

CASE STUDY

OneStream Success Story

# CHG Healthcare



COMPANY:  
**CHG Healthcare**

INDUSTRY:  
**Healthcare**

## CHG Healthcare Overview

CHG Healthcare, founded in 1979 and based in Salt Lake City, UT, is the largest and oldest physician staffing company in the United States. CHG offers physician, nurse and allied health staffing for temporary and permanent positions in all 50 states, as well as far-flung places like New Zealand, Australia and Guam — with solutions tailored to meet the unique needs of their clients. For more information, visit [CHGHealthcare.com](http://CHGHealthcare.com).

**“OneStream has really simplified our processes. All the administrative tasks with Excel®-based budgeting have gone away. We can now spend more time on review, analysis and value-add activities.”**

— **Steve Schultz**  
*Senior Director, FP&A*  
**CHG HEALTHCARE SERVICES**

## The Challenge

As a staffing business, robust people and salary planning is critical to CHG's success. Conducting their monthly rolling forecast and people planning was a critical, but manually intensive process. And while this was manageable as a smaller organization, using Excel® spreadsheets and legacy budgeting tools to manage CHG's high growth became increasingly challenging.

To complete the monthly forecast, the CHG Finance team would first export a payroll file from their JD Edwards Payroll system and then use the Oracle Smart View for Excel® add-in to extract budget data from their Hyperion Financial Management (HFM) application. From this, they would create over 150 individual

Excel® spreadsheet templates and distribute them via email to the business owners for them to complete. Once those spreadsheets were complete, the Finance administrators would then use Smart View to load them into HFM to compile the results and send reports back to the business owners.

With fragmented and manual processes, CHG required several iterations to correct errors. Spreadsheets had to be revised, and multiple emails were required to communicate issues and transfer new files. Adding to the complexity of this process was the need to closely manage sensitive payroll information to ensure it was only visible to the correct individuals. The process had become untenable.



## Corporate Performance Management Solutions Delivered

- ✓ Budgeting, Planning and Forecasting
- ✓ People Planning



## Business Challenges

- ✓ Lack of agility in budgeting and planning, reliance on static budgets
- ✓ Excel®-based planning and forecasting cannot align level of detail at BUs vs. Corporate
- ✓ Managing process mechanics limits Finance time for value-add analysis



## Key OneStream Benefits

- ✓ Enabled faster and more accurate budgeting and forecasting
- ✓ Aligned granularity of budgets and forecasts to the same level of detail
- ✓ Empowered Finance to focus on analysis rather than process

## Selecting a Modern Solution

CHG began their search for a modern corporate performance management (CPM) solution that would address their immediate need for more sophisticated and efficient planning, budgeting and forecasting and support future expansion.

After evaluating over 10 potential solutions, CHG selected OneStream's unified and extensible platform to modernize their budgeting, planning and forecasting process. Steve Schultz, Senior Director, FP&A of CHG Healthcare Services said, "The deciding factors in selecting OneStream were the 100% customer success rate and that only OneStream offered a unified platform that would not require additional solutions to be purchased and bolted on."

## Implementing OneStream

For Phase 1, CHG targeted driving efficiency in planning, budgeting and forecasting. One of the first steps was to connect their JD Edwards payroll system to OneStream to eliminate the manual data export that was previously required.

CHG also connected OneStream directly to their GL system. This eliminates the spreadsheets that Finance had to create, distribute and manage. Changes or updates to the data are now immediately visible, and audit trails provide a history of changes made.

People Planning from the OneStream Marketplace™ enables CHG to conduct employee compensation, benefit, travel and expense planning with a 16-period rolling forecast and a 12-period budget. And with a direct connection to CHG's payroll system, People Planning enables CHG to easily add new employees to the system and incorporate them into their financial planning processes.

## Benefits Achieved

By modernizing their budgeting and planning process, the CHG Finance team now spends less time managing process mechanics and more time on reviewing results and analysis to guide enterprise decision-making. Users are much more efficient now that they have access to all necessary data such as payroll information directly within OneStream. Their user experience is easier with OneStream's role-specific workflows to guide their steps.

OneStream Guided Workflows and Dashboards eliminated the chaos of back-and-forth process emails. Users can now see exactly what steps they need to do and when they need to do them. Throughout the process, the Finance team has complete visibility into where each user is in their steps without having to query them via email.

The myriad of spreadsheets is no longer needed. Communication about the process is easier and done within the OneStream platform instead of email. According to Mr. Schultz, "Our FP&A team can now focus our efforts on analyzing data as opposed to tracking down templates, status and progress."

CHG's Finance team is also now empowered to better support key decision guidance with more granular forecasts and planning enabled by direct access to all required data and drill-down capabilities.

OneStream has not only increased CHG Finance team's efficiency, but has also improved their accuracy and confidence in their numbers. By replacing the fragmented components of the process, CHG eliminated many potential points of error. And having a repeatable process within OneStream instead of having to manually build fragmented spreadsheets each month helps drive consistency.

## Future Plans with OneStream

CHG is currently implementing OneStream's Predictive Analytics solution to model gross profit per day forecasts. CHG is also refining their monthly rolling forecasting to include more detailed People Planning calculations for commissions, bonuses, taxes and 401K expenses.

Once their planning implementation is complete, CHG will retire Oracle HFM and leverage the OneStream platform for consolidation.

## About OneStream Software

OneStream Software provides a market-leading intelligent finance platform that reduces the complexity of financial operations. OneStream unleashes the power of finance by unifying corporate performance management (CPM) processes such as planning, financial close & consolidation, reporting and analytics through a single, extensible solution. We empower the enterprise with financial and operational insights to support faster and more informed decision-making. All in a cloud platform designed to continually evolve and scale with your organization.

OneStream's Intelligent Finance platform can easily be extended with over 50 solutions from the OneStream MarketPlace. These downloadable solutions are fully battle-tested and optimized for the OneStream platform. They allow customers to easily extend the value of their investment to meet the changing needs of finance and operations.

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