

G-Cloud 15

**Service Definition
Document**

Oracle EPM Solutions

Oracle Enterprise Performance Management

Reporting, Budgeting, Forecasting, Consolidation
and Account Reconciliation

January 2026

ORACLE | Partner

GK
ORACLE EPM SPECIALISTS

Contents

- 1 Overview3
- 2 Oracle EPM Solutions4
 - I. Connected Planning 4
 - II. Financial Consolidation and Close..... 4
 - III. Narrative Reporting 4
 - IV. Account Reconciliation 4
- 3 Service Detail5
 - V. Our Approach 5
 - VI. Service Description 5
 - VII. Capabilities 7
 - VIII. Project Management 9
- 4 Pricing.....10
- 5 Key Contacts11

1 Overview

GK is proud to offer our world class services to you as part of G-Cloud 15. We are a boutique 'Oracle EPM Specialist', focused on delivering the best solutions using Oracle market leading EPM software¹.

We concentrate on Oracle EPM cloud, which also has Oracle's primary attention, receiving continuous development through a single code base and allowing our clients to leave the majority of the technical infrastructure to Oracle to manage.

Our focus on leading the niche that we own allows us to bring deep understanding and the latest Oracle innovations in the product to our clients.

As a niche supplier GK holds many advantages as your Oracle EPM partner including:

- a. Experienced local directors to manage and deliver your services
- b. Ability to customise your solution to your requirements
- c. Flexibility to contract for the exact services you require when you require them
- d. Freedom to put our arms round our clients when they need training and support
- e. Long term partnership with dependable resourcing

As a certified Oracle partner GK offers a full range of services to help you assess, buy, implement and manage your Oracle EPM solutions where the most popular use cases are reporting, budgeting, forecasting, consolidation and account reconciliation - see section 2.

Figure 1 – The EPM cycle covered by GK's Solutions



Figure 1 – Benefits of implementing Oracle EPM Cloud solutions with GK



¹ Gartner® named Oracle as the overall leader in their magic quadrants for Financial Planning Software and for Financial Close and Consolidation Solutions

2 Oracle EPM Solutions

I. Connected Planning

- **Reporting, Budgeting and Forecasting**

Oracle's Planning (PBCS/EPBCS) allows you to drive accurate plans from long range planning to rolling forecasts and line of business planning.

- **Align strategy with plans**

Spend more time running your business and less time maintaining planning and reporting processes. Enable your team to collaborate to develop your strategy.

- **Speed up data analysis to take faster action**

Maintain transparency and control across your business at a higher pace.

II. Financial Consolidation and Close

- **Meet global reporting requirements**

Oracle's Financial consolidation and close (FCCS) is a purpose-built business process for effectively and efficiently managing consolidation and close end to end.

- **Automate complex consolidations and eliminations**

Press button consolidation that is compliant and auditable to your business's standards.

- **Orchestrate a connected close**

Ensures your processes are dependable and correct and delivered in a timely manner and available to all your stakeholders.

III. Narrative Reporting

- **Streamlined and connected reporting**

Oracle's narrative and regulatory reporting solution answers the reporting requirements for any size business.

- **Collaborate securely across the report process**

The application provides an interactive dashboard for defining, authoring, reviewing, and publishing financial, management and regulatory report packages.

- **Publish and distribute reports**

A process driven approach for internal and external stakeholders delivering a single source of truth.

IV. Account Reconciliation

- **Audit and log reconciliations to meet compliance**

Oracle's account reconciliation solution comprehensively addresses reconciliation risk, manages the global process, and utilises automation. Provides real time visibility into your reconciliation performance.

- **Automate high volume transaction matching**

Helps companies optimise reconciliation performance by automating certain tasks including high volume transaction matching and variance analysis.

- **Support complex reconciliations**

Auto match engine capable of matching more than a million transactions a minute.

3 Service Detail

V. Our Approach

Our approach is built on collaborating with our clients, delivering ongoing mentoring, and training and using the system to facilitate consistency through automation. We operate a virtual open-door policy, supported by regular show, and tell to ensure transparency.

Our methodology is to use the right tool for the right purpose. We use our skills to minimise complexity in the design and to simplify processes to make our solutions intuitive to users. We do what is necessary to achieve success and support our clients to make informed decisions.

Success to us is people buying into the new processes which are supported and promoted by leadership. People are at the heart of any successful transformation. As with any change managing scepticism and building trust in the new process is important, ultimately for the project to be successful people need to use it!

VI. Service Description

- **Introduction**

At GK we aspire to bring our full breadth of experience to our services, customise our solutions to fit your requirements, implement the latest features and follow Oracle best practices.

We tailor our services to your requirements, stand alone or a combination of:

1. Assurance Services
2. Implementation Services
3. Managed Services

- **Assurance Services**

Have you ever wondered if your reporting, and planning solution is as efficient as it could be? If your consolidation could take less time or your forecast be more accurate?

