Cloud Finance Software Services

G-Cloud 15 Service Definition Document

January 2026

Contents

1 Deloitte Overview

As a leader in professional services, Deloitte LLP is committed to making an impact to our clients, our people and for society. We have over 27,000 staff based across the UK providing audit, risk advisory, tax, consulting, financial advisory and legal services to public and private clients across multiple industries. We work together to build trust, support inclusive growth, and build capability, enabled by our **breadth and depth of expertise across advisory, delivery, engineering and managed services.**

Our **public sector practice** serves Central Government, Government Agencies, Local & Regional Government, Defence, Security and Justice, Health and Social Care, Transport, Education and Housing. We also provide services to the Northern Ireland Office, Scottish Government, Welsh Government and Crown Dependencies.

Our Cloud Capability

At Deloitte, we help our clients **Imagine, Deliver** and **Run** the businesses of the future through the power of **Cloud**. We have deep Cloud architecture, engineering, operational, commercial, and business transformation expertise delivered by a team of more than 26,000 Cloud Practitioners globally. We have delivered over 2,000 cloud implementations over the past 5 years and have 60+ cloud centres of excellence supporting the delivery of cloud services to our clients.

In the UK, we have a team of over 100 Cloud managed service specialists plus the following certifications across AWS, Microsoft Azure, Google Cloud and Oracle Cloud Infrastructure (OCI):

We help our clients with all aspects of their journey-to-cloud and optimisation of their cloud and cloud-services investments. Our Cloud practice can support you to optimise your client investments, and to navigate your organisations cloud journey, providing specialist cloud architecture, engineering, and operational skills at all stages, with a large proportion of our team holding the clearances required to meet your specific security requirements.

Our AI Capability

Deloitte stands at the forefront of AI transformation and was recognised as a Leader in the 2025 IDC MarketScape for Artificial Intelligence (AI) services for the fourth consecutive time. Supported by a £3 billion investment in AI, Data, Automation, Cloud, and Cyber, we seamlessly integrate our deep AI expertise with our extensive cloud capabilities. Our UK team is part of 339K AI-fluent practitioners globally, and includes over 1,300 AI specialists and engineers, many of whom hold the necessary security clearances for public sector delivery.

Through the Deloitte AI Institute, our hub for cutting-edge research and innovation, and strategic alliances with leading hyperscalers, we empower public sector clients to optimise costs, streamline processes, and navigate their AI journey. We achieve this by leveraging our ReadyAI™ models, which provide end-to-end support for AI solution implementation, and our Trustworthy AI™ framework, ensuring responsible and ethical deployment.

Our alliances & ecosystems

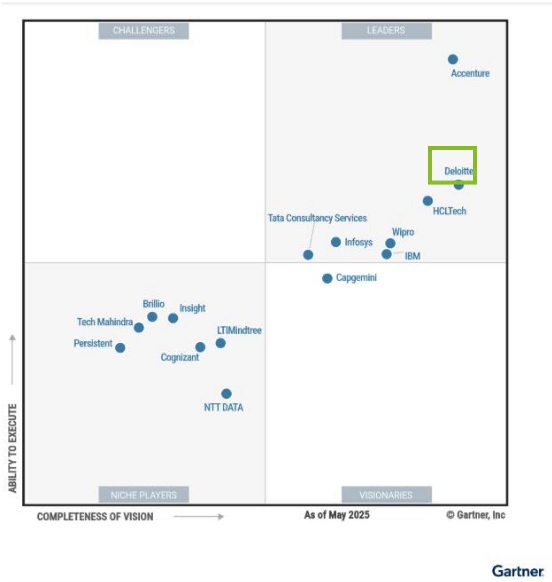
To bring full value to our clients, Deloitte is a premier consulting partner with all the leading hyper-scale cloud vendors in the market including AWS, Google, Microsoft[1] and SAP. A selection of our partners and alliances are presented below:

What the analysts say

Don't just take our word for it. Deloitte is recognised by the analyst community as being **leaders in cloud transformation services.** This reflects the wealth of experience we have in delivering cloud services across the public sector and wider private sector combined with our out-of-the-box templates, tools and assets.

