FSN
Innovation Showcase
2019

OneStream

FSN

The Modern Finance Forum

Gary Simon
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Dear Colleague,

Innovation is central to the success of the modern finance function and the businesses in which they operate. Yet, earlier FSN research, "The Future of the Finance Function 2017" highlighted that only 6% of CFOs understand the technologies available to them, only 37% know what solutions are available in the market and only 25% of CFOs have the time to investigate opportunities for technology innovation.

With this in mind, I am delighted to bring you FSN's 2019 "Innovation Showcase", an opportunity to bring to the attention of hard-pressed finance professionals what we consider to be leading innovations in core finance processes that could materially improve the way you work both now and in the future. And for the first time this year, we have reviewed and commented on two case studies for each vendor, to illustrate some examples of innovation in practice.

All the products which have been showcased by FSN are extremely complex and sophisticated and in all cases have taken many man-years of development effort. But innovation is very much in the 'eye of the beholder' and every finance organization is at a different stage of maturity. Some of the innovations assembled in this Showcase are at the leading edge of technological developments, others are around the architecture of the products or the way that vendors seek to reduce implementation risk. But if you've always relied on spreadsheets then even the simplest ideas, such as a unified transaction environment or a specialized budgeting tool can be innovative and game-changing.

Our work this year covers ten leading vendors and in this document, we showcase the work of OneStream. We have then identified independently for each of the ten global software vendors featured, three areas that we consider to be differentiating and interesting innovations to bring to the attention of modern finance leaders striving to understand and leverage the latest capabilities. As such, this document is not a product review. It simply represents what we consider, in our experience of the market, to be great examples of innovation in finance processes.

Last year's FSN Innovation Showcase was read by more than 14,000 finance professionals and we received some fabulous feedback. We hope that you find the innovations set out in this year's document thought-provoking and interesting. But above all we hope that the contents will inspire you to explore innovation in your own organization and discuss with colleagues and the featured vendors, how you can leverage these developments to take your finance processes to the next level.

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INNOVATION SHOWCASE

ONESTREAM

THE ONESTREAM SOFTWARE INNOVATION SHOWCASE

Innovation has been at the core of OneStream's approach since the very beginning, driven by its founders who have a long history of financial software innovation. Before co-founding OneStream, Tom Shea, a veteran of the financial reporting software industry, founded UpStream which was acquired by Hyperion and became the Hyperion Financial Data Quality Management (FDQM) product. OneStream co-founder Bob Powers, invented, architected, implemented, and led the development organization for Hyperion Financial Management (HFM) in addition to leading development for all financial applications at Hyperion.

It is this deep background in financial system engineering combined with a chance to do it all over again that spurred the development of OneStream. Having learnt what worked and didn't quite work the first time around, the founders sought to overcome many of the commonplace barriers to smooth financial reporting and planning in sophisticated organizations by using their formidable domain knowledge to create a completely fresh approach.

In this showcase we highlight three major innovations, namely; Extensible Dimensionality®, the XF MarketPlace, and what OneStream calls "Smart CPM™" (corporate performance management).

Innovation 1: Extensible Dimensionality®

From the very start, OneStream's founders wanted to solve a widespread problem within the CPM market – the issue of the divergent requirements for business units and the corporate center. In earlier generations of CPM software, disparate business units that needed to budget or plan at their unique and relevant levels of detail would often be forced to manage this in separate products and applications in order to preserve local reporting requirements without jeopardizing the overall budgeting or consolidation requirements at the center. Inevitably, compromises meant that local reporting entities often lost out to the more pressing needs of the corporate center.

OneStream has eliminated the historic tension between the corporate center and reporting units by removing the need to build and maintain separate applications to accommodate specific business unit reporting requirements. Its Extensible Dimensionality® allows business units to develop their own budgets and financial reporting to suit the level of granularity they need, within a single instance of the OneStream environment, while also rolling this data up into the standard central information required at the center.

The premise of Extensible Dimensionality is flexibility. Complex organizations are in a constant state of flux and their CPM system must be able to change as the company changes, for example, adding new accounts, cost centers or products as the need arises. OneStream currently has a market-leading 18 dimensions, 10 of which are predefined and 8 of which are custom dimensions. Integrated financial data quality management tools enable direct integration with any open ERP/GL system or any other internal or external source, and specialized migration tools allow meta data to be drawn in quickly from older generations of CPM solutions.

