

**SPEAKER\_02: 0:00**

The OneStream Global Education Services team proudly presents the OneStream Podcast with your host, Peter Fugere.

**SPEAKER\_00: 0:11**

Greetings, fellow OneStreamers, and welcome to the OneStream Podcast, where we explore and examine all things OneStream, talk to experts in the industry, and gain knowledge from some of the brightest minds that help deliver and implement solutions for our clients. This episode is part of the Partner Spotlight series, where we explore and examine fundamental concepts, tools, and topics surrounding Thanks, Peter. I really appreciate the intro and the energy you got coming through here.

**SPEAKER\_01: 0:42**

It's exciting to be here.

**SPEAKER\_00: 0:49**

Yeah, so great. So why don't we start with the Grant Thornton team? Why don't you give a little bit of background? Let's start with a little bit of background about yourself, and then let's talk about the Grant Thornton practice, and we can dive into some of the things you guys are doing with OneStream.

**SPEAKER\_01: 1:04**

Yeah, no, absolutely. So My name is Will Watton, partner here at Grant Thornton. I've actually been with the firm for over 15 years now. I've stopped counting at 15 as another partner told me. After that, nobody really cares. But I've done a little bit of everything from a technology perspective. with Grant Thornton and our clients throughout my career here, but had the opportunity about eight years ago with a client here at Houston, Texas, where I'm based out of. Actually, before OneStream was even on the Gartner Magic Quadrant, helped implement, actually helped select V.Oracle and then implement OneStream with that client. I've been a huge fan of the platform, have been in a support capacity since that time of implementing the platform with that client, and So how long ago was

**SPEAKER\_00: 1:55**

that, Will? When did you start with that?

**SPEAKER\_01: 1:57**

That was eight or nine years ago now. Oh, wow. That long. Wow, wow, wow. I was actually, I think y'all printed out the client list and it was an Excel spreadsheet that had, you know, I

think about 200 people or 200 clients at that time, you know, all referenceable, all live. And it's much, much larger now. I don't think anybody actually prints it out and takes it to a client, but Justin Caldwell printed it out and handed it to a client. I said, call any one of them.

**SPEAKER\_00:** 2:25

Isn't that a power move? Yeah, it's such a power move from one stream. Like when we walk in and you can talk to any one of our customers. But I also really think it says a lot about the product, the company, our partner network. Like, you know, call anybody. It's such a power move. Oh, absolutely. And not many people can do it, by the way. But yeah, so since then, how big has your practice grown? I mean, how many guys are you now?

**SPEAKER\_01:** 2:52

So right now we're about 25, both domestically and internationally. So for those who don't know Grant Thornton, we are in the GSI, the Global System Integrator community, but we like to consider ourselves, you know, we've heard one student call us GSI light, meaning we're much more nimble, much more quick. Also means we're a little bit smaller, but we are the largest private equity backed accounting firm in the world and have started to merge with our international counterparts and have been building an international presence as well. So a lot of exciting things happening at Graham Thornton. One stream being one of them, first and foremost, we are our fastest growing practice within the technology team over the last 12 months in a no part to what we're going to talk about here today and express and jumping on the methodology for a lot of our clients because of where we sit in the market. And there's a huge, huge opportunity for many more OneStreamers to become part of the platform with the Express methodology.

**SPEAKER\_00:** 3:58

Well, let's talk about CPM Express then, I guess. When a client asks you, you know, what is CPM Express? I mean, what do you tell them?

**SPEAKER\_01:** 4:07

It's an interesting question. And I know we've refined our response to that question along with the OneStream team, you know, over the last several months. But really at its core, it is... a best in practice methodology. It's not a separate product. It is the exact same platform, but where we have 25, you know, dedicated practice members and a team of, you know, other resources we can pull in and, you know, 20 plus go lives, um, We don't have the 2,000-plus customers at OneStream and the best practices that you have across every single customer on your platform. And so what Express does is the ability to bring the best

practice and bring an accelerated methodology to clients who want, just give me what company XYZ is doing, give me the best in practice, best in breed, and get us on the platform as quickly as possible because we've got a need right now that we've got to solve. And that's been the message that... Everybody, our team included, is really, really excited about hearing. Again, it's not the perfect solution for everybody. I don't think there is a perfect solution. That's why extensibility of OneStream is kind of beating everybody in the market, frankly. But that express best of whatever it is that everybody else is doing, get us on this thing as quickly as possible.

