



Maximizing Tax Transformation: A Strategic Guide for Tax Leaders Moving to the Cloud

Setting the stage for a successful Vertex O Series Cloud
implementation with Oracle

The world of enterprise technology is changing rapidly, and tax, finance, and IT leaders are increasingly at the forefront of these transformative shifts. As organizations face growing regulatory complexity alongside the need to support advanced use cases like AI, analytics, and automation, the urgency to modernize ERP platforms across IT, tax, and finance has never been greater. Strategic decision-makers are being called upon to lead their organizations through complex cloud migrations—ensuring compliance, controlling costs, and unlocking new value at every step.

At Vertex, we understand that migrating to cloud-based solutions is both a necessity and an opportunity. Built and strengthened on the principle of a trusted relationship, the Vertex and Oracle partnership gives customers automated tax technology and integrated solutions that streamline tax determination and compliance across critical business functions in the enterprise and around the world. In addition, we have continued to move with our customers, as their Oracle systems and platforms have evolved—from on premise, to hybrid and private cloud. Our experience also means we are able to meet them where they are and leverage both our knowledge and experience with Oracle systems and platforms to jointly develop and deliver solutions to support them at every step—ensuring alignment with Oracle and extending the value of their investments.

This guide is designed to provide practical insights, actionable strategies, and a clear roadmap for organizations ready to future-ready their tax operations and drive enterprise-wide success.

Why Cloud Migration Is a Strategic Imperative for Tax and Finance

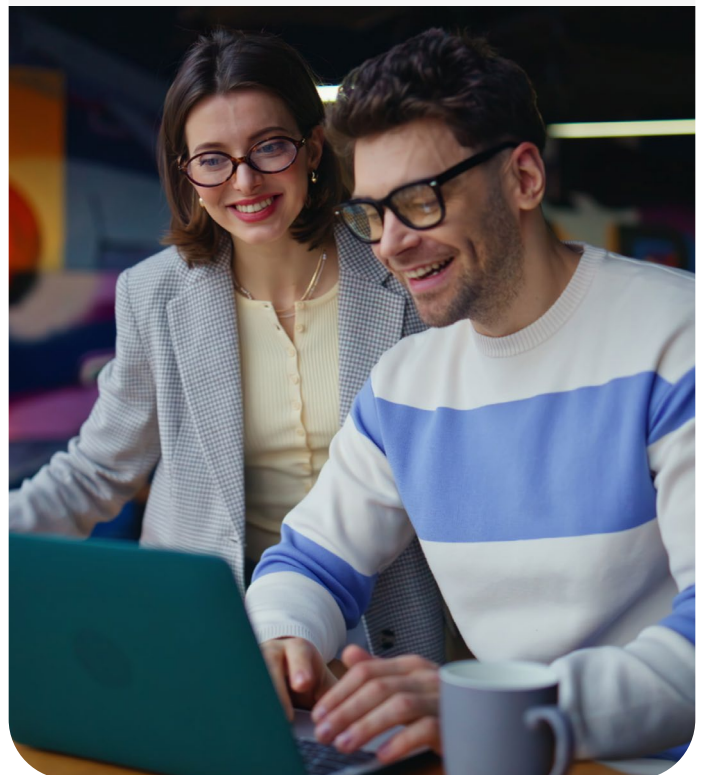
The shift to cloud-based applications and infrastructure is not just a technology upgrade—it's a business transformation. The benefits of the cloud are clear: agility, scalability, cost-efficiency, and the ability to innovate at speed. For tax and finance leaders, these advantages translate into improved compliance, more robust data management, and the power to support organizational growth without being tethered to aging, inflexible legacy systems. These advantages are also about process optimization and improving tax data governance to fuel those processes—as well as supporting the business needs that help enable growth.