Gartner

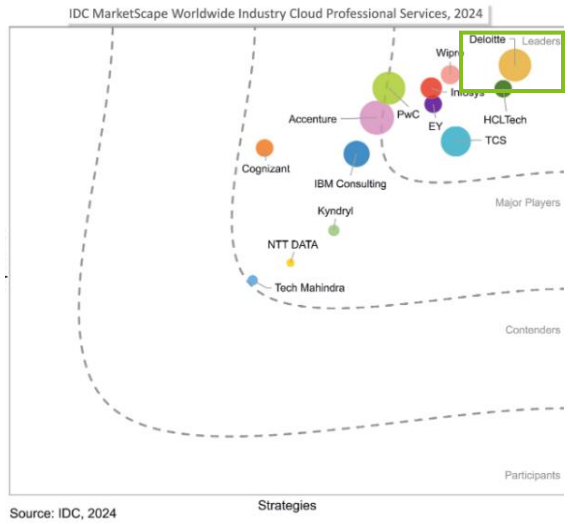
Originating in 2021, Deloitte has been recognised as a Leader in this category for four years in a row. Deloitte was also positioned as a Leader in the **Gartner Magic Quadrant for Public Cloud Infrastructure Professional and Managed Services, Worldwide** in 2021, 2020 and 2019, the previous form of this category.



Gartner: Magic Quadrant for Public Cloud IT Transformation Services. **© Gartner inc. 2025**

IDC

Deloitte has been awarded Leader status in the **IDC MarketScape: Worldwide Industry Cloud Professional Services 2024** Vendor Assessment. We have also been recognised as Leaders in **Hybrid IT Consulting & Integration Services** and **Software Engineering Services**.



IDC MarketScape: Worldwide Industry Cloud Professional Services Vendor Assessment
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Cloud Transformation

Transform Faster, Transform Smarter

Deloitte's Cloud Transformation can fast-forward your journey to the Cloud, unlocking innovation, efficiency, and growth.

Find out more here

[1] As Microsoft's Independent Auditor, Deloitte cannot have a direct or material indirect business relationship with Microsoft, such as having an alliance or being a registered partner. Nonetheless, Deloitte can provide Microsoft-related technology services and invests heavily across its global business building technical skills and capabilities to develop world-class consulting and solution delivery capabilities.

2 Service Overview

Leading organisations treat their financial system as the backbone of the business, without which day-to-day operations would not be possible. Financial systems within Government are used to accurately record the core transactions of the organisation and comply with the statutory responsibility to report to lay accounts before Parliament. Increasingly, the finance systems are also used as the key tools to prepare the annual budget, the monthly forecast and report key performance management information to the business.
The implementation of effective Cloud financial systems requires not only a deep understanding of the Finance function, but of the business itself. Deloitte's Financial Software services helps Finance leaders mitigate risk while improving the effectiveness and efficiency of financial statements and internal controls.
There are many instances when it becomes a priority for organisations to improve and standardise their finance software. In general, we consider finance software as dividing into two broad categories:

- Finance transaction systems that are typically included within and Cloud Enterprise Resource Planning (ERP) package. Examples include (General Ledger (GL), Accounts Payable (AP), Accounts Receivable (AR), Fixed Assets (FA); and
- Finance performance management systems that are part of the Cloud Enterprise Performance Management (EPM) systems. Examples include; Planning, Budgeting and Forecasting (PBF), Statutory Consolidation and Management Information (MI) & Reporting tools including finance analytics.

Modern Cloud finance software vendors can provide an integrated solution across both these categories or point solutions depending on the requirements.

Deloitte offers a portfolio of Cloud finance software services including finance systems strategy, vision, specification & selection, vendor appraisal, requirements analysis, design, build, development, implementation, testing, migration, transition and post go-live services. Services make effective use of Cloud components and enable integration of Cloud-based and legacy components.

The Deloitte services also provide full Application Management Service (AMS) for all the cloud based solutions provided within this service. Our full range of services would be discussed and agreed as part of the service on-boarding procedure.

This service is aimed at clients looking for assistance for finance software systems using defined toolkits and methodology. Deloitte offers a Cloud Finance ERP and Finance EPM software methodology, refined through deployment in the public and private sectors.

Features and benefits of this service include:

