Finit

UNMATCHED EXPERIENCES

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Who Are We?

Finit Is Intentionally Different...

We understand that Finance is the heartbeat of every organization. When the Office of Finance operates efficiently and delivers critical insights, every team is empowered to elevate their performance.

Finit executes toward this vision by putting people first. This begins by attracting and retaining the most experienced, effective, and likeable team members in the OneStream community. Those team members founded Finit's values and our culture, which is renowned in the community and recognized by leading organizations such as Fortune.

Our foundation is further strengthened by being a 100% employee-owned company and having incentives focused on client success, not billable hours.

Finit brings leading practices and deep expertise across every area of the OneStream platform and the functional needs of our clients. Through our comprehensive Finit 360 offerings—including best-in-class implementations, ongoing support and enhancements, and plug-and-play solutions—we create lasting value for our clients.

Finit's people-first foundation and focus on client success, combined with our capabilities and offerings, foster a strong sense of responsibility and commitment among Finitians, driving long-term success for our clients.

First is Our Favorite Word

FIRST
OS PARTNER

FIRST
APP DEVELOPER

500+
OS PROJECTS

45k
OS USERS ENABLED

3x
OS ARCHITECT EXPERIENCE

100%
CLIENT SUCCESS

WHY CHOOSE FINIT?

Leader in OneStream Success

Finit is the global market leader in creating success on the OneStream platform, helping over 166 clients achieve valuable outcomes. By partnering with our clients long-term, Finit has taken finance further across every OneStream platform capability—enhancing reporting and insights and transforming processes.

AI-Powered Finance

FIRST
AI CERTIFIED
ARCHITECTS

MOST
AI CERTIFIED
IMPLEMENTERS

OneStream's SensibleAI Forecast provides an advanced forecasting method alongside traditional approaches like zero-based and driver-based methodologies. It allows planners to choose the best forecasting approach for specific metrics and accounts based on their business value and dynamics. This results in greater agility, improved forecast accuracy, and dramatic efficiency gains in forecast cycle times.

Rebecca LoSurdo
AI Architect

Ben Anderson
AI Architect

Customer Challenge:

- Custom-built machine learning algorithms developed by data scientists required significant investment, resulting in limited transparency and agility—and ultimately, low adoption.
- Models were managed by analytics and data science teams rather than business users, further reducing adoption.
- Reforecasting processes took several days to run and analyze.

Customer Solution:

- **90% efficiency gain**: Reforecasting reduced from several days to under 30 minutes
- **10% improvement in forecast accuracy** over existing ML models
- **Business-owned**, no-code models built within intuitive workflows
- **Faster time to value**: From years to < 6 months, with significantly higher adoption

Key Success Factors:

- **Ensure stakeholder alignment**: Effective change management is essential to drive process change and achieve targeted value

- **Balance consistency with local needs**: Standardize where possible, but provide meaningful value at the business unit level—not just at corporate

- **Prioritize what matters**: Focus on key performance indicators and areas with high volatility or significant impact on margins and profitability

- **Make data accessible**: High-quality, comparable enterprise data unlocks significant value

- **Consider the full finance lifecycle**: A comprehensive solution should support all critical technologies used by Finance

Financial & Operational Planning

Leading companies position FP&A as a **strategic business partner** that helps management improve financial performance. These organizations emphasize data-driven decision-making to influence future outcomes, leveraging capabilities such as advanced analytics, predictive modeling, and continuous planning. OneStream's sophisticated features and extensible platform empower FP&A teams to realize this value.

50+
DRIVER-BASED PLANNING PROJECTS

40+
PEOPLE PLANNING PROJECTS

Cindy Eichner
FP&A Architect

Roger Tam
FP&A Architect

Jeff Kantor
FP&A Architect

Chuck Usher
FP&A Architect

Amplify SAP with OneStream

15k

ENABLED OS USERS
ON SAP ERPS

40+

OS CLIENTS
USING SAP

SAP is integral to the operations of many organizations; however, it falls short in delivering exceptional capabilities for the Office of Finance. OneStream bridges this gap by providing agility, completeness, integrity, flexibility, and simplification through a unified platform. It empowers Finance leaders to drive transformation efforts, with support from IT counterparts, while fully leveraging their advanced SAP ERPs to achieve outstanding results.

