



Inspiring Digital Transformation with  
Intelligent Finance

# • Agenda

1

The Future of Finance is Now

2

Finance Leaders' Challenges

3

Finance Needs to Lead at Speed

4

OneStream Overview

# We are Living in a Different Era

## NEW DEMANDS

CONTROLS & COMPLIANCE

CULTURE & TALENT

DATA MANAGEMENT & SECURITY

MODERNIZE BUSINESS MODELS

ENVIRONMENTAL & SOCIAL  
RESPONSIBILITY



## NEW TECHNOLOGIES

ROBOTIC PROCESS AUTOMATION

BIG DATA & PREDICTIVE ANALYTICS

MACHINE LEARNING

ARTIFICIAL INTELLIGENCE

VIRTUAL & AUGMENTED REALITY

## WHERE DO WE START?

# Transformation is Everywhere

Consider the car.....

## FUNCTION

ANALOG EXPERIENCE

LIMITED INSIGHTS

DRIVER ONLY INTERACTION



## FUNCTION FORWARD

DIGITAL DASHBOARD

DATA DRIVEN DECISIONS

ENVIRONMENTAL INTERACTION



**THE FINANCE JOURNEY  
HAS BEGUN**

# The Finance Journey

We are Living it NOW

## PREVIOUS GENERATION

CLOSE THE BOOKS  
REGULATORY COMPLIANCE  
ACTUALS REPORTING  
COST REDUCTION  
ANNUAL BUDGETS



## MODERN FINANCE

PROCESS AUTOMATION -  
BUSINESS PARTNER FOCUS



FREQUENT DRIVER-BASED  
ROLLING FORECASTS



DATA GOVERNANCE  
& DEMOCRATISATION



IMPROVED INSIGHTS & DECISIONS  
VIA NEW TECHNOLOGIES



# Finance Transformation

Requires Operational & Management Excellence



## ERPs Run the Business:

Cost – Increase Efficiency  
Quality – Reduce Errors  
Speed – Customer Response

## CPM Manages the Business:

Insights – Across Systems and Processes  
Agility – Dynamic Planning and Reporting  
Alignment – Across the Enterprise