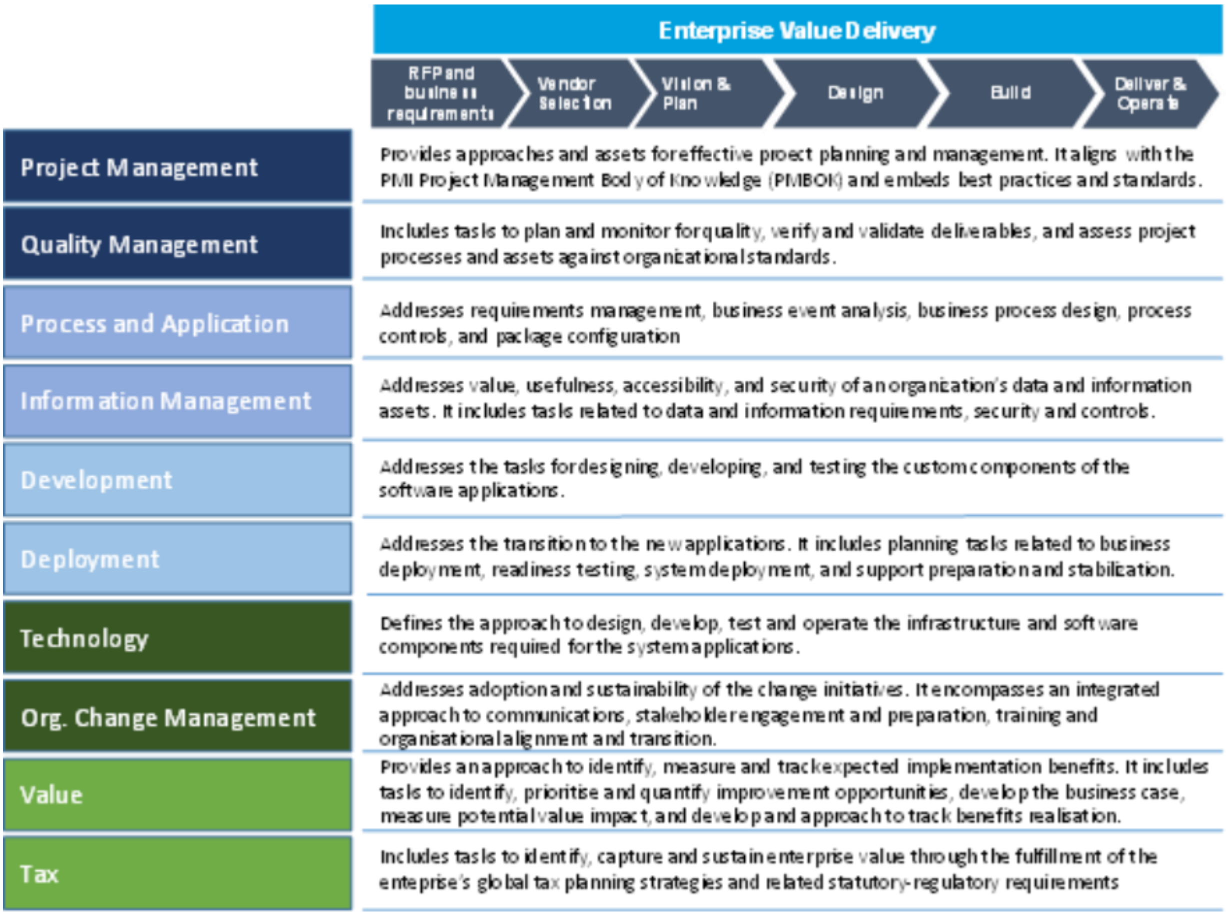
- Tools and templates that can be tailored for both client and sector. Deliverable templates, sample deliverables and accelerators are available by function or discipline.
- Methodology frameworks that enable processes to be adapted for a cloud-based environment and that address the potential benefits and issues associated with cloud-based solutions. Iterative, waterfall and agile approaches are fully supported and the appropriate governance will be defined during the set-up of the programme.
- Leading practice project phases such as Specification/Selection, Vendor Appraisal, Vision, Plan, Design, Build, Deliver and Operate can be further decomposed by Discipline (Project Management and PMO, Quality Management, Process and Application, Information management, Organizational Change Management, Value and Business Case Management) for a more specific control of the overall scope.
- Ability to define business requirement (using both a process and a value driven approach), prioritise functional and non-functional requirements and create a vendor Request for Proposal (RfP) and quotation.
- Methods to review the as-is architecture and finance software tools and assess them against benchmark industry good practice.
- Frameworks that define good practice performance management; specifically the planning, forecasting, consolidation and operational reporting processes.
- Methods to support the preparation of a finance Management Information (MI) strategy and associated information models that support delivery of leading finance KPIs.
- Optimisation tools to support the improvement of existing software solutions; Oracle (EBS, Discoverer, OBIEE, Hyperion), SAP (ERP, BW, BPC, FC), Workday, NetSuite, MS Dynamics, Infor, & IBM Cognos implementations.
- Capability transfer, knowledge transfer and skills transfer available. Staff training and change management services are also available.
- Independent of software and hardware providers.
- Can be tailored to address your specific requirements. Scalable services suitable for projects of all sizes and complexity.
- Expertise in reporting, analysis and analytics to support management in decision-making.
- Deloitte can provide partners and staff who are sector specialists across both central and local government covering all key sectors such as defence, health, justice, police, transport. Extensive experience of implementation in both the public and private sectors.

