

JOSEPH ROSS, CPA

ONESTREAM SENIOR ARCHITECT



AREAS OF EXPERTISE

- OneStream
- Planning & Budgeting
- Close & Consolidation
- Project Management
- Program Management
- PeopleSoft ERP
- Hyperion
- Oracle EBS ERP Financials
- Anaplan
- FP&A Business Process Expert

EDUCATION/ PROFESSIONAL

- Certified Public Accountant, USA
- Chartered Professional Accountant, Canada
- BCIT - Finance /Accounting
- BA - Ambassador University, Texas
- Graduate Leadership - Colorado State University
- Project Management Institute

CONTACT INFORMATION:

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563.581.1072

Joseph has extensive OneStream experience in Budgeting and Forecasting, Close and Consolidation, Program Management, Project Management, and Transaction Matching.

Joseph is a Financial leader and expert with an outstanding ability to understand an organization's financial processes and to drive financial transformation through process redesign and technology.

Joseph's background includes 10 years of experience directing GL, FP&A and Treasury operations. He also has 15+ years of experience leading and managing financial ERP, FP&A and EPM/CPM system implementations with a keen sense of client needs and requirements. He has successfully reengineered, designed and implemented solutions for multiple large private and public sector clients. He has also managed multiple large-scale implementation projects with the major firms (KPMG, IBM, Deloitte and Sierra-Cedar).

He has worked in various industries such as the Public Sector, Higher Education, Hospitals/Medical Centers, Insurance, Energy, Retail/Wholesale Transportation, Manufacturing and Aerospace Clients.

Joseph is a team builder, a thinker with vision and has superb analytical abilities. He is an excellent communicator, an experienced leader and an exceptional presenter with a long history of delivering successful business/ executive presentations.



RELEVANT EXPERIENCE

Skehana Systems LLC - August 2023

Senior OneStream Consultant

2004 - Current

Smart Beans Consulting, Dubuque IA

Consulting Partner

Client engagements: Financial Process/Systems Expert, Financial Transformation, SOX reporting, Management Consulting, Financial process redesign, Hyperion Planning, Budgeting and forecasting, Hyperion EPM, Hyperion HFM, Financial Reporting redesign. OneStream (Budgeting/Forecasting and Close & Consolidations), PeopleSoft FSCM, PeopleSoft EPM, Program Management, Project Management, Experience with Public Sector, Higher Education, Hospitals/Medical Centers, Insurance, Energy, Retail/ Wholesale/Transportation, Manufacturing, and Aerospace Clients. Led Projects for IBM, Deloitte, Sierra-Cedar, KPMG, and Clarity Partners.

Representative Engagements:

Safariland

OneStream Planning & Budgeting Lead

OneStream Budgeting/Forecasting, Close & Consolidation, implementation project. Full cycle Budgeting & Forecasting Team Lead. Provided support for Close & Consolidation. Led requirements, design, build, and full testing cycle. Provided training support. Cubes, Security, Cube views, People Planning, Dashboards, Business Rules, Workflow/Task Mgr, Forms/Reports, Data Mgmt.

SUBWAY

OneStream Project Manager and Team Lead

IT Project Manager for OneStream Cloud Budgeting/Forecasting, Close & Consolidation, RCM/Transaction Matching implementation project. Requirements and Design review, Provided advisory consulting to Finance and IT, Oversight of Integration and API design and development, Managed Project Plan, Interfaced with PMO, and managed off-shore resources. Provided presentations to the executive steering committee.

Clarity Partners, Chicago, IL

Director of EPM and FP&A Solutions

Program Manager and Project Manager of FP&A and CPM Projects. Managed Chicago client projects for Clarity. Provided pre-sales support for OneStream, Oracle & Anaplan.

RELEVANT EXPERIENCE

Padagis Pharmaceuticals

OneStream Planning & Budgeting Lead

OneStream Cloud Budgeting/Forecasting, Close & Consolidation, implementation project. Inserted to get the derailed project back on track. Managed requirements and design for Planning & Forecasting. Participated in the design of People Planning Module. Provided oversight of development and testing support. Handed off project to the client.

