

Unlock the Future of Finance: Discover How Agentic AI Can Transform Your ERP and Finance Operations

We bridge the gap between your challenges
and the right-fit solution for your business



[Book your Discovery Workshop today &
start your finance transformation journey!](#)

Finance Transformation at Swiss SMBS

The Core Challenges & Our Discovery Approach

SMBs often face significant challenges when selecting an ERP system, navigating complex platforms like D365 F&O, NetSuite, Oracle and SAP. Common hurdles include **high costs, overwhelming complexity, and uncertain returns**. Our **solution-agnostic discovery process** is designed to directly address these pain points, transforming a difficult choice into a **clear and confident decision**. We **bridge the gap between your challenges and the right-fit solution for your business**.

Challenges



High Costs & Budget Constraints

Significant upfront and ongoing expenses for ERP systems place a heavy strain on the finances of Swiss SMBs, creating a major barrier to adoption.



Complexity & Lack of Expertise

Leading platforms are often too complex for internal teams to evaluate effectively, leading to decision paralysis and a lack of confidence in the selection process.



Unclear ROI & Vendor Lock-in

The difficulty in quantifying benefits and the fear of being tied to a single vendor often cause hesitation and delay critical technology upgrades for SMBs.

Opportunities



Tailored ERP Fit

Our process identifies the ERP solution that precisely matches your operational needs and budget, turning a significant expense into a **strategic investment** for growth.



Clear Cost Transparency & ROI Insights

We provide a clear **total cost of ownership** breakdown and data-backed **ROI projections**, empowering you to make a financially sound and justifiable investment decision.

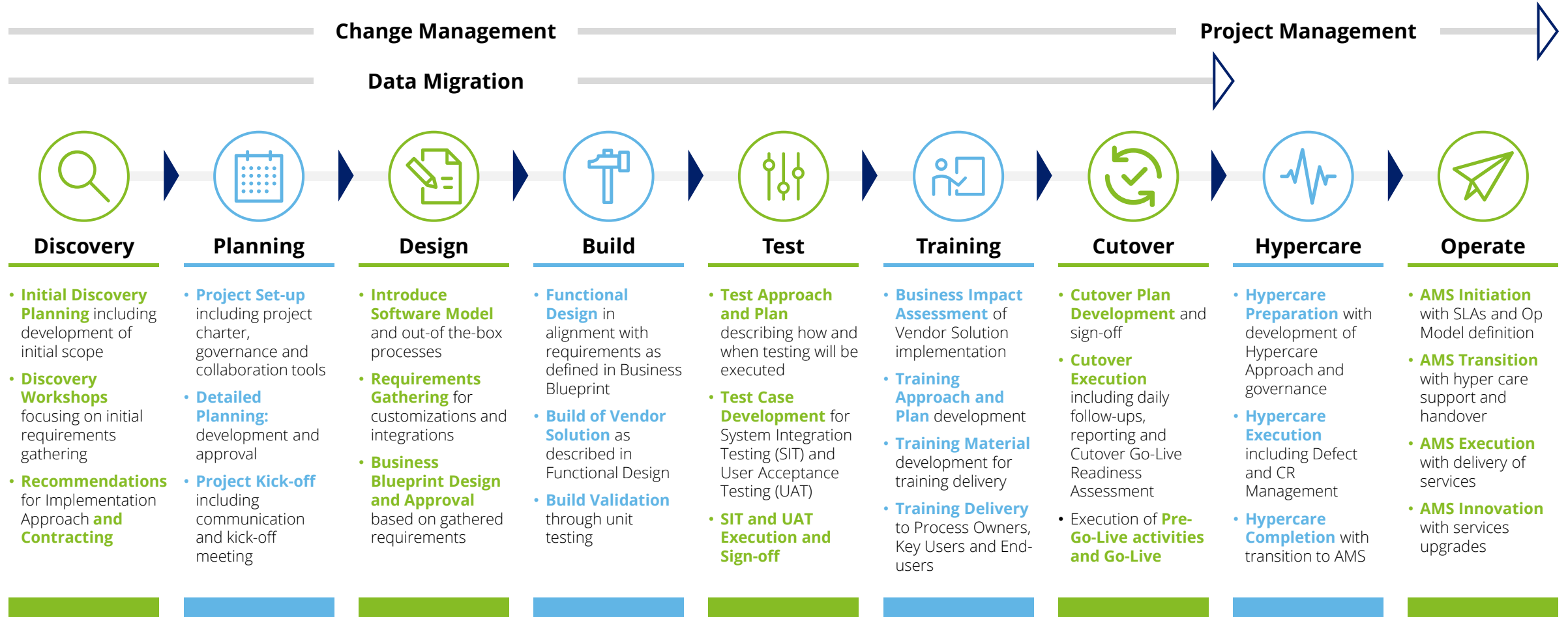


Risk Mitigation & Negotiation Power

We identify risks early and provide **vendor-neutral leverage**, empowering you to secure flexible terms and avoid the pitfalls of long-term **vendor lock-in**.

ERP Implementation Approach | End-to-end overview

Providing a high-level overview of the 9-phases and key activities to be executed in each phase



Data Migration, Change- and Project Management run as parallel activities throughout the MS D365 implementation phases.

ERP Discovery Phase For Swiss SMBS

Key Activities

Our structured process is designed to deliver clear, tangible results. We guide you through a series of **key activities**, each producing a valuable deliverable that moves you closer to a successful ERP implementation.

This ensures a transparent, data-driven approach to selecting the perfect solution for your business, culminating in a clear path forward.

Discovery Workshops



We conduct in-depth workshops to capture your specific **functional** and **non-functional** business requirements and current business processes.

Market Analysis



Analyze workshop findings to identify critical gaps and map needs to **potential solutions based on our thorough market and vendor analysis** to identify suitable ERP solutions.

Solution Shortlisting



We create a shortlist of top **vendors** and provide a **structured evaluation framework** for comparison.

Risk Assessment



A detailed **cost-benefit analysis** and risk assessment ensures a financially sound and secure decision.

Contracting Support



We provide expert support during the **contracting phase** to secure favorable terms for your business.

AI-Enabled Finance Transformation



We identify **specific finance processes** within your ERP that can be automated using **Agentic AI**. We provide a **customised transformation roadmap** integrating ERP capabilities with Agentic AI tools as well as POC ideas.

ERP Discovery Phase For Swiss SMBS

Outcomes & Your Next Step

Discovery Workshop

Engage with us for a tailored **Finance Transformation Discovery workshop** to drive your business growth with confidence.



You will receive a **comprehensive requirements document** detailing your specific needs,



A **comparative analysis of shortlisted vendors** with a clear, unbiased recommendation



And a **strategic roadmap for phased implementation**, leveraging Agentic AI to automate processes, improve accuracy, and drive smarter finance decisions.

This ensures the selected solution aligns with your business goals, budget, and scalability requirements, providing a solid foundation for future growth and **maximizing ROI**.

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Following the first DISCOVERY Phase, we would recommend to engage in the remaining project phases with us on Planning, Design, Build and Operate. Key outcomes of the BUILD phase include **Functional and Technical Design Documents**, and a **Build Validation report** confirms that all components have passed unit testing and are functioning correctly, ensuring a robust and validated system is delivered. During Hypercare and OPERATE, you will receive the **AMS Operating Model** and agreed-upon **SLAs** to govern ongoing support. A fully configured Service Management Tool will be provided for tracking incidents and requests.

Speak with us today on how we can help you through an end-to-end successful ERP Journey.



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