

Company Overview

Shape Associates Limited (Shape Associates) is an independent, vendor-agnostic ERP advisory firm specialising in guiding organisations through the full lifecycle of enterprise resource planning (ERP) transformations. We act as an *intelligent client function*, bridging the gap between our clients, ERP software vendors, and systems integrators to ensure that ERP programmes align with strategic business objectives and deliver measurable outcomes. With decades of ERP experience from both client-side and integrator perspectives, our team knows how to deliver smooth, low-risk implementations that set organisations up for long-term success. We have a proven track record in maritime, transportation & public sector transformation, having successfully overseen **100+ cloud ERP programmes** across various clients.

Our Mission: To be the trusted partner for organisations undergoing or exploring ERP transformation by providing independent, business-centric, and risk-aware advisory services.

Our Vision: To establish Shape Associates as the go-to ERP advisory firm for organisations seeking to maximise the value of their ERP investments while ensuring smooth and risk-free implementations.

We are a purpose-driven consultancy that prioritises business outcomes over technology. Unlike system integrators or software resellers, we do not sell or implement ERP software – **our sole focus is our client's success**. We support our clients **through every stage of the ERP lifecycle**, from initial strategy and vendor selection through implementation, organisational change, go-live and beyond. Throughout engagements, we operate as a trusted advisor and an extension of the client's team, transferring knowledge and building internal capability for sustained success. Our approach is collaborative and transparent, tailored to public and private sector needs and aligned with government procurement standards and best practices (e.g. managing risk, ensuring value for money, and delivering social value).

Below, we outline our key service capabilities in detail. Each service area is supported by Shape Associates' real-world experience and thought leadership in ERP transformations.

ERP Strategy & Readiness

We help organisations lay a solid foundation for ERP initiatives. Early strategic planning and preparation are critical to minimise risk and ensure the programme delivers true business value. Shape Associates works with stakeholders to define the vision, business case, and roadmap for ERP change.

- **ERP Vision & Business Case:** We develop robust business cases and **ROI analyses** to justify ERP investments

This includes identifying pain points and improvement opportunities in current processes, estimating benefits, and aligning the ERP programme with strategic objectives. For example, Shape Associates recently guided Port of London Authority through an ERP readiness assessment and business case development, identifying key process inefficiencies and quantifying benefits to secure executive approval for the transformation programme.

- **Roadmap Planning:** We create comprehensive ERP **strategy and roadmaps** that align technology plans with business goals. Our consultants define the future state vision for processes and systems, and outline phased implementation plans (prioritising “adopt not adapt” of best practices) to achieve that vision incrementally.

- **Readiness Assessment:** Shape Associates conducts thorough **readiness assessments** to evaluate organisational preparedness before the ERP programme starts. We examine factors such as data quality, business processes, stakeholder buy-in, and resource capabilities. Any gaps or risks are identified and mitigated *before* implementation kicks off, ensuring the organisation is truly **“ERP-ready”**. We often deliver readiness workshops and health checks to help clients firm up governance, data, and change management plans ahead of engaging implementation partners.

By investing in strategy and readiness, our clients establish clear objectives and risk controls for their ERP journey, greatly increasing the likelihood of success.

Programme & Project Governance

Strong governance is the backbone of a successful ERP programme. We help set up and run the structures and processes needed to keep large ERP projects on track and accountable to the organisation’s goals.