Extensible Dimensionality is innovative because it allows organizations with complex structures to satisfy local and central information requirements without compromise and to change sympathetically with the business as the organization changes shape or grows. It also provides corporate Finance and other executives complete visibility into business unit detail as they analyze summarized financial results- with drill down capabilities into the operational details, and through to transactional systems.

Innovation 2: The XF MarketPlace

All businesses are inherently different which is why a single piece of software can never be all things to all people. Progressive vendors know they must continually update and improve their service to meet the diverse needs of their customers. Sometimes though, universal upgrades aren't enough and specialized solutions are required for specific situations. Recognizing that these specialized solutions may benefit a number of customer organizations OneStream has opened up the availability of these unique solutions and made them available for download by customers and partners via their innovative XF MarketPlace.

Modeled on an app-store, customers can select the solutions they need, quickly download them onto their existing OneStream CPM system, configure and deploy them to address new requirements, without having to resort to in-house development, spreadsheet workarounds or integrating third-party software.

Solutions already exist in the XF MarketPlace for 'Account Reconciliations', 'Close Management', 'Reporting Compliance' (IFRS 16/ASC 842), 'People Planning', 'Capital Planning', 'Cash Planning' and 'Thing Planning', the latter being a pre-built component for detailed driver-based planning on anything, like project planning or SKU level planning.

As part of the continuing commitment to the XF MarketPlace, OneStream have announced further solutions, including Data Entry 123, Diagnostics 123, Process Control Manager and a Tax Provision Starter Kit. Data Entry 123 provides a simple to use 'wizard' to create standardized data forms for say, budget data capture and Diagnostics 123 gives users a dashboard view into the system's performance and status at any point in time. Tax Provision extendsthe established OneStream architecture to support tax provisioning so that users can leverage common accounting data to more readily reconcile their accounting profit to their taxable profit.

Users of the MarketPlace simply choose the most relevant applications to add to their OneStream platform. And because these solutions are written to the same design and development standards as the core CPM platform, the approach greatly reduces the risks and timescales associated with adding specialized functionality.

Currently all the solutions in the XF MarketPlace have been built by OneStream, but partners will also now be adding to the collection of solutions. These partner-developed solutions must conform to development guidelines and a certification program. This promises to bring even more choice for customers in the future.

The XF MarketPlace solutions already available include a combination of productivity tools, specialty planning tools, financial close tools and compliance solutions. Often, they draw on datasets outside of the core CPM remit, and this could provide a helpful boost to the availability and advantages of non-financial data within CPM processes.

FSN's surveys on the future of the finance function and on planning, budgeting and forecasting have all highlighted the substantial advantages of including a wide range of non-financial data to improve insight when generating forecasts, plans and budgets. But the obstacle has often been the integrity of data derived outside of the strict finance processes, as well as its traceability.

The range of financial and non-financial data being delivered into the system is growing as the number of solutions grow. For example, information about lease contracts and people management can now be drawn into planning models and reporting scenarios and used to uncover more accurate insight across the business.

Innovation 3: End-to-End visibility of the customer journey

Central to the concept of SmartCPMTM is the ability to handle multiple requirements in a single application, extend and grow as companies add business units and new data dimensions, and draw on and analyze multiple dimensions without constraint. Deployable on-premise or in the cloud with full interoperability, OneStream's unified environment provides the platform for these capabilities through data blending, scalability, interchangeability and machine learning.

Smart Scalability:

When an organization scales up, extra business units or operational dimensions can be easily added into the unified environment. For organizations that deploy via the cloud, OneStream XF Cloud leverages the Smart Cloud platform of Microsoft Azure, enabling user organizations the flexibility to 'scale with the burst', or draw more capacity during times of greater demand.

This is especially important because financial consolidation, budgeting and forecasting are particularly prone to peaks and troughs of demand at month-end, quarter-ends and year-ends. Now, these demand changes are managed as they occur, but machine learning techniques are being introduced by OneStream which, based on usage data, will anticipate these peaks and troughs, and intelligently scale up and scale down cloud capacity to match peaks and valleys in user demand during crunch periods.

