



Agenda

1 Introduction to Processes

2 Product Vision

3 Demo

4 Timeline/Next Steps

5 Q&A



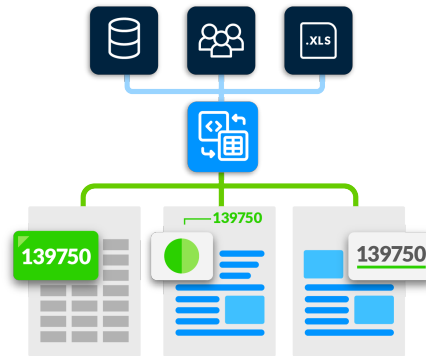
Introduction to Automating Business Processes in the Workiva Platform

Areas of Complexity

End Report Complexity



Data Management Complexity



Business Process Complexity



Solving the Universal Challenges of Complex Work

Data Transparency | Data Integrity | Collaboration | Data Availability | Workflow | Task Management



Digital
Review

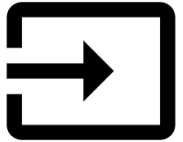


Comments

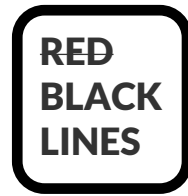


Tasks

Workiva has features that aid
collaboration



Data
Collection



Blacklines



And more!



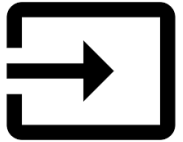
Digital
Review



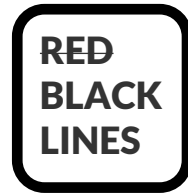
Comments



Tasks



Data
Collection

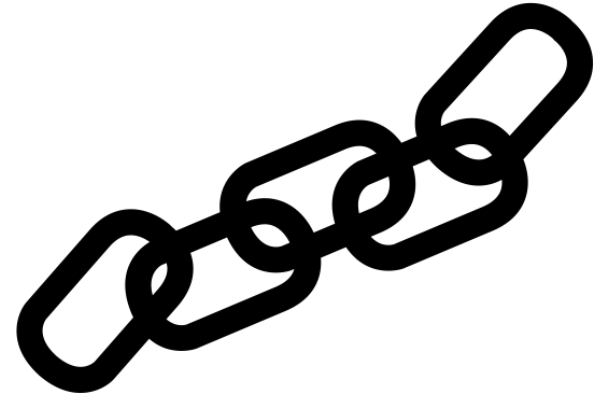


Blacklines



And more!

Workiva has features that aid
collaboration



Processes is the chain that will
link them together



Our staff accountant sends out tasks and then constantly monitors and updates a spreadsheet. I think that is a ridiculous waste of his time. We are paying a live human being to do something we know computers can do.

Workiva's process and automation capabilities

Workiva's process and automation capabilities are designed to drive the progression of work

Workiva's process and automation capabilities are designed to drive the progression of work for complex, cross-functional, business processes

Workiva's process and automation capabilities are designed to drive the progression of work for complex, cross-functional, business processes that require human judgement,

Workiva's process and automation capabilities are designed to drive the progression of work for complex, cross-functional, business processes that require human judgement, integrate structured/unstructured (often regulated) content

Workiva's process and automation capabilities are designed to drive the progression of work for complex, cross-functional, business processes that require human judgement, integrate structured/unstructured (often regulated) content from a variety of internal and external sources,

Workiva's process and automation capabilities are designed to drive the progression of work for complex, cross-functional, business processes that require human judgement, integrate structured/unstructured (often regulated) content from a variety of internal and external sources, and are volatile in nature.



Product Vision

Process Automation Ecosystem

Low-code and no-code tools to automate the processes of complex work.

PROCESSES

INTEGRATED
AUTOMATIONS

CANVAS
BUILDER

Process Automation Ecosystem

Low-code and no-code tools to automate the processes of complex work.

PROCESSES

INTEGRATED
AUTOMATIONS

CANVAS
BUILDER



Process Designer

Process Automation Ecosystem

Low-code and no-code tools to automate the processes of complex work.



Process Builder/Monitor

Supports building processes that are typically **long-running** and represent patterns of **combined human and system actions**. Heavy use of dashboards to manage as a project.

Experience is designed for process owners

INTEGRATED
AUTOMATIONS

CANVAS
BUILDER



Process Designer

Process Automation Ecosystem

Low-code and no-code tools to automate the processes of complex work.