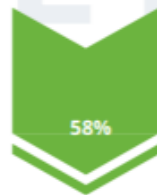
lower cost as a % of revenue



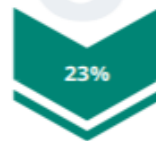
fewer FTEs per \$1 billion of revenue



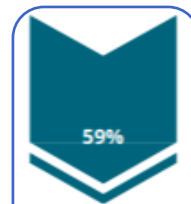
lower labor cost



fewer transaction processing FTEs



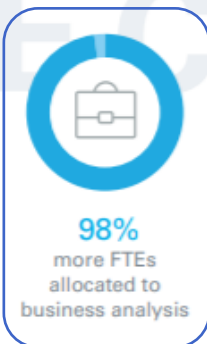
lower spend on technology



lower transaction processing cost as a % of revenue



more likely to have staff with direct operations experience



more FTEs allocated to business analysis



more managers can access reports online



more time spent preparing reports that address future action



more likely to include financial and nonfinancial metrics



less time spent compiling and collecting data for standard reports



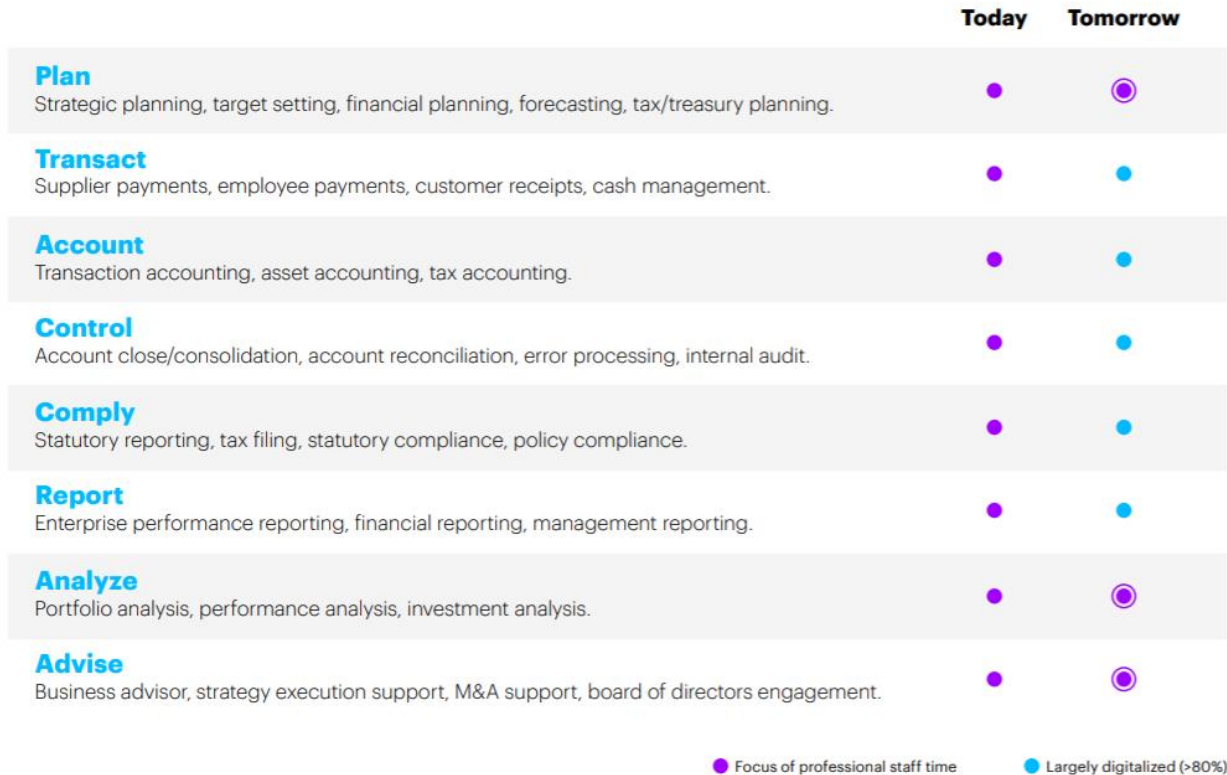
more likely to be viewed by stakeholders as a valued business partner



more likely to be perceived as agile in meeting business challenges

# → Digitalisation is Coming

Accenture – CFO Re-Imagined 2021





# Finance Leaders Face Diverse Challenges

## External Forces



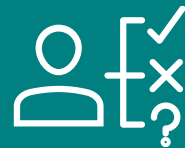
Macroeconomic Impacts  
Supply Chains  
Prices  
Competition

## Internal Complexities



More Enterprise Systems  
Integration Challenges  
Inefficient Reporting &  
Analysis Tools

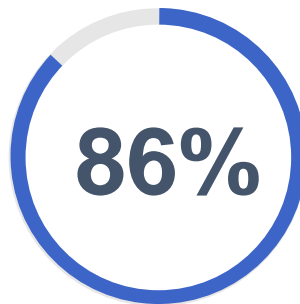
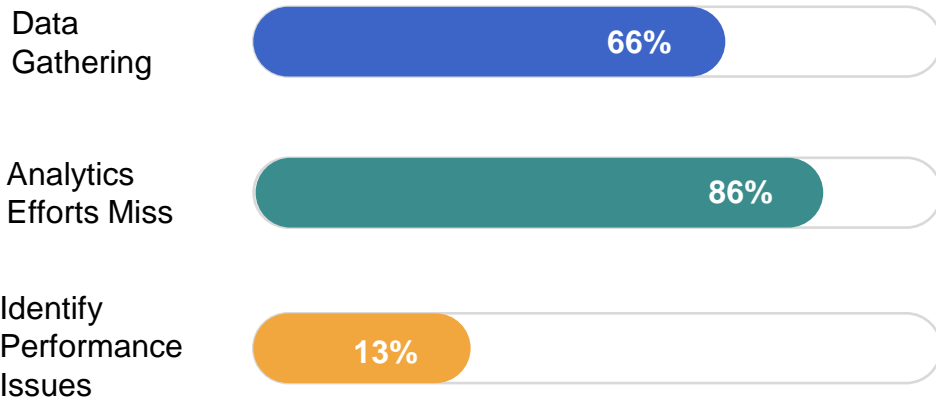
## People & Operations



