

## Our Story

CompIntelligence has been providing enterprise performance management and equity compensation services since 2002. It was started by a team of dedicated professionals who wanted to deliver better value to clients than was possible with the major financial performance and compensation software companies they had been working for since the 1990s. With CompIntelligence, these consultants and technologists found ways to apply their experience and expertise to build and deliver tailored solutions that improve enterprise financial performance and equity compensation at the lowest possible cost.



Today, our seasoned professionals provide consulting and solutions for organizations around the world. They have also developed, in response to clients' needs, a full catalog of training courses and education programs. CompIntelligence has also used its extensive national network of dedicated EPM and compensation experts to provide clients with temporary and permanent staffing solutions that meet the urgent and long-term needs of organizations of all sizes, from mid-market to the Fortune 500.

At CompIntelligence, we not only know software and technology, we are dedicated business people who know how to partner and create solutions that help companies better manage their equity compensation and enterprise financial performance needs.

## Our People



CompIntelligence has over 50 employees across the United States and Canada. Many work out of our Connecticut offices, and we have additional employees in New York, New Jersey, Chicago, Texas, Tennessee, California, Florida and Montreal. Our Oracle Hyperion and OneStream consultants and developers work with and support clients throughout the country and internationally.

At CompIntelligence, we know that one solution is not right for every organization, so our consultants work closely with clients to understand their organization's technology and human capabilities and determine what they need to improve performance. With our record of success, proven methodologies, trove of satisfied clients and network of experts and partners, clients rely on us to be their trusted EPM and Equity Compensation solution provider.

## Our Services

The CompIntelligence Enterprise Performance Management team provides clients with the services, products, tools and support they need to optimize business operations, reduce costs, improve efficiency and pursue growth opportunities. By establishing an integrated, accurate approach to planning, budgeting, forecasting and reporting, we help clients gain the insight they need to make informed business decisions. Specific services are outlined below.

### **Solution Selection**

Senior EPM Specialists will help to prioritize your needs, rationalize your time line and budget, and identify the right software solutions to meet your requirements. With our depth of experience and network of contacts within the EPM industry, we provide objective assistance with everything from introductions to actively managing the RFP and selection process for you.

### **Education**

Having the right tools and solutions in place is essential for effective enterprise performance management. But truly optimizing your company's financial management requires equipping your employees with the right set of skills and expertise to get the job done every day. That's why comprehensive education and training are an integral part of the services offered by CompIntelligence.

The CompIntelligence education curriculum has been developed by dedicated, experienced Hyperion professionals with many years of experience implementing, administering and using Hyperion products in real business situations. These experts are constantly updating our coursework, while associating content with the roles and functions of your trainees. In addition, our instructors are long-time Hyperion field consultants, with several coming from the pre-Oracle acquisition IMRS/Hyperion. We offer an ever increasing slate of courses, virtually and in person, or classes can be customized to fit your schedule and location.



For a full list of our classes, see our website at <http://www.compintelligence.com>.

## Our Services

### Consulting

Organizations are not static entities. To meet their ever changing requirements companies have to be able to adapt quickly. EPM applications have to keep up.

CompIntelligence EPM consultants work closely with you to provide whatever assistance is required to adapt and keep up. Whether implementing for the first time, upgrading to a new release, adding functionality, or modifying an existing EPM application, we can help.

Our EPM Consulting Team is comprised of seasoned individuals capable of performing all project roles, including project management, design, development, technical installation and configuration as well as on-going support. As part of our methodology, we identify which roles are required and how much of their time is required to perform specific tasks. We also help identify what additional resources are required from you to ensure project success.



### Application & Process Reviews

CompIntelligence technology and finance consultants assist our clients in reviewing their applications, processes and environments to ensure that they are operating optimally.

- Is your consolidation taking too long?
- Is your close process inefficient and fraught with unexpected data issues?
- Are your business rules too complex to untangle and maintain?

CompIntelligence design consultants will perform a thorough evaluation of your application and processes and provide you with recommendations to improve, streamline and enhance them.

CompIntelligence infrastructure consultants will review your environment footprint and design, and perform testing to ensure it is tuned appropriately and performing optimally.

The CompIntelligence Education team can work with you to assess the skill level of your EPM staff and recommend a training path to enhance skills and empower users. Experience has shown us that an educated user is typically a satisfied user.

## Our Services

### Staffing & Placement

EPM applications require a hybrid skillset that can be difficult to find. The most successful EPM System Administrators have a solid finance background with a focus in consolidations or planning within their industry plus an affinity for technology. Additionally, they must be flexible enough to adapt to the ever changing environment that exists in large organizations today, be able to manage endless details, and be able to communicate with a broad spectrum of individuals and levels. Our Placement Specialists understand this mix of skills very well having worked for many years with IMRS/Hyperion assisting them to locate and hire both temporary and permanent talent.

Requests for temporary staff come in all flavors and sizes and there are many reasons why a client needs temporary, experienced EPM staff from outside their organizations. CompIntelligence assists clients in finding and screening talented temporary staff to fill these needs. Some of the requests we have received include:

- Sudden Loss of an Administrator
- Monthly or Quarterly Close Support
- Report Writing
- Pregnancy or Family Leave
- Data Reconciliation

## Our Partners



CompIntelligence is an Oracle Gold Partner that focuses on the Hyperion Suite of products from HFM to FDMEE and Planning/Essbase. Our Gold membership provides us with access to expertise, training, and the opportunity to provide input into the development and testing process.



CompIntelligence is an authorized OneStream Implementation Partner. We have been formally trained at the OneStream corporate training facility and have worked closely with OneStream Software founding consultants on implementations as part of our field training. We are ready to help you implement OneStreamXF successfully.