



# FINANCIAL DATA MIGRATION WITHOUT CHAOS

## *HOW LEDGER MIGRATOR HELPS PARTNERS DE-RISK BUSINESS CENTRAL PROJECTS AND WIN FASTER*

### **WHY FINANCIAL DATA MIGRATION IS A DIFFERENTIATOR**

The partners who can make migration safer, faster, and more complete won't just deliver better projects. They'll win more deals. Because in ERP, trust is the product.

### **TURBO BOOST YOUR ERP IMPLEMENTATIONS**

This paper provides actionable insights and explains why faster migrations, cleaner outcomes, and shorter sales cycles are within reach

# Executive Summary

*If you've ever been part of a Microsoft Dynamics 365 Business Central implementation, you've probably felt it. That moment when the project is going well... until someone says, "Okay, now we need to migrate the financial data."*

*Suddenly, timelines stretch. Confidence drops. And the entire go-live starts to feel fragile. Because here's the uncomfortable truth: data migration is where Business Central projects either stay on track - or completely unravel.*



This was discussed in a recent episode of IAMCP Profiles in Partnership "Ledger Migrator: Automating Financial Migration for Business Central Partners," featuring Ledger Migrator founders Robert Papier and Gerry Allan.

And if you're a Microsoft partner helping customers move from legacy ERPs (Enterprise Resource Planning systems) like GP (Dynamics GP), SL (Dynamics SL), NAV (Dynamics NAV), or "some system we've had forever," this episode hits close to home.

In this paper, we'll break down the most useful insights from the conversation and show how Ledger Migrator's approach is becoming a real advantage for partners.



# Why ERP Migration Still Feels Like a High-Risk Bet

ERP migration shouldn't feel like a gamble. But for most partners, it does—regardless of how powerful Business Central is or how capable partners are.

Not because Business Central isn't powerful. It is.

Not because partners aren't capable. They are.

It's because financial data migration is still stuck in an old world of exports, spreadsheets, manual cleanup, and endless reconciliation loops.

And when something goes wrong, it's never small. It's a trial balance. Vendor balances. Customer history. Audit trails. Trust. That's why migration has quietly become the "make or break" phase of ERP delivery.

## Partners talk customers out of migrating their financial history

Traditionally, the cost and complexity of bringing historical data into Business Central made it hard to justify, so partners migrated only the chart of accounts and opening balances, moving forward with a "clean slate."

The problem is... CFOs don't want a clean slate. They want continuity. Context. Intelligence.

And now, with Microsoft Copilot (an AI-powered assistant) and AI-driven insights accelerating inside Business Central, historical data isn't just "nice to have." It's the fuel.



# Migration Is Still an Excel-Driven Process

The “old way” of doing ERP migration is something that every partner immediately recognizes: And you repeat... because the source system keeps changing during the project.

That repeat part is what kills you.

ERP implementations take time, but business doesn't pause: invoices still go out, payments come in, and journal entries are made. The data keeps moving. So even if you “migrate once,” you're not done. You migrate again. And again.

This is why financial data migration becomes expensive, risky, and time-consuming. Not because it's impossible - but because it's not repeatable without automation.

## Bring the client's full financial history into Business Central

Ledger Migrator goes beyond basics, migrating all financial and historical transactions so customers retain valuable data when moving to Business Central. It migrates all financial data, including historical transactions, so customers aren't forced to abandon years of financial intelligence just to get into Business Central.

Many partners have learned to “lead the witness” in conversations with customers. In other words, they guide the discussion until the customer agrees they don't need historical data, because migrating it is too difficult.

But finance leaders do want it. They want to look back. They want continuity for reporting. They want the business's story preserved, not erased.

Ledger Migrator allows partners to transfer complete financial history, not just opening balances, so customers move to Business Central with full data continuity.



# Automation + Date Chunking = Less Risk at Cutover

Instead of trying to migrate 5–10 years of data in a single massive run (which can take days and introduce significant risk), Ledger Migrator lets partners migrate in segments, often by financial year.

This gives partners a safer, more controllable migration path:

- Move older historical data to the early part of the project.
- Validate and reconcile as you go.
- Leave only the most recent open periods for final cutover.
- Reduce the “big bang” risk at go-live.

In a world where ERP projects can be derailed by one reconciliation issue, this matters. It means partners can test, prove, and validate outcomes throughout the project—not just hope everything works at the end. And that's the real shift: migration becomes a process, not an event.

## The Presale License Model: A Sales Accelerator for Partners

With the refundable pre-sale license, partners can migrate real customer data into a sandbox environment (not production). That means:

- No more demos with sample data
- No more “trust us, it will work” conversations.
- Customers can see their data inside Business Central before they commit.

This changes the sales conversation from theoretical to tangible.

It builds trust. It **reduces perceived risk**. And it often shortens the sales cycle because stakeholders can validate outcomes earlier.



# Why This Matters Even More Now: Copilot Needs History

If you migrate only opening balances and master data, Business Central doesn't have enough historical context for Copilot and AI agents to deliver meaningful insights right away.

You may have to wait years before the system has enough data to become truly intelligent. But if you migrate the full history?

Now Copilot can work with real context from day one. That's a huge advantage for customers - and a differentiator for partners.

Because the conversation shifts from:

"Let's implement an ERP." to: "Let's unlock intelligence, forecasting, and insight immediately."

## Conclusion: The New Standard for Business Central Migration

This paper reinforces five clear takeaways for Microsoft partners:

1. Data migration is still the biggest risk in ERP projects.
2. Most partners avoid migrating the full history because it's traditionally painful.
3. Ledger Migrator makes full financial data migration repeatable and automated.
4. Presale sandbox migrations reduce objections and accelerate deals.
5. Historical data unlocks faster Copilot and AI value inside Business Central.

## Moving Forward

If you're a Microsoft partner working on Business Central migrations, share this paper with your delivery or sales team today. Start using these strategies now to reframe migration in your next client conversation and win more deals.

