

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.



Stephen Budd

Director of Partner
Enablement and Delivery



workiva | PARTNER

How to Implement ESG with Workiva

Mark Mellen
Director of ESG
Enablement
Workiva

Myles Quinn
Senior Solutions
Architect
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

Implementing Workiva for ESG

Thursday, November 11 at 2 p.m. ET

Management Reporting in the Workiva Platform

Other Training Opportunities

1 [Learning Paths](#) | Certification Program

- Workiva Essentials
- Workiva Platform
- ESG

2 [Partner Portal](#) | Asset Library

- Partner Materials
- News & Updates

Partnersupport@workiva.com

The image displays two screenshots of the Workiva interface. The top screenshot shows the 'learning hub' with a 'Certification Program' banner. Below the banner, there are navigation tabs: 'MY TRAININGS', 'BROWSE CATALOG', 'GUIDED LEARNING', and 'CERTIFICATION PROGRAM'. The main content area shows three certification paths: 'Workiva Essentials', 'Workiva Platform', and 'ESG'. The bottom screenshot shows the 'WORKIVA PARTNER PROGRAM' interface, specifically the 'ASSET LIBRARY' section. It features a search bar, filters for 'CATEGORY' and 'FILE TYPE', and a list of collections including 'Workiva Platform', 'Partner Brand Guidelines', 'APAC Materials', and 'Product Update Blog'. The 'ESG' collection is highlighted, showing it contains 3 items.

Q&A



Mute



Stop Video



Participants



Chat



Share Screen



Record

Send your question to "Everyone"



To: **Everyone** ▾

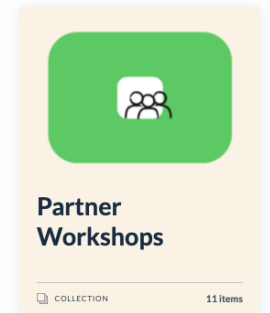
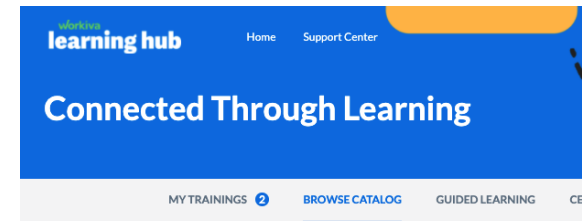
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File