Process Builder/Monitor

Supports building processes that are typically **long-running and** represent patterns of combined human and system actions. Heavy use of dashboards to manage as a project.

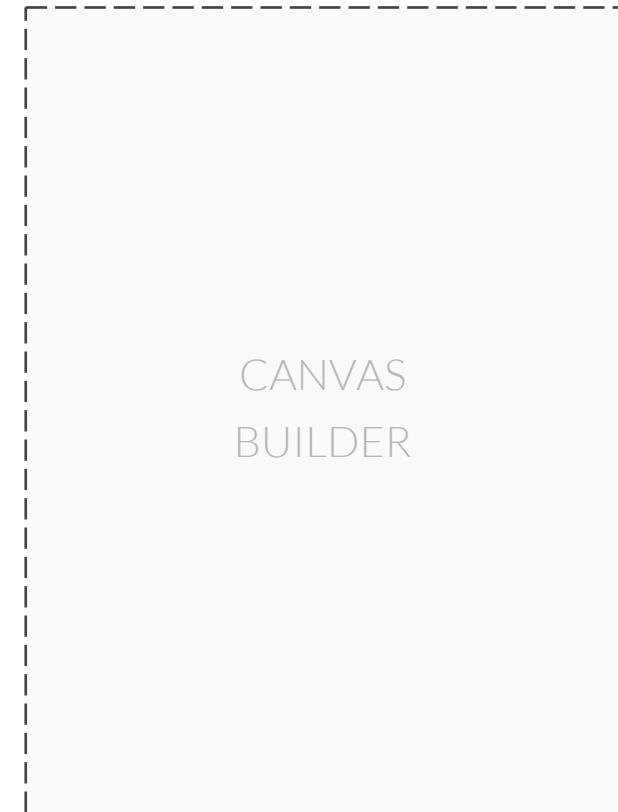
Experience is designed for **process owners**



Integrated Automations

Supports **simple**, easy to configure **automations** that are embedded into multiple experiences. Quick 'one and done' ops that do not need to be monitored.

Experiences are designed for **process collaborators**



Process Designer

Process Automation Ecosystem

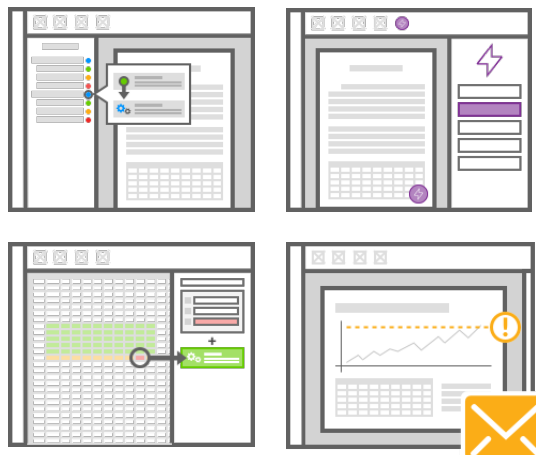
Low-code and no-code tools to automate the processes of complex work.



Process Builder/Monitor

Supports building processes that are typically **long-running and** represent patterns of combined human and system actions. Heavy use of dashboards to manage as a project.

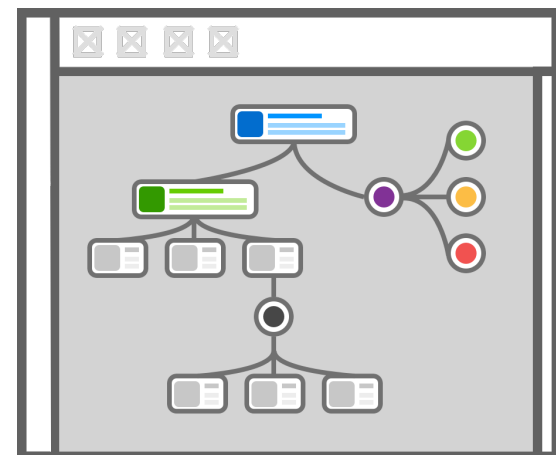
Experience is designed for **process owners**



Integrated Automations

Supports **simple**, easy to configure **automations** that are embedded into multiple experiences. Quick 'one and done' ops without significant oversight needs.

