Global Advisory Services: Assurance, Tax, Financial

OneStream Success Story

Implementation of transformative Corporate Performance Management platform

Company Glance

Professional Services Industry
Public accounting, tax, consulting, & business advisory firm

$2B	300+	1500
Revenue	U.S. Locations	OneStream Users

Challenges

- Oracle Essbase costly to maintain
- Data volumes were exceeding tool capabilities
- Legacy solution wasn't scalable

- Multiple versions of truth
- Different reporting structures across fragmented applications

- Reporting, planning, & analysis processes were in separate tools, with over-reliance on manual user intervention

"Managing Partners say that OneStream dashboards will be a game changer for the management of their practice"
– Director of Accounting & Financial Analysis

Legacy CPM

9 Essbase
4 Planning
1 ERP instance

OneStream Solution Delivered

Financial Consolidations & External Reporting	Guided reporting, interactive graphical dashboards
ERP & data warehouse integration	Budgeting, planning, & forecasting

Outcomes

One source of truth
Common set of data & structures shared across all reporting processes in single platform

4M Records integrated nightly
System refresh of new project & contract data from data warehouse

60% IT debt reduction
Eliminated 13 isolated legacy apps

Real-time notifications
Central status hub for viewing data availability

Automated processes
Driver based planning capability, auto-rolling of forecast data, master data syncing

Reporting flexibility
State of the art visual dashboards pairing KPI's with smart conditional formatting & textual support for direct insight

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