At the same time, the costs of technical debt associated with on-premises environments continue to rise. Software providers are announcing end-of-support timelines for legacy Oracle solutions, making cloud migration not just attractive, but inevitable. The question is no longer if, but when—and more importantly, how tax and finance teams can take charge of the process to deliver optimal outcomes.

Vertex and Oracle: A Partnership Built on Trust and Innovation

For more than 30 years, Vertex and Oracle have partnered to deliver seamless, integrated tax technology to over 2,000 global customers. This longstanding relationship is built on the shared values of trust, reliability, and a relentless focus on customer success. Our joint solutions empower enterprises to streamline tax determination, ensure compliance, and manage global tax obligations across critical business functions and geographies. We also have a joint development agreement and ability to deliver solutions in alignment with Oracle's own roadmap, ensuring seamless integration, optimized performance, and improved data governance.

By combining the power of Vertex tax automation with the flexibility and performance of Oracle's cloud ERP, organizations can transform their tax operations in ways that simply aren't possible with legacy technology. Whether your goal is to optimize compliance, improve reporting accuracy, or reduce manual effort, the Vertex-Oracle partnership delivers the agility and depth of your business needs for the modern era.



Controlling What Matters: Strategic Choices in Cloud Migration

One of the realities of cloud migration is that some of the drivers for transformation and migration go beyond just compliance. Business and market drivers to support new business models, geographic and channel growth, M&A can all drive the need for change. In fact, major decisions around Oracle cloud migration timing and execution are often driven by CIOs and CFOs due to the scale and complexity of these projects. However, tax teams can—and should—focus their energy on the variables within their sphere of influence, especially given that the fact that these teams are often running lean, making the need to automate even greater. This includes planning for tax system upgrades, ensuring compliance, and actively engaging in the broader migration strategy to safeguard the interests of the organization.

A critical consideration is the need to consolidate onto a single platform and solution to support the broader business and drive efficiency. These upgrades offer significant improvements in automation, integration, and reporting, but require careful planning and alignment with broader enterprise initiatives.



Understanding the Migration Landscape: Key Drivers and Challenges

Every migration to the cloud is shaped by a unique combination of drivers and constraints. For many organizations, the primary motivations include:

- **Rising costs of maintaining legacy infrastructure:** As technical debt increases, so does the risk of outages, compliance failures, and escalating support expenses.
- **Demand for greater agility and innovation:** Cloud platforms enable organizations to scale quickly, adopt new technologies, and respond to changing business needs.
- **Complex compliance requirements:** Global tax regulations are continually evolving, making robust, automated solutions essential for accurate reporting and risk management.
- **New features and integrations:** New features and integrations make it possible to support business growth and requirements.
- **Advanced use cases:** Cloud platforms make it possible to utilize advanced analytics, automate workflows, and optimize operations.

Vertex also makes it possible for Oracle Cloud Infrastructure [OCI] users to “Lift and Shift” their tax engine. We are the first tax technology provider to be able to integrate and host applications in OCI. We have our own OCI instances, deployed around the world, where you can deploy Vertex O Series, as well as our integration for Cloud ERP. Therefore, if you’re also hosting your application, everything can remain in the same environment—reducing latency and boosting your performance.

Despite these powerful drivers, organizations face a range of challenges as they embark on cloud migration. These include aligning cross-functional stakeholders, managing data integrity, ensuring system compatibility, and planning for business continuity. Successful migrations require not just technical expertise, but also a clear vision, strong leadership, and a commitment to collaboration across tax, IT, and finance teams.

Strategic Approaches: Tax Engine Migration Options

One of the key strategic choices for tax leaders is whether to pursue a tax engine upgrade independently of an Oracle migration or to align both initiatives. Each approach offers distinct advantages, depending on the organization's priorities, resource availability, and risk appetite.

- **Integrated Migration:** Aligning the tax engine and Oracle migrations ensures tight integration and less duplication of effort. This approach is particularly effective when both systems are approaching end-of-support or when significant business process changes are anticipated.
- **Independent Tax Engine Upgrade:** Upgrading the tax engine after the Oracle migration can provide enhanced compliance and automation, providing additional benefits from the migration.