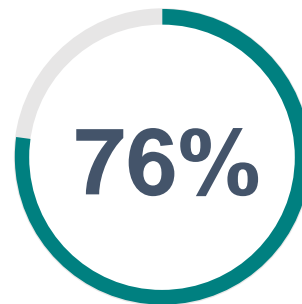
Siloed Decision-Making  
Limited Decision Support  
Lack of Agility

# Finance Self Assessment

20 Years of “Finance Transformation”



**Analytics Efforts  
Miss the Mark**  
FSN Future of  
Analytics in Finance  
2020

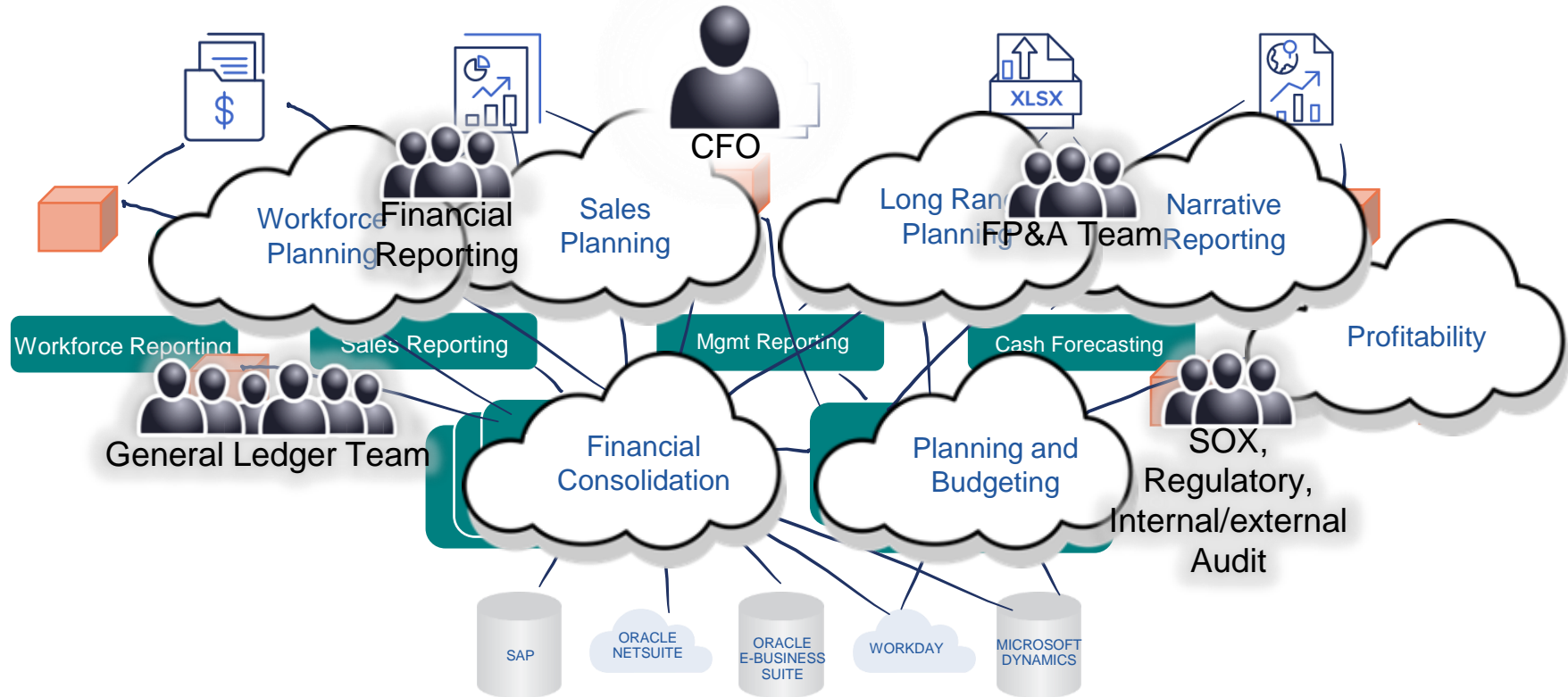


**Agree One Version  
of Truth needed to  
meet Objectives**  
Accenture – CFO  
Re-Imagined  
2021

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PWC Leading Finance in the Digital Era  
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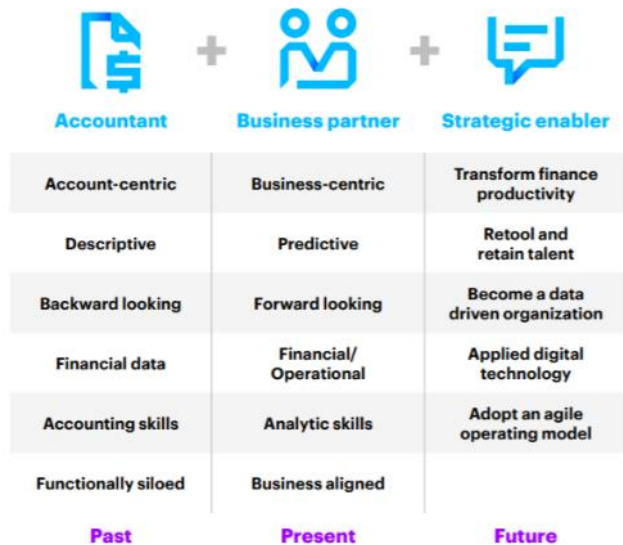
# CPM 1.0/Connected Finance – Fragmented