This service can also be purchased in modules through G-Cloud. In particular, it is possible to order separately a service for Cloud ERP specification, selection and implementation and a range of Technology Adoption services.

3 Detailed Service Description

Our Approach

Deloitte LLP ("Deloitte") has a proven approach to Cloud Finance ERP & EPM selection, specification, design and implementation including industry leading good practices. Our approach uses tools and templates that can be tailored for the client and sector and is based on the understanding that cloud based solutions may require changes in business processes and ways of working. Deloitte's Enterprise Value Delivery (EVD) methods are the main pillar of our Finance ERP & EPM implementations. The EVD methods are a robust set of system development and delivery methodologies focused on sustainable and predictable project delivery for complex solutions. The EVD methods were developed based on the CMMI model, PMBOK, industry trends, and effective practices from Deloitte's database. Our implementation methodology represents a collection of deliverable templates, sample deliverables and accelerators organised by disciplines and sub-disciplines as shown below.



The following table details activities, descriptions and example templates which can be tailored to meet your requirements.

Activity	Description
Define business requirements	This will establish the technology scope, evaluation criteria and scoring methodology. It will include prioritisation of functional and non-functional requirements.
Create vendor Request for Proposal (RFP)	This frames the current business situation, provides details of current functions and future scope and requirements. It structures the appropriate set of response categories including detailed requirements and cost capture templates to effectively compare prospective vendors' capabilities. This also includes facilitating vendor demonstrations, client references and Q&A calls.
Scoring participating vendors / vendor options appraisal	This consolidates the client's scoring of the Request for Proposal (RFP) responses, vendor demonstrations and client references. This also includes the quantifying of cost estimates, comparison of vendors' performance.
Vendor assessment report	This assesses vendors based on client's objectives and requirements, providing a vendor short list and identifies a recommended vendor for the client to be taken into final negotiations. This also includes producing an executive summary to be used by the Executive Committee.
Finance ERP Vision	Shaping the vision of the ERP Implementation is critical for a successful implementation not only in terms of technical adoption and alignment with your cloud strategy but also organisational and process adoption. This will articulate the value that you are looking to add to your business aims and organisational structure. A "Why Not" approach has often proved to be successful for simplifying and streamlining the functionalities of an existing, complex ERP Architecture (by focusing only on those tasks necessary for the implementation and assuming the use of a design by exception approach which will not require gathering detailed business requirements across the enterprise). Instead, an adoption of leading practices and standard industry requirements and processes as defined within SolutionPrint will be used. This is a good starting point from which projects can adjust based on the scope of the implementation.
Finance Performance Management Vision	The performance management processes are typically the least standardised within a finance function. Organisations that have well documented and systemised processes for general ledger accounting, typically have poorly defined processes for planning, budgeting and forecasting. To address this challenge, we have developed the Integrated Performance Management tool. This defines the core processes that organisations need to support as part of the planning, budgeting, consolidation, forecasting and management reporting processes.