Our directors will carry out an audit of your applications and give you the assurance you need that your solution is performing, you are using what you are paying for and that your team are comfortable utilising the capabilities for maximum efficiency.

We understand the positive impact of effective processes and collaborative apps to enable better working because at GK our background and experience is the same as yours. If, and only if we truly believe actions are required to improve overall efficiency, to support your teams, to improve cost and time – we will recommend changes in your report.

- **Implementation Services**

GK provide implementation services as part of a journey to better finance department performance where the project empowers users to make and accept change. We are looking for long term partnerships with clients that want to implement Oracle's world class EPM solutions.

Success to us is people buying into the new processes which are supported and promoted by leadership. We implement processes that provide completeness and accuracy of data.

- Completeness of data through integrated automated processes
- Accuracy in all data sets to meet your reporting requirements.
- An Oracle EPM solution built in the cloud to your requirements

- Rapid implementation adopting Oracle's latest best practices
- GK's usability design and useful features
- Requirements met in a consistent manner with calculations that are transparent and understood by the business
- Full project management, testing, training, and documentation

GK's implementation services deliver a project from initiation to go-live and beyond. Post implementation our Oracle EPM solutions are designed to be a platform for growth and extension. We like to deliver a large project in phases with each phase delivered using GK's rigorous project management methodology – see table 1. We can also follow your methodology if more convenient.

Table 1 – GK's Tried and Tested Implementation Methodology

Analysis	Design	Build	Test	Deploy
Tasks				
- Global design focused on all phases and releases - Conduct interviews and workshops to clarify business requirements - Meet with SMEs to discuss planning processes - Review of requirements and map planning process to solution	- Draft design document and review with Business and IT - Finalise processes - Finalise integration settings and file specifications - Design interfaces and application components - Approve design documents	- Build application and perform unit testing - Create workflows, web forms, dashboards, calcs - Perform loads of data and test setup - Perform system integration testing to validate application, user interfaces and business functionality	- Conduct testing with SMEs - Finalise data validation - Support UAT - Track and resolve issues - End-user training - Sign-off reporting	- Migrate app to production environment - Validate production environment including integrations - Perform handover with administrators
Deliverables				
- Task-level project plan - Detailed list of requirements - Raid Log	- Solution Design - Functional - Technical - Raid Log	- Test plan - Test scripts - Finalised application - Raid Log	- UAT Sign-off - User Training Material - Reporting - Raid Log	- Administration guide - Raid Log
Milestones				
Project Plan	Solution Design Document	- Application Walkthrough - System Integration Testing	User Acceptance Testing	Go-live
Change Management				
Communication	- Prototype - Communication	- Interactive demos - Admin training - Communication	- End-user training - Communication	Go-live event

• Managed Services

GK provide a managed service for peace of mind so you can focus on your core business, and we will provide expert friendly advice and support when you need it.

We offer a strategic partnership and a flexible package of services which could just include support. Alternatively, we can administer your solution for you, end to end, as well as providing upgrades and enhancements. We can perform analysis of your issues, provide recommendations and route large changes through a change request process.

Our managed service is provided by the same consultants that deliver our solutions giving our managed service clients access to the same level of expertise as our implementation clients.

VII. Capabilities

- **Services**

Our Oracle EPM Solutions service includes a full range of sub-services that can be tailored to meet your requirements including:

- Consulting
 - Assurance Audits
 - Oracle EPM Cloud Readiness Assessments
 - Oracle EPM Application Evaluation
 - Gap Analysis and Non-Financial Requirements
 - Post Implementation Reviews
- Cloud Implementation
 - Project Management
 - Solution Design
 - Technical Architecture
 - Functional and Technical Development
 - System, Integration and User Acceptance Testing
 - Cutover and Go-Live Activities
 - Hypercare
 - Change Management and Training
- Managed Servicing
 - Functional and Technical Support
 - System Maintenance and Upgrades
 - Regression Testing and Business as Usual
 - Issue Analysis and Recommendations
 - Enhancements and Change Requests
- Upgrades
 - On premises Oracle Hyperion to Oracle EPM Cloud
 - PNBCS / EPBCS to Oracle EPM Cloud
 - Functional Upgrades to Best Practice
 - Technical Upgrades to Best Practice
 - Integration Upgrades to Best Practice
- Change Management
 - Change and Communication Strategy
 - Target Operating Model Development and Implementation
 - Training Development and Delivery
 - Service Transition, Test Support and Go-Live Support

- **Oracle EPM applications**

EPM software is considered to be critical for managing public sector organizations by linking financial and operational metrics to insights—and ultimately driving strategies, plans, and execution. Planning is the ideal tool to set your annual budget, handle budget transfers, control budgeted expenditure and feed budget pressures into your strategic budget.

