

# *EntityShift Introduction & Services*

## Service Definition Document, G-Cloud 15

*January 2026*



# Introduction

EntityShift specialises in advisory, design, implementation, migration, and ongoing support services for Microsoft Dynamics 365 Finance and Operations, covering Finance, HR, and Supply Chain Management.

We support public sector organisations with end-to-end cloud ERP solutions, helping to optimise financial, operational, and supply chain processes while ensuring compliance, governance, and secure cloud deployment.

# Origin story

More than 70% of ERP implementation projects fail to achieve their stated objectives\*. That alone is a signal for change.

Working within large, renowned consultancies, the EntityShift founders gained valuable insight to the factors that made a difference between project failure and success.

The sector suffers from a them and us mentality between traditional system implementation partners and their clients, undermining projects and comprising the likelihood of success.

We know that lasting change comes from within an organisation.

In contrast to traditional partners, EntityShift empowers its customers to take more ownership of the transition, with an evolved approach to ERP projects guided by our unique framework and assets.

A relentless focus on the successful adoption of D365 F&O is born from a deep understanding of the product and delivered in collaboration with the only people that really make any project succeed; your team and your people.

# Features

- End-to-end D365 F&O implementation focused on user enablement
- Strategic consulting for implementations, upgrades, and cloud migration
- Project and programme management with risk and delivery oversight
- Solution architecture across Finance, Supply Chain, and HR
- Integration design connecting D365 F&O to all business systems
- Data migration strategy, mapping, cleansing, and execution
- Data governance, quality management, and ongoing maintenance
- Independent quality assurance across all delivery stages
- Business change support with readiness and communications
- Ongoing D365 F&O support and continuous improvement

# Benefits

- User focused delivery enabling knowledge transfer and measurable benefits
- Best practice processes ensuring consistent operational efficiency
- Streamlined design improving productivity and end user capability
- Quality assurance framework delivering predictable, high-quality outcomes
- Iterative approach reducing risk and validating benefits early
- Proven success delivering D365 F&O across sectors
- Early engagement to drive strong user adoption
- Blended delivery model maximising knowledge transfer
- Solution blueprinting ensuring clear design and business alignment



# Summary of Services

| Service                    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Planning</b>            | EntityShift works with clients to plan ERP implementations using a proven methodology. We define key activities, risks, and assumptions, produce joint project plans, and set clear success criteria. Planning includes requirements analysis, solution design, technical architecture, data migration strategy, security and governance review, and knowledge transfer to internal teams. Service transition planning is included for clients using EntityShift managed services. |
| <b>Training</b>            | EntityShift delivers tailored training programmes covering end-user, super-user, and system administrator training. Training includes learning needs analysis, training design, delivery, assessment, and sustainability support. Training can be delivered in-person, remotely, or via digital materials, including train-the-trainer sessions and knowledge transfer to internal teams.                                                                                          |
| <b>Setup and migration</b> | EntityShift assists clients with full ERP setup and migration to cloud-based Microsoft Dynamics 365 F&O. Services include pre-migration assessment, roadmap creation, configuration planning, data migration, security and access planning, and execution using Microsoft tools and proven methodologies. Migration is tailored to balance cost, configuration versus customisation, and scalability requirements.                                                                 |
| <b>Quality assurance</b>   | EntityShift implements a robust QA framework to ensure high-quality ERP solutions. We provide risk and performance reporting, clear governance roles, and managed services support including continuous improvement and service management. Performance testing is coordinated with the client and platform owner to ensure cloud services meet operational requirements.                                                                                                          |
| <b>Managed services</b>    | EntityShift provides helpdesk and managed support for Dynamics 365 F&O and Power Platform. Services include Tier 2 / Tier 3 support, proactive monitoring, break/fix response, incident management, and Evergreen services. Support is available via phone and email with SLAs aligned to standard working hours, with accessibility standards (WCAG 2.1 AA) applied to ticketing portals.                                                                                         |

# Managed Services

EntityShift provides helpdesk and managed support for Dynamics 365 F&O and Power Platform. Services include Tier 2 / Tier 3 support, proactive monitoring, break/fix response, incident management, and Evergreen services. Accessibility standards (WCAG 2.1 AA) are applied to our ticketing portals.

**Email/online ticketing support:** Yes, as standard

**Phone support:** Yes, default Mon-Fri, 9am–5pm UK

**Support levels:** Full Managed Service, Proactive Support, and Break-Fix/Reactive Support with SLA-based response prioritisation



# Social Value

EntityShift is committed to public sector social value including:

- Skills transfer and workforce development
- Working with other SMEs and UK suppliers in the supply chain
- Sustainable delivery and reducing travel emissions
- Promoting diversity, equality, and inclusion in the workplace
- Volunteering and contributions to local communities



# Contact Us

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