- **Governance Framework:** Shape Associates helps clients establish robust programme governance structures, such as steering committees and project boards, to provide executive oversight and clear decision-making channels. We define roles and responsibilities (e.g. sponsors, business leads, technical leads) and escalation paths so that issues are managed proactively. We ensure the right people are in place to govern the programme effectively, aligning all stakeholders from day one.
- **Client-Side PMO & Oversight:** We often act as or alongside the client’s **Programme Management Office (PMO)**, providing hands-on project oversight and coordination. Our team tracks progress against plans, manages interdependencies, and maintains a **single source of truth** for programme status. We implement rigorous **risk and issue management** practices to prevent delays and cost overruns, facilitating risk workshops and maintaining risk registers. Through independent **quality assurance**, we verify that vendors and SIs deliver on their commitments and that the solution meets the business requirements.
- **Independent Challenge:** As an independent advisor, Shape Associates serves as a critical friend to both the client and their implementation partners. We are unafraid to **challenge vendors or internal teams** on decisions and designs to ensure they align with the organisation’s best interests. This “critical eye” helps uncover issues early and hold delivery partners to account, ultimately protecting the client’s investment.
- **Example – ERP Governance:** Shape Associates is currently providing **programme leadership to Port of Tyne** undergoing an Oracle Cloud ERP implementation. We helped set up a joint governance model with the Port’s senior management and the chosen SI, including a programme board and working groups for functional and technical streams. By acting as the client-side Programme Director, we coordinate between the SI and the Port, clearly communicating progress, risks, and issues, and enabling the Port’s leadership to make timely, informed decisions. This governance oversight is ensuring the project stays on schedule and maintains quality standards through to a successful go-live.

Through our governance support, clients gain control and visibility over their ERP programmes. We instil discipline in delivery, enabling confident decision-making and effective risk mitigation at the highest levels.

Vendor & Systems Integrator Selection

Choosing the right software vendors and implementation partners is a make-or-break decision in any ERP journey. Shape Associates provides **vendor-agnostic** guidance to help clients select the best-fit ERP solution and Systems Integrator (SI) through objective, structured procurement processes.

- **Unbiased ERP Evaluation:** We conduct comprehensive, **unbiased evaluations** of ERP software options based on each client's specific business needs. Our methodology typically includes requirements gathering, market research, vendor demos, and scorecard-based assessments. Because we are independent of any ERP vendor, our recommendations are purely driven by what's best for the client's operating model and future vision (whether that is SAP, Oracle, Workday, Microsoft Dynamics, or others).
- **Systems Integrator Selection:** For implementation services, we assist in selecting the ideal **Systems Integrator or delivery partner**. This involves defining procurement strategies (e.g. using frameworks or competitive dialogue), preparing tender documents, and evaluating SI proposals against criteria such as experience, approach, cultural fit, and cost. We bring deep insight into the ERP SI landscape, including each firm's track record in the public sector. Our team has managed selection processes that include demos, reference site visits, and negotiation of Statements of Work to ensure a partner capable of delivering success. In one recent engagement, our consultants managed the ERP vendor and integrator selection for a Europe's busiest ferry port, running an options appraisal and guiding the client through a structured evaluation of cloud ERP solutions. We helped the agency define evaluation criteria, facilitated supplier workshops, and ultimately supported the negotiation of a contract with the chosen ERP vendor and SI, ensuring the solution and team aligned with the agency's strategic requirements.
- **Contract & Commercial Advisory:** Shape Associates provides expert support in **contract negotiations** and commercial advisory to secure favourable terms for our clients. We leverage our experience with ERP contracts to advise on service level agreements, implementation scope, pricing models, and risk/reward mechanisms. Our advisors help clients navigate complex licensing models and ensure there are no hidden costs. We also make sure contracts protect the client's interests (e.g. clear deliverables, accountability for outcomes, flexibility for future changes). This results in deals that offer strong value for money and solid governance of vendor performance. For instance, we can support in renegotiating its ERP support and hosting contracts – achieving cost savings and improved service levels by tightening KPIs and benchmarking the fees against the market.

By engaging Shape Associates for vendor and SI selection, clients ensure an objective and well-documented procurement process that stands up to scrutiny and yields the right long-term partners.

Digital & Enterprise Architecture

Shape Associates helps organisations design and implement **digital and enterprise architecture** strategies that underpin successful ERP and business transformations. We ensure that technology architecture is fully aligned to the organisation's goals and that new ERP solutions fit into a coherent, future-proof enterprise model.