Rutvij Desai
SAP & OS
Delivery Leader

SAP CPM Challenges:

- SAP's CPM capabilities are limited and comprised of multiple, separately licensed products.
- SAP is sunsetting its leading CPM solution, BPC.
- SAP CPM systems are typically IT-owned and IT-supported, limiting Finance's direct control.

Best-of-Both-Worlds:

- OneStream is a unified platform built specifically for CPM, enabling a "Finance-First" transformation strategy that is Finance-owned and IT-supported.
- OneStream delivers expansive capabilities for Accounting, FP&A, external reporting, tax, treasury, and business finance leaders — all within a single platform.
- Streamlined data integration with a single connection point from SAP to OneStream, synchronizing both data and master data seamlessly.

How Finit
Drives Transformation:

Strategy: We partner with you to define the long-term vision and tailor a strategy aligned with your desired outcomes.

Process: We treat processes and technology as interdependent, shortening project cycles, preventing rework, and improving ROI.

Data: We help you optimize your most valuable asset by crafting data standards and architectures that enable planning, analysis, and AI capabilities.

Models: We craft user-centric data models and capabilities that deliver required features and dynamic views of your business Insights: We create visualizations that help users understand the most relevant information in ways that are easy to use and act on.

Operations: We enable and deliver an operating model for business users that continuously monitors, improves, and enhances capabilities over time.

Transformation Happens Through OneStream

Transforming finance operations enables organizations to achieve greater efficiency, deeper financial insights, and stronger alignment with business objectives. While policies, methodologies, and adjacent technologies are important, OneStream offers a next-generation finance platform that fully integrates processes and technology — embedding them directly into the core of the platform. This seamless integration empowers clients to incorporate processes without isolating them, achieving true transformation through intentional design, configuration, and enablement within OneStream.

"

Financial close cycle shortened by 50%

Planning process shortened by 75%

We are seeing a 10x improvement in processing speed

"

Matt Aldrich
Executive Finance
Transformation Director

Close & Consolidation

100+
OS CONSOLIDATION PROJECTS

40+
ENHANCED CASH FLOW SOLUTIONS

A high-quality consolidation solution creates value far beyond external reporting, extending into management, tax, and regulatory reporting. Leading processes combine quarterly external reporting with the more granular data needed for tax provisioning and returns, statutory compliance, and internal analysis. These solutions bring the entire Office of Finance together around a consistent, cohesive, and trusted view of financial statement data — delivering the right level of detail to every stakeholder group.

Manasvi Ravichandar
C&C Architect

Millie Vazquez
C&C Architect

Julien Coudrette
C&C Architect

Phil Brosnan
C&C Architect

Customer Challenge:

- 30+ EPM applications across multiple vendors required significant effort to administer & maintain.
- Over 120 ERP & source systems needed to be integrated, mapped, & loaded each month, creating complex data workflows & submission processes.
- Key operational management data required merging inputs from multiple disparate systems.

Customer Solution:

- A single source of truth for external, management, & tax data — fully aligned to strategic ERP data standards.
- System-driven, enterprise-standard management financials.
- Enhanced workflow providing visibility into the process & status of each data source & input throughout the close.
- Account reconciliation & statutory consolidation capabilities eliminated the need for separate point solution technologies.

Accounting Hub

Leading Practices

Single Integration: Source data into the OneStream platform once, and use it across consolidation, internal management, planning, and account reconciliations.

Accelerate: Start the account reconciliation process earlier by sourcing data as the close is happening, instead of waiting for it to finish.