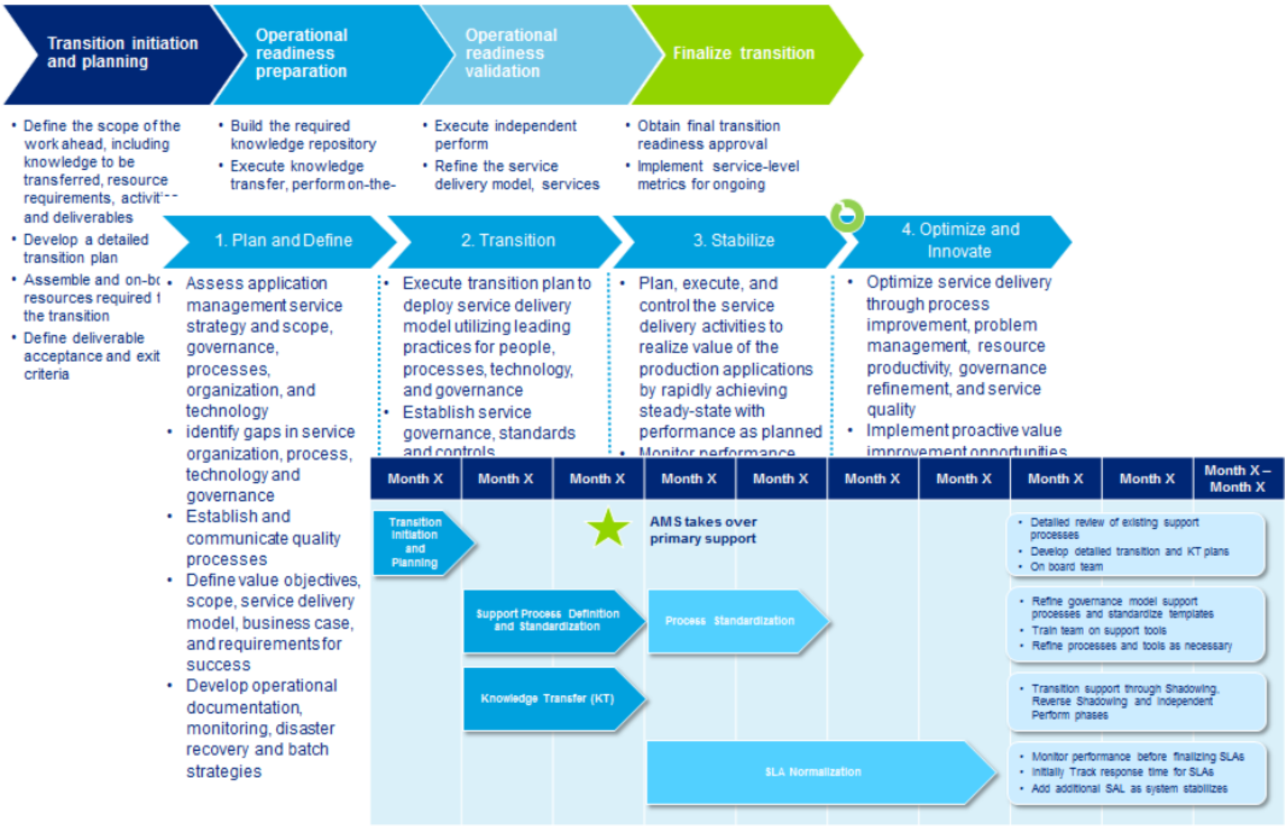
	This tool can be used to support an organisation as it develops its target vision for performance management and to prioritise initiatives to deliver the vision.
MI Strategy	One of the key challenges that the business will level at finance is an ability to deliver high quality management information to support decision making. We have developed a method to support the finance function to develop an MI strategy, the information model that will be required to deliver the strategy and the high level software architecture required to implement the solution.
Plan	Agreement of a detailed definition of project delivery including scope, structure, roles, work-streams, risk management and delivery approach (i.e. big bang or phased). This will include an appropriate testing approach and the management of vendors or specialists as required.
Design	Based on an understanding of the ‘out-of-the-box’ functionality offered by the selected solution, development of a functional design document which includes the impact on existing business processes, and a technical solution which defines the data migration and reconciliation approach (understanding any infrastructure changes required).
Build	Building the solution specific to the client’s requirements and in line with the client’s strategy. Developing and undertaking a suitable approach to change management, system testing and facilitating user acceptance testing to ensure the solution meets business requirements.
Deliver	Implementing the solution through a big bang or phased approach and understanding changes to hosting arrangements. Migration of any existing data as required and adherence to a pre-defined cutover plan to enable smooth transition.
Operate	Supporting the go-live process by sharing support materials, floor walking and enabling business-as-usual since the transition may require a change of process and ways of working.

Transition to IT service management

A key stage in the delivery of the service outlined in the above is the transition to IT service management stage of implementation. In the following sections we elaborate further on the services we can provide to the Buyer to provide ongoing support of a Cloud Finance solution platform. These services will be discussed and agreed with the Buyer as part of any commercial arrangements made.

Deloitte’s proven transition process minimises the risk of transferring the ongoing application responsibilities from the implementation team to the ongoing Deloitte support team to provide the required level of buyer support.

This IT service management transition process covers four major stages and encompasses the full spectrum of activities from initiation through to the day-to-day activities necessary to manage the new Finance cloud environment for the Buyer as outlined in the diagram below.



Our Transition Approach

The transition phase is critical to the implementation of Finance applications hosted within a cloud support operating model and our methodology enables a seamless transition from implementation to application operations and service delivery excellence while minimising disruption to business operations.