- **Digital Transformation Strategy:** Our experienced architects and digital transformation practitioners work with clients to develop overarching **digital strategies and target operating models** tailored to their business needs. We take into account each organisation's unique context – including public sector considerations such as political, social, and economic factors – to co-create a transformation roadmap. This often involves defining design principles and a clear vision of how processes, people, and technology will interact in the future state.
- **Enterprise Architecture Planning:** We assess the client's current **business and technology architecture** and then design the **future-state enterprise architecture** required to support their corporate vision. This covers application architecture (how the ERP and related systems like CRM, BI, etc. integrate), data architecture, and technical architecture (infrastructure and cloud). We identify gaps between the “as-is” and “to-be” architectures and create actionable plans to bridge them. Key artifacts may include target application maps, integration architectures, and reference architectures aligned to standards (for example, leveraging **TOGAF** methodology for enterprise architecture best practices).
- **Technology Roadmap & Integration:** Based on the target architecture, Shape Associates develops detailed **technology roadmaps** and transition states, ensuring that new ERP solutions and digital initiatives are introduced in a logical sequence without disrupting services. We plan integrations and data flows so that legacy systems and new cloud services work together seamlessly. Our architects also advise on selecting the right platforms and tools (for example, middleware for integrations, reporting/data warehouses, etc.) to support the ERP and wider digital ecosystem.
- **Governance & Standards:** We assist in establishing architecture governance within the organisation – defining standards, reference models, and guiding principles to maintain architectural integrity over time. This helps the client continuously align IT investments with the strategic roadmap and adapt to emerging needs (e.g. adopting new technologies like AI in the ERP context). By embedding good enterprise architecture practice, our clients gain resilience and agility in their IT landscape.

Through our Digital & Enterprise Architecture services, clients get a clear blueprint of “where they are going” with their digital transformation. This ensures the ERP programme and other initiatives are executed within a cohesive, well-thought-out architectural framework, reducing technical risk and enabling future innovation.

Change Management & Business Adoption

Even the best technology will fail to deliver value if people do not embrace it. Shape Associates places a strong emphasis on **change management and business adoption** to ensure that ERP transformations are not just technically successful, but also achieve lasting business outcomes.

We support the *human side* of ERP change, preparing the organisation, engaging stakeholders, and enabling users to work in new ways.

- **Change Strategy & Stakeholder Engagement:** We develop comprehensive **change management strategies** tailored to each client's culture and stakeholder landscape. This includes stakeholder analysis and engagement planning – identifying who is impacted by the ERP change (from executives to front-line staff) and crafting targeted communication and engagement activities to build understanding and buy-in. We often help establish change champion networks within the organisation to facilitate two-way communication and feedback during the programme.
- **Training & Enablement:** Shape Associates delivers robust **user training and enablement programs** to equip employees with the skills and knowledge to use the new ERP system effectively. We create customised training materials, run workshops and e-learning, and use “train-the-trainer” approaches to build internal training capability. Our goal is to ensure all user groups (e.g. HR staff, finance officers, managers, end-users) are confident and capable in the new processes and system functionalities by go-live.
- **Business Process Adoption:** We assist organisations in redesigning and adopting new business processes that come with the ERP. This involves updating standard operating procedures, defining new roles/responsibilities, and helping users transition from old ways of working to new, more efficient processes. We ensure that process changes are clearly documented and understood, so that the organisation realises the full efficiency and service improvements from the ERP. We also put in place *post-go-live support* structures (super-users, help desk support, floor-walking, etc.) to reinforce adoption in the critical period after launch.
- **Benefits Realisation & Culture Change:** Our change management approach extends to **benefits realisation**, making sure that the expected benefits in the business case are tracked and achieved through changes in ways of working. We help clients define KPI targets for adoption (such as % of transactions done via self-service, user satisfaction scores, etc.) and monitor them. Culturally, we work to foster a mindset of continuous improvement and openness to change. For example, as part of an ERP replacement at a self-financing UK deep-sea trust port in North East England, Shape Associates led a business change program that introduced a new self-service model for managers and employees. This involved shifting previously centralised HR processes to online self-service, accompanied by training and support. The result was a higher adoption rate of the ERP's HR module and empowered line managers making better decisions with accurate data – a key factor in the council's improved organisational performance. By addressing people, process, and cultural factors, our change management services ensure that the organisation not only **accepts** the new ERP system but actively **leverages** it to drive improvements. We help our clients build lasting capabilities so that the transformation's benefits are fully realised and sustained.

