


A solid orange rounded rectangle is located in the top-left corner of the slide.

Welcome!

The Partner Workshop will begin at 11 a.m. ET.

Please make sure to mute yourself.

You will be able to ask questions via the chat function throughout the workshop.

A solid blue rounded rectangle is located in the bottom-right area of the slide.



workiva | PARTNER

Workiva Platform Demonstration & Overview

Stephen Budd
Director of Partner
Enablement and
Delivery
Workiva

Derek Paschal
Solution Engineer
Workiva

Additional sessions

Monday, November 8 at 11 a.m. ET

Workiva Platform Demonstration & Overview

Monday, November 8 at 2 p.m. ET

Better Data Management with the Workiva Wdata Suite

Tuesday, November 9 at 11 a.m. ET

Workiva SEC Reporting: A Key Part of Your Growth Strategy

Wednesday, November 10 at 11 a.m. ET

Evolve Your Practice with Global Statutory Reporting

Wednesday, November 10 at 2 p.m. ET

Private Company Financial Reporting in the Workiva Platform

Thursday, November 11 at 11 a.m. ET

How to Implement ESG with Workiva

Thursday, November 11 at 2 p.m. ET

Management Reporting in the Workiva Platform

Partner Learning Paths



Our partners are a key component of Workiva's overall success. We want to enable our partners to be successful by providing the right tools that drive the creation of a valuable, long-term relationship.

Providing badges and certifications via formal learning paths for our partners will showcase their Workiva acumen in the market and drive opportunities and growth throughout our partnership. See below for an outline of the learning paths related to Workiva and our platform.



A foundational learning path that introduces Workiva and the fundamentals our partners need to know to get started with our solutions.

A learning path all about the Workiva platform. This path includes two badged courses and a certification exam.

Report

This course is focused on functionality within the Workiva platform, such as workspaces, blacklines, permissioning, docs, presentations, spreadsheets, etc.

Prepare

This course explores how to extract data sets from multiple systems of record and integrate them into the Workiva platform. Discover how to prepare the data to automate your reporting process and utilize built-in tools for data analysis.

This learning path explores the Chain Builder functionality within the Workiva platform, covering topics such as accessing and managing Chain Builder, creating a chain, variables, publishing/execution, and more.

Q&A



Mute



Stop Video



Participants



Chat



Share Screen



Record

Send your question to "Everyone"

2

To: Everyone ▾

Type message here...

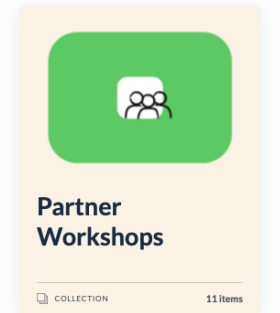
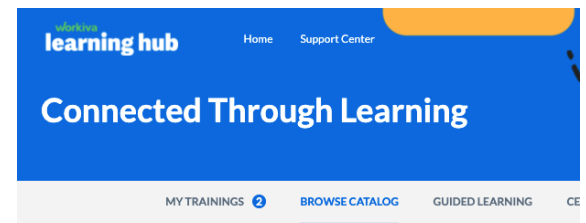


File



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Click here



Today's Speakers



Stephen Budd

Director of Partner
Enablement and Delivery



Derek Paschal

Solution Engineer



Agenda

1 Workiva Platform

2 Platform Approach

3 A Single Platform

4 Demo Agenda







5 Certification

6 Q&A

Transformational Value of the Platform Approach



Adopting Workiva as a system of work for connected reporting and compliance delivers unmatched, transformational value

-  Shared data resides in platform and is published to multiple reports, documents and sheets, representing an important step toward **single source of truth**
-  **In-platform collaboration** between cross-functional teams and processes increases and redundant effort decreases
-  Executing in one cohesive system enables **faster onboarding** of new employees
-  **Fungible human resources** are easily reallocated as required by strategic priorities, eliminating road blocks to organizational change
-  **Reporting culture** is one of 'proactively providing business insights' rather than one of 'constantly rushing to deliver the next minimum viable product'
-  Using consistent, best-in-class technology contributes to maintaining a **highly-desirable workplace** for top performing talent

The Workiva Platform

Financial Reporting

- Annual and interim financial reporting
- Statutory Financial S
- Profit and loss / income statement
- Balance Sheet
- Statement of cash flows
- Equity rollforward
- Consolidated trial balance

Regulatory Reporting

- Global statutory Reporting
- Liquidity and capital management
- CCAR / RRP / Living Will
- Insurance Prospectus
- ESG Reporting
- ALCO
- CECL



Management Reporting

- Performance Reporting
- Budget / forecast reporting
- KPIs, variance and/or flux analysis
- Flash packages
- Board Presentations
- Operational metrics and reporting
- Headcount / FTE reporting

Integrated Risk & Process Management

- SOX and controls management
- Regulatory compliance
- Enterprise risk management
- Enterprise stress testing
- Internal controls
- Policies and procedures

A Single Platform for Financial & Non-Financial Data

SEC Reporting

Financial Reporting

ESG Platform

Management Reporting

Integrated Risk

Global Statutory Reporting

Everyone has visibility into the right data at the right time in a single platform.