Automate: Leverage auto-matching, thresholds, and conditions to eliminate manual effort and focus resources on material and high-priority areas.

Targeted Deployment: Account reconciliations don't require a "big bang" rollout — they can be deployed in targeted waves to drive better adoption.

Continuous Improvement: Measure and track performance metrics, assess results and gaps, and execute plans to enhance and optimize over time.

Extending the OneStream platform with Accounting Hub capabilities — including Account Reconciliations, Transaction Matching, and Journal Entry Management — enhances the integrity of financial data while reducing risk through stronger controls, improved audit trails, and better reporting. These capabilities also present a compelling business case by reducing legacy technical debt and licensing costs associated with point solutions, while improving processes through increased automation.

30+
ACCOUNT RECONCILIATION PROJECTS

20k+
RECS PERFORMED IN LARGEST ACCOUNT RECONCILIATION SOLUTION

Heather Brown
Director, Accounting Hub

Costco

290k
EMPLOYEES

$195.9B
REVENUE

828
WAREHOUSES

Company Snapshot:

Global membership club/retailer, dedicated to bringing their members quality merchandise at a great price while creating a pleasurable shopping experience.

Challenges:

- Financial consolidation was conducted in an aging Oracle Hyperion platform with offline P&L hierarchy definitions required to produce required management reports
- Budget and Forecast were captured in iSeries "green screens" or Excel and routed to Oracle for reporting
- Disconnected, manual processes
- Lack of visibility to detailed transaction data to analyze the business locally
- No access to world-class CPM tools for international locations

Legacy Financial Systems:

- Oracle Hyperion
- Excel Models

OneStream Solutions:

- Consolidated OneStream application that generates external and internal financial statements for local, regional, and corporate reporting
- Role-based dashboards to facilitate simple, intuitive input and review of financial data (with drill to detail) for every Warehouse GM in the world.

OUTCOMES

Streamlined P&L Format

Redesign metadata and account hierarchies to simplify numerous P&L formats being managed offline.

Global Planning Solution

First globally deployed financial application at Costco to enable every location to input, report, and analyze their Actual, Budget, and Forecast data.

Role Based Dashboards

Unique role-based dashboards that get people "back to work" by allowing them to focus on discrete tasks to be completed in a simple, intuitive interface.

Internal to External Talk

Provide the ability to "walk" from an Internal P&L to an External P&L with clear visibility to reporting differences.

Drill to Detail

Deliver single-click drill to transaction detail in a data lake from either base or parent locations, accounts, or departments.

Improved External Financial Reporting

Complete cash flow solution available for the first time in OneStream.

Statutory reporting added for Puerto Rico and Canada Liquor (and kick-started statutory cube for Costco's completion).

Quarterly estimate process refined and further automated.

Why Choose Finit?

Align

everything we do to achieve client success.

Utilize

a modern approach that pairs process with technology.

Leverage

the most valuable set of IP, tools, templates, and innovations.

Deliver

value to all levels of the organization.

Partner

value to all levels of the organization.

"The Right Partner Makes *all* the Difference."

Welcome to True Partnership.

We orbit around you, deeply understanding your team and business. As one unified team, we constantly align with your goals and make decisions that drive shared success.

Expertise Without Ego.

We streamline your path to success by serving as experienced guides with a personal touch. We anticipate challenges, lead with expertise, and collaborate seamlessly, to ensure the process is low-stress and built on a mutual respect and trust.

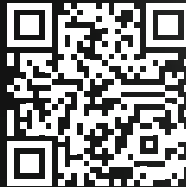### Timeless Solutions, Lasting Impact.

We take pride in building solutions that withstand the test of time, and relationships that last even longer. We ingrain ourselves with your team to create transformative work experiences that drive adoption and ensure our solutions are actively used to deliver real, lasting value.

Finit

UNMATCHED EXPERIENCES

Let's Talk:

WE'D LOVE TO CONNECT.

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