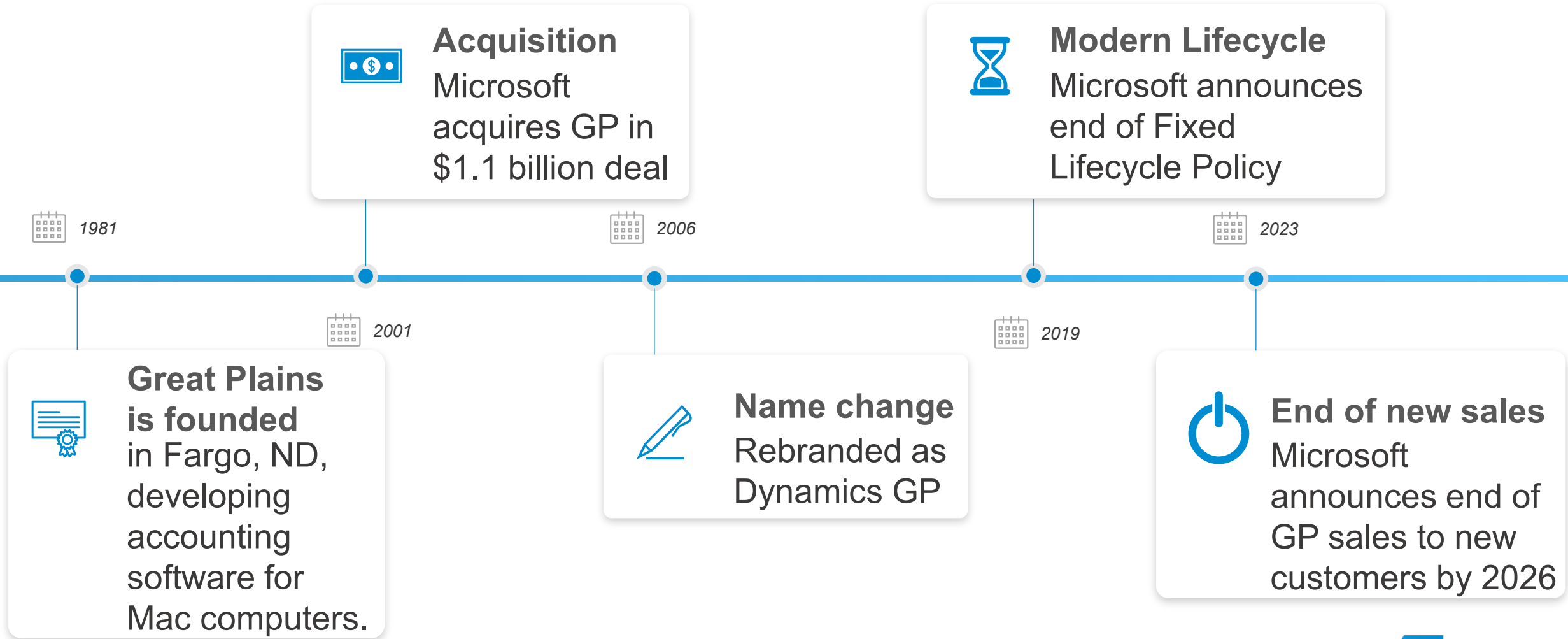- Avid Lego builder

Dale Stratton

- Central Kentucky native (fan of the winning-est college basketball team of all time)

- Microsoft Dynamics GP certified implementer

- 20 years of experience with Dynamics GP implementation and support

- Sage Intacct certified implementer and accountant

Flash Back:
A Brief History of Microsoft GP

How did we get here?

Acquisition
Microsoft acquires GP in $1.1 billion deal

Modern Lifecycle
Microsoft announces end of Fixed Lifecycle Policy

1981

2006

2023

2001

2019

Great Plains is founded in Fargo, ND, developing accounting software for Mac computers.

Name change
Rebranded as Dynamics GP

End of new sales
Microsoft announces end of GP sales to new customers by 2026

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Things we love about GP

- It goes back to medieval times
  - A long history backed by a strong company
- Huge cast of characters
  - A large partner network provides lots of integration
- Full control with on-prem
  - No provider rules to follow
  - No need to wait for support