Multiple Applications, Points of Maintenance and Data Integration

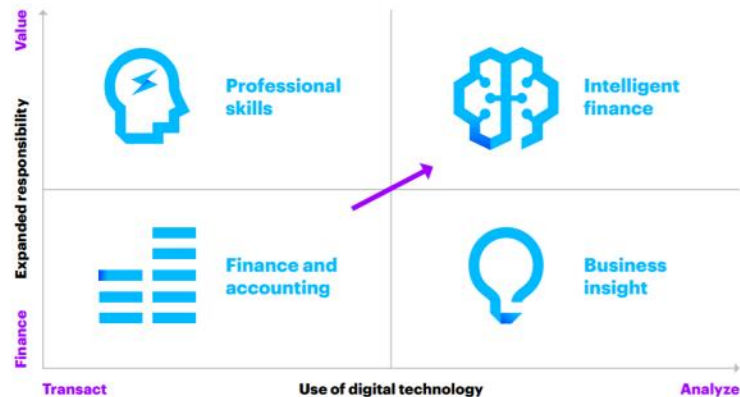


# Finance Skill Sets Now and of the Future

## The Three Hats of the Modern CFO

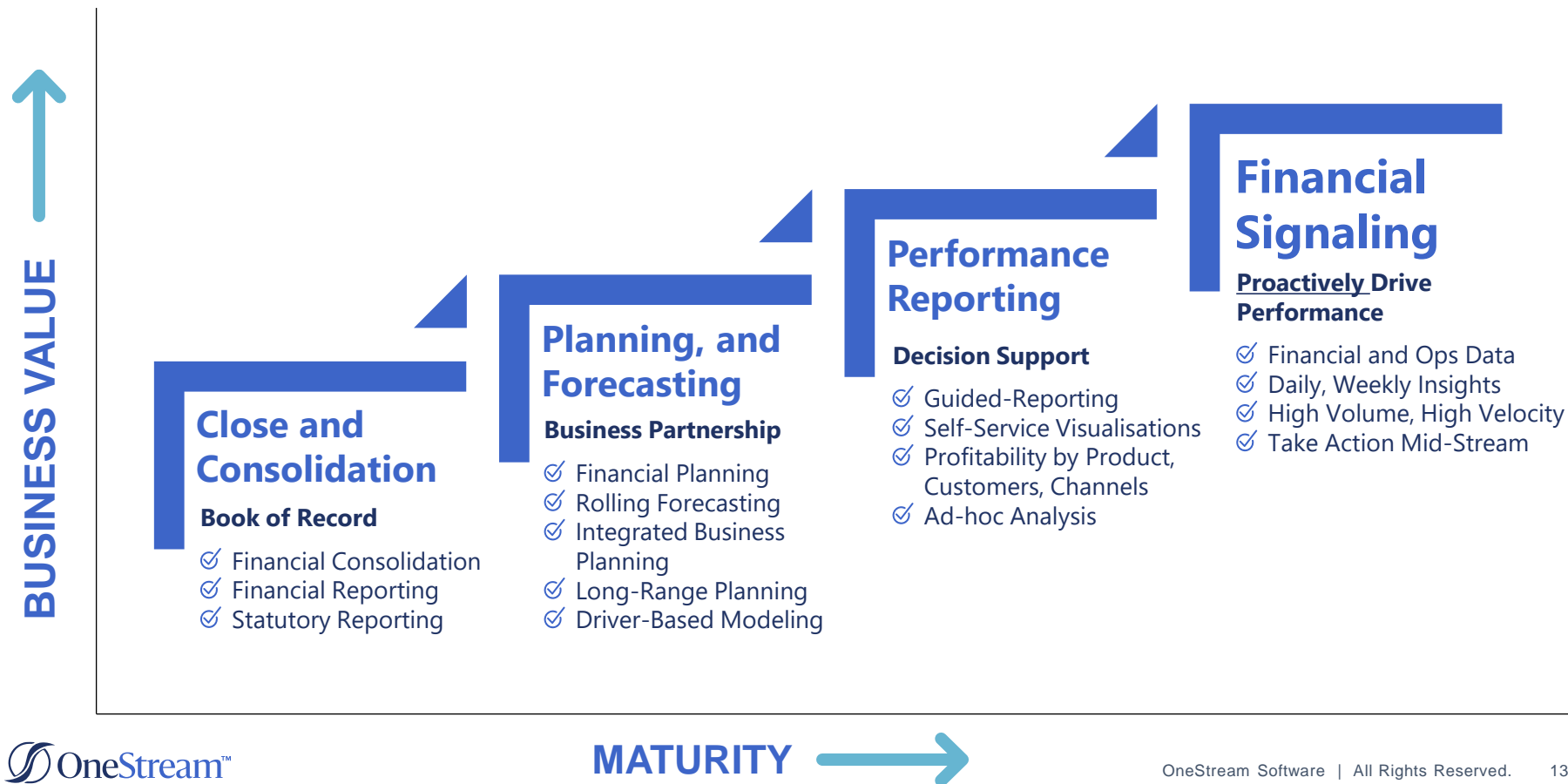


## Developing Future Finance



Accenture – CFO Re-Imagined 2021

# → The Evolution of Intelligent Finance





# → 6 Steps to Leading @ Speed

1



Drive Simplicity  
and Efficiency in IT  
Systems

2



Implement a Fast and  
Accurate Financial  
Close Process

3



Align Strategic,  
Financial and  
Operational Planning

4



Empower Managers  
with Financial and  
Operational Data  
and Metrics

5



Leverage Advanced  
Analytics Such as  
Predictive Forecasting  
and Machine Learning

6



Ensure Internal Systems  
and Processes are Poised  
to Support Growth  
and Change

# OneStream's Intelligent Finance Platform

One Platform Multiple Solutions

- ✓ Unleash the Value of Finance
- ✓ Empower the Enterprise with Insights
- ✓ Evolve and Scale with Your Business



# • The Finance Journey Is Reaching an Inflection Point

## LOOKING BACKWARD



### Book of Record

#### Close Processes & Consolidation

- Financial Consolidation
- Financial Reporting
- Statutory Reporting
- Performance Reporting

## RIGHT-TIME FINANCE



### Financial Signaling

#### Proactively Drive Performance

- Financial and Operational Data
- Daily, Weekly **Insights**
- High Volume, High Velocity**

## LOOKING FORWARD



### Business Partnership

#### Planning & Forecasting

- Financial Planning
- Rolling Forecasting
- Integrated Business Planning
- Long-Range Planning
- Driver-Based Modeling

# → Because Leading @ Speed Requires a Unified CPM Platform for Finance





# Thank You!

**Please reach out to us with any questions or for more information.**

**Contact us:**



[OneStreamSoftware.com](https://www.onestreamsoftware.com)



[sales@onestreamsoftware.com](mailto:sales@onestreamsoftware.com)

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