Oracle
Playbook

PROFESSIONAL SERVICES

Unlock Endless Possibilities

Enabling a resilient and modern organization for the journey ahead

Professional services

Whether you're a consulting business, accounting firm, law firm, staffing provider, or other services provider, you must exceed client expectations every time, everywhere. Improve operations and scale by connecting people, operations, finance, and additional lines of business to better understand client needs, identify growth opportunities, increase profitability, improve efficiency, and reduce costs.

![Oracle Playbook]

Key imperatives for professional services firms

1   Put people first.

2   Build a great reputation through great client experiences.

3   Do more with less.

4   Evolve beyond the day-to-day to innovate for what's next.

Forces shaping the professional services industry

INDUSTRY CHALLENGES

People
A skills shortage, the rise of AI, and lifestyle flexibility demands make it difficult to attract and retain the next generation of talent.

Client engagement
Firms struggle with competitive differentiation and client engagement.

Knowing where you make and lose money
Professional services firms face ever-growing demands from their clients to deliver increased value faster and provide a clear return on their investment.

Resource and project management woes
Data silos between people and projects make it difficult to manage and achieve expectations.

Innovation
Firms have difficulty balancing innovation with the day-to-day of selling and delivering projects.

VISION OF SUCCESS

Click on a link to learn more.

1   Create a modern employee experience

2   Turbocharge client interactions

3   Improve profitability

4   Automate work planning and delivery

5   Innovate more

6   Start your journey

1: Create a modern employee experience

Transform culture and the employee experience. Align the right people to projects for the best outcomes.

Recommended actions

- Build consistency at every stage of the employee lifecycle.
- Enhance the employee experience, including work-life balance and assignments to the right projects.
- Use data to identify critical roles to drive business value.
- Use agentic AI to automate routine tasks.

How to get started

- Identify sources of employee turnover.
- Leverage data and analytics for informed decision-making in hiring, promotions, and project resourcing decisions.
- Prioritize employee retention by fostering a corporate culture that aligns with the values and work-life balance needs of workers.

Oracle capabilities enabling strategic goals

Optimized incentive compensation	Resource and project planning	Optimized talent retention

2: Turbocharge client interactions

Efficiently access your target market, track omnichannel engagement, enable AI responses to internal and external inquiries, turbocharge client service, and closely manage discounting and margins.
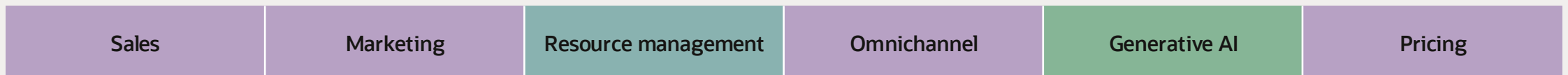
Recommended actions

- Create a cohesive client experience that spans all channels.

- Use generative AI to hyperpersonalize client interactions in all channels.

- Improve targeting and management of client opportunities and profitability.

How to get started

- Identify disparate sources of client, product, and project data.

- Collect data about discounts and pricing.

- Learn about AI possibilities.

Oracle capabilities enabling strategic goals

Sales	Marketing	Resource management	Omnichannel	Generative AI	Pricing

3: Improve profitably

Refine processes for greater profitability. Focus on efficient execution and advanced analytics that show where you're making and losing money.
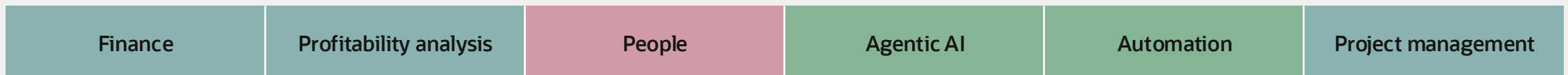
Recommended actions

- Modernize your technology stack.

- Get granular about profit margins and business results.

- Manage your people to think differently about the holistic costs of running the business—and give them tools for actionable insights.

How to get started

- Analyze resource and project data.

- Use predictive analytics to help improve profitability and forecasting.

