



APTELLIGENCE

ABOUT US

Aptelligence is a recognized leader in delivering OneStream's corporate performance management solutions. Founded by finance & technology professionals, we help our clients extract the most value from their OneStream software investments.



ADVISORY

Pre-purchase advice, application assessments, technology roadmaps, and more.



IMPLEMENTATION

We take a collaborative implementation approach and deliver deep functional and technical skills.



MANAGED SERVICES

Services to provide support after the project is complete to make the most of your investment.

OUR LEADERSHIP TEAM

Meet the Squad



Eric Born

Eric Born leads our Financial Close & Consolidations practice. Eric has over 18 years of functional experience in roles from auditor and accountant to financial controller and vice president of multi-national companies. Eric has an extensive financial background with experience in auditing, accounting, close process, consolidations, and reporting.



Matt Geyer

Matt Geyer, CPA, CMA is the leader of our commercial sector practice. Matt has 18+ years of experience in deployment of corporate performance management solutions across 100+ engagements. Matt has focused his career on helping customers achieve success and return on investment with CPM deployments.



Scott Williams

Scott Williams leads our Planning and Analytics practice. Scott has over 15 years' functional experience working in corporate accounting, finance and IT. His consulting experience includes over 13 years of implementing Corporate Performance Management software.

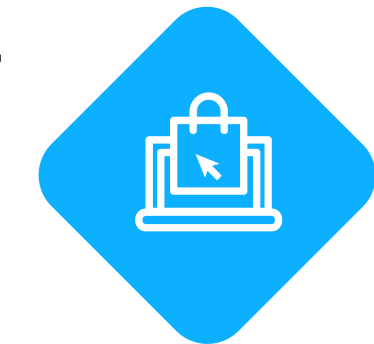
COMPANY OVERVIEW

We have the formula to ensure a successful implementation



Deep OneStream Relationships

+



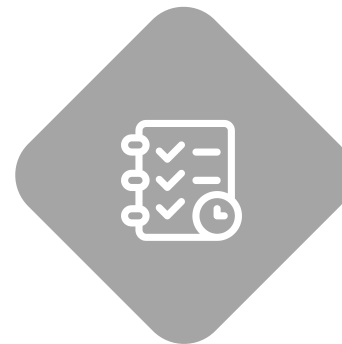
Industry Expertise

+



OneStream Certified Experts

+



Proven Methodology

=



Satisfied Customers

WHY US?

Our Expertise



Commitment to Customer Success

We are committed to customer success! Expect us to work collaboratively with your team and since quality assurance is a high priority on every engagement, count on our leadership team to ensure attainment of solution benefits.



Functional Finance Expertise

We are functional finance professionals first and consider ourselves “business techies.” We are former customers ourselves with experience running CPM products successfully in corporate finance departments.



Industry Knowledge

Our industry knowledge allows us to quickly understand your requirements, help you envision the solution, and allow for an efficient implementation process.



Deep Product & Platform Expertise

We’ve worked with OneStream performance management products and leverage best practices from hundreds of engagements.



Integration Expertise

We provide deep technical expertise on all aspects of the implementation including automation, transformation, mapping, drill-through, single sign-on and more.



Collaborative Approach

Our proven methodology and project management approach will minimize risk, while our project accelerators will streamline the implementation.

