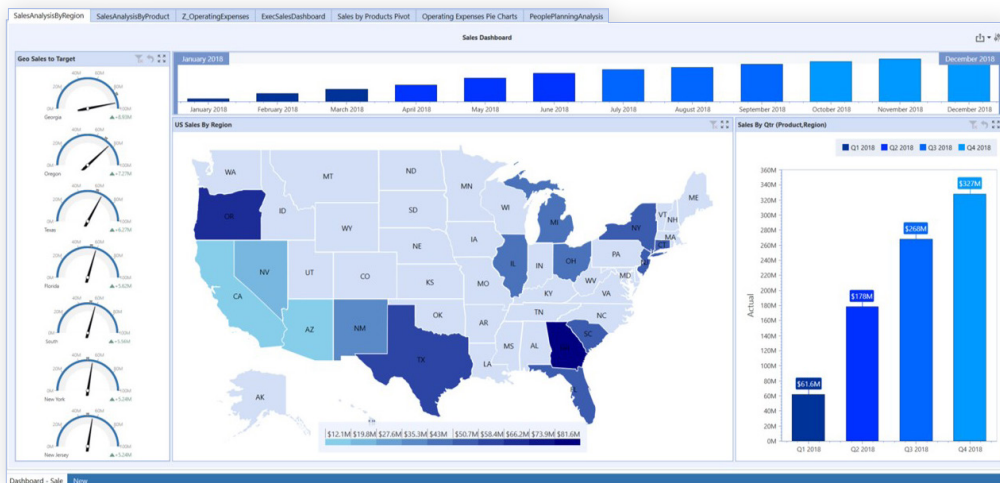## CONQUERING COMPLEXITY IN
STAKEHOLDER REPORTING

When it comes to reporting, Finance teams serve distinct audiences with varying requirements and needs including cost-center managers, line-of-business leaders, executives, board members, investors and regulatory bodies. Their reporting needs range from production reports and financial statements to ad hoc reporting, dashboards and visualizations, board presentations and external reporting such as 10Ks and 10Qs. But unfortunately, many organizations just don't have the right tools for the job, and still rely on fragmented silos of spreadsheets, legacy corporate performance management (CPM) software and BI tools. This approach forces Finance teams to compromise by manually copying and pasting information between fragmented sources and tools rather than analyzing results to identify for opportunities and risks.

Financial & Operational Insights on Demand

- Can your Finance team create high-quality financial and operational reports with drill-down capability without requiring IT resources?

- Does your CPM solution integrate with Excel® for ad-hoc analysis and reporting needs with easy-to-use drag and drop capabilities?

- Are you able to easily automate the creation, maintenance and distribution of high-quality reporting for the board of directors and executive team?

- Can you create pixel-perfect visualizations that combine financial and operational insights within the same dashboard and underlying analytical model?
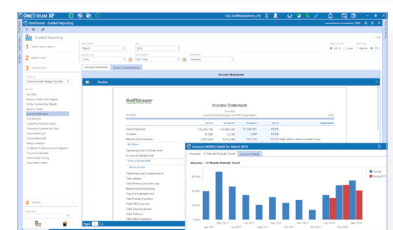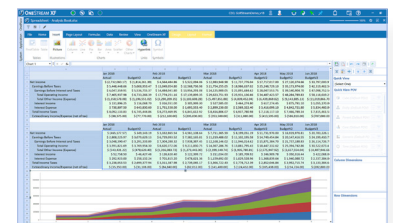
Modern finance leaders require more than just fragmented point solutions to meet the demands of stakeholder reporting. Finance leaders require unified solutions with the right controls and the power to scale across the world's largest and most sophisticated organizations.

OneStream's Intelligent Finance Platform provides organizations with a wide range of solutions for the office of the CFOs' current and future needs. With built-in reporting and analytics, financial consolidation and planning, OneStream provides Finance leaders with the flexibility and control to address the needs of multiple stakeholder groups.

Self-Service Reporting & Analytics

☑ **Guided Reporting**
Choose from OneStream's built-in report library. Step-by-step report designer makes it easy for users to manage their own reporting needs.

☑ **Excel® Integration**
Conduct ad-hoc analysis with the ultimate flexibility and control using powerful drag-and-drop and pivot capabilities.

☑ **Interactive Dashboards**
Bring your data to life with built-in self-service visualizations. Ease of use increases collaboration and helps leaders make faster and better decisions.

☑ **Microsoft® Office Blend**
Blend OneStream reports, charts and data with Microsoft® Office content to deliver visually stunning report books.

A Trusted Platform for Stakeholder Reporting

OneStream supports Finance teams with the agility, control and scalability required to support management, financial and statutory reporting needs of complex organizations. With a broad range of reporting and analytical capabilities, OneStream's Intelligent Finance Platform helps reduce reliance on spreadsheets and fragmented reporting tools to increase the speed, scope and accuracy of reporting across the organization. OneStream's unifies finance processes across the office of the CFO and includes several capabilities to address the needs of various stakeholder groups, including the following and more:

- **Guided Reporting** — Easily create reports with a step-by-step report designer and increase user adoption. Choose from a pre-built library of pre-formatted row or column sets and instantly export reports to Excel®, PDF or any other standard format.

- **Excel Integration** — Leverage powerful drag-and-drop and pivot capabilities for flexible ad-hoc reporting and analysis. Maintain financial models in Excel® and retain calculations and styling even when refreshed.

- **Interactive Dashboards** — Easy-to-use interactive dashboards offer executives, managers and business leaders the ability to change variables and bring data to life for the insight required to make faster and better decisions.

- **Microsoft® Office® Integration** — Automate board book and executive report creation with unique Microsoft® Word®, PowerPoint® and Excel® integration with OneStream content for a rich reporting experience.

Addressing the Challenges

OneStream works with hundreds of global organizations to unleash finance teams from reconciling data silos and building reports to spending more time developing insights, identifying opportunities and risks, and driving effective decision-making.

Key Benefits Include:

- **Unify Financial & Operational Data** — Bring detailed operational insights to finance and operations users with Analytic Blend. Direct connect to multiple data sources such as CRM, HCM or data warehouses and align operational data to governed financial reporting hierarchies.

- **Streamline Reporting & Increase Controls** — Eliminate reliance on Excel®, rogue databases and manual processes for data gathering, reconciliation and creating reports. Create reports with 100% accuracy through a unified platform for analytics and reporting.

- **Automate Report Creation & Distribution** — Standardize reports for varying stakeholder groups with over 50 predefined report types from the OneStream MarketPlace.™ Automate report creation and distribution with Parcel Service from the OneStream Marketplace.

- **Create Self-Service Visualizations** — Enable line of business and functional business partners to tell the story with easy-to-use self-service visualizations. Extend insights further by unifying operational and financial data in a unified dashboard visualizations down to detail transactions and sources of all data.

> " We wanted a CPM solution that would drive some solid monthly reporting, and analysis as data integrity is a big piece for us. We reviewed OneStream Software alongside other CPM providers but quickly realized that other vendors did not have the same functionality that OneStream could provide. **OneStream gives us complete autonomy as well as transparency, visibility and drill-back capabilities into** transactional data. OneStream's tailored solution has allowed each business unit the ability to **take control of their own consolidation**, reporting, analysis and close process—a key requirement in our corporation."
>
> *—Michael Barfuss, Corporate Controller*
> *CLEAVER BROOKS*