

CASE STUDY

OneStream Success Story

SunStream





Company:
SunStream Business Services

Sector:
Business Services

Implementation Partner:
eCapital Advisors

SunStream Business Services

SunStream Business Services is a managed IT service provider that works with farm credit lending institutions that provide credit to farmers and ranchers. SunStream Business Services provides technology and other business services to AgriBank, Farm Credit Associations and other Farm Credit entities. These entities all are part of the customer-owned, nationwide Farm Credit System, which supports rural communities and agriculture with reliable, consistent credit and financial services, today and tomorrow. The organization aims to provide customers with all the tools necessary to help them succeed by leveraging common services and technologies to their advantage. For more information visit SunStreamServices.com.

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The value add has really been that administrative improvement – the ease of administration and the ease of access for all that is downstream as a whole. It supports the digital transformation that we’ve been on as well as showing our clients that we’re in it to win it. **We’re improving all of the products that we offer to them, and we’ll continue improving.**”

—**Kyle Fatzinger**

*Product Owner and Senior Manager,
Financial Systems & Applications
SUNSTREAM BUSINESS SERVICES*

Driving Financial Transformation

“It became imperative. It was time to change,” said Kyle Fatzinger, Product Owner and Senior Manager, Financial Applications, at SunStream Business Services. The frustration towards an outdated, inefficient system became the impetus for enterprise-wide digital transformation.

SunStream took the initiative to drive finance transformation by replacing their outdated enterprise performance management (EPM) software both internally and across 13 customer units. Navigating change at this scale can be difficult. But that’s what makes SunStream’s story so unique.

SunStream’s digital transformation is based on a unified software platform that can evolve and scale to support the company as it grows over time. SunStream empowered users with an intuitive, easy to navigate system to help cut down the time and effort spent maintaining an outdated system and disjointed spreadsheets. Now, users have their data easily accessible and securely stored, enabling rapid insights and analysis.



Corporate Performance Management Solutions Delivered

- ✔ Financial Consolidation and Reporting.
- ✔ Financial Planning & Analytics.



Business Challenges

- ✔ Oracle Hyperion on-premise solution was going out of service.
- ✔ Manual, disjointed Excel-based spreadsheets were inefficient.
- ✔ System was costly and time intensive to maintain.



Key OneStream Benefits

- ✔ Unified cloud-based EPM solution that is easy to maintain.
- ✔ Significant reduction in spreadsheets.
- ✔ Easily accessible and secure data.
- ✔ Reduced complexity and administrative tasks create more time to analyze and drive efficiencies.
- ✔ Extensible Dimensionality® allows quick, easy and secure access to data.

Struggling to Support Oracle Hyperion

Headquartered in Saint Paul, MN, SunStream provides farmers, ranchers and other customers with credit and other financial services across a 15-state region in the United States. SunStream was struggling to maintain an outdated Oracle Hyperion on-premise solution, which was going out of service. As a result, SunStream faced several consequences including customers losing access to their financial data with no ability to support their financial reporting or business planning. Third-party support to keep the current solution was expensive, with costs going up every year.

Change was inevitable and the Finance team at SunStream wanted a cloud-based system that could modernize their outdated processes. According to Fatzinger, “You can imagine the consequences there as the solution goes out of service. It was time to change.”

Adopting a Secure & Agile Solution

SunStream provides financial services to 14 different customer bases. When looking for a replacement EPM solution, data security and user flexibility were top priorities. SunStream evaluated several cloud-based vendors and agreed that OneStream’s platform outperformed the competitors in architecture, security administration and other key capabilities.

SunStream selected eCapital Advisors as their implementation partner and went live with financial consolidation and reporting, followed by planning. OneStream was implemented across SunStream’s internal Finance team and the company’s 13 other customer bases. “We end up being a unique customer for OneStream,” said Fatzinger. “We have 220 users, so it’s not a huge user caseload. However, we have 14 different customer bases. We’re one of those entities, and then we service a bank, and have 12 agricultural lending institutions. There’s not just one person who can say, ‘This is what we need to do’ — there’s 14. So, it’s been a fun challenge.”