OUR UNIQUE VALUE

The Aptelligence Difference

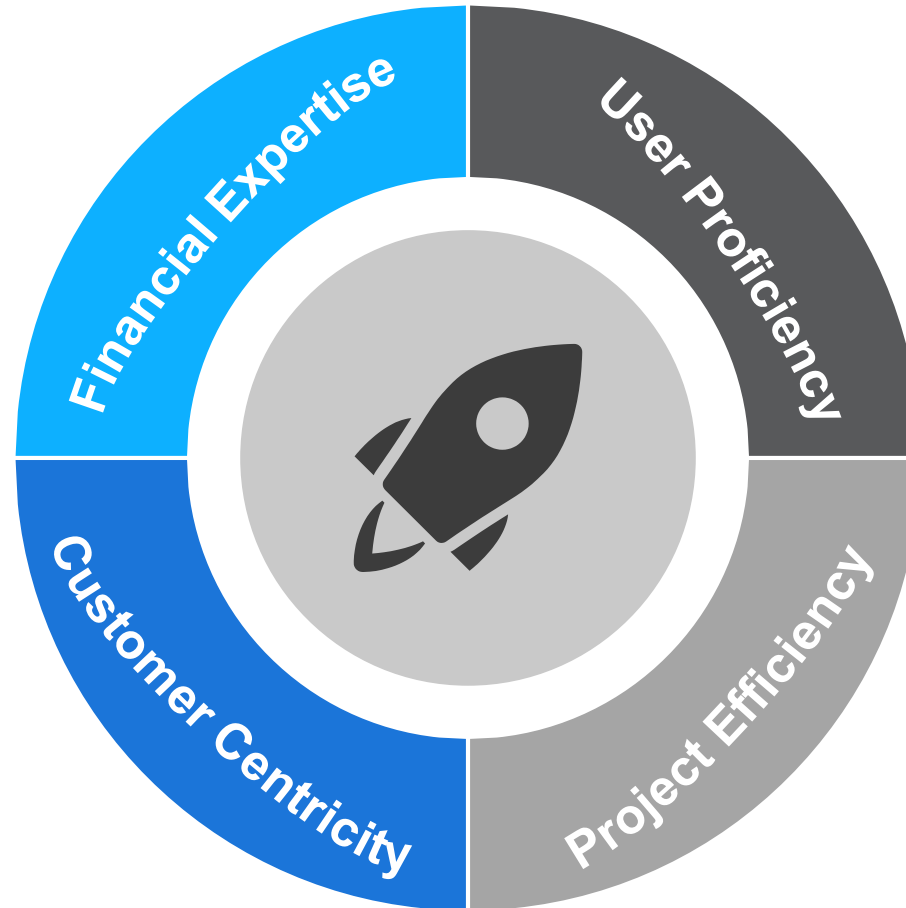
Transformational

Single version of the truth with improved accuracy and visibility.

Simple designs that solve problems for end-users.

Industry Relevant

Simple solutions that are easy to use, and provide high industry aligned business value.



Proven Success

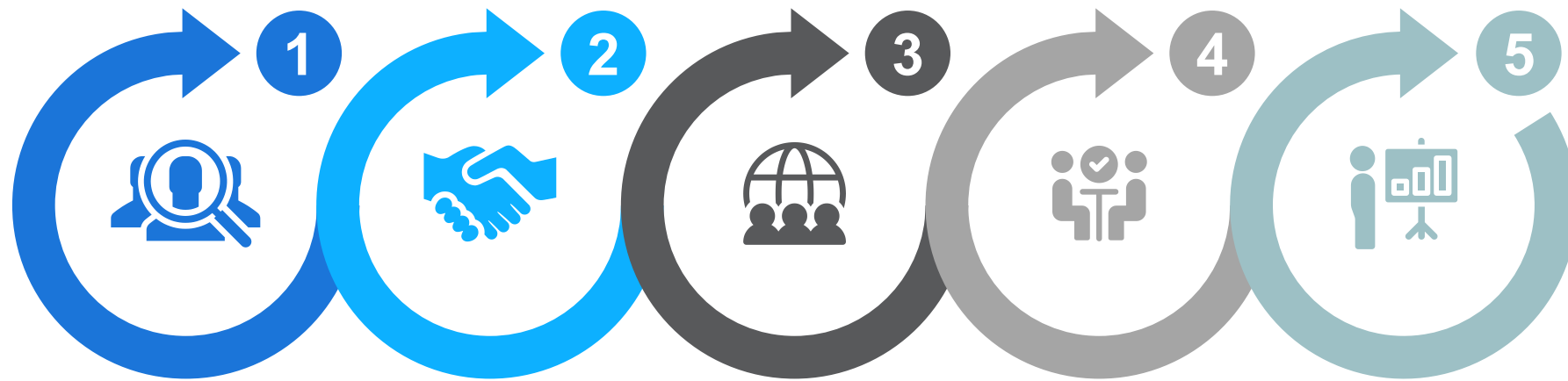
Applications built based on experience with many live applications both as consulting professionals and as customers.

Team Agility

Fast development with feedback incorporated to shorten cycle times and streamline the project experience.