With finance at the helm, EPM business processes (strategic modelling, plan, consolidate and close, report, and analyse performance) can help public sector organisations understand their data and use it to make better business decisions.

We support all Oracle EPM applications as part of this service including:

- Planning (PBCS / EPBCS)
 - o Finance, Workforce, Capex, Project
 - o Cash Flow Forecasting
 - o ESG Solution
- Profitability and Cost Management
- Financial Consolidation and Close (FCCS)
- Account Reconciliation
- Tax Reporting
- Narrative Reporting
- Freeform
- Enterprise Data Management

- **Oracle EPM integration**

We design and build integration and automation to and from Oracle EPM as part of this service using standard Oracle tools including:

Connecting to Oracle ERP Cloud

- Native Oracle Integration
- Narrative Reporting Data Connections

Connecting to Oracle applications and or third-party applications in the cloud or on-premises

- Oracle EPM APIs
- Oracle EPM Agent
- Oracle EPM Data Exchange
- Oracle EPM Data Management
- Oracle Integration Cloud
- Third Party APIs
- File based integration

- **Oracle EPM Cloud Readiness Assessment**

GK provides a cloud readiness assessment service for public sector enterprises. This service encompasses enterprise strategy, roadmap, business case and implementation planning and incorporates the areas below:

- Roadmap Determination
- Business Case Development and Support
- Organisational Integration and Deployment Strategy
- Technical Architecture and System Integration Design
- Process Modelling Referencing Oracle Best Practice
- Operating Model Design and Delivery

- **Oracle Hyperion (on-premises) to Oracle EPM (cloud)**

GK provides a functional or technical service to move public sector enterprises from Oracle Hyperion to Oracle EPM Cloud. This service is also available to move off old or sub-optimal Oracle PBCS / EPBCS applications to Oracle EPM Cloud.

VIII. Project Management

GK's projects are managed by our director who engages in the delivery of the project. This brings the required experience to the table as well as proximity to the process allowing for timely identification and resolution of risks, issues and dependencies that arise.

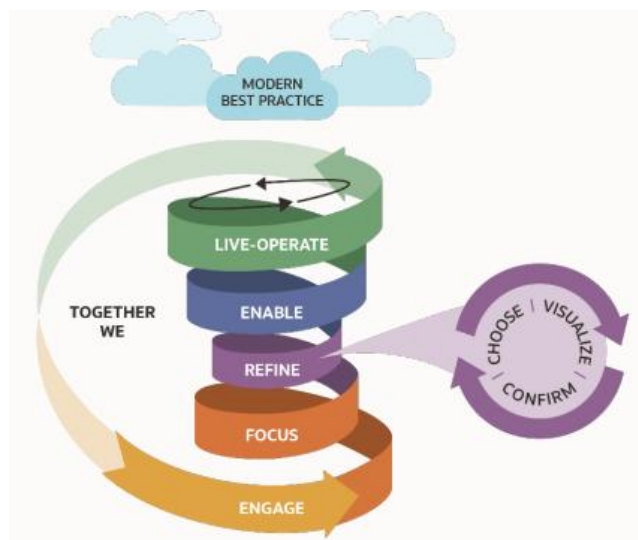
AT GK we are happy to follow our client's project methodology for our projects whether it is waterfall or agile, Prince2 or PMI.

Recently our team has been training in Oracle's True Cloud Method which we can also apply if required – see Figure 3.

In addition, GK has built a project methodology, see Table 1, that combines the best aspects of agile management and proven waterfall flows. Our principles include:

- Phased deliveries
- Clear ownership
- Flexible design and build
- Rigorous testing
- Continuous improvement – especially after go-live!

Figure 3 – Oracle True Cloud Method



4 Pricing

This service is priced in accordance with the SFIA rate card provided and can be modelled using a range of commercial approaches including time & materials, fixed price, and other options. GK may also be able to provide offshore pricing at reduced rates.

‘Ordering and Invoicing’ and ‘Termination’ are to be undertaken in accordance with G-Cloud 14 contract terms unless varied by mutual agreement and detailed within a call-off contract.

5 Key Contacts

For further information please get in touch via the email address below:



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GK | Oracle EPM Specialists

About GK

GK is an official Oracle Partner and Oracle certified specialist based in London, United Kingdom. We provide a number of services, and each is dedicated to developing world class Oracle EPM Systems. We are dedicated to enabling our clients to reach a full and successful digital transformation, delivering quick time to value and reaching for a vision of finance utopia over time. We ensure your Oracle EPM systems work at their optimum, enabling your team and CEO to make important decisions, in a “real time” state. We help to remove costly and insecure “point solutions”, and improve connectivity within your organisations, between people and departments.

Graham Kirton Limited

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