Post-Go-Live Optimisation

Shape Associates's support doesn't end at go-live. We continue to partner with clients in the **post-go-live phase** to stabilise the ERP solution and optimise its value. Many ERP initiatives struggle after the initial implementation due to lack of follow-through – we make sure our clients avoid that “value drop” and continue to improve.

- **Stabilisation & Hypercare:** In the immediate go-live aftermath, we provide **post-implementation support** and advisory. Our team helps triage and resolve any critical issues, refine processes or configurations as needed, and guide the business through the initial adjustment period (often called hypercare). We work alongside the client's support teams and the SI to ensure a smooth transition to business-as-usual operations, with minimal disruption to services.
- **Continuous Improvement Reviews:** Once the system is live, we conduct **post-go-live health checks** and periodic reviews of the ERP solution. Using data from the live system and feedback from users, we identify opportunities for **continuous process improvement**. This might include streamlining workflows further, enabling additional ERP modules or features that were deferred, or tweaking configurations to better suit user needs. We help clients prioritise these improvements and create a roadmap for incremental enhancements.
- **Benefits Realisation Tracking:** We assist clients in tracking **key performance indicators (KPIs)** and benefits to ensure the ERP is delivering the expected ROI. For example, we set up dashboards to monitor efficiency gains (time/cost savings), data accuracy, compliance metrics, and user satisfaction post-implementation. If certain benefits are lagging, we investigate why and recommend actions (such as additional training or process changes) to get things back on track.
- **Value Maximisation:** Our advisory services continue as the organisation grows with its ERP. We provide ongoing strategic advice to **optimise ERP usage** and adapt the system to evolving business needs. This could involve evaluating new features from the ERP vendor's updates (cloud ERP systems have frequent releases), incorporating complementary technologies (like advanced analytics or robotic process automation integrated with the ERP), or planning for a phased rollout to new departments. In essence, we help clients **realise continuous ROI** from their ERP investment by ensuring the system and processes keep pace with change.

With our post-go-live optimisation support, clients don't just "survive" go-live – they continuously enhance their operations and extract maximum value from their ERP solution over time.

Data Migration & Integration

Managing data and systems integration is a crucial aspect of any ERP implementation. Shape Associates offers specialised services in **data migration and integration** to ensure that when the new ERP system goes live, it has the right data and connectivity to function effectively within the client's application landscape.

- **Data Migration Strategy & Execution:** We develop comprehensive **data migration strategies** to safely move data from legacy systems into the new ERP. This involves early identification of data sources (e.g. old HR/Finance systems, spreadsheets), mapping legacy data to the new ERP data structures, and defining data cleansing and enrichment requirements. We advise on data governance during the programme – for instance, establishing data owners and quality criteria for critical data (such as customer records, supplier details, employee data). During execution, we support extract-transform-load (ETL) processes, rehearsals, and data validation. Our team's experience ensures that come go-live, the ERP has high-quality data supporting it. At one of our most recent clients, Shape Associates experts oversaw a major data cleansing effort as part of an Oracle

Cloud ERP migration – tracking cleansing progress (percentage of records cleaned) and ensuring key data (like organisational structures and financial data) met the required quality benchmarks before cutover.

- **Systems Integration Design:** Most ERP implementations must integrate with a variety of other systems (e.g. payroll, CRM, reporting, legacy databases). We design the **integration architecture** to connect the ERP with these surrounding systems. Our consultants determine the best integration approaches (real-time APIs, batch file transfers, middleware usage, etc.) for each interface, focusing on reliability and data consistency. We also consider the security and compliance aspects of data flows. The result is an integration blueprint that ensures the new ERP will seamlessly communicate with other applications in the enterprise environment.
- **Integration Build & Testing:** We provide oversight or management of the **build and testing of integrations**. This includes helping select and configure integration tools or platforms if not already in place (for example, leveraging an iPaaS or an existing enterprise service bus). We coordinate between functional teams and technical developers to ensure that business processes flow smoothly across system boundaries – for instance, that an HR hire in the ERP triggers account creation in Active Directory, or that finance data flows into the reporting warehouse. Rigorous testing (unit, system integration testing, user acceptance) is conducted for all interfaces. In a recent project, we helped a client optimise its sales invoicing processes by moving from 20% system automation to 95%, saving 1 FTE. This also resulted in faster and more accurate data exchange across the council's application landscape.
- **Cutover Planning:** Data migration and integration activities culminate in the cutover to the new ERP system. Shape Associates assists with detailed **cutover planning** to orchestrate all the moving parts – migrating final data sets, sequencing the shutdown of legacy systems and start of new system interfaces, and having rollback plans. We make sure that the transition is as smooth as possible, with minimal downtime and a clear timeline of tasks. Post go-live, we verify that all data has migrated correctly and that interfaces are working as intended.