Experiences are designed for **process collaborators**



Canvas Builder

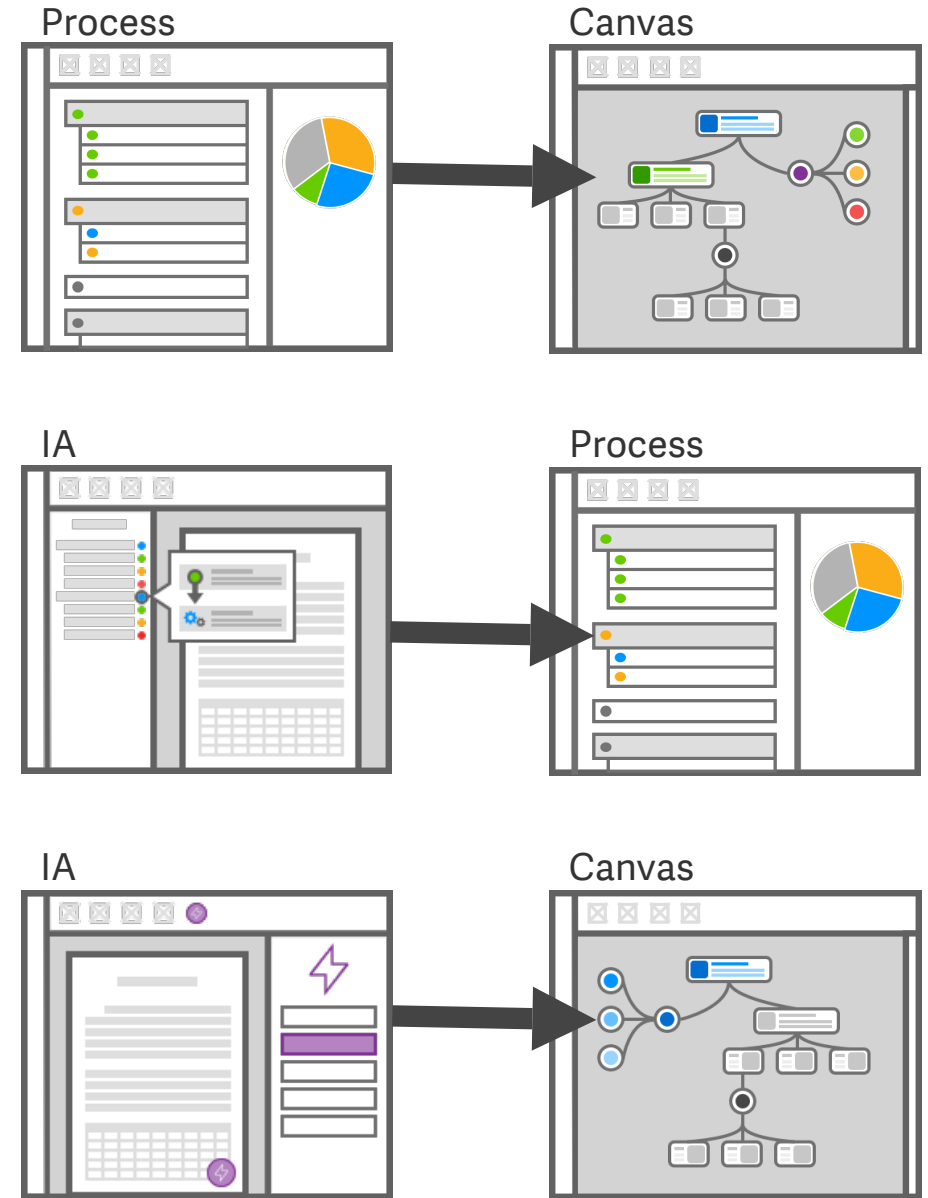
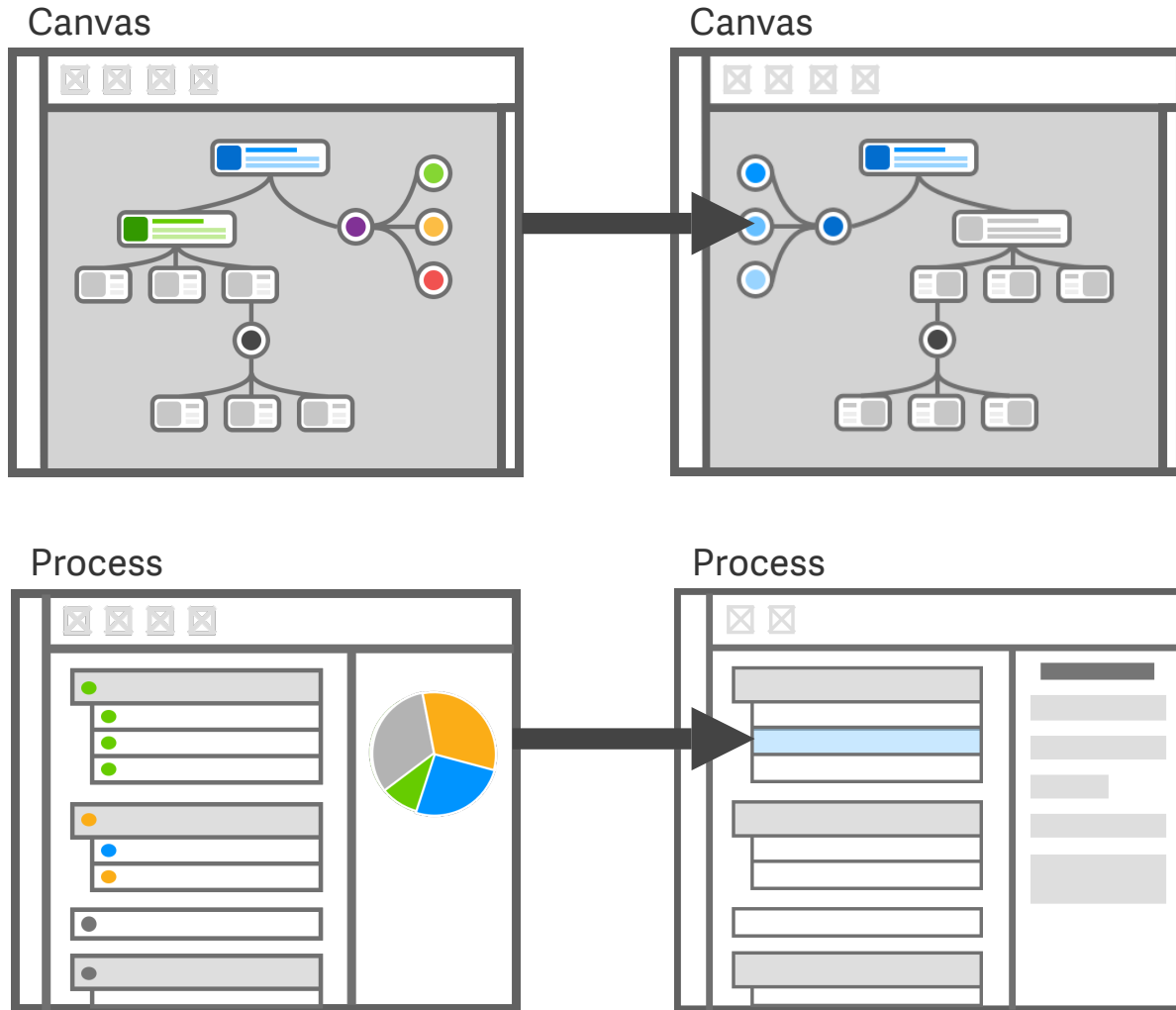
Supports building **advanced workflows** that are logically complex and heavily utilize external integrations. These processes typically run quickly and are repeated. Status monitoring and troubleshooting are a focus.