Regardless of the approach, the objective is the same: to implement tax technology that is robust, compliant, and future-ready—delivering value today and positioning the organization for tomorrow's challenges.



Key Success Factors for Tax, Finance, and IT Leaders

To maximize the impact of a cloud tax solution migration, tax and finance leaders should focus on several critical success factors:

1. **AI Integration:** AI further enhances the foundation that Vertex provides, with additional clarity, transparency, and trust. We are addressing the everyday friction that slows teams down, from reconciliation to validation to workflow coordination—so tax teams can operate with speed and confidence.
2. **Establish a Clear Vision and Business Case:** Define success in terms of compliance, efficiency, risk mitigation, and strategic value. Quantify the benefits and communicate them to executive stakeholders to secure buy-in and resources.
3. **Engage Early and Collaborate Often:** Successful migrations are built on cross-functional teamwork. Engage IT, finance, procurement, and operations early to align objectives and address potential roadblocks.
4. **Leverage Vertex Expertise:** Work closely with Vertex consultants and support teams to design and implement best-in-class solutions tailored to your organization's unique needs.
5. **Prioritize Data Quality and Governance:** A successful cloud migration depends on accurate, well-governed data. Invest in data cleansing, validation, and mapping to ensure seamless integration and reliable reporting.
6. **Plan for Change Management:** Technology transformations impact people and processes. Develop a robust change management strategy to train users, manage expectations, and drive adoption.
7. **Focus on Compliance and Future-readiness:** Select solutions that not only meet today's requirements but also adapt to evolving tax regulations and business growth. Vertex O Series Cloud is engineered for flexibility and compliance in a dynamic regulatory landscape.

Vertex O Series Cloud: Empowering Modern Tax Operations

Vertex O Series Cloud sets the standard for automated tax technology—enabling finance and tax teams to tackle the most demanding compliance challenges with confidence. Key features include:

- **Global Coverage:** Comprehensive support for indirect tax, sales and use tax, and value-added tax (VAT) requirements across jurisdictions. It also can support e-invoicing.
- **Advanced Automation:** Automated tax determination, calculation, and reporting that reduces manual intervention and minimizes risk.
- **Seamless Integration:** Pre-built connectors and APIs for Oracle ERP Cloud and other leading enterprise platforms.
- **Robust Data Management:** Centralized, secure tax data repository with powerful analytics and reporting tools.
- **Continuous Compliance:** Regular updates to reflect changing tax laws and regulations, ensuring ongoing compliance with minimal effort.
- **Reporting:** Vertex for Oracle Cloud ERP offers enhanced reporting and report scheduling – including comprehensive prebuilt reports easily configured for business needs.

By migrating to Vertex O Series Cloud, organizations gain the agility to respond to new business models, expand into new markets, and stay ahead of regulatory changes—while reducing the burden on internal teams.



Implementation Best Practices: A Roadmap to Success

A successful cloud migration requires careful planning and disciplined execution. The following best practices can help tax and finance leaders chart a smooth and effective transition, since we understand the use cases and processes that you want to evolve and optimize:

1. **Assess Current State:** Conduct a thorough assessment of your existing tax processes, data flows, and system integrations. Identify pain points, compliance risks, and opportunities for improvement.
2. **Engage Stakeholders:** Involve key stakeholders from the outset, including IT, finance, procurement, and compliance teams. Establish clear roles, responsibilities, and communication channels.
3. **Develop a Detailed Migration Plan:** Outline every step of the migration, from data extraction and cleansing to system integration and user training. Set realistic timelines and milestones to track progress.
4. **Leverage Vertex Support:** Take advantage of Vertex's Global Professional Services to assist with comprehensive support resources, including technical documentation, implementation guides, and expert consulting services. Vertex was the first tax technology partner to be recognized as an Oracle Build Partner with expertise in Integrated in Oracle Cloud and Powered by Oracle Cloud. We defined the standard and have been enhancing ever since. Vertex was also the first tax technology provider to offer a validated integration for Oracle Cloud ERP available on Oracle Cloud Infrastructure (OCI).
5. **Test Thoroughly:** Rigorous testing is essential to ensure data integrity, system compatibility, and compliance. Validate all integrations and processes before going live.
6. **Prepare for Go-Live:** Develop a go-live checklist, establish support protocols, and communicate clearly with end users to minimize disruption and maximize adoption.
7. **Monitor and Optimize:** Post-migration, establish KPIs to measure success, monitor performance, and continuously optimize tax processes for efficiency and compliance.

Making the Business Case: Driving Value with Vertex in the Cloud

For tax and finance leaders, building a compelling business case for cloud migration is essential. The value delivered by Vertex O Series Cloud extends far beyond compliance—it touches nearly every aspect of enterprise performance and provides the automation to overcome complexity and a lack of staffing:

- **Reduced Total Cost of Ownership:** Eliminate the need for costly, resource-intensive on-premises maintenance.
- **Faster Time to Value:** Accelerate deployment and realize benefits quickly with pre-configured integrations and best-practice templates.
- **Improved Compliance and Audit Readiness:** Centralized data, automated reporting, and continuous updates ensure you're always audit-ready.
- **Scalability for Growth:** Expand into new jurisdictions, manage increased transaction volumes, and respond to business changes without costly infrastructure investments. In fact, Vertex is the only tax technology vendor with solutions deployed in region, in Europe, on Oracle Cloud.
- **Empowered Tax Teams:** Free up valuable resources to focus on strategic initiatives, not manual processes and troubleshooting.

By aligning tax technology strategy with enterprise objectives, tax and finance leaders can position their organizations for sustainable success, resilience, and growth.

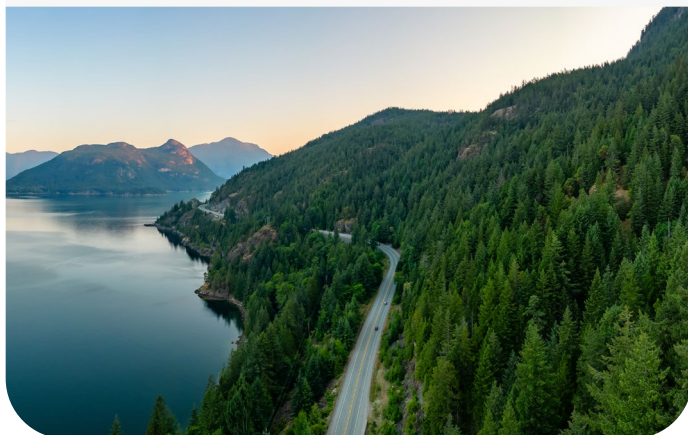
Conclusion: Leading the Way with Vertex and Oracle Cloud

Migration to the cloud is one of the most consequential initiatives tax and finance leaders will undertake in the coming years. With the right strategy, trusted partners, and a commitment to excellence, organizations can transform their tax operations—and their business—by embracing the power of Vertex O Series Cloud.

Vertex brings decades of expertise, proven technology, and a collaborative spirit to every customer engagement. As you consider your next steps, remember that the journey to the cloud is not just about technology—it's about unlocking new possibilities, enabling compliance with confidence, and driving value for your entire organization.

For over 45 years, Vertex has been singularly focused on indirect tax. It's our entire business—not an afterthought or a secondary offering. And when it comes to Vertex and Oracle, the average tenure of the customers using our solutions is 18 years.

Are you ready to lead your organization's tax transformation? Contact Vertex today to discover how we can help you navigate the path to cloud success and deliver ongoing value in a world of constant change.



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