Released in early 2019, 'OneStream XF 5.0" (5th generation platform) provides the first step towards enabling the autonomous cloud with a broad set of environmental and process sensors and smart load balancing with 'intelligent bots' that route tasks to servers with available capacity based on live system data. The intelligent bots are able to prioritize large tasks, such as consolidation, and assign them to a dedicated server that keeps other resources free and available for other important tasks. This boosts overall performance and maximizes productivity. Future releases will support scheduled and machine-learned auto-scaling of the cloud environment.

Relational Data Blending:

The flexibility of the unified environment extends to its core analytical processes, which can seamlessly blend data at varying levels of granularity, without overloading the analytical engine (the 'cube') with detail.

It allows companies to bring very detailed transactional data (frequently held in a relational database environment) into this analytical 'cube', offering up granular insights that are frequently lost when CPM systems only focus on the central corporate financial requirements. But crucially, the relationship between granularity and overview is bi-directional so that finance professionals can drill back to relational source data within OneStream, then back to source systems or forwards to consolidated numbers as needed. This relational data blending capability is leveraged in some of OneStream's XF MarketPlace solutions such as People Planning and Lease Accounting.

Interchangeability:

The cloud may appear to already be ubiquitous for all software applications, but many companies still want the option of an on-premise solution. OneStream's vision of a SmartCPM platform enables their customers the choice of either, by offering full interoperability of on-premise and cloud deployment. Its customers can choose to switch from one to the other, in most cases in just a matter of hours.

Experimenting with Machine Learning:

Machine learning is on everybody's lips but many instances and examples in the finance function are experimental. Vendors will play a leading role in developing the full potential of machine learning and OneStream is at the forefront of Machine Learning innovation. With data preparation as one of the biggest challenges in leveraging Machine Learning, OneStream will enable customer to capitalizing on its stage engine data integration capabilities by pulling in and combining data from a variety of internal and external sources at low levels of granularity. Data Science teams will then be able to integrate with leading machine learning engines to apply the data science and then bring the results back into the CPM environment to leverage its analytic capabilities to inform predictive models and forecasts and compare them to actuals and traditional forecasts.

Case Study: Guardian Industries

INTRODUCTION – FSN'S VIEW

Tax automation is often viewed as a backwater in corporate reporting, but this ground-breaking case-study illustrates that tax provisioning is also amenable to digital transformation and the solution can be found 'under the noses' of every corporate finance function.

INNOVATION IN ACTION

The stand-out innovation in this case study is to use the very same infrastructure that serves corporate performance management (CPM) to provide a tax data collection and provisioning system that sits comfortably alongside the statutory reporting process allowing the financial view of profit to be easily reconciled with what the tax man calculates as profit.

HOLISTIC APPROACH TO FINANCIAL REPORTING & TAX

The obvious question raised by this case study is, that if you use a CPM system to manage your processes, workflow and data for financial consolidation, budgeting, planning and forecasting- why wouldn't you use it also for tax provisioning and reconciliation? Afterall, at the very core, financial reporting and tax provisioning share the same data source, i.e. the general ledger.

This case study demonstrates that for modern CPM, the tax structure is just another entity hierarchy and, while data collection is a little different, (tax rules are different from accounting rules), the same platform can be used to collect and consolidate tax data. And because all of the relevant data and structures are now in the same system, the ability to reconcile between the statutory filings and tax becomes a simpler task. In the same way that financial consolidation eliminates spreadsheets and wasted effort so does tax provisioning, enabling the whole process to be accelerated by a considerable margin and allowing tax professionals to manage the tax liability, rather than just calculating it.

Guardian Industries
OneStream Tax Provision Success Story

About Guardian Industries
Guardian Industries, a global company headquartered in Auburn Hills, Michigan, employs around 18,000 people and operates facilities throughout North America, Europe, South America, Africa, the Middle East and Asia. Guardian companies manufacture high-performance float, coated and fabricated glass products for architectural, residential, interior, transportation and technical glass applications, and high-quality chrome-plated and painted plastic components for the automotive and commercial truck industries. Guardian's vision is to create value for its customers and society through constant innovation using fewer resources. Guardian is a wholly owned subsidiary of Koch Industries, Inc. Visit guardian.com.

