

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

Revenue

300+

U.S. Locations

1500

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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