Experience is designed for **architects and partners**

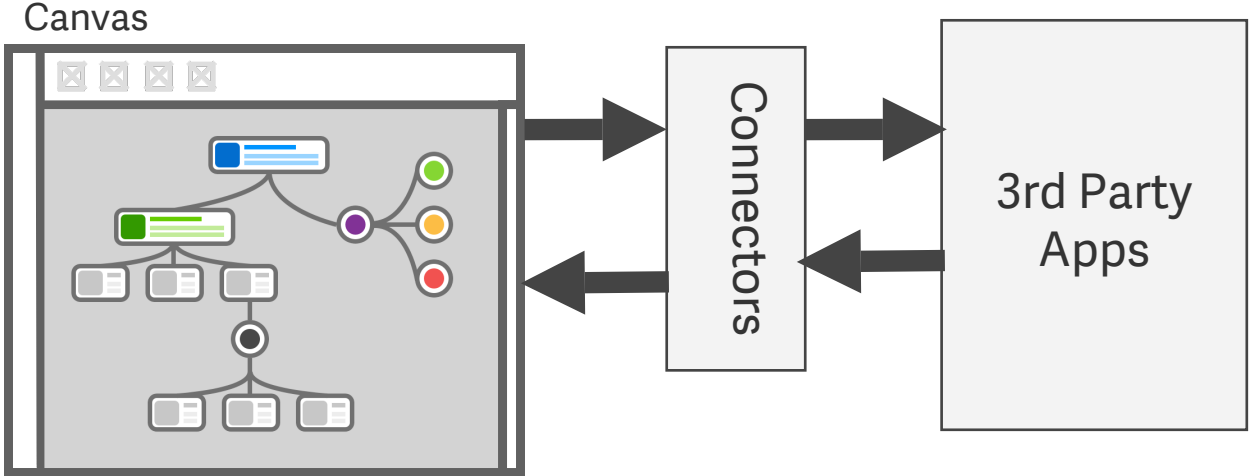
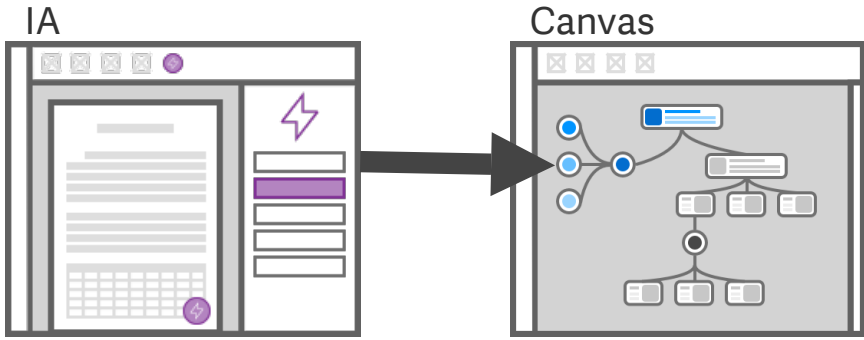
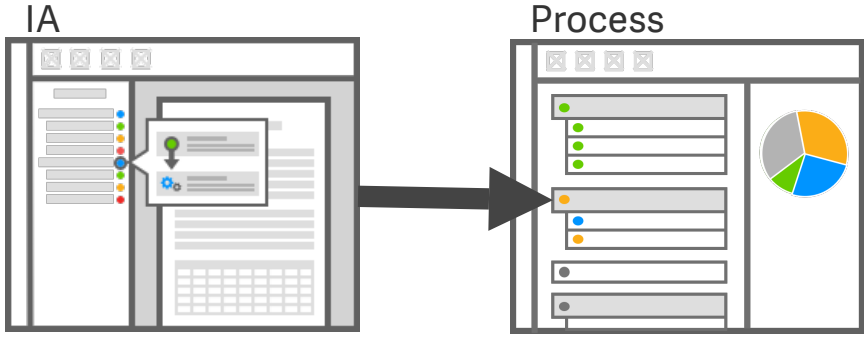
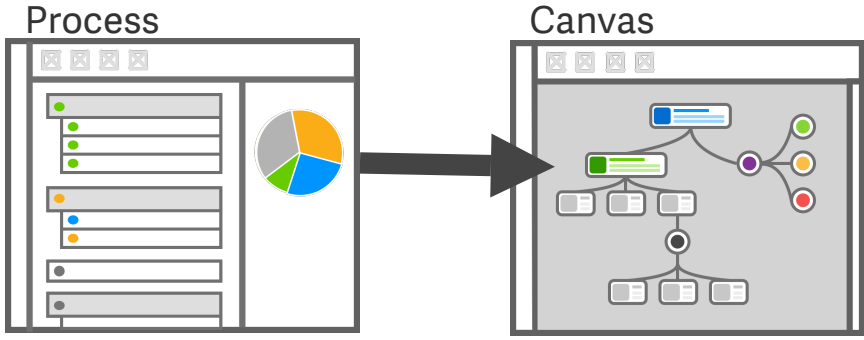