**SPEAKER\_00:** 5:34

You know, it's interesting you say it's not a product. I think that's a really important thing to call out. I mean, CPM Express isn't some hobbled version of OneStream. But when you go through the CPM Express process and you're up, you're just like any other customer. You can add any solution. You can do whatever you want. You can customize and modify from there. You can go in any direction, use anything from the marketplace. But you're just up faster, I think. And you really get a lot more out of the investment if you're able to see reconciled reports in CPM. And you're right. If you're a good fit for the program, like you can really benefit from it. So is that the reason why the Grant Thornton team has embraced Express or, you know, where do you what is your thinking with it and how do you see this impacting your team?

**SPEAKER\_01:** 6:25

No, absolutely. And I like what you said there about the it's not a hobbled version at this last splash conference event. We like to say it's and this is part of the refinement of the messaging. It's not one and done. It's one and run. You can do everything. The world is your oyster. You can do everything on the platform with Express. It's just a faster version. And that's honestly why, you know, one being private equity backed. We have a lot of private equity clients, a lot of their portfolio companies that are looking for that platform. run methodology of let's get this in as quickly as possible. We've got an acquisition or we've got a carve out. We need reporting, you know, day one of close and we can prep for it pre-close, but we really got to get financial reporting done. And that's a huge benefit for them. For some of our other clients who have a smaller accounting team and people wearing multiple hats, you know, they don't have the time and the bandwidth to really be able to design something from the ground floor up, which they can still modify it as much as they want, but they really say, give me best in breed for what a manufacturing company looks like in our space. And that's been, you know, honestly, the point of not just our Grant Thornton OneStream team, but the extended Grant Thornton network of our Finance transformation professionals, our audit professionals, our tax professionals. That is a

message that every single one of our Grant Thornton partners, directors, executives can take to market. And

**SPEAKER\_00:** 7:56

there's a huge response coming back. You know, it's interesting. I think about like, you know, what you were talking about, some of the design considerations and things that go into it. I've said before. multiple times to people I'm probably a broken record with some of this express stuff at this point but you know when when I would do designs people would always ask me you know well what are other people doing you know what you know or if I god forbid I did a competitor you know well what are what's our competitor doing you know what they're desperate to know not just the the pros and cons of different design decisions, but what I would do, what I would recommend. And I feel like a lot of the big design topics in the Express Solution are exactly that. It's a lot of the one-stream experience. It's how I'd set up my app. I think I marry that with the accounting expertise and the implementation expertise you guys have, your team has. I mean, how many countries is Grant Thornton in? I mean, it's really a global organization, right? You guys are everywhere.

**SPEAKER\_01:** 8:58

Yeah, absolutely. We're all over the world, every major market country that you could think of that, you know, are based out of the U.S. myself, that any of our U.S. clients are doing business in. And that accounting, finance and tax expertise is really core to every single country that we're operating in.

**SPEAKER\_00:** 9:18

And I mean, if I'm sitting there and I'm a customer and I'm thinking about, you know, I want to have a good implementation, if I have specific accounting challenges, but I still want to have the best design possible and I need it done quickly, you know, it just seems like a really good option, you know, to have a Grant Thornton implementation around Express. I think it'd be something I'd really consider. What kind of challenges do you see from customers out there, especially on the implementation or accounting front? What kind of things have you guys seen that are just interesting to talk about from an implementation standpoint?