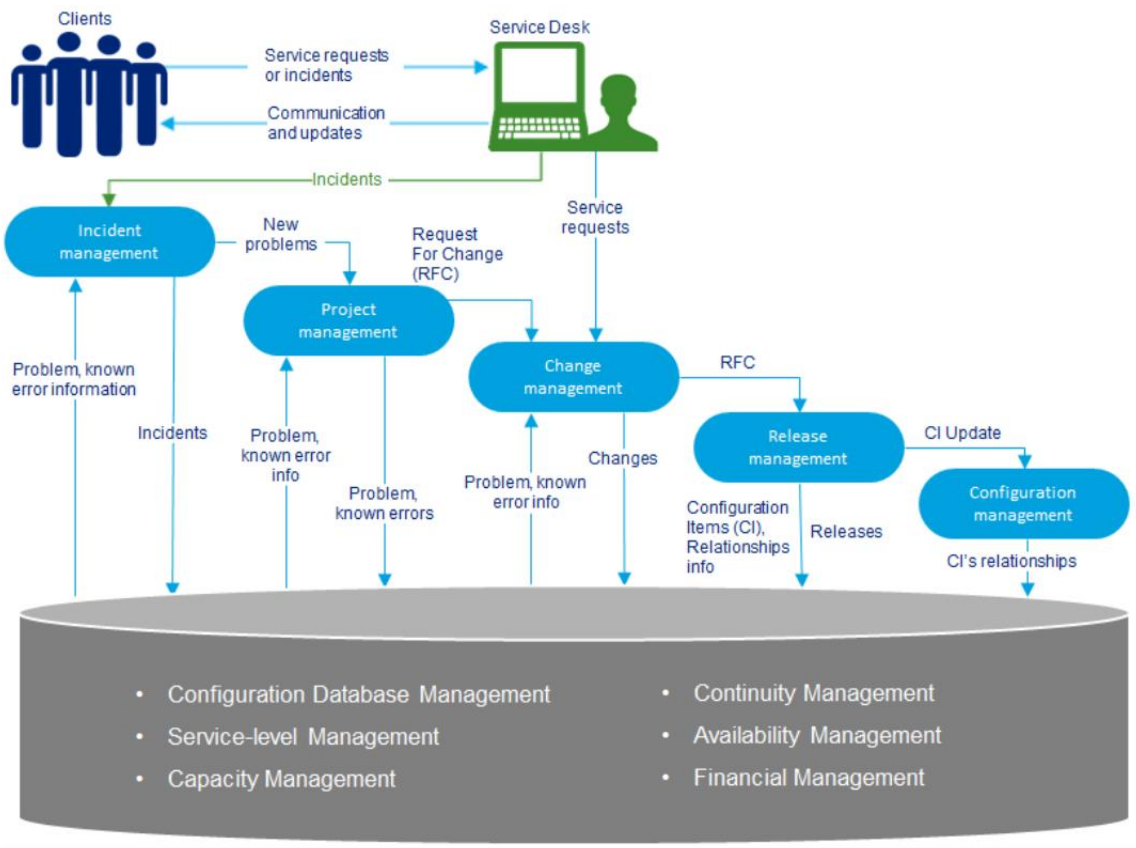
Our transition approach is based on a standard, repeatable process that promotes knowledge transfer and operation readiness. Our transition process covers the four major stages presented below.

These stages encompass the full spectrum of activities from planning through independent execution of support services. Our transition activities and tools incorporate leading ITIL service management practices and leverage prior transition experience to address the full scope of AMS processes and to provide an efficient and effective transition.

Service Desk Model

Our practice deploys a proven, process-centric approach based on industry best practices, including CMMI and ITIL-based service processes.

- Confirms that all customer requests (issues, enhancements, or questions) are managed to completion
- Facilitates adherence to service level objectives
- Focuses on end-to-end service management
- Supports quality initiatives
- Refines through delivery experience
- Facilitates cost-effective service delivery



Responsiveness Goals

The following table describes the standard priority levels assigned to reported incidents. In addition to standard support reporting based on priority levels, we will implement the following levels of escalation where service requests based on an assigned priority cannot be resolved within the target resolution time.

Priority	Target Resolution Time	Escalation Level		
		1	2	3
Priority 1 Severe	4 Hours	> 4 Hours	>4 Hours	> 4 Hours
Priority 2 Major	8 Hours	> 8 Hours	> 12 Hours	> 16 Hours
Priority 3 Moderate	24 Hours	> 24 Hours	> 36 Hours	> 48 Hours
Priority 4 Minor/Nominal	80 Hours	> 80 Hours	> 120 Hours	> 160 Hours

Escalation can be triggered, at any time, by the buyer Support Manager or Support Team where, based on the priority level, target resolution times may/will be exceeded.

Our escalation process will be utilised during critical events to keep senior management of both organizations informed and involved to resolve these incidents in a timely manner.

The details of the procedures and key contact information will be determined during the Transition Phase.

Inputs

We have assumed that you will be in a position to provide certain inputs to the service, which we have listed here. If you are not in a position to provide all of these inputs then we can discuss options, as it is likely we can reach agreement to alter our approach to accommodate your situation.

