Overview

Shape Associates helps organisations **maximise the value of Microsoft 365 as a strategic business platform**, not just a productivity tool. We support clients to unlock the full potential of Microsoft 365 by **driving adoption, embedding sustainable change, retiring costly third-party applications, and integrating Microsoft 365 seamlessly with core ERP platforms**.

We act as an **independent, client-side advisor**, bridging business needs, Microsoft capabilities, and enterprise systems such as ERP, finance, HR, and asset management platforms. Our focus is on ensuring Microsoft 365 delivers measurable outcomes — improved productivity, simpler technology estates, reduced costs, stronger governance, and better user experience.

Unlike system integrators or software resellers, we do **not sell licences or implementation packages**. Our role is to ensure clients make informed decisions, adopt best practices, and realise long-term value from Microsoft 365 investments.

Maximising the Value of Microsoft 365

Many organisations own Microsoft 365 but underuse it. Shape Associates helps clients move from **licence ownership to value realisation**.

We work with stakeholders to:

- Assess current Microsoft 365 usage, configuration, and maturity
- Identify gaps between available capability and real-world use
- Prioritise opportunities for productivity gains, automation, and simplification
- Define a clear roadmap aligned to business objectives

Our services include:

- **Microsoft 365 capability and maturity assessments**
- **Target operating model design** for collaboration, content, and digital work
- **Usage analytics and insight** to identify underused features
- **Value-based roadmaps** focused on business outcomes, not tools

We ensure Microsoft 365 is positioned as a **core digital platform**, supporting frontline staff, managers, leaders, and enterprise processes — not just email and documents.

Successful Change, Adoption & Ways of Working

Technology only delivers value when people use it well. Shape Associates specialises in the **human and organisational change required for Microsoft 365 success**.

We design and deliver change programmes that help organisations:

- Shift from legacy tools and behaviours to modern digital working
- Embed new collaboration, information management, and self-service models
- Build confidence and capability across all user groups

Our change services cover:

- **Change and adoption strategy** aligned to organisational culture
- **Stakeholder engagement and communication planning**
- **Role-based training and enablement** (not generic platform training)
- **Champion networks and super-user models**
- **Post-rollout adoption reinforcement and benefits tracking**

We focus on **practical behaviour change**, ensuring staff understand *why* ways of working are changing and *how* Microsoft 365 supports them in their roles.

Replacing Third-Party Applications with Microsoft 365

Many organisations run multiple third-party tools for document management, collaboration, workflow, surveys, intranets, or light CRM — often duplicating Microsoft 365 capability.

Shape Associates helps clients **rationalise their application landscape** by identifying where Microsoft 365 can safely and effectively replace third-party systems.

Our approach includes:

- **Application and cost rationalisation assessments**
- Identification of suitable replacements using:
    - SharePoint
    - Teams
    - Power Platform (Power Apps, Power Automate, Power BI)
- Risk-based analysis of functionality, support, compliance, and user impact
- Transition planning to minimise disruption

The outcome is a **simpler, lower-cost, better-governed digital estate** with fewer vendors, reduced licence spend and stronger integration across the organisation.

Microsoft 365 and ERP Integration

Shape Associates brings together deep experience in **ERP advisory** and **Microsoft 365 enablement**, ensuring both platforms work together as part of a single enterprise ecosystem.

We help organisations design and govern integrations between Microsoft 365 and ERP systems such as:

- SAP
- Oracle
- Workday
- Microsoft Dynamics
- Other finance, HR, payroll, and asset management systems

Our services include:

- **Integration strategy and architecture design**
- Use of Microsoft tools such as:
    - Power Platform
    - SharePoint
    - Teams
    - Azure integration components
- Enabling:
    - Workflow approvals
    - Notifications and alerts
    - Data surfacing and reporting
    - Secure document and record management

We ensure integrations are **business-led, secure, and maintainable**, avoiding tactical solutions that create long-term technical or operational risk.

Governance, Risk & Control

Microsoft 365 introduces huge flexibility — but without proper governance, it can quickly lead to risk and sprawl.

Shape Associates helps organisations put the **right governance in place without stifling productivity**, covering:

- Information architecture and lifecycle management
- Security, access control, and data protection
- Teams and SharePoint creation policies
- Power Platform governance models
- Compliance and audit readiness

We align Microsoft 365 governance with existing **corporate, digital, and ERP governance frameworks**.

Our Difference

Clients choose Shape Associates because we:

- Are **independent and vendor-neutral**
- Focus on **business value, not technology for its own sake**
- Understand both **Microsoft 365 and enterprise back-office systems**
- Specialise in **change, adoption, and client-side assurance**
- Transfer knowledge and build internal capability

We act as an extension of the client team — providing clarity, challenge, and confidence throughout the journey.