Company
Guardian Industries

Industry
Manufacturing

Corporate Performance Management Solutions Delivered
- Financial Consolidation and Reporting
- Account Reconciliations
- Financial Data Quality Management
- Planning, Budgeting and Forecasting
- Sales and Operational Planning
- Tax Provision

Business Challenges:
- Was relying on 75 Excel-based tax packages for data collection
- Process was highly manual, too much time spent on data manipulation
- Tax Manager was working long hours
- Company was missing reporting deadlines to parent company

Key OneStream XF Benefits
- Aligned tax provision process to financial consolidation and reporting
- Elimination of 75 spreadsheets
- Saves 5 hours per month at each of 75 reporting locations
- Moved to monthly provision reporting process vs. quarterly
- Almost 1 week saved annually on tax reporting to parent company

The Challenge
Guardian Industries had implemented OneStream for financial consolidation, reporting, planning, forecasting, account reconciliations, return on capital and supplemental reporting. However, they were using Excel spreadsheets for tax data collection, provisioning and reporting.

Their annual tax provisioning process relied on the distribution of 75 Excel-based tax packages worldwide, with 12 tabs in each package with various calculations and reconciliations. The process was highly manual, with too much time spent collecting and consolidating data, reconciling to the GL, and correcting errors and not enough time reviewing and analyzing the data.

The extra hours spent managing the tax data collection process caused the Finance team to miss reporting deadlines to their parent company, despite the Tax Manager working around the clock to get her work done.

Selecting OneStream XF
The Guardian team began looking at alternatives to their Excel-based process including Thomson Reuters OneSource, Longview and Vertex. All these solutions required a download of trial balance data from the GL, which was already collected and consolidated in OneStream. So, the team began exploring the feasibility of managing the tax provision process in OneStream.

In evaluating OneStream, the team found they could have an integrated and more flexible process for the tax provision, which would avoid duplicating data, and would also avoid additional licensing costs from other vendors.

Implementing Tax Provision in OneStream
OneStream's tax experts began working with the Guardian tax team to configure their tax provision solution in OneStream. The initial phase started with replicating the initial tax package focusing on the retained earnings reconciliation, which identifies tax to book timing differences.

This required the configuration of a new tax account hierarchy, new legal entity structure for tax, and new forms for the provision calculations including many validations and data quality checks.

"Tying out the tax provision solution to consolidated GAAP GL earnings was a big accomplishment, and really important," said Jessica McAlpine, Project Manager

at Guardian Industries. "With the new system users can add attachments to support calculations, create a journal entry to book the tax provision and ensure the tax provision expense ties out to the GL."

Guardian is leveraging the Guided Workflow within OneStream to organize required vs. optional forms that users need to complete. Once all the required forms are complete, the user must confirm and certify their workflows, which triggers regional Finance managers to perform their reviews. The system also includes tracking of tax submissions from 80 users across 100 entities.

Benefits of Aligning Tax Provision with Consolidation and Reporting

Phase 1 of the tax provision project focused on addressing the tax provision for all US locations, and phase 2 is focusing on international locations and the monthly rollforward of data. Phase 2 includes implementing currency translation, so Guardian will be able to tie out each of their tax schedules to the GL in both local currency and US dollars.

"One of the key benefits of the new tax provision solution has been moving to a monthly provision reporting package for all locations, which was previously done only quarterly," said McAlpine. "For the US, our close process has significantly improved, and our reporting is more accurate for all locations. Users are excited about the automation and time savings from the Excel approach. They are spending more time reviewing and analyzing tax data before submission deadlines. As we move into phase 2, our international users are looking forward to utilizing these benefits."

According to McAlpine, "The new system will eliminate 75 spreadsheets and save an estimated 5 hours per month preparing the tax provision at each of the 75 locations. Also, the time spent to create the reports that are sent to their parent company is instantaneous as compared to the week spent in the past."

"OneStream is so user-friendly and can be applied in many areas – reporting, planning, tax and others," said McAlpine. "Once you understand the workflow it's easy to leverage it more broadly. The integration and addressing so many solutions in one platform is great – you just can't beat it!"

