

Experience gen AI designed for assured integrated reporting.

The excitement around generative AI is real, but for reporting professionals to realize those benefits, the need for data security and domain-specific application is paramount.

That's why we built Workiva Generative AI—so finance, audit, risk, and sustainability teams can capitalize on the promises of generative AI to boost productivity, scale resources, and drive innovation—all within a secure, trusted environment.

Workiva Generative AI is more than just the latest technology—it's a solution built to address the unique challenges faced in assured integrated



- Customer Data**
 - Not used to train gen AI models
 - Encrypted
- Inputs to Gen AI**
 - Not cached beyond the session
 - Requires active input and engagement
- Gen AI Responses**
 - Does not run in background
 - Does not update files without approval
 - Based on content filtering + context guardrails
 - Can opt out at any time



reporting, so you can streamline workflows, simplify complex tasks, and free your time for more strategic initiatives.

Think of Workiva Generative AI as your digital co-worker, purpose built to amplify your impact and achieve more with less—whether you're analyzing a debt agreement, creating an ESG double materiality assessment narrative, or preparing a SOX narrative for revenue recognition, among other things!



Securely access cutting-edge AI

Experience the latest in generative AI technology, developed with Workiva's commitment to responsible data stewardship. Your sensitive data stays protected—never stored, shared, or used to train the models.



Choose your industry-leading model

Select the ideal Large Language Model (LLM) from top providers to perfectly match your needs, preferences, or project requirements.



Boost productivity, scale effortlessly

Leverage AI-powered assistance to streamline your workflow without ever leaving the Workiva platform. Reference your files for contextualized responses, saving valuable time that adds up—empowering your team to focus on strategic initiatives and ultimately scale operations.



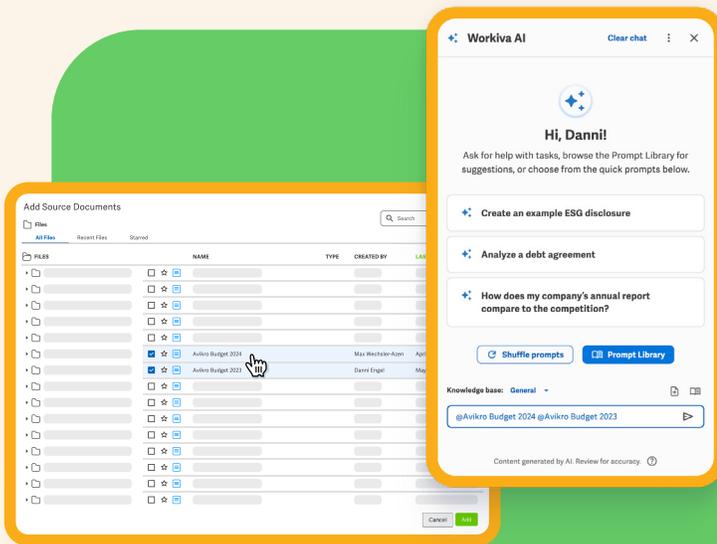
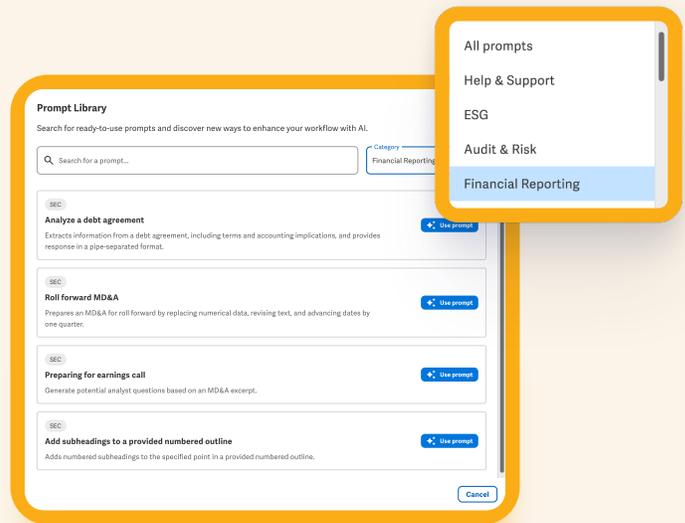
AI built for your challenges

Tackle the unique challenges of financial reporting, audit, risk, and sustainability with AI designed specifically for you. Leverage file referencing and our prompt library to accelerate common processes, drive efficiency, and innovate with your own data. We're invested in your success, going beyond off-the-shelf solutions to deliver AI tailored to your specific needs.