Click here



Today's Speakers



Mark Mellen

Director of ESG
Enablement



Myles Quinn

Senior Solutions
Architect



Agenda

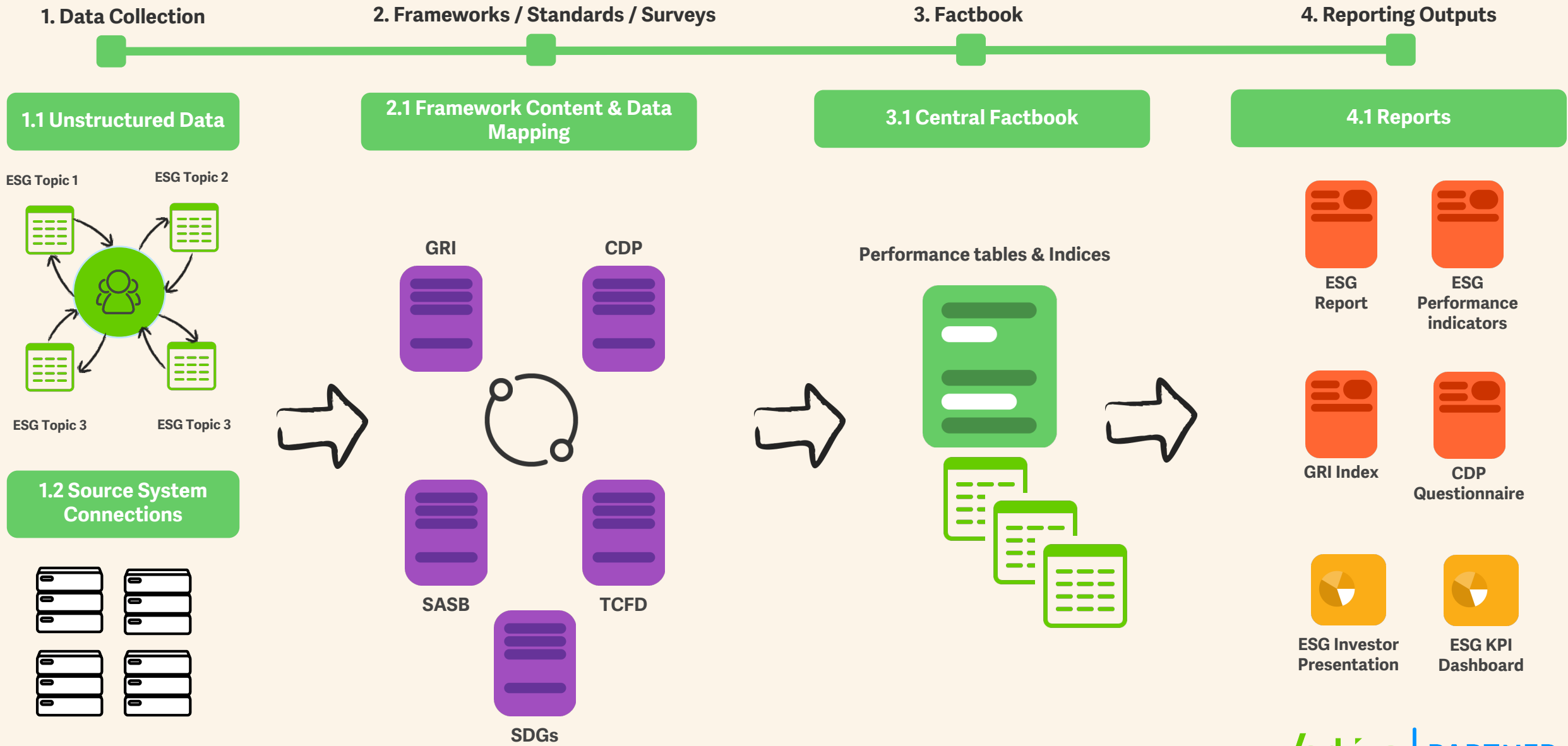
1 Workiva ESG solution overview

2 Scoping for ESG

3 Implementation for ESG

Workiva ESG Solution

ESG Project Workstreams & Platform Deliverables



Names of reports, frameworks, questionnaires and standards above are examples and not representative of the scope of the project.

High Level Implementation Method

Client Current State

Unstructured data sources

- Email
- Excel
- Sharepoint

Structured data sources

- What structured data sources will be used? (e.g. Workday, ADP)

Data providers

- # of Data Providers
- Consolidated or granular data?

Frameworks / Surveys

- GRI-SASB-TCFD-SDG-CDP
- Others Provided by Client

Reports

- What reports will be part of implementation? (e.g. ESG report, presentations, surveys)

Phases

Phase 1: Align

Establish consistency in expectations according to the statement of work, timelines and objectives.

Phase 2: Discover

Thoroughly understand the current process, requirements, controls and data systems involved.

Phase 3: Design

Develop, recommend, and establish a scalable process that meets the customers needs and is aligned with Workiva best practices.

Phase 4: Build

Replicate and test the designed solution in accordance with the Statement of Work.

Phase 5: Enable

Provide documentation, and training allowing the client ESG team to successfully maintain and iterate off of the delivered solution.

Go-Live

Project hand-off and onboarding services completion.