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The OneStream XF MarketPlace features downloadable solutions that allow customers to easily extend the value of their CPM platform to quickly meet the changing needs of finance and operations. We are driven by our mission statement that every customer must be a reference and success

For more information, visit OneStream Software http://www.onestreamsoftware.com or on Twitter @OneStream_Soft.

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Case Study: Carlyle Group

INTRODUCTION – FSN'S VIEW

Tax automation is often viewed as a backwater in corporate reporting, but this ground-breaking case-study illustrates that tax provisioning is also amenable to digital transformation and the solution can be found 'under the noses' of every corporate finance function.

INNOVATION IN ACTION

There are two stand-out innovations in this case study. The first is the streamlining and standardization afforded by a single, extensible CPM environment. Afterall, if a business has always used disparate point solutions for consolidation, reporting, planning, budgeting and forecasting then a single integrated environment is truly innovative. The second relates to the innovative use of 'plug and play' specialized solutions free to download via a customer marketplace (the "OneStream XF MarketPlace") eliminating the need for workarounds or bespoke code for extra bits of functionality that are less commonly needed.

EXTENSIBLE CPM ENVIRONMENT

The case study illustrates the classic "before" case of financial reporting working in one environment and planning working in an entirely different one. Fractured processes, workflows and data repositories cause immeasurable delay, especially when trying to bring actuals and budgets together for analysis and reporting. OneStream XF swept away all these limitations at a stroke, as well as automating data capture from underlying operational systems.

THE XF MARKETPLACE

The core requirements of a modern CPM system are relatively uniform across many industries but there is frequently a need for other applications that lie outside of the core. For these more specialized needs, OneStream has laid down a whole series of additions written to the same design standards, that are available to download and incorporate in the application. In this case, the organization benefited from a People Planning solution that would allow detailed modeling around new positions, promotions, transfers and enabled the financial plan to be updated for budget holders in real-time.

The Carlyle Group
OneStream XF Success Story

About Carlyle Group
The Carlyle Group is a global alternative asset manager with $195 billion of assets under management across 317 investment vehicles. Founded in 1987 in Washington, DC, Carlyle has grown into one of the world's largest and most successful investment firms, with more than 1,600 professionals operating in 31 offices in North America, South America, Europe, the Middle East, Africa, Asia and Australia. For more information, visit www.carlyle.com.

Company
The Carlyle Group

Industry
Financial Services, Asset Management

Implementation Partner
Finit Solutions

Corporate Performance Management Solutions Delivered
• Financial Consolidation & Reporting
• Budgeting, Planning and Forecasting
• Financial Data Quality
• People Planning

Business Challenges:
• Outdated version of HFM wasn't compatible with Windows 10 and was difficult to maintain
• Outdated planning system was unsupported and lacked flexibility
• Actual vs. budget reporting was highly manual
• Legacy HR budgeting and forecasting system relied on Excel data input and had limited reporting capabilities

Key OneStream XF Benefits
• Consolidation times reduced by more than 50%
• Revenue and expense budget updates reduced from 1 week to 5-10 minutes
• Updating allocation metrics reduced from 1 week to 30-60 minutes
• Updating headcount assumptions reduced from 1 week to 20 minutes

The Challenge
Carlyle had been struggling with a fragmented approach to their financial reporting and planning needs. For financial consolidation and reporting the company was using an outdated version of Oracle Hyperion Financial Management (HFM) that wasn't compatible with Windows 10, and had a complicated design that made change management difficult. They were facing increased costs for extended support, and Oracle was pushing their cloud offering which offered limited functionality.

For financial budgeting and planning, Carlyle was using Business Objects Planning which was no longer supported by SAP and was running on an outdated and unsupported operating system. There was no flexibility to expand the application's functionality, and no ability to automate actuals vs. budget reporting and analysis due to differing levels of detail between systems.

In addition, Carlyle was using a legacy HR budgeting and forecast system that was single user, causing version control issues. The system relied heavily on Excel-based data integrations, with limited and manual reporting and manual maintenance of key reference data.