Get started quickly

Workiva Gen AI was developed to accelerate the routine work performed by teams focused on financial reporting, audit, risk, and sustainability initiatives within the Workiva platform.

- ✦ Need ideas on how GenerativeAI can help you?
- ✦ Consult the prompt library, which offers a selection of pre-vetted, expertly crafted prompts specifically designed for your area of specialization.



Amplify your impact

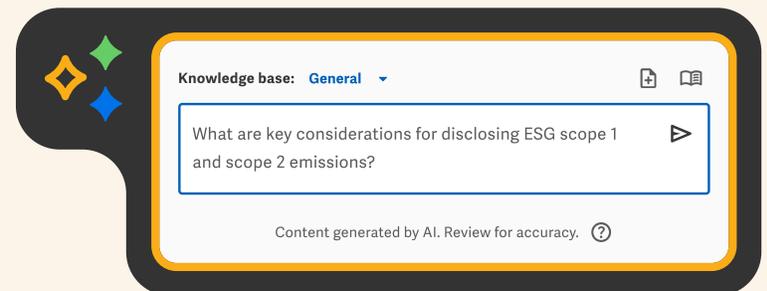
At your command, Workiva Gen AI can create net new content in seconds. And editing has never been easier: rewrite, summarize, shorten, or change tone—the options are endless.

- ✦ Want to save time creating new content inspired by your existing reports?
- ✦ Easy! You can use Workiva Gen AI to reference your Workiva files to provide inspired, contextualized responses.

Gain a digital co-worker

The world of assured integrated reporting is complex, to say the least. But you don't have to go it alone. Gain an ally that will help you spark ideas, provide fresh perspective, and answer your immediate questions to keep your flow, well, flowing.

Just remember: Your ally is still artificial—all responses are intended for human review and oversight for accuracy.

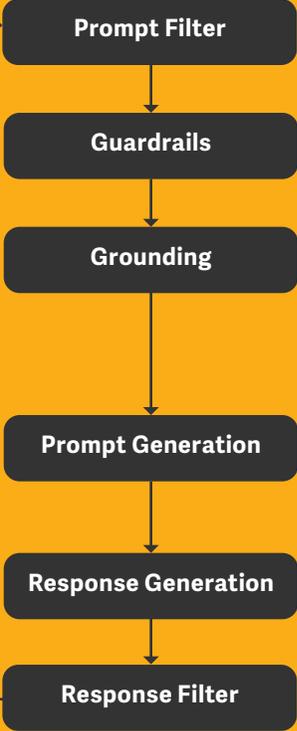
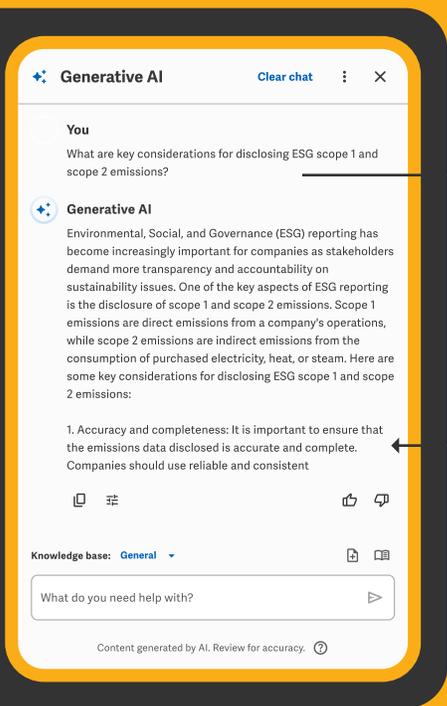


“Workiva Generative AI has allowed us to provide high-quality summaries in a fraction of the time, allowing for faster and more informed decision-making across the board.”

Heather Holding
ERM & Chief Privacy Officer



How Workiva Gen AI works



User inputs are filtered to adhere to guidelines, eliminating off-limits requests

Boundaries are set for generating responses, using factors like context, intent, and persona. As a result, responses generated are more relevant and aligned with your need.

We leverage embeddings and retrieval augmented generation (RAG), consider the solution and file type being used, and offer knowledge bases for specific Workiva-exclusive extensions, such as Workiva Support or ESG European Sustainability Reporting Standards content. We also provide citations and references for responses, indicating their source.