**SPEAKER\_01:** 9:54

So it's a great question. And recently we had a client, a global manufacturing company that's looking at Express. They asked the question, I said, well, why wouldn't every client start with that? And every client start right here. And honestly, I think there's a point where every client probably does, at least generally most of them start there. But I think that's the

challenge is getting the client mindset around start fast, start with best practice, because in essence, the CFO... Always ask for that. But when it gets down to the people executing, you're fundamentally changing their jobs. And there's a change management exercise that just having people understand maybe a different chart of account mapping or a different process, having them buy in takes a little bit more time and a little bit more effort just to make sure that everybody is on board and everybody's as excited as the executives who are making these decisions. And so, but that's not unique to any implementation, I would say. I think it's just a faster timeline with Express because it is so quick to implement.

**SPEAKER\_00:** 11:07

And what would you say, what industries or clients that are most interested around Express? I mean, where's the focus of that attention going?

**SPEAKER\_01:** 11:14

You know, I think right now, manufacturing is number one for us and partly because that's, probably not the easiest, but there's more of a need with the changes in the industry, changes in the economy, and changes of how our domestic economy is working, that there's just a greater need for something faster lately. But I do see a lot of opportunity within construction real estate. We've got clients there. We've got clients in energy that are currently looking at it. We've got... Even our own services Grant Thornton team is looking at Express as well. And we're very excited about what that's bringing to us as a global firm too.

**SPEAKER\_00:** 12:02

That's exciting. And so the speed of the implementation, the time to value is something we'd like to talk about with Express. How do you guys see that with a Grant Thornton implementation? What's a timeline a customer... You know, generally would think about,

**SPEAKER\_01:** 12:20

you know, I think we go in with the base estimate of eight to 12 weeks and usually we're landing right around the 10 week mark. And again, some of that's some of that's change management. Some of that's just organizational readiness. But that that 10 week mark, you know, for at least. Really good pre go live or go live is kind of the target that we're trying to hit. Now, to your point earlier, there are some clients that say, well, hey, we want to talk about adding AI capabilities or we want to talk about capital planning or a marketplace solution and start extending. You know, that's where that. Let's do it. Hey, let's do a phase two, phase three, phase four and get you on the platform live as quickly as possible. So your users are getting the benefit while we're still adding these additional capabilities that you're you're you're desiring so much.

**SPEAKER\_00:** 13:14

And would you say, like, let's say somebody came to you and they said, hey, look, we want to do, we like the idea of Express, but we want to do transaction matching. And we know that's not part of Express, but we want to include that. How do you guys tackle that? Do you do, like, workflow one, workflow two? Like, are they two projects that are happening at the same time, potentially? How would you manage that?

**SPEAKER\_01:** 13:37

You know, we can do it. Either way, honestly. Now, what we find is it's usually two separate work streams and two slightly staggered work streams. Most of that's just because of bandwidth of the individuals that are required for input, data validation, and sign-off are usually a lot of the same individuals. And this is where, Peter, you know, we work closely with you and your team on everything Express-related to make sure that We're in alignment with the best possible implementation plan and what you're saying, not just from the customer we're talking to collaboratively, but all of your customers that are looking at Express and adding in those additional capabilities.

**SPEAKER\_00:** 14:23

Yeah, I know. For the listeners out there, Will and I have gotten to work a lot on some big deals. So I'm talking to him like I don't know any of this stuff. But the truth is, Will's been a great partner to work with. I'm curious, though, too, from a Grant Thornton perspective, and you guys have been doing implementations for that long. How would you compare the benefits, the contrast between a full project, what we might call an unlimited, a bigger implementation? Which, to be fair, I think some people still need because To my mind, if you've got deeper business processes, if you've got bigger issues you're trying to work through or problems you're trying to solve, you wouldn't benefit from sort of accelerating and getting up. I can think of a couple examples, like structural changes to the data, things like that. And you're still going to want to have that option. It's a great option to have. But how would you say this faster timeline, this faster implementation compares to that bigger project? And not necessarily in bad ways, but just what are the key differences?

**UNKNOWN:** 15:34

Yeah.