Process Designer

Interoperable Ecosystem



Interoperable Ecosystem



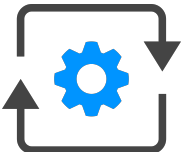
Marketplace Ready



Linked Document Templates



Data Models & Queries



Process Automation



Solutions

workiva Marketplace

Marketplace

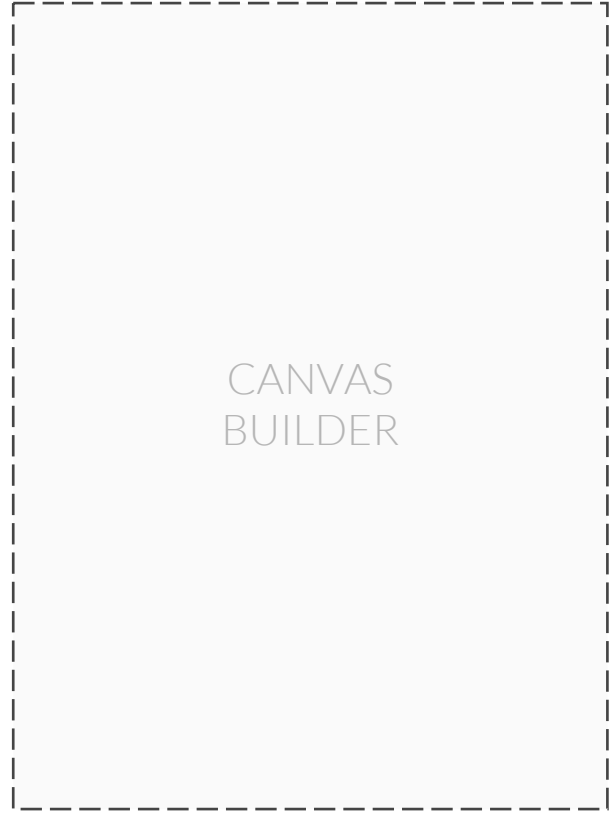
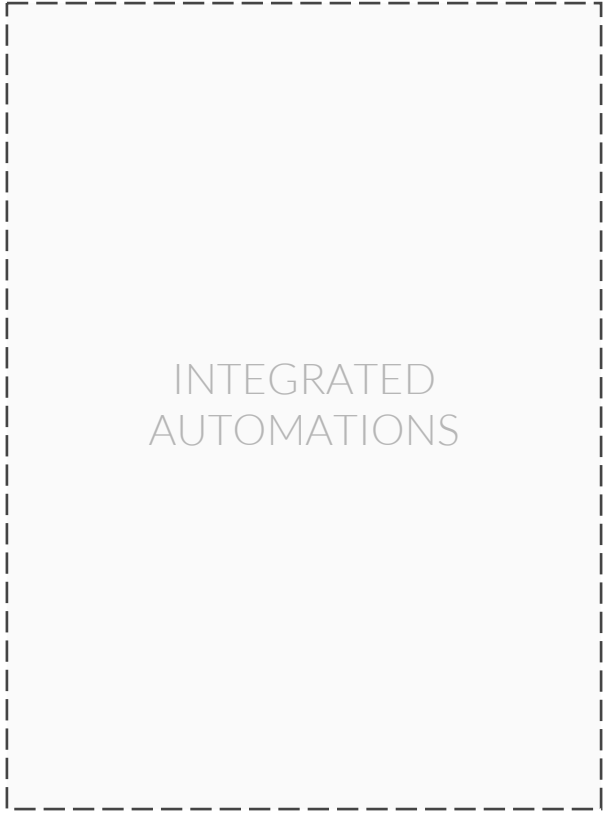
Demo

The Solutions



Process Builder/Monitor

Supports building processes that are typically long-running and represent patterns of combined human and system actions. Heavy use of dashboards to manage as a project.



A template for how a business operation should be executed



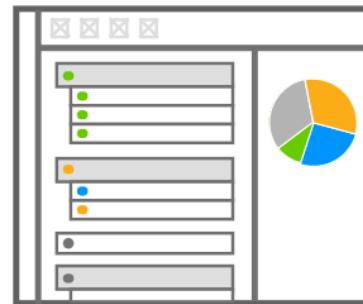
Process Builder



A linear 'builder' view of single and grouped **actions** that allows the user to define their **process**

Start

Active Process



Statuses and charts become available for **monitoring** progress. The process can be modified or stopped at any time

Complete

Completed Process



On completion, the owner is **notified** via email. They can now see a **historical** view of their process and **copy** to run again



Timeline & Next Steps

Timeline

**Q1
2021**

In Q1 we started beta testing processes for collecting data and managing checklists.
****For testing only****

**Q3
2021**

In Q3, we plan to release a few simple integrated automation patterns.

2022

In 2022, we'll support more complex processes with robust monitoring experiences.

**Q2
2021**

In Q2 we will continue beta testing. At the end of Q2, we'll make processes available to all customers.

**LATE
2021**

In the second half of this year, we'll expand the use cases that processes support and add process templates.

Note: Dates are subject to change