Furthermore, the Finance team at SunStream faced the challenge of migrating a user base that had been using Hyperion for 12 years to a new platform. So, SunStream prioritized ensuring their customers were comfortable with using OneStream. To help users with the transition, SunStream started training immediately with pre-implementation and post-implementation training as well as bi-weekly and weekly Q&A sessions to help customers with any questions that come up during the transition.

“This has been a really rewarding experience, both professionally and personally. From the challenges that we’ve had, and the ability to overcome them, plus having the implementation happen so smoothly without batting an eye, it’s been very rewarding,” said Fatzinger.

Streamlining Complex Financial Processes

With a new solution in place, SunStream has converted many spreadsheets like-for-like to aid speed to implementation and plans to further reduce spreadsheet usage in the near future. SunStream has also realized cost and time efficiencies with OneStream. Whereas

their Hyperion solution had 3 or 4 different instances that required maintenance, the unified finance solution has all SunStream data and reporting in one place.

Added Fatzinger, “The administration on reports and the back-end administration for tasks like user provisioning, member maintenance, account maintenance and things of that nature has definitely improved on my team. The value add has really been that administrative improvement – the ease of administration and the ease of access for all that is downstream as a whole. It supports the digital transformation that we’ve been on as well as showing our clients that we’re in it to win it. We’re improving all of the products that we offer to them, and we’ll continue improving.”

OneStream’s Extensible Dimensionality® has been a key benefit to SunStream as well. Fatzinger explained, “We’re using Extensible Dimensionality as a function to enable our unique customer base of 14 different entities to access their data, only their data, when they need it – quickly and easily.” SunStream pulls in customer data daily and operates on a monthly close cycle. Users can drill back general ledger data to the transaction level, allowing customers to drill down to the information they need in detail quickly and easily. Customers’ data is maintained in OneStream’s secure cloud allowing privacy at the individual level and enterprise level.

Enabling Future Growth

SunStream will continue its OneStream journey with phase 2 of implementation. Added Fatzinger, “We need to implement account reconciliations and transaction matching this year, and we’re looking forward to that as well as pulling in some new data sets with account maintenance and some historical legacy Hyperion data after that.”

SunStream will continue to leverage OneStream to scale with the company as it grows over time. As SunStream adds new customers to their portfolio, OneStream can easily accommodate their data without any disruption to the system. Fatzinger said, “If we took on a whole new customer association group, a bank with their 14 new associations, we could deliver without any performance impact and no potential security issues with accessing the wrong data or anything like that. OneStream aligned with the SunStream digital transformation strategy that we embarked on a couple of years ago. So, moving to the cloud, upgrading our EPM reporting product — it was a good move.”

About the Implementation Partner

Solving problems, creating opportunities. For the past 20 years, we have helped companies become more data-driven decision-making organizations. We have helped them with disconnected manual planning and forecasting processes, lack of insights into key business metrics, and inability to access key data sources. We have completed over 500 successful implementations helping our clients better use their data to create valuable insights into their businesses.

About OneStream Software

With its industry-leading intelligent finance platform, OneStream Software enables confident decision-making to maximize business impact. OneStream unleashes organizational value by unifying data management, financial close and consolidation, planning, reporting, analytics and machine learning. We empower Finance and Operations teams with AI-enabled insights to make faster and more intelligent decisions every single day. All in a single, modern CPM platform designed to continually evolve and scale with your organization.

OneStream’s intelligent financial platform can easily be enhanced with over 75 solutions from its Solution Exchange. Proven and optimized for the OneStream platform, these downloadable solutions make it easy for clients to maximize their investment to quickly meet the changing needs of finance and operations departments.

OneStream Software

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We are eCapital Advisors; problem solvers, transformation leaders and technology experts with a mission to connect expertise and analytics to drive better business decisions.

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