- History repeats itself
  - No major changes = smooth sailing (mostly)
- You can tinker with the universe
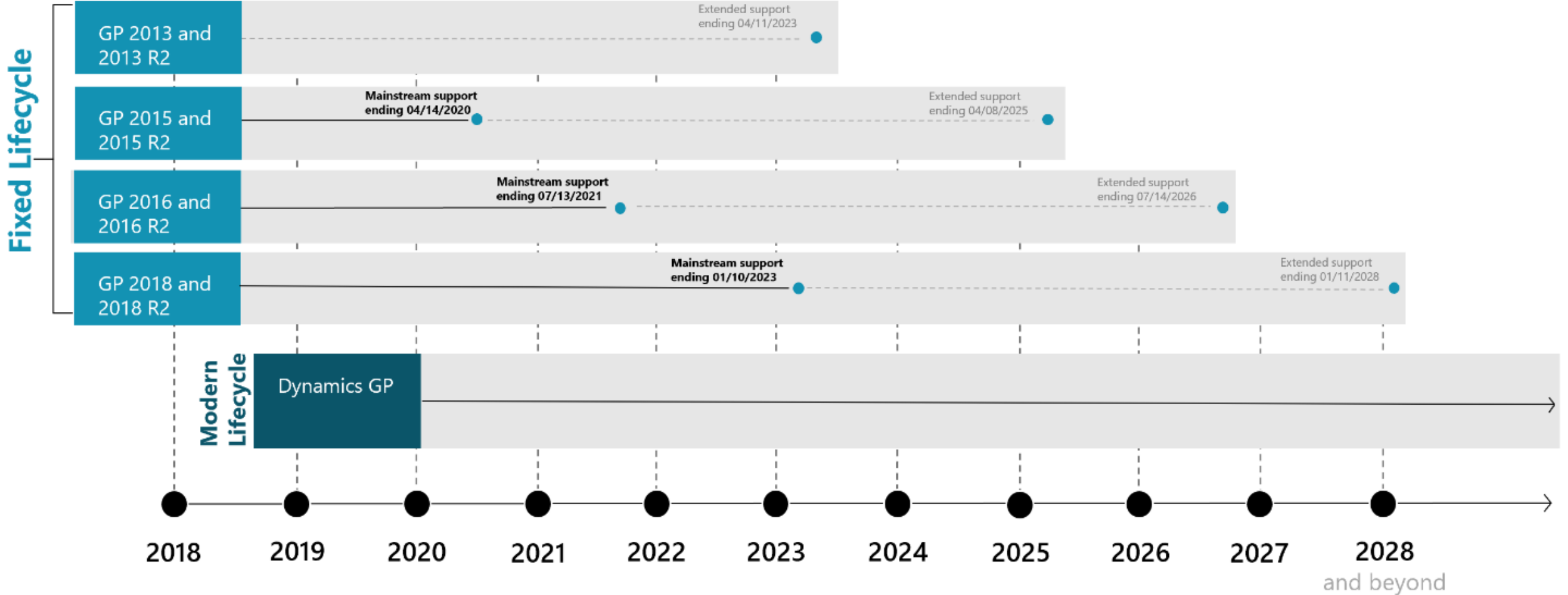 - Direct database access gives you (nearly) infinite power

Trapped In Time

Is GP dust in the wind?

- Major feature updates are history
  - Version 18.6 (late 2023) was the last major feature update
- What is the "modern lifecycle" anyway?
  - Tax, compliance and security updates will continue through at least 2028
  - You have to stay up to date to remain in support
- Reading between the lines
  - Microsoft is shifting toward cloud services
  - Roadmap hasn't changed since 2019

Dynamics GP versions governed by Fixed and Modern Lifecycle

Things we love(d) about GP

- It goes back to medieval times
  - Inertia limits innovation

- Huge cast of characters
  - Partners are starting to focus more on modern software systems

- Full control with on-prem
  - No checks & balances
  - No one to support you when you need it

- History repeats itself
  - No major changes = falling behind the curve

- You can tinker with the universe
  - Direct database access gives you (nearly) infinite potential points of failure

Bogus Pitfalls of On-Prem

The original timeline – what went wrong?

Luckily you won't have to go back in time to avoid these!

Infrastructure & support costs

Security & liability risk

Disaster recovery

Falling behind your competitors

Party On in the Cloud

Things are "more moderner" than before

- Bigger, and yet smaller
  - Cloud infrastructure and feature updates make your system more powerful than ever
  - Modern user interface is easier to use
  - Automation makes tedious manual tasks a thing of the past
- Your business will be most triumphant
  - Scale with your business growth
  - Quicker, easier implementation
  - Continuous updates and innovation

Modern inventions

- AP Automation

- Artificial Intelligence

- Machine Learning

- Real-time Integrations

- Shared Data (Portals)

- Continuous Close

Personages of historical significance

- ## Spendthrift Farm
  - "With Great Plains, the reporting was very cumbersome, cutting and pasting data into spreadsheets to see the information as we needed it. With Intacct, it's the push of a button."
    - Controller, Spendthrift Farms

- ## Legacy Healthcare
  - "After installing Sage Intacct, Legacy has a completely different accounting department. We close faster than we ever have."
    - CFO, Legacy Healthcare

Next Steps

Don't get stuck in the past

- Start your research soon
  - What are your current and future business needs?
  - Evaluate your absolute requirements & "nice-to-haves"

- Plan ahead for resource needs
  - Consider platform vs on-prem costs, internal resources and necessary training

- Consult an expert
  - Sometimes you need a guide (don't worry – we're professionals)

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Questions?

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Closing Thoughts

- Hofstadter's Law
  - It always takes longer than you expect, even when you take into account Hofstadter's Law.

- Flight of the Buffalo, James Belasco & Ralph Stayer
  - Change is hard because people overestimate the value of what they have - and underestimate the value of what they may gain by giving that up.

Thank you

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