

SaaS Company

OneStream Success Story

Transition from several disparate systems to a unified OneStream application, enabling enhanced reporting capabilities across several user groups

Company Glance

Our client is a SaaS provider that supports & enables boards of directors across various industries

Private Est. Rev. \$500M-\$1B	1,000 Employees	16,000 Customers
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Challenges

- Lack of a close & consolidation system caused year-end reporting to be very time consuming
- Concerns related to accuracy of financial information given that it was prepared manually
- Disparity between actual & budget reporting made comparative reporting very difficult

"We leveraged Finit's diverse expertise & knowledge of best practices while implementing OneStream, providing our company an opportunity to improve core processes & implement new controls allowing greater accountability."
- Finance Manager

Legacy CPM

Anaplan

NetSuite

Oracle HR

OneStream Solution Delivered

The OneStream XF Platform

People Planning

Tracking & Forecasting
Subscription Revenue

Outcomes

One version of the truth

A centralized close & consolidation application drives controls during the close process which increases confidence in the reported balances

Customer & product detail

Created a separate solution for customer & product level of detail to provide reporting of activities to drive decision making

Custom intercompany reports

Developed custom intercompany matching reports to provide greater transparency on eliminations & balances between trading partners

Budget vs. actual reporting

With budget & actual data in the same solution having consistent metadata, comparative reporting has become easier & straight forward

Driver based revenue planning

Rules & drivers were developed for planning & reporting of revenue based on amortization of subscription revenue

Enhanced reporting

Custom reporting for GAAP / Non-GAAP, Synergy, Constant rate, & other key metrics were developed in OneStream