- Circulation of relevant materials and content as is currently available (e.g. business capability functions, as-is information system map including system interfaces)
- Established IT Procurement strategy
- Current IT infrastructure
- Draft business requirements
- Current as–is process maps and organisation structure

Your Contribution

Our services are designed to be delivered with you rather than to you. We have assumed that you will be able to make the following contribution to the work. If you are not in a position to take on these responsibilities then please get in touch to discuss options, as it is likely we can reach agreement to alter our approach to accommodate your situation.
Your contribution and guidance is vital to the success of this project, and in particular we will strongly encourage that you:

- Ensure sufficient time is given with business representatives and decision makers for any input, review and sign-off
- Ensure the project team is provided with the best available information
- Ensure the project will have access to business users and/or system administrators
- Provide the appropriate level of resources to support the project throughout its lifecycle, and ensure that staff participate in project related activities such as workshops and meetings
- Ensure review and sign-off are completed in a timely manner
- Provide effective working space for the duration of the project to optimise collaboration with the business.

Outputs

What will you get in terms of deliverables, outputs and outcomes from this service?
As required and agreed at Order stage (a non-exhaustive list):

Activity	Sample Deliverables	
Definition of Requirements	Tailored functional and non-functional requirements based on good practice libraries Vendor request for proposal (RFP)	RICE inventory
Vendor selection	Vendor scoring processes and evaluation criteria Vendor long and short lists	Vendor assessment reports
ERP Vision	Benchmark of current capability against finance aspiration Review of current finance ERP solution (e.g. SAP, Oracle)	Finance ERP target architecture based on finance function aspirations
Performance management vision	Benchmark of current capability against finance aspiration Review of current EPM solution (e.g. Hyperion, BPC, Cognos)	Performance management target architecture based on finance function aspirations
MI Strategy	MI strategy Information model	Target MI software architecture Data model
Plan	Implementation plan	Business case

	Change management plan	Risk mitigation plan
Design	Assessment of IT infrastructure High level & detailed software design	Business / functional design Prototypes to support sign-off
Build	Configured solution Testing strategy	Test scripts Data migration plan
Deliver & Operate	Change management delivery Production support	Cutover planning Systems assurance
Project Management	Project Charter / PID Project planning & assurance	Risk management Stakeholder management

Business Context

What situations is this service designed to be used in?
This service is designed for public sector organisations that want to:

- Establish leading practice Cloud Finance operations for their own organisation and potentially other public sector organisations;
- Transform and improve the efficiency of support services;
- Improve and increase self-service through web enabled technologies;
- Standardise processes and reduce hand-offs and manual intervention;
- Have a timely and well managed transition process;
- Improve the quality of data and management information; and
- Integrate support services systems more effectively with core line of business systems.

It is appreciated that some or all of these factors may be relevant to your business circumstances.

Scale and Complexity

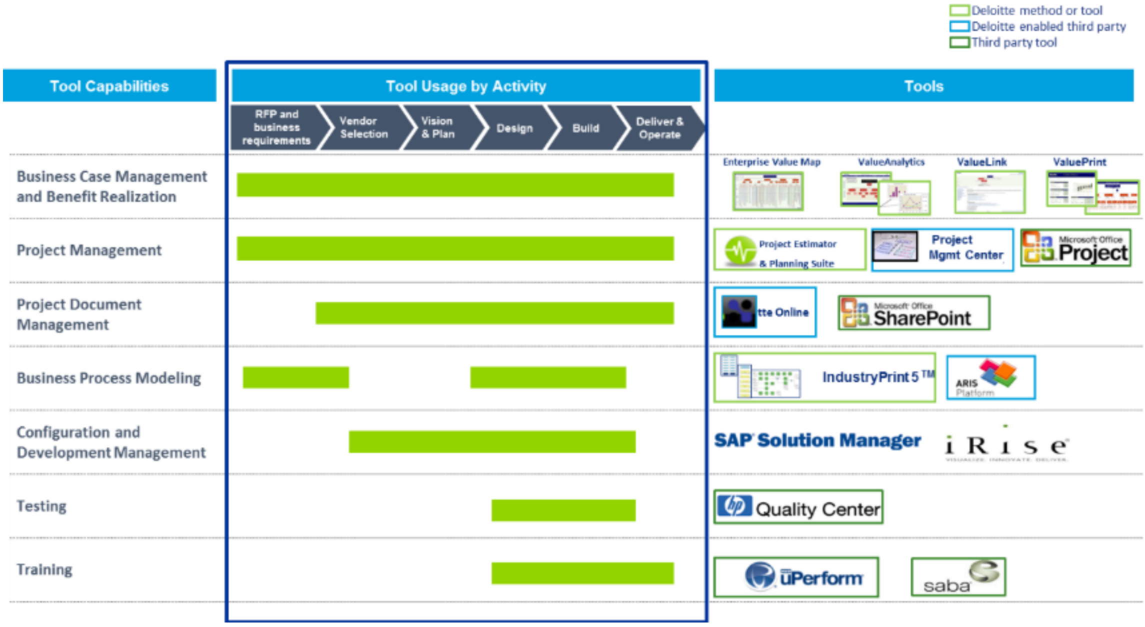
The effort involved in delivering our service is driven partly by what we will do and what you will do before we arrive and alongside us whilst we work. It is also driven by the scale and complexity of your business situation. This section describes the scale and complexity that we have designed this service to address. If your business situation is bigger or smaller than this then we can discuss options, as it is likely we can reach agreement to alter our approach to accommodate your situation.
The scale and complexity of this service offering can be impacted by one (or many) of the following factors:

- Size of organisation
- Localisation needs for specific business units, divisions, countries, legal entities etc.
- Number of end users (to drive not only the configuration of the ERP but also the Training needs and the Organisational Change Management)
- Complexity of system interfaces (across IT estate)
- Specific vendor roadmaps (our well established relationship with major vendors allows us to suggest solutions that are future-proof)
- Level of customisation required
- Volume of data migration required.

Our approach to estimating the complexity of your finance software transformation initiative (together with our proven experience over the last 30 years) is driven by all of the above mentioned factors and is supported by our estimation accelerator.

Tools

A complete set of Cloud methodologies and best practices would have a less than optimal impact without tools that promote their usage. At Deloitte we provide a wide range of proprietary and third party enabled solutions that cover all the activities of a Cloud ERP implementation programme.



- Project Management Centre (PMC): Web-based, Deloitte hosted project management solution, built on HP's PPM Center application. PMC provides Work plan management, Workflow-driven project management processes, Link tasks, deliverables and requests, Dashboards for real-time project health and progress viewing, Preconfigured solution and startup guide for quick project startup.
- Project Estimator and Planning Suite (PE&PS): A parameter-driven approach to estimating implementation costs, effort, and resources for ERP & EPM projects. By entering a few key parameters, Parametric Estimation allows for precision without the need for detailed data for each deliverable.
- Industry Print 5: based on the ARIS platform, IP5 contains predefined models used to scope projects, jump-start fit/gap analysis, and perform process modelling. Includes updated models based on our experience in a wide variety of industries and engagements.
- HP Quality Centre: we often use HPQC in our large ERP projects to support the entire testing life cycle, cover Requirements Management (capture and track detailed requirements, have real-time visibility of requirements coverage) and Test Management (Provide an organized framework for testing applications and manage all cycles of testing).
- Integrated Performance Management (IPM): The IPM tool contains standard finance processes for performance management. This includes; Planning, budgeting, forecasting, statutory consolidation, financial reporting and operational / management reporting. This tool contains leading processes and can be used to help benchmark organisational performance and define the to-be target.
- MI Framework: The Management Information framework is our method to approach management information improvement projects. It is based on an approach that first defines the information required, documents this as an information model and then maps this model to the current architecture and systems. The approach helps to identify the key systems gaps and risks in delivering the required MI and enables organisation to prioritise MI initiatives while avoiding taking on too much in one phase.

Exclusions

Our service description defines the scope of what we will deliver. For the avoidance of doubt, we have listed below any activities that (in our experience) are sometimes expected to be in our scope but which are not included within this service.

- Provision of and payment for any software licenses;
- Data / master data validation or cleansing;
- Reconciliation and sign off of historic data; and
- Purchasing any technology infrastructure and systems.

Service Constraints

Where service constraints exist of a general nature, they would usually be addressed in the Service Definition document. These and any other constraints would need to be discussed with the client prior to placing the Order. This includes constraints that are specific to the client or the client's situation or that need to be addressed before delivery of the service. We will rely on the client to bring to our attention, before the order is agreed, any specific constraints that need to be addressed including those that could impact on quality, service levels, costs or duration of the engagement.

We can advise on maintenance windows, level of customisation permitted, schedule for deprecation of functionality/features and other matters if relevant to the service.

4 Contact Details

Please send your requirement to publicsectorbidteam@deloitte.co.uk. Alternatively, if you wish to discuss your requirements in more detail, please send us the following information and we will be happy to contact you:

- Your organisation name
- The name of this service
- Your name and contact details
- A brief description of your business situation
- Your preferred timescales for starting the work.

Deloitte.

MAKING AN IMPACT THAT MATTERS since 1845