

# OneStream Success Story

Comp*Intelligence*

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HOMES

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Training Partner



# OneStream Implementation

Company:  
Shea Homes

Industry:  
Home Builder



## About Shea Homes

Shea Homes is one of the largest private homebuilders in the U.S. Since its founding in 1968, Shea Homes has built more than 115,000 homes. Over the past several years, Shea Homes has been recognized as a leader in customer satisfaction with a reputation for design, quality and customer service. Shea Homes builds new homes in California, Arizona, Nevada, Colorado, Washington, North Carolina, Florida, Idaho, Virginia and Texas.

## The Challenge

Shea Homes recognized the need to replace their forecast and planning tools, and to find a more simplified and agile solution that was sustainable and would grow over time. Shea Homes was utilizing three systems to derive their quarterly division and community level forecasts: JD Edwards, Hyperion Planning and TractPIE. The planning process achieved their desired results but was cumbersome and inefficient for business users and system administrators. The goal was to build a solution that enabled a seamless forecast process, utilizing data integrations and automation to reduce non-valued efforts and shift the focus to providing quality financial analysis, improving forecast accuracy, and creating a framework that provides visibility into how financial decisions translate into achievable results.



## Project Overview

Shea Homes selected ComplIntelligence as their OneStream implementation partner after recognizing the need for a more unified and efficient platform to better manage consolidation and financial planning. Since implementation of both features, Shea Homes experienced many improvements including elimination of multiple platforms, automation of manual workarounds and reconciliations, and increased transparency of data and financial reporting.

## About ComplIntelligence

Established in 2002, ComplIntelligence employs 150+ people across the United States and Canada. We provide Corporate Performance Management (CPM), Business Intelligence (BI), and Equity Compensation Solutions for hundreds of mid-sized to Fortune 100 companies.

ComplIntelligence was one of the first OneStream strategic partners of OneStream Software, providing implementation, consulting, and training services using OneStream technology since 2012.

We established ourselves as a leading independent service and solution provider through exceptional customer service and lasting customer relationships.

## The Solution

The ComplIntelligence team helped Shea Homes implement OneStream for consolidations at the onset of the project, and phased in the forecast and planning features after the consolidation framework was built. Although both required in-depth development, the most substantial and recognized benefits were on the forecast and planning side.

OneStream Marketplace solutions including People Planning and Capital Planning were also incorporated into the platform, which provided additional efficiencies to the overall planning process.

## The Results

- One platform providing one source of truth, eliminating the migration of data between multiple systems
- Enhanced system efficiencies through automated integrations with JD Edwards
- Significant reduction of manual spreadsheets and workarounds
- Reduced consolidation times
- Improved visibility of key metrics and statistical data and results by utilizing drill down features in OneStream
- Increased transparency of changes utilizing native audit logging
- Improved workflows and consistency in the forecast process