Master Working File

- Data Sources
- Systems
 - Trial Balance
 - Budget Data
 - Head Count Data

Trial Balance			
	Accounting Period	Period Change	Account Name
	9/30	221,092	Installs
	9/30	4,687,399	Capital Leases
	9/30	8,020,004	Accounts Payable
	9/30	77,900,503	Common Stock
	9/30	60,000,800	Notes Receivable

Data



Connectors & API's



Data Prep & Unification



Control Frameworks



Linking

Workflow



Task Management



Data Orchestration



Process Automation

Reporting



Documents & Spreadsheets



Decks & Dashboards

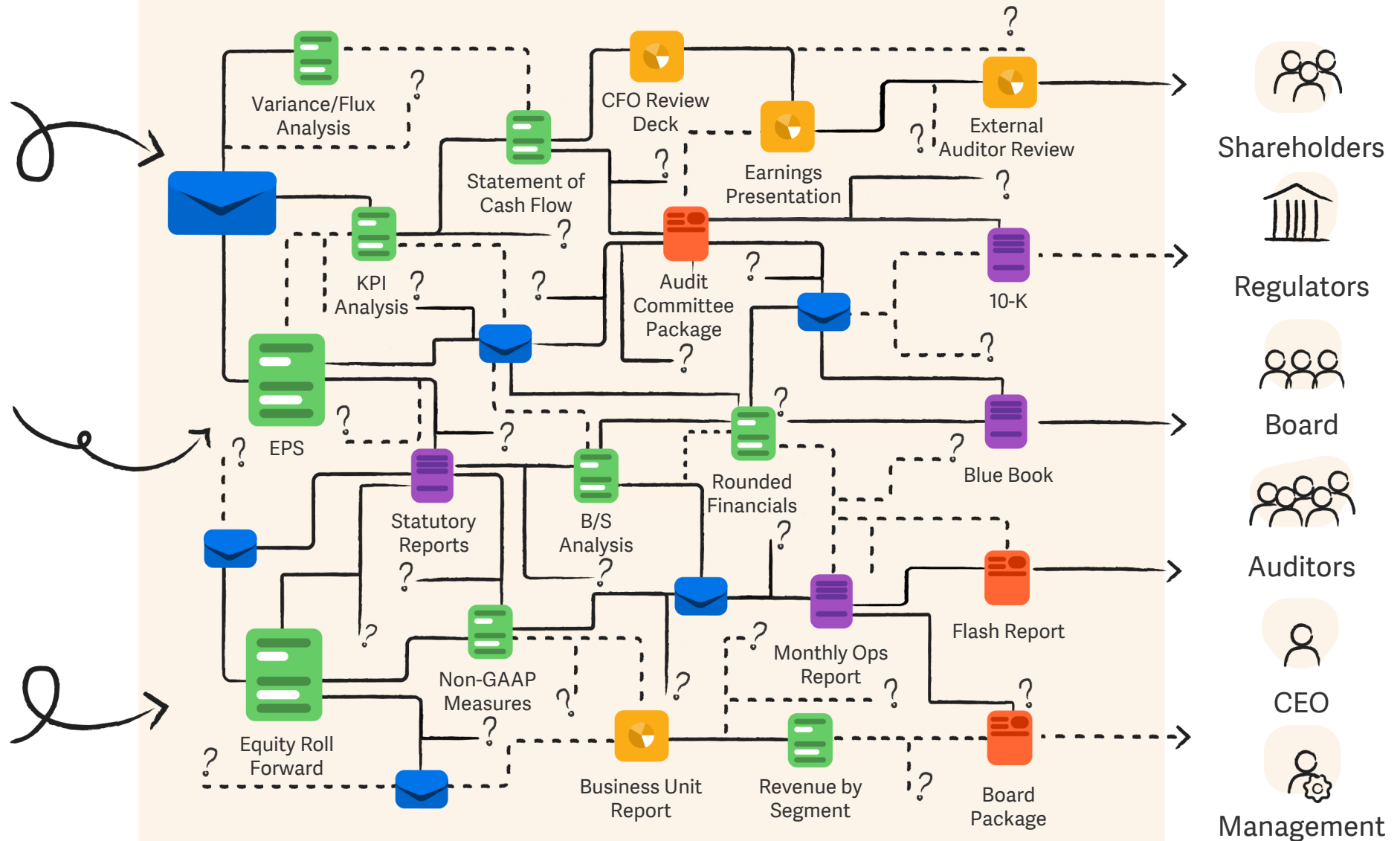


Charts & Tables

Complexity...

Record Close Consolidate Prepare Report Stakeholders

ORACLE	salesforce
SAP	ADP
workday.	Anaplan
planful	BLACKLINE
IBM	Power BI



Future state

Record

Close

Consolidate

Prepare

Report

Stakeholders

ORACLE

salesforce

SAP

ADP

workday.

Anaplan

planful

BLACKLINE

IBM

Power BI



workiva

Connected and Transparent



Collaborative,
Consistent, Continuous



Shareholders



Regulators



Board



Auditors



CEO



Management



Demo Agenda

1 Workiva Platform Overview

2 Data Management

3 Process Management