By handling the complexities of data and integration, we ensure our clients have a fully functional ERP environment at go-live. High-quality data and well-designed integrations translate into better decision-making, user trust in the system, and more efficient end-to-end processes.

Commercial & Contractual Advisory

Public sector organisations must ensure that their ERP programmes and IT services are procured and managed to deliver best value and remain in compliance with regulations. Shape Associates provides **commercial and contractual advisory** throughout the ERP lifecycle – helping clients structure deals, manage contracts, and optimise commercial outcomes.

- **Procurement Strategy & Support:** We guide clients through the **procurement process** for ERP-related services (software, implementation, support), aligning with public sector procurement regulations and frameworks. Our team can assist in drafting procurement documents (RFPs/ITTs), defining evaluation criteria, and conducting market engagement. We ensure transparency and fairness in supplier selection, while focusing on achieving the client's target outcomes and budget constraints (delivering *value for money* as a core principle).

- **Contract Negotiation:** Shape Associates brings expert **negotiation skills** to help clients secure favourable contract terms with ERP vendors and SIs. We advise on pricing models (fixed price, T&M, gainshare, etc.), implementation milestones, payment terms, and terms for scope/change control. For cloud ERP SaaS contracts, we help navigate subscription terms, renewal protections, and data/security clauses. We draw attention to potential risk areas (for example, data residency, IP rights, exit provisions) and ensure contracts include the necessary protections and flexibility for the client. Our experience includes negotiating complex multi-year contracts on behalf of councils and government bodies, often achieving savings or improved terms by leveraging industry benchmarks.
- **Contract Management & Governance:** Once contracts are in place, we assist in **contract management**, helping clients maintain vendor accountability. We can set up contract management frameworks with regular service reviews, performance monitoring against SLAs, and mechanisms to manage any non-compliance or change requests. If issues arise, we advise on remedial actions per the contract (for instance, service credits for missed SLAs, or step-in rights). We also help ensure that the spirit of the contract is maintained – fostering a partnership approach with vendors while firmly protecting the client’s interests. In one case, our team supported a city council’s contract management of their SI by instituting joint governance forums and a clear issue escalation path, which improved vendor responsiveness and collaboration.
- **Commercial Health-Checks:** For organisations already in long-term ERP contracts or outsourcing arrangements, Shape Associates offers **commercial health-checks**. We review existing contracts and supplier performance to identify opportunities for improvement – this could include benchmarking costs against the market, checking for compliance with contractual obligations, or identifying services that are under-utilised. We then provide recommendations, which might involve renegotiating certain terms, consolidating contracts, or preparing for re-procurement if needed. For example, we helped a large unitary authority assess its ERP support contract and uncovered that certain support services were being charged above market rate; we supported the renegotiation which led to cost reductions and additional services at no extra cost.

Through our commercial and contractual advisory services, clients gain confidence that their ERP programme is underpinned by solid contracts and commercial arrangements. We aim to secure the best value deals and ensure ongoing vendor performance is managed rigorously – ultimately protecting public funds and enabling successful delivery.

Delivery Approach: Shape Associates services are designed to be flexible and client focused. We can provide support on a project basis or as part of a longer-term partnership. Our consultants are experienced in working within public sector environments and can engage on-site or remotely as needed. We emphasise knowledge transfer in every engagement – leaving behind lasting tools, frameworks, and skilled client personnel. All our services under G-Cloud 15 (Lot 3 Cloud Support) are delivered under a **“open and transparent” approach, with clear deliverables and no vendor lock-in.**