Ideal Tridon

OneStream Planning & Budgeting Lead

OneStream Cloud Budgeting/Forecasting, Close & Consolidation, implementation project. Managed requirements and design for Planning & Forecasting. Analysis of current Cognos Reporting environment. Design of Dimensions and cube, cube views, dashboards and business rules.

University of Texas System

Program Lead and Lead Architect

Team Lead for Oracle EPM (Hyperion) planning and forecasting upgrade and improvement projects. Strategy and Road Map development, design and development of RCM Budget process and application, Designed and developed modifications and enhancements to Hyperion PSPB, Oracle EPM PBCS review and roadmap, Business Rule/Calc Script development, Interface modifications, FR and SmartView design and development, Application and Server architecture modifications, ASO reporting, Provided leadership and direction on Budget process redesign, Designed forecasting and long term planning processes.

City of Chicago

Program Manager and Team Lead

Program Manager of Planning, Forecasting and Financial Reporting system implementation. Led full cycle implementation of Hyperion Planning and Budgeting as well as Hyperion Financial Management; Financial and Budget Process redesign; Financial Reporting process redesign; Provided leadership and direction of the implementation team; implementation strategy and project planning oversight; architectural and design oversight.

Cook County Government

Program Manager and Team Lead

Program Manager of Oracle Financial Management and Planning/Budgeting; Capital Planning, and Hyperion Financial Management implementations supporting Operation Budgeting, Capital Budgeting, Financial Close/Consolidations and Financial reporting, Interfaces from Oracle EBS. Provided leadership and direction on implementation teams; Provided implementation strategy, client relationship and overall team leadership.

RELEVANT EXPERIENCE

State of California/KPMG

Executive Assessment Consultant

Assessment project for the State of California PeopleSoft ERP Financials implementation. Performed review of Accentruer \$500 Million ERP implementation project.

London Health Sciences Center

Team Lead and Lead Architect

Led Budget and Planning implementation for Hospital operations and Capital Budgeting. Redesigned hospital budget and reporting process; designed reporting architecture. Designed interface with PeopleSoft Financials and HCM, designed rolling forecasting, business rules & scripts, developed, build and customized applications; Change management.

University of Texas System Lead

Architect and Team Lead

Led EPM portion of PeopleSoft ERP implementation for UT System (7 campuses), Higher Ed Process redesign, Led development of requirements and design of new University budget process, Public Sector Planning and Budgeting app (PSPB), as well as Revenue and Expense budgeting; Designed Hyperion planning and reporting architecture. Design of interface with PeopleSoft Financials and HCM, business rules and customization of PSPB app.

University of Texas Southwestern Medical Center

Project Manager, Lead Architect and Team Lead

Led EPM portion of PeopleSoft ERP implementation for Hospital and University Medical Schools, Higher Ed Budget and Reporting process redesign; COA design; Designed University budget process; Hospital Revenue budgeting, Expense budgeting, Position budgeting, Grants; Developed all components of Application. Design and development of reporting cubes and Regulatory reporting system, Design and development of an interface with PeopleSoft Financials, HCM and Grants; Other Compensation planning apps; Oversight for system testing and Unit Testing; Designed Training strategy; Design of capital planning process.

American Electric Power

Financial Reporting Transformation Management Consultant

Divisional Management Reporting Transformation Project; business process reengineering; management scorecard reporting and forecasting for Shared Services division.

RELEVANT EXPERIENCE

Principal Financial Group

EPM Lead Consultant

Lead Consultant in PeopleSoft EPM Financial Warehouse, Planning and Budgeting; Designed modifications to the current PeopleSoft EPM processes; Full analysis and recommendation of the Planning system.

Countrywide Financial – Bank of America

Financial Planning System Consultant

Lead Consultant in PS EPM Planning and Budgeting; Designed budgeting process and architected and built complex budgeting models; Configuration of the system; Testing.

Career Education Corp

Team Lead and Lead Architect

Led Planning and PS Budgeting rollout; Developed and managed Project Plan; Designed and set up management reporting environment; Designed budgeting process and complex budgeting models; Customization design; Configuration of system and Testing.

Financial Reporting Transformation

Led assessment, design and build of PeopleSoft Financial Reporting environment using nVision and Cognos; Reporting transformation strategy development; Developed and managed Project Plan; designed financial models; roll-out of interfaces; built OLAP environment, corporate score carding and financial analytics.