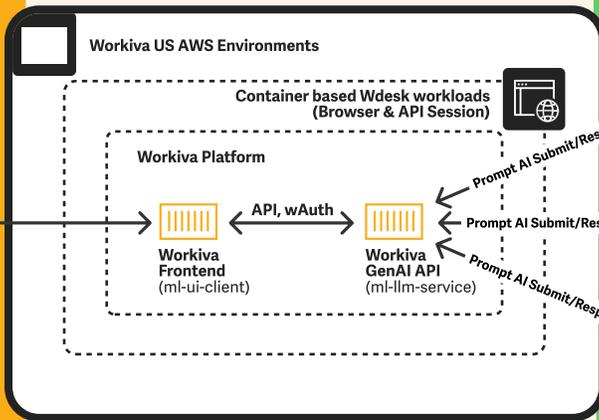
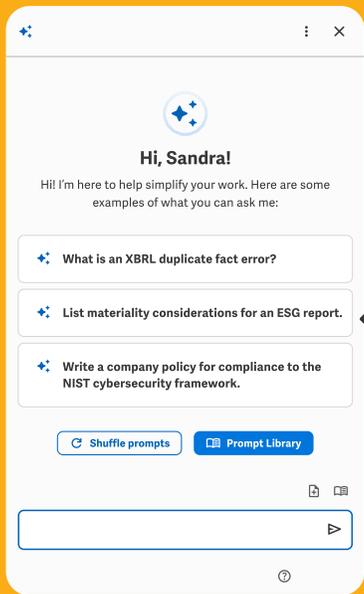
Prompts and model parameters create a user-friendly experience—including predefined commands like “shorten” or “elaborate,” as well as prompt-tuning with industry terms to avoid confusion (e.g. 10-K report vs. 10-K run)

Reports are generated based on advanced AI models from industry leaders such as Google, Microsoft/OpenAI, AWS/Anthropic.

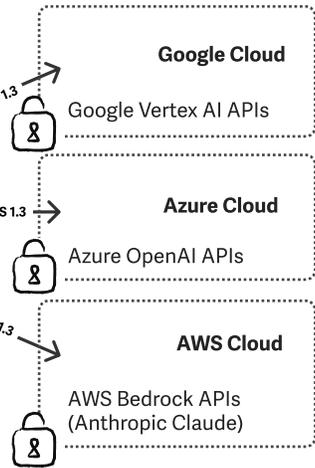
Reports are filtered to exclude inappropriate or prohibited content, such as unethical terminology. **Visit our Gen AI security hub for our vendors’ ethical AI policies.**

Workiva Generative AI Architecture

More information about the large language models (LLM) Workiva uses in their gen AI experience can be found at workiva.com/genai-security.



Foundation Model Services (US) (GCP,Azure,AWS)



↔ Data security measures throughout the experience:

- Encrypted at rest while cached
- Encrypted in transport (1.2+)
- Not cached outside a session with our secure LLM providers



Data security measures with each LLM provider:

- Providers cannot access customer prompts or data
- Data enters and leaves only through API calls

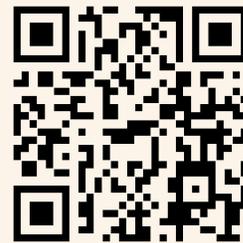
Read more about workiva Gen AI security and common FAQs at workiva.com/genai-security.

Workiva Generative AI can be accessed via the global toolbar across the entire Workiva platform and leveraged directly in documents, spreadsheets, and presentations.



Ready to get started?

If you're a current customer, request access today at workiva.com/getgenai, or scan the QR code below:



Not a Workiva customer?
Learn more at workiva.com/genai

"This is exactly the kind of generative AI implementation we want to use from a data security standpoint."

CIO, SVP of Internal Audit
Commercial & Consumer Finance Company

[WORKIVA.COM/GENAI](https://workiva.com/genai)

About Workiva

Workiva Inc. (NYSE:WK) is on a mission to power transparent reporting for a better world. We build and deliver the world's leading cloud platform for assured integrated reporting to meet stakeholder demands for action, transparency, and disclosure of financial and non-financial data. Workiva offers the only unified SaaS platform that brings customers' financial reporting, environmental, social, and governance (ESG), and governance, risk, and compliance (GRC) together in a controlled, secure, audit-ready platform. Our platform simplifies the most complex reporting and disclosure challenges by streamlining processes, connecting data and teams, and ensuring consistency. Learn more at workiva.com.



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