**SPEAKER\_01:** 15:35

You know, we'd still start. I always like to start with what's it like. I know you asked for the differences, but we will still take a phased approach for those larger projects, much like we would, you know, potentially with what you described with transaction matching and

express. But the key differences are, you know, really alignment in complexity. And so if an organization is. got a number of different charter accounts, a number of different subsystems, potentially separate accounting teams or separate finance teams that are running more of a distributed model than a centralized model. That's additional logic that has to be built into the system and in but basically built and tested. Data quality is another challenge often of, you know, how much data do you want to go back and actually bring into the system? And that takes time for somebody to approve and validate it and actually model and design it out as well. But there are some organizations that for regulatory compliance reasons, for business complexity reasons, for legacy, you know, It would take longer because they're not in a place that they need more core finance transformation as part of the one stream project versus, hey, we're ready, just best in breed. We're going to go with what you have because we can and we're ready to go. I don't know if that actually answers your question or not, though.

**SPEAKER\_00:** 17:05

Yeah, it does. It's give me something to think about. I mean, I'm even thinking about like. You know, taking a step back, when you come in, Grant Thornton comes in for a CPM Express project. We like to do some pre-work, you know, sort of to accelerate the design. But I think you guys go a level deeper than I think I've done on projects before, where you actually workshop some of the business processes with the client, right? How do you do that?

**SPEAKER\_01:** 17:31

You know, we partner with our finance transformation team. We're actually working with a client. We're doing this. They're looking at accelerating their close as part of a, you know, a future. Basically, there's a. There's a revenue size they're going to trip that they're going to have to close the books much faster. And so in parallel with OneStream, OneStream is going to enable the close to be faster and be the platform that they will leverage. But there does need to be evaluation of how the business is actually closing the books today and where there are other automation opportunities. as well as there is another project working simultaneously in parallel on their data structure, on consolidating data into one common data mart. And that's often where we find that we can bring in other experts to support and optimize all of the pieces around OneStream to make it really the best transformational solution for a client, not just within the walls of the platform.

**SPEAKER\_00:** 18:36

It's interesting. I mean, most of my career, you know, I did work for a boutique firm, same sort of thing, implementing a Hyperion product, but working at Hyperion and now, you

know, a big chunk of my career, obviously here at OneStream, you know, working for the software vendor, transformation, business process transformation work is, it's, you know, it's interesting, but you try to avoid it in the sense of, you know, the expertise, the time that's needed. You want to sell the software, you want to get the client up very quickly, but if they do need process work, that's kind of not what a software company needs. They're selling software. And that sort of accounting or functional expertise, you would go to a GSI to get the right support for and go through. So that's really interesting how you guys do that and then work with a customer on that. I think that's really interesting. And I think... you know, you tie that in with global support, like some of these bigger customers who are looking to, you know, maybe do something more than just replicate their existing consolidation system. They have some other transformational thing. Maybe it's part of like a workforce realignment, or maybe it's part of some reporting initiative, or, you know, some, you know, new reporting, IFRS reporting requirements that those seem to come out every year. You know, I could really see how having that that in your back pocket as part of the project team would bring a lot of value.

**SPEAKER\_01:** 20:10

Yeah. And I'll give a, you know, a plug back to the OneStream team here is, you know, there's the three legs of the stool between OneStream, Grant Thornton, and our client that we all have to be working in harmony. And to your point, what success looks like for You know, a software company is different than what success looks like for a services company and different for what our client is defining as success. But we all three work collaboratively to really make sure that we're all delivering on our best capabilities and pulling each other in the right places where we can collaborate. really deliver that success for each of us individually. Because at the end of the day for Grant Gordon, our goal is to build, you know, a trusted client relationship across, you know, all of their organization on the entire enterprise, not just within OneStream, but we've got to deliver OneStream to be able to be trusted for everything else. And so it goes, it goes hand in hand. And the OneStream team is different than any other, software company I had ever worked with in my career. And part of the reason I jumped at the opportunity to lead our one stream practice. Your team is your team is absolutely different. And I was so excited because of the way we partner together. It's just it's just different. And you don't see that in the market.

**SPEAKER\_00:** 21:33

Well, I think I think it's really interesting to see how your team works and you're delivering the solution like Yeah, I'm excited to see like where you guys go next with it. I think it's really interesting. So, Will, OneStream's been doing a lot with AI in the tool. What have you seen from the Grant Thornton side?



