

Increasing Pipeline and Brand Recognition with Financial Leaders

Exhibitor Success Story

Learn how OneStream drove
success with Gartner



Increasing Pipeline and Brand Recognition with Financial Leaders



Summary

In pursuit of engaging CFOs, OneStream turned to Gartner Finance Symposium/Xpo™ Conference. Through early planning, expert staffing, and a robust awareness program, they effectively connected with financial leaders, significantly boosting their brand recognition and sales pipeline. This impactful engagement strategy has become a cornerstone for OneStream's awareness and market expansion efforts.

OneStream Software

OneStream is a financial software solutions company, specializing in transforming financial operations with its modern operating systems. By integrating financial reporting, budgeting, planning, and forecasting with advanced capabilities like AI, OneStream empowers finance teams to achieve accuracy and efficiency. Their comprehensive platform is designed to streamline processes and provide real-time insights, enabling businesses to make informed decisions and drive growth.

“If you want to get in front of a large group of decision-makers in one spot again and again, this is the place. This is truly the highest level of titles that I've ever seen at a conference.”

Paul Giardina, Vice President of Demand Generation at OneStream

Objectives

- Increase awareness with CFOs and financial leaders.
- Generate demand for OneStream.
- Convert conversations to opportunities won.
- Engage with existing customers.

Solutions

- London CFO Conference Sponsorships: 2023 Platinum Sponsor, 2024 Premier Sponsor
- America CFO Conference Sponsorship: 2023 Platinum Sponsor with Registration, 2024 Premier Sponsor with Registration

Why Gartner

- Engage CFOs and decision-makers in meaningful conversations
- Leverage the Gartner brand and ecosystem
- Connect with current customers to drive new opportunities
- Educate ICP on solutions and boost brand awareness

Results

- Notable ROI received from pipeline generated
- Increased sales with current customers
- Advanced brand recognition and awareness with key financial leaders
- Supported global market expansion efforts

Keep reading to learn how they achieved success with Gartner



OneStream Increases Pipeline and Awareness Through Strategic Planning

Creating a Strategic Growth Strategy

Marketing leaders are continuously identifying initiatives that will drive profitable growth and enhance their engagement with hard-to-reach buyers.

Paul, the Vice President of Demand Generation at OneStream, faced similar pressures.

In 2018, he began exploring how Gartner Finance Symposium/Xpo™ Conference could align with his key objectives of increasing demand generation, attracting new leads and improving exposure with key financial leaders.

"We don't go into these things lightly, and we're very selective about which events we attend," Paul noted. However, they decided to attend due to the potential to engage with high-level financial leaders, and the results exceeded their expectations.

Then, COVID happened, and there were concerns that financial leaders wouldn't return in the same numbers as before. Thankfully, that wasn't the case. In fact, Paul said, "it was even better."

"The first year was good for us; we got great exposure," Paul said, "but the second year of sponsoring, after COVID in 2020, was when the recognition factor really went through the roof; it was massive."

Now, at the end of 2024, Paul shared that sponsoring the CFO Conference year after year is "not even a question when it comes up anymore."

"There's just more decision makers that come to Gartner conferences" Paul said. "If you want to get in front of a large group of decision-makers again and again, this is the place."

"This is truly the highest level of titles that I've ever seen at a conference and at this type of scale."

For every CFO Conference they sponsor, Paul begins planning months in advance to ensure that he and his team are fully prepared to engage with CFOs.

Their robust strategy includes detailed preparation that enhances their on-site execution, allowing them to successfully convert opportunities into growth after the conference.

Pre-event Planning:

Paul and his team begin by identifying presentation themes based on CFO top priorities and the conference agenda. They then align with the sales teams to identify key prospects and prepare them with FAQs and presentation details to ensure readiness for meaningful interactions.

"We do some multi-channel pre-work to reach out and invite our customers and prospects that we're already working with," Paul explained. This outreach includes personalized invitations, webinars, and more to secure meetings in advance of the conference. They also work in conjunction with the sales team to ensure they are prepared to interact with financial leaders on-site.

On-Site Execution:

At the booth, OneStream ensures they have senior personnel and subject matter experts capable of engaging in deep, meaningful conversations and providing on-the-spot demonstrations.

"We always bring people that can have really meaningful conversations with prospects," Paul shared. Having these meaningful conversations on-site with financial leaders is extremely helpful in tailoring post-conference outreach.

OneStream Increases Pipeline and Awareness Through Strategic Planning (OneStream)

The benefit of engaging in meaningful conversations at the conference has been evident to Paul.

He shared, “the ROI is really high because we have the opportunity to engage in meaningful discussions while we’re there.”

Having on-site conversations with financial leaders “really allows you to learn about their challenges, what they’re trying to achieve, and what systems they’re using,” Paul stated. “It gives you the opportunity to discuss how you differentiate from competitors.”

This is especially helpful when they are looking to follow up with prospects and clients. “We’re able to provide more information that’s meaningful to them, rather than starting from scratch,” he said.

From a pipeline generation standpoint, one thing that has helped is having a speaking session.

“We usually always have a speaking engagement session, which is an important factor for us,” Paul said. “The audience gets to hear more about us and hear from our customers.”

Although lead generation is extremely important for Paul and his team, connecting with current customers has been just as beneficial.

Paul mentioned that meeting customers at the CFO conference, has “opened opportunities for additional sales.”

“We get to have great conversations and then subsequently business is usually initiated from that.” Paul said.

They also prioritize setting meetings with any prospects they currently have a sale cycle with. As Paul shared, “it’s great at advancing deals we may already be involved in.”

Expanding into new Markets:

Gartner’s global CFO Conferences have played a crucial role in supporting their market expansion efforts.

“We believe in it so much and have had such great success in the North American conference that we’ve sponsored the London, and APAC CFO conferences,” Paul mentioned.

Paul emphasized the importance of early engagement with key leaders, which drives their decision to sponsor the CFO conference in new markets.

“We get in on the ground floor and expand when we can because it’s that important,” he explained.

Results and Impact:

The strategic participation in the Gartner CFO Conference has delivered significant benefits for OneStream. By engaging directly with high-level financial decision-makers, OneStream not only enhanced its brand recognition but also experienced a substantial increase in its sales pipeline.

Paul noted, “We had a good ROI just on the pipeline generated alone.” Yet he emphasized they “would still see value if we didn’t have that” due to the awareness generated with financial leaders, support in closing existing deals, and interactions with current customers.

Moreover, the conference served as a platform for OneStream to reinforce its position as a thought leader in the financial technology sector. The opportunity to showcase their solutions and engage in deep discussions with prospects and customers has solidified OneStream’s brand awareness with financial leaders.

In summary, the Gartner CFO conference has become an essential component of OneStream’s growth strategy. As Paul succinctly put it, “It’s the event that has to happen.”

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