The OneStream XF Solution
The Carlyle team evaluated Oracle's EPM Cloud and other alternatives and agreed that an investment in OneStream made the most sense, if the platform was used to replace the existing financial and HR planning systems, as well as HFM for financial consolidation and reporting, and other point solutions such as account reconciliations in the future.

The Carlyle team projected that an investment in OneStream would yield the strongest ROI (36% over 5yrs) when compared to an all-Oracle investment. Key drivers of savings/cost avoidance in the business case included avoidance of costly upgrades, reduced IT/admin staffing, and reduced software maintenance costs.

Streamlining Financial Consolidation and Reporting
With OneStream, Carlyle implemented a direct connect to their PeopleSoft GL and automated the loading Excel-based templates that were done manually before. They now perform matching of intercompany GL balances in transactional currencies to isolate true FX impact. They also use Guided Workflow for loading non-GAAP data, and have segment reporting aligned with FP&A.

Improving Visibility in Budgeting and Forecasting

With OneStream, Carlyle leverages the direct connect with PeopleSoft to load project-level actuals, and is now able to budget and reforecast at both the legal entity and project level. In additional to automating reporting and segment allocations, the company has improved visibility and traceability into allocations and budget version changes, with real-time budget impact viewing capabilities. And they have implemented decentralized, self-service reporting and analysis for business usersthat enables them to see the immediate impact of changes on plans and reports, driving a new level of efficiency and control at the business user level.

Extending the Investment with People Planning

Leveraging the People Planning solution from the OneStream XF MarketPlace, Carlyle now has detailed modeling capabilities for new positions, promotions, transfers, and other adjustments. The solution includes compensation and benefit drivers by geography supporting their global employee base. And, changes to the workforce plan can be pushed into their Financial cube in a matter of minutes to so that budget owners can see the impact in real-time.

Simplification of Technical Landscape

Carlyle was able to simplify their IT landscape and reduce costs compared to their previous Hyperion system. OneStream was easier to install, taking 90 minutes via WebEx, and VMs used for OneStream were less than half that of Hyperion. System monitoring is much easier and Carlyle has received immediate responses to support tickets with rapid issue resolution.

System and Process Efficiency Gains with OneStream

The implementation of OneStream has resulted in significant process improvements for Carlyle. Consolidating a full year of GAAP actuals was reduced from 6-8 hours to 3-4 hours while including significantly more detail than was previously loaded in Hyperion (e.g., project-level details). Submitting revenue and expense budget updates and reviewing the impact was reduced from 1 week to 5-10 minutes. Updating allocation metrics and reviewing the impact was reduced from 1 week to 30-60 minutes and is now run four times daily. And updating headcount assumptions and reviewing the impact was reduced from 1 week to 20 minutes.

Future Plans

Carlyle plans to extend their use of OneStream with XF MarketPlace solutions for Account Reconciliations and Close Management. Other areas under consideration include decentralizing their use of People Planning, implementing Cash Forecasting for Treasury, financial reporting for fund accounting, and advanced scenario modeling for FP&A and key budget/forecast stakeholders.

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Methodology

All of the products which have been showcased by FSN are extremely complex and sophisticated and in all cases have taken many man years of development effort. FSN has independently desk reviewed publicly available information (for example, websites, customer testimonials, videos, demonstrations, technical details and white papers) about the organization and its products. We have then identified independently three areas that we consider to be differentiating and interesting innovations to bring to the attention of the FSN Modern Finance Forum on LinkedIn and discussed their development history, the ideas behind their creation and their direction with senior members of the management team. As such, this document is not a product review, and neither is it an exhaustive list of all the innovative ideas in the product. It simply represents what we consider, in our experience of the market, to be great examples of innovation in finance processes.

About FSN

FSN is a global publisher of thought leadership, research and "must-have" content for CFOs and senior finance professionals around the world. FSN's highly popular and active Modern Finance Forum on LinkedIn has a membership of more than 55,000 readers in more than 23 countries and across every major industry segment. It is also the publisher of the popular www.fsn.co.uk website and regularly holds networking dinners and events for its members.

Innovation Showcase 2020

If you would like to be considered for inclusion in the 2020 Innovation Showcase then please contact Michelle Fabian, research director, michelle.fabian@fsn.co.uk or Gary Simon, CEO, gary.simon@fsn.co.uk

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