OUR METHODOLOGY

Implementation Overview



DISCOVERY

- Goals & Objectives
- Process Workshops
- Requirements Analysis
- Initial Product Demos

DESIGN

- Design Workshops
- Integration Design
- Design Documentation
- Detailed Project Planning

DEVELOPMENT

- Build Cycle 1
- Conference Room Pilot 1
- Build Cycle 2
- Conference Room Pilot 2

TESTING

- Integration Testing
- User Acceptance Testing
- Final Issue Resolution
- Go/No-Go Assessment

DEPLOYMENT

- System Documentation
- Administrator Training
- Migration & Roll-Out
- End-User Training

Managed Services Overview

What are CPM Managed Services?



1

Minor System Updates & Guidance

- Data Metadata Updates
- Monthly Close Support
- Chart of Accounts Maintenance
- Report updates
- Hierarchy Maintenance
- Budget/Forecast Process Support
- Minor Security Updates

2

Troubleshooting and Support

- User Issues and Requests
- Escalation path for issues

3

Upgrade Analysis

- Perform upgrade application
- Perform upgrade testing on test environment
- Provide an overview of new features

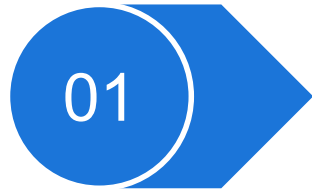
Managed Services Packages

Our Offerings

SILVER	GOLD	PLATINUM	DIAMOND
<p>20 Hours / Month</p> <p>Provide remote administration support to Client Administrators Monthly Fixed Fee for 20 hours of support</p>	<p>40 Hours / Month</p> <p>Provide remote administration support to Client Administrators Monthly Fixed Fee for 40 hours of support</p>	<p>80 Hours / Month</p> <p>Provide remote administration support to Client Administrators and End-Users Monthly Fixed Fee for 80 hours of support</p>	<p>Full-Time / Custom</p> <p>Provide one or more full-time remote administration support resources for the end-user community. Custom support solutions tailored to the size and needs of the organization.</p>
<p>\$</p>	<p>\$\$</p>	<p>\$\$\$</p>	<p>\$\$\$\$</p>

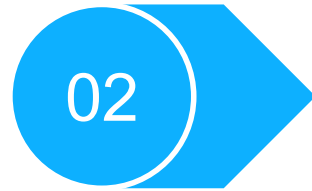
Managed Services Details

How to get started



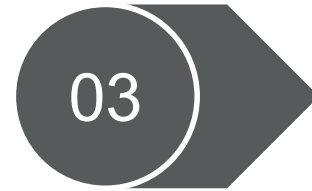
CONTRACTING

Incident Management
 Problem Management
 Access to Consulting Resources



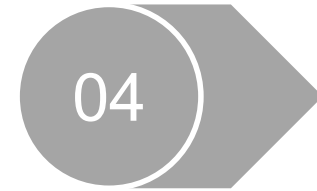
ASSESSMENT

Design Documentation
 Admin Guide
 Application Architecture
 Performance & Satisfaction
 OneStream Licenses in place
 Upgrade test procedures



SUPPORT ENABLEMENT

System updates, if needed
 Admin training, if needed
 Knowledge Transfer
 Zendesk Training









SUCCESS!

Smooth operation of your
 OneStream CPM
 environment

Our Strengths

Implementation Overview

STRENGTH	BENEFITS	APTELLIGENCE
We are focused on OneStream CPM solutions	Utilizing a highly-experienced team of experts mitigates risk	
Business & Technology saavy	We know and understand your business and the value of effective technology	
High Client Satisfaction	We pride ourselves on delivering highly usable solutions to happy customers	
Industry experience & templates	Our templates and experience accelerate implementation time and lowers project risk	
Best Practice Solutions	We enable best practices that improve efficiency and effectiveness	
Deep relationships with OneStream on Development, Support and Strategy	Tight alignment with OneStream allows us to effectively deliver quality implementations and resolve any issues as they arise	

Questions?

Our Contact Information



Eric Born

Senior Managing Director
Close, Consolidation & Reporting

eric.born@aptelligence.com
773.332.5107



Matt Geyer

Senior Managing Director
Business Development

matt.geyer@aptelligence.com
949.422.6918



Scott Williams

Senior Managing Director
Planning & Analytics

scott.williams@aptelligence.com
714.206.0143



thank you.

