



## Rapid Deployment for OneStream

CompIntelligence's finance-led implementation approach leveraging CPMx to deliver a complete OneStream foundation.

CompIntelligence Rapid Deployment combines a focused finance assessment with OneStream CPMx accelerators to deliver close, consolidation, budgeting, forecasting and reporting within a single platform. The approach confirms fit, protects the 10-week timeline and creates confidence in the scope and expected outcomes.

### A practical path to OneStream

| 10 WEEKS                  | ASSESS FIRST              | COMPLETE               | FINANCE-LED               |
|---------------------------|---------------------------|------------------------|---------------------------|
| Design through production | Confirm fit and readiness | Close, plan and report | Accounting-first delivery |

**Whether you are moving beyond Excel, replacing a legacy CPM system or establishing a more scalable finance platform, getting started with OneStream should not require a long, open-ended transformation. CompIntelligence Rapid Deployment begins with a focused assessment of how finance closes, consolidates, plans and reports today. We then leverage OneStream's CPMx methodology, combined with our finance and accounting expertise—to establish a clear, practical path into implementation.**



Finance leads the assessment and design. Together, we evaluate the way your organization closes, consolidates, plans and reports; the data that supports those processes; and the people who will ultimately own the platform.



That early clarity allows the team to confirm where CPMx fits, identify risks before they become delays, and agree on the outcomes that matter most.



From there, CompIntelligence uses CPMx accelerators, proven configurations and deep OneStream experience to move quickly, without losing sight of the accounting and FP&A decisions behind the system.



The result is more than a technical implementation. It is a governed finance platform, supported by trained users, practical documentation and a roadmap for continued growth.

**Finance-first expertise. OneStream outcomes that last.**

 [jnilsen@compintelligence.com](mailto:jnilsen@compintelligence.com)

 [www.compintelligence.com/cpmx](http://www.compintelligence.com/cpmx)



## THE ENGAGEMENT

### From finance requirements to a working OneStream platform in 10 weeks

Our accounting-led methodology keeps the program focused on business outcomes, timely decisions and user readiness—not unnecessary customization.

|    |                                                                                                                                |                                                                                                                                                                                                                                                                                                                                   |
|----|--------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 01 | <b>Assess and align</b><br>Confirm CPMx fit and translate the way finance operates into a practical OneStream design.          | <ul style="list-style-type: none"> <li>Assess current close, consolidation, planning and reporting processes</li> <li>Confirm structures, source systems, data readiness, reporting priorities and user needs</li> <li>Establish success measures, scope boundaries, risks and the decisions required to maintain pace</li> </ul> |
| 02 | <b>Build the foundation</b><br>Configure a governed platform for actuals, plan data and financial reporting.                   | <ul style="list-style-type: none"> <li>Core dimensions, consolidation logic, currency, intercompany and journals</li> <li>One source integration, mappings, historical actuals and transaction drillback where supported</li> <li>Security, controls, validations and close-status visibility</li> </ul>                          |
| 03 | <b>Activate close, plan and report</b><br>Connect the finance so cycles teams work from the same trusted information.          | <ul style="list-style-type: none"> <li>Annual budget and periodic forecast with workflow, versions, commentary and spreading</li> <li>Financial statements, budget and forecast reporting, and actual-versus-plan analysis</li> <li>Integrated testing, parallel-cycle validation and issue resolution</li> </ul>                 |
| 04 | <b>Enable the team and roadmap</b><br>Prepare users to operate the platform and identify the next highest-value opportunities. | <ul style="list-style-type: none"> <li>Role-based training, administrator enablement and practical documentation</li> <li>Production deployment, stabilization support and two post-go-live checkpoints</li> <li>A sequenced roadmap for additional planning, automation, analytics and AI</li> </ul>                             |

#### Why CompIntelligence

CompIntelligence is a OneStream Diamond Partner and Global Authorized Training Partner with experience across more than 80 OneStream clients and 340 projects. Our consultants understand the accounting and finance work behind the system—helping clients make faster decisions, avoid unnecessary complexity, and build a platform their teams can confidently own.

#### The commercial commitment

**Following assessment and scope confirmation, CompIntelligence Rapid Deployment provides a complete 10-week implementation at a \$135,000 fixed fee\*, creating one foundation for close, consolidation, planning and reporting.**

\*The \$135,000 fixed fee applies to projects that meet the defined CPMx Rapid Deployment scope and assumptions. Requirements outside the agreed scope may be priced separately.

##### 1. ASSESS

Confirm CPMx fit, finance priorities, readiness and success measures.

##### 2. IMPLEMENT

Configure, integrate, validate and train in one accelerated engagement.

##### 3. ADVANCE

Operate confidently and expand from a scalable OneStream foundation.

**Finance-first expertise. OneStream outcomes that last.**

 [jnilsen@compintelligence.com](mailto:jnilsen@compintelligence.com)

 [www.compintelligence.com/cpmx](http://www.compintelligence.com/cpmx)