- Gather key pieces of data that show real profitability— such as projects, people, procurement, time tracking data, expenses, supplies, and more.

- Learn how AI can drive efficiency and optimization.

Oracle capabilities enabling strategic goals

Finance	Profitability analysis	People	Agentic AI	Automation	Project management

4: Automate work planning and delivery

Connect data—on people, projects, finance, marketing, and sales—that enables smarter project management, people management, better efficiency, and improved client outcomes.
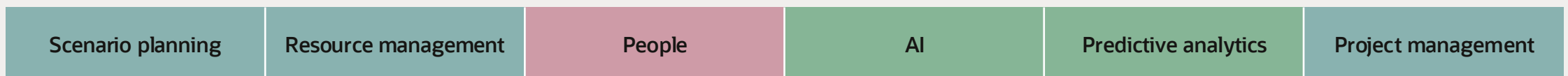
Recommended actions

- Improve short- and long-range planning and budgeting.

- Model scenarios.

- Forecast resourcing needs more accurately and better adapt available resources to changing and forecasted project needs.

- Track and enhance skills for better outcomes.

How to get started

- Get a sense of your key data sources about projects and people to silos and redundancies.

- Determine the right KPIs to determine the success of your project.

- Look to modernize and simplify your tech stack.

Oracle capabilities enabling strategic goals

Scenario planning	Resource management	People	AI	Predictive analytics	Project management

5: Innovate more

Invest in technology that eases collaboration and gives employees more time to innovate.
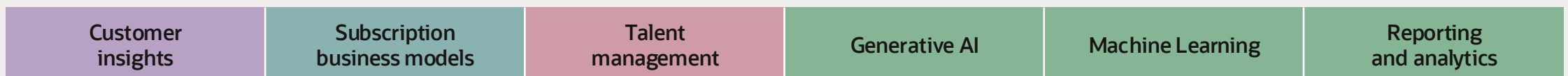
Recommended actions

- Use generative AI to help improve efficiency and free up time for innovation and idea generation.
- Reward innovation for both internal and external improvements.
- Strike the right balance of talent to provide creative thinking in addition to solid execution.

How to get started

- Look to remove cultural and technological barriers to innovation.
- Use analytics to identify areas for innovation, based on internal processes and customer insights.

Oracle capabilities enabling strategic goals

Customer insights	Subscription business models	Talent management	Generative AI	Machine Learning	Reporting and analytics

Internal questions to get going

Data

Are we able to accurately connect resource and profit data with client promises, proposals, and pricing?

Do we understand how to implement successful change management procedures?

Are we able to manage data securely and comply with regulations?

People

Do our associates feel like they're working with modern technology?

What kind of upskilling will our teams need to administer and adopt cloud technology?

Can we risk losing our top talent to other firms with more modern technology?

Which teams do we foresee being the hardest to enable? The fastest?

Finance and planning modernization

What kind of analytics and insights do we need?

Do we have a clear understanding of our financial situation, including granular profitability analysis?

Are we able to accurately measure product and customer profitability?

System architecture and consolidation

Are IT silos hindering our results?

Do we have the right technology stack for evolving business needs?

Oracle solutions for every industry

3rd-party cloud solutions	Industry Applications									Partner ecosystem
	Comms	Financial services	Healthcare	Life sciences	Retail	Hospitality	Restaurants	Utilities	Construction and engineering	Government	

Fusion Cloud Applications

Enterprise resource planning	Supply chain and manufacturing	Human capital management	Customer experience

Independent software vendors

AI, Data, and Integration

AI/ML predefined models	Analytics dashboards	Open APIs, integration, and business flows
Industry data models		

Marketplace

Cloud Infrastructure

Industry-specific compliance	Public, sovereign, or dedicated cloud regions	Platform services for innovation

Systems integrators

Multi cloud interoperability

Why Oracle?

Complete Suite

Best-of-breed apps designed and built based on customer needs—with AI throughout.

