



CLIENT HIGHLIGHTS

INDUSTRY

Telecommunications/Service

REVENUE

<\$500M - category

OneStream XF

- 3 Cubes
- Detailed Management dimensionality including:
 - Entity
 - Account
 - Product
 - Customer
 - Vendor
 - Department/Cost Center
 - Function
 - Contract/Project
 - Oppty Owner
- 100+ Product Lines
- Product/Function Allocations
- Automated/"lights out" data integration
- Full Consolidation Process (sub consolidations/Global)
- Financial Planning and Analysis
 - People Planning (20+ Drivers)
 - Sales/Revenue Planning

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Our journey:

The Challenge:

Client desired to transition from their extensive Excel pivot table based, manual Consolidation and FP&A processes to a more streamlined and automated OneStream XF platform. The NetSuite G/L was not report friendly nor did it allow for detailed analytics, comparative reporting, etc. Multi-currency reporting and analysis was difficult, and the close/FP&A processes were inefficient. The initial phase established the foundation for the collection, consolidation, and analysis of the monthly close data. Additional phases added business unit metric reporting, compensation planning/forecasting using People Planning, and Sales/Revenue planning/forecasting using Sales Planning. Future phases will integrate sales metric reporting, executive dashboards, and balance sheet/cash flow forecasting.

The Solution:

- Robust dimensional detail for product, customer, vendor, and department, etc. reporting
- People Plan and Sales/Revenue cubes with function specific dimensionality for detailed analysis
- 200+ page management reporting book including major financial statements as well as detailed product line and department analysis
- People Plan marketplace solution forecasts compensation and is integrated with a People Plan cube that applies allocations across a matrix of products and functions
- Sales Planning solution forecasts sales and related revenue as well as revenue schedules for existing contracts and backlog by month. Includes Product, Customer, Project, Type, and Country detail.



Technology Solution meets Process Improvement

The Benefits:

- Global foundational system housing both full consolidation and FP&A processes in one place
- Elimination of Excel pivot table-based reporting for Actuals and Forecast/Plan.
- Central reporting available on demand.
- Significant reduction in Actual close time and forecasting/plan cycles
- Desperate planning functions (Revenue, People, Cap Ex., Expense) all housed in the same system.
- Multi-currency analytics
- Streamlined data integration and workflow management from NetSuite
- Ability to plan and forecast at the individual employee level
- Ability to plan and forecast at the project/opportunity owner level for sales and revenue.
- Users can make live updates to the forecast/plan during review meetings with departments

“We have simplified the chaos.” – Client Quote

Our History

GBI Consulting was established over a decade ago to bring the best blend of functional, process and technology experience to bear at our clients. As a OneStream Platinum partner, we are a team of certified consultants solely focused on driving accounting principles and financial processes leveraging technology as an enabler and accelerator. Our global team members average over 15 years of industry, functional and technical experience. We have designed and delivered on 100's of financial system solutions through our proven approach of thoroughly understanding our client's needs and challenges and putting in the right technology and processes for success. Our team brings real world experience and countless client collaborations, to guide our clients seamlessly through the implementation process. We define our successful projects as not only achieving our clients end goals in a collaborative way, but also empowering them to remain self-sufficient upon completion.

GBI At A Glance

COMPANY

- Firm solely focused on Performance Management
- Over 25 years of software implementation experience
- OneStream Platinum Partner
- Thought Leadership

CLIENT SUCCESS

- Full scale EPM deployments
- Broad industry experience
- Global, national, and regional clients
- Significant Fortune 100 Experience
- 100's of Finance technology-based solutions delivered

METHODOLOGY

- Rigorous Project Methodology/Checkpoints/Milestones
- Best practice library and quick start Accelerators
- Quality assurance built into each step
- Collaborative mentoring approach
- Refined methodology and toolkits based on deep experience and history with products

CONSULTANT DEPTH

- Significant blend of functional and technical expertise
- Significant industry experience
- CPAs experienced with industry experience
- Average level of Experience at Architect/Lead level – 15 years

CONTACT US

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