Project Deliverables

Platform Deliverables

1. Data Collection

- Data collection sheets
- Data collection process

2. Frameworks / Standards / Surveys

- Framework/survey indicators
- Framework/survey mapping

3. Factbook

- Framework indices
- Key data points for reporting

4. Reporting Outputs

- ESG Report

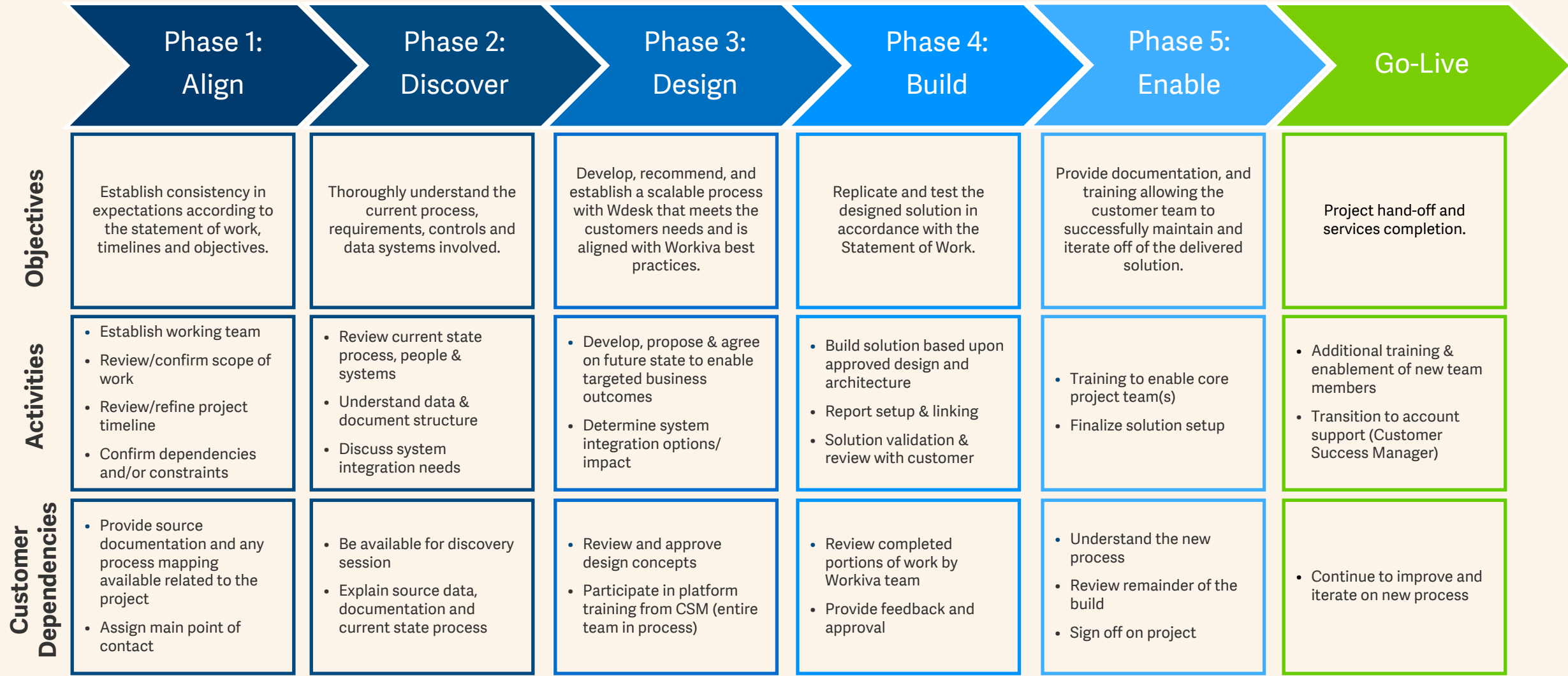
Training & Documentation

- Core ESG team training
- Data provider training
- Data model documentation

Project Management

- Partner resourcing
- Workiva resourcing
- Status updates and meetings

Workiva method proven to enable fast time-to-value



Key Build Activities and Responsibilities

1. Data Collection

2. Frameworks / Standards / Surveys

3. Factbook

4. Reporting Outputs

Partner

- Data collection discovery
- Import data collection templates and tailor to client specification
- Assign data owners and reviewers
- Set up permission structure
- Provide data collection training

- Framework discovery
- Set up in scope frameworks
- Set up metrics / indicators
- Assign permissions
- Set up disclosure level mapping to data collection sheets
- Provide framework management training

- Set up factbook with relevant data points for reporting outputs
 - Frameworks Indices
 - Survey structures
 - Performance data tables
- Provide factbook training

- Set up in scope reporting outputs
- Configure report layout and import style guide
- Assign preparers and reviewers
- Establish data linkages from factbook to reports
- Provide report training

Client

- Provide relevant data points, mapping, existing collection sheets, data reports from systems
- Provide roles/responsibilities
- Provide conversion calculations
- Validate design and build
- Assign permissions to end-users

- Provide summary of ESG frameworks, relevant data points
- Provide framework mapping guidance
- Provide roles/responsibilities
- Validate design and build
- Assign permissions to end-users

- Provide relevant data tables for presentation in reports
- Provide existing framework / survey presentations
- Validate design and build
- Assign permissions to end-users

- Provide existing reports in editable format (.docx)
- Provide brand guidelines in form of style sheet/guide
- Validate design and build

workiva

*see standard [Workiva Support](#)

- Guide on importing of template and creating granular tags for mapping
- Provide general support to template duplication

- Advise on Topic-Section-Disclosure updates to meet client's reporting requirements
- Advise on Questionnaire mapping best-practices

- Guide on importing of Factbook
- Provide general support and best-practices to template duplication

- Assist with document creation tickets with internal team
- Provide best practices for table creation

Partner-led Engagement Approach & Resources



Experienced Workiva Services Teams:



Customer Success Manager (CSM)

- Dedicated ongoing account support
- New features plus tips and tricks
- Design & Set-up Account Workspaces
- Wdesk enablement and training

Staffing: 1 person

Duration: Implementation project + post-implementation relationship



Solutions Architect(s) (SA)

- Platform and Connected Reporting Expert
- Best practices and process improvement
- ESG Implementation Guidance and Best Practices

Staffing: 1 lead SA and supporting SAs*

Duration: Entire implementation project

Partner Team



Manager

- Overall project management
- Coordination of meetings with client, partner and WK teams
- ESG process training delivery to customer

Staffing: 1 person

Duration: Implementation project + post-implementation relationship



Staff/Senior

- Engage with client contacts to drive design of ESG deliverables
- Build of ESG deliverables
- Test of ESG build with client

Staffing: 1 lead and 1 supporting*

Duration: Entire implementation project

*the number of supporting professionals will depend on project scope and project timeline - all resources will be introduced to the client team during project kickoff and/or the first discovery session

Workiva dedicated support on every implementation

24/7 Support Team



- Phone
 - 1-(800)-706-6526
- Email
 - support@workiva.com
- In-app chat
- In-app training tours

Support Center



- Help [Articles & Videos](#)
- Workiva [Community](#)
- [Learning Hub](#)
 - *Requires initial registration*

Scoping Method

Client-Sales Interactions



Step 1: Introduction & Understanding

- Introduce WK ESG support team & offering
- Understand your ESG program & goals for alignment



Step 2: ESG Solution Demonstration

- Introduce WK ESG platform to broader stakeholders
- Showcase the features, functions, and benefits of our ESG offering
- Introduce partner, if not already



WK & Partner checkpoint

Step 3: Solution Design w/WK preferred partner

- Develop a deeper understanding of your ESG program current state
- Enables a goals-based solution recommendation & implementation plan



WK & Partner checkpoint

Step 4: Evaluation & Decision