Industry-specific apps, finance, HR, supply chain, manufacturing, marketing, sales, service, and analytics built to work together.
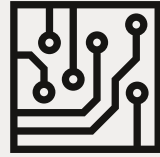
Best Cloud Technology

Next-generation Oracle Cloud Infrastructure (OCI) with the performance, security, and availability to run your mission-critical operations.

Cloud regions worldwide for commercial and government needs.

Award-Winning Design

Award-winning consumer-grade+ user experience built with Redwood Design System.

The same tools for all developers to easily personalize, extend, and build applications.

Self-learning and self-improving applications.

Committed to Your Success

Oracle Customer Success Services helps you maximize your cloud investment with proactive support, expert guidance, and comprehensive tools and best practices.

Oracle Playbook

Committed to your success
Oracle Cloud Success Navigator: An interactive digital platform to help guide you

Get your bearings

Understand what's possible with your cloud solution using preconfigured starter environments to support your design decisions.

Chart a proven course

Access Oracle expertise, reference Oracle Modern Best Practice, and use Cloud Quality Standards to inform your implementation approach.

Find value at every turn

Get more from your quarterly releases using AI assistance and preview environments to experience and adopt the latest features that matter to you.

Blaze new trails

Build your own cloud roadmap based on your organization's goals keeping you focused on the capability you need for today and the road ahead.

Extensive partner ecosystem

+20,000
Partners and ISVs

accenture

Deloitte.

KPMG

pwc
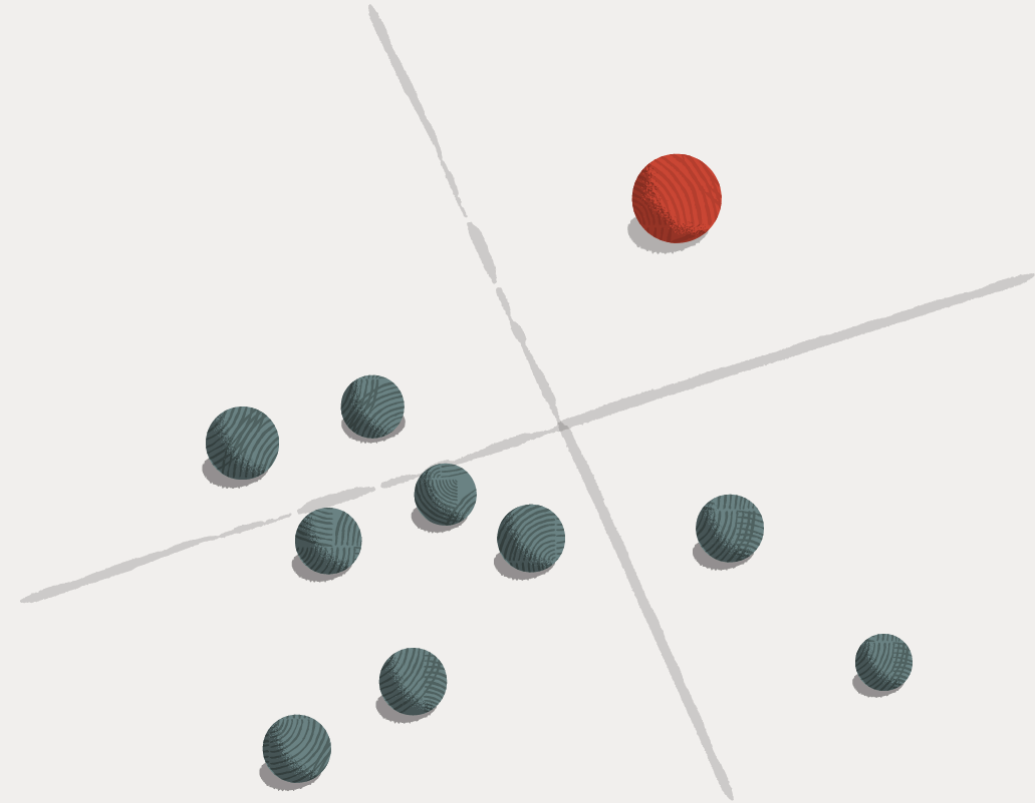
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