**SPEAKER\_01:** 21:53

You know, I've been around a lot and I've worked with a lot of vendors and, you know, we had a technology advisory that was somewhat, we went in with the, we're agnostic, we want the best solution, but we had obviously partners we worked with. But Splash in Las Vegas two years ago, you know, I was leading our AI practice at Grant Thornton. I was talking about AI and AI strategy. But OneStream's product is, for us being an accounting firm, is so far ahead of what most of our clients, you know, have the opportunity to either build internally or have the opportunity to leverage that one that was part of the other reason I jumped at this opportunity to lead this practice at Grant Thornton. The AI capabilities, the auditability, the transparency, and the extensibility of what y'all are building, and not just today, right? What you have today is market leading. What you're coming up with in version nine is, I'm not going to say revolutionary because it's still finance accounting, but it's cutting edge, right? And what our clients are asking for And this is the other reason we've really, really gotten excited and jumped at the opportunity and want to be, honestly, a partner of choice for our clients and for OneStream around Express is you have to have the platform to leverage the AI capabilities. And in and of itself, you need the data to leverage the AI capabilities. Why not implement with Express, get on the platform as quickly as possible so you can then tap into those AI capabilities that are The boards are asking for, executives are asking for, your team is asking for. And this is a faster route to that. And it's just an incredible opportunity, not just for our clients that are already leveraging OneStream, but the ones that are contemplating it.

**SPEAKER\_00:** 23:45

Yeah, I think it's one of those cases where it's win-win-win. For the customer, they're getting value faster. For OneStream, we're reducing risk and cost. ensuring a better implementation and getting the customer looking at other solutions. And for the partner too, I mean, yeah, you don't get a longer project, but you just get that happy customer sooner. And then you're on to phase two or three. I tell people all the time that if they don't do the second phase, next phase, two, three, four, and AI is on that roadmap for a lot of people, then it's a big miss for Express. You know what I mean? That's what we want. We want customers really utilizing the platform and taking advantage as much as they can. And

**SPEAKER\_01:** 24:32

that's core to us, as I mentioned earlier, is Grant Thornton. It's not one and done, it's one and run, and there's so much on the platform that As soon as you can get up and the faster you can do that, the faster you're going to move on to the next thing because we haven't

had a single client at Cramp Thornton that hasn't enabled a phase two or gone on to want to leverage the platform for something more, whether it's another line of business, another type of capability, some marketplace solution, whatever it might be. There's always additional value that an organization can obtain through the platform.

**SPEAKER\_00:** 25:09

So if it If a customer has questions or wants to learn more about Grant Thornton, where can they get some more information?

**SPEAKER\_01:** 25:17

Do you want me to just give out my personal email address here? Sure.

**SPEAKER\_00:** 25:20

What's your home address so we can write you letters? No.

**SPEAKER\_01:** 25:24

We've got a OneStream page on the Grant Thornton website. You can look myself up on LinkedIn. Kirsten de Guzman, Peter Bedell on our team and our leadership team within Grant Thornton. If you're speaking to one of us, you're basically talking to any one of us. Look us up. Connect with us on LinkedIn. Or through your OneStream reps you know ask for the Grant Thornton team by name that you heard this podcast and and we've got great relationships with the entire one stream team and they they know how to get in touch with us usually via text sometimes at night sometimes on weekends but it's always good

**SPEAKER\_00:** 26:03

We could do it like a regular promotional thing. Like if you mentioned the one stream podcast, you get some sort of discount, maybe a soft serve ice cream or something. Hey,

**SPEAKER\_01:** 26:12

I'm really happy to do that. I will include on the first visit. So my my brother in law. has started a new company for, and now I'm going to give a plug for him, for organic condiments called Smash Kitchen. So you watch organic ketchup or mustard or mayonnaise, I'll bring some to the first meeting.

**SPEAKER\_00:** 26:34

We've officially slipped into the promotional phase of the OneStream podcast. Another great discussion. Thank you very much for bringing expertise to the podcast today. And thank you, fellow OneStreamers, for joining us. Remember, if you like this content, please

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**SPEAKER\_02:** 27:05

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