



SC&H

GROUP

# The Blueprint for Organizational Transformation Starts with OneStream

REAL ESTATE ADVISORY





# State of the Industry

*Organizations that operate within the Real Estate industry face a landscape of high-powered competition and constantly changing market conditions.*

Finance and operational leaders are under persistent pressure to evolve and to operate more efficiently while providing better metrics and visibility than ever before. Layer in the complexities that come with a global pandemic and changing political climate, and many Real Estate industry participants are facing a combination of factors that are unprecedented for the industry.

Beyond the impact of these market level factors, Real Estate encompasses a broad array of business categories including Residential and Commercial Sales and Leasing, Property Management, Real Estate Asset Management, and Real Estate Investment Trusts. Larger Real Estate organizations often own properties that operate in multiple Industries and Sectors and therefore require multifaceted expertise and reporting. Add this to the challenge of balancing short term operational and financial property management with long-term portfolio and fund management, and you have a big challenge to overcome.

To help organizations meet these challenges, Real Estate executives need to close the gap between the availability of data and the ability to harness data for fast and actionable insights. Most importantly, these executives need solutions that can deliver agile and insightful analytics that blend operational and financial data together with increased efficiency. To increase the efficiency, accuracy and value of data, finance and operations leaders are re-evaluating their existing planning and reporting processes and solutions. They are evaluating ways to better align changing organizational needs with the latest technology to increase efficiency, improve decision-making and deliver results.



# Real Estate Organizations Require Dynamic and Scalable Solutions

*Over the last few years, many Real Estate organizations have turned to OneStream's unified Corporate Performance Management (CPM) platform. OneStream has the capability to meet the needs of a changing business environment by enhancing financial and operational efficiencies through its dynamic and scalable platform.*



## Data Collection

Automate the collection of data from a variety of source systems to create unified source of truth for both operational and financial data.



## Consolidation and Close

Leverage a true financial aggregation engine with a built-in task management solution to simplify the close process and provide constant visibility into the status of reports and outputs.



## Forecasting, Budgeting and Long-Range Planning

Build monthly or quarterly forecasts, annual budgets, and 10-year plans all within a single platform and leverage OneStream's Predictive Analytics to model scenarios on both the short and long-term projections. Easily compare actuals, forecasts, budgets, and long-range plans.



## Calculations, KPIs and Metrics

Leverage a combination of simple business rules and MarketPlace solutions to deliver powerful, driver-based models, KPI's and other Metrics that are critical to business decision making.



## Visualizations and Analytics

Provide easily accessible dashboards and reports to data consumers at every level of the organization.



*OneStream makes it easy to collect, consolidate, project, and analyze data. For our Real Estate industry clients, this means having the ability to review operational and financial data in a timely manner.*

**REAL ESTATE CUSTOMERS USING ONESTREAM CAN REVIEW:**

- » Average sales price
- » Occupancy and Vacancy Rates
- » Loan to Value (LTV) Ratio
- » Average days on the market
- » Gross Net Income / Property
- » Capitalization Rates
- » Price per square foot
- » Return on Investment (ROI)
- » Funds from Operations (FFO)
- » Average Rent
- » Internal Rate of Return (IRR)

**AND FILTER BY:**



**Industry**



**Sector**



**Market /  
Sub-Market**



**Location**



**Property  
Manager**



**Franchise**



# Addressing the Challenges

OneStream's rise to the top of the CPM world has been directly correlated with the platform's capability to solve problems for its customers.

## CHALLENGE

**1** Real Estate organizations often operate across industries and sectors requiring a combination of segregated reporting requirements as well as a robust consolidated reporting framework.

**2** Real Estate organizations often require a blend of long range planning / cash flow focused elements AND short range operational budgets. Both are required for analysis and reporting.

**3** Many Real Estate organizations are a combination of multiple businesses on separate general ledgers or manage properties on separate ledger systems but still need to bring the data together for reporting.

**4** The Real Estate industry places a high value on data driven decisions that often require the combination of financial and operational data. However, this data ultimately comes from different sources.

**5** Real Estate organizations need to quickly evaluate decisions based on KPI's at varying levels of detail including Property, Sector, Market, Region, Portfolio, Fund, etc.

## SOLUTION

**1** OneStream's unified platform provides capability that allows organizations to deploy unique solutions by industry, sector, business area, etc. on a single unified platform.

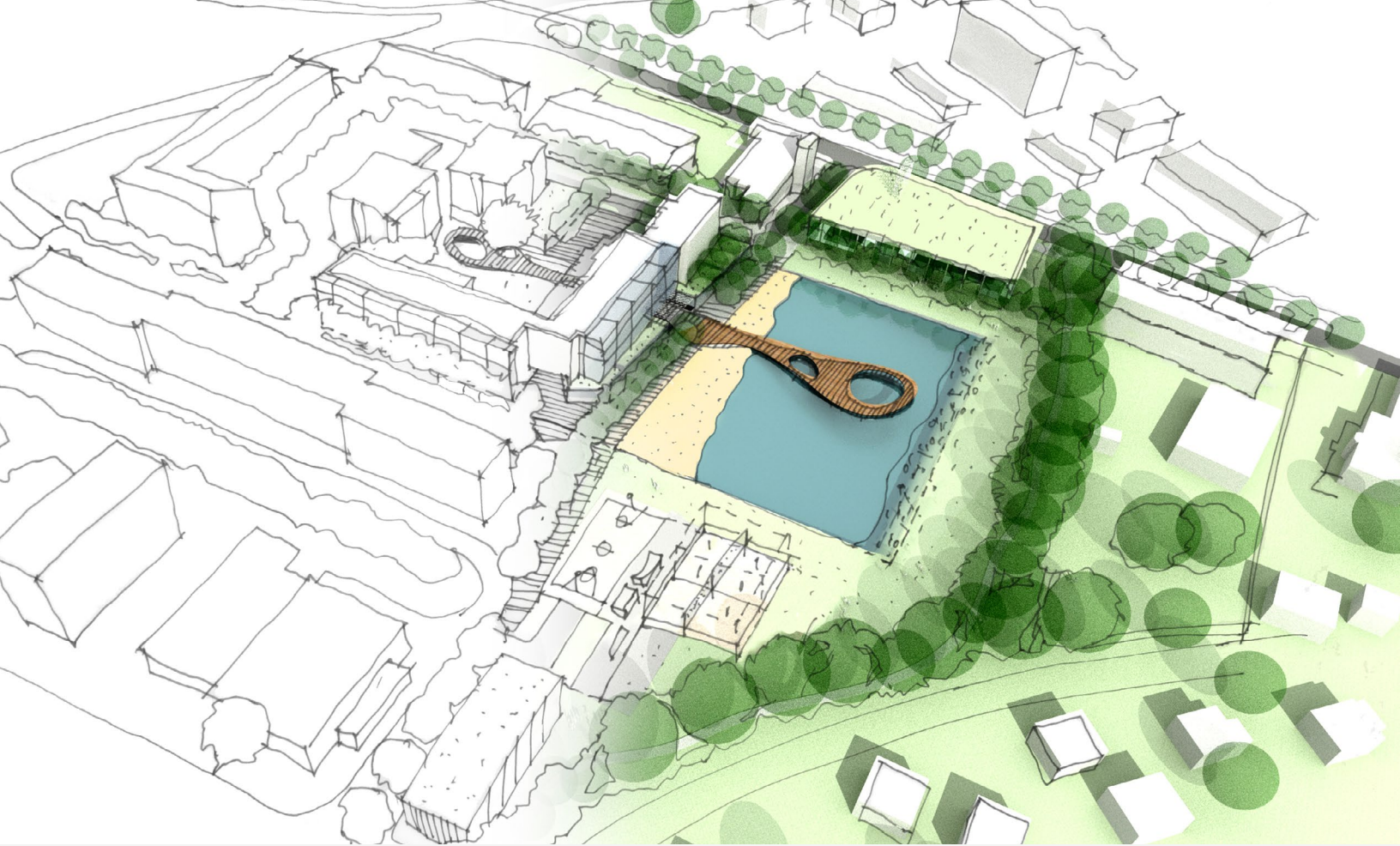
**2** Leveraging OneStream's Extensible Dimensionality<sup>®</sup>, the solution can be configured to provide the appropriate level of operational details for those responsible for property budgets while also containing long range plans at a higher level of detail.

**3** Through OneStream's data integration technology, the solution has the capability to connect to countless source general ledgers including many of those common in the Real Estate Industry (Yardi, MRI, Real Page, JDE, etc.) while always providing drill back visibility into source system data.

**4** Leveraging OneStream's Analytical Blend intelligently brings together CPM, Financial Analytics, BI, Operational and other transaction-level data for comprehensive analysis and visualization directly within one platform, using the same data integration and preparation, guided workflow, metadata and reporting tools that customers already understand.

**5** OneStream's built-in reporting & analytics provides the ability to easily review key metrics across varying levels of detail through the use of many available reporting modalities.





## Next Steps

Over the last 15 years working with large organizations, we have seen several solutions that serve both corporate executive functions and the Real Estate Industry. The OneStream platform is uniquely positioned to serve the Real Estate Industry. The combination of foundational consolidation, planning and reporting capabilities in conjunction with the latest and greatest analytical and visualization capabilities provide for a platform that is unmatched in the industry.

### **Contact us to learn more about developing a Strategic Roadmap that will help your organization:**

- ✓ Assess current-state planning and reporting processes;
- ✓ Make recommendations to improve processes and leverage new technology;
- ✓ Develop a roadmap to prioritize recommendations and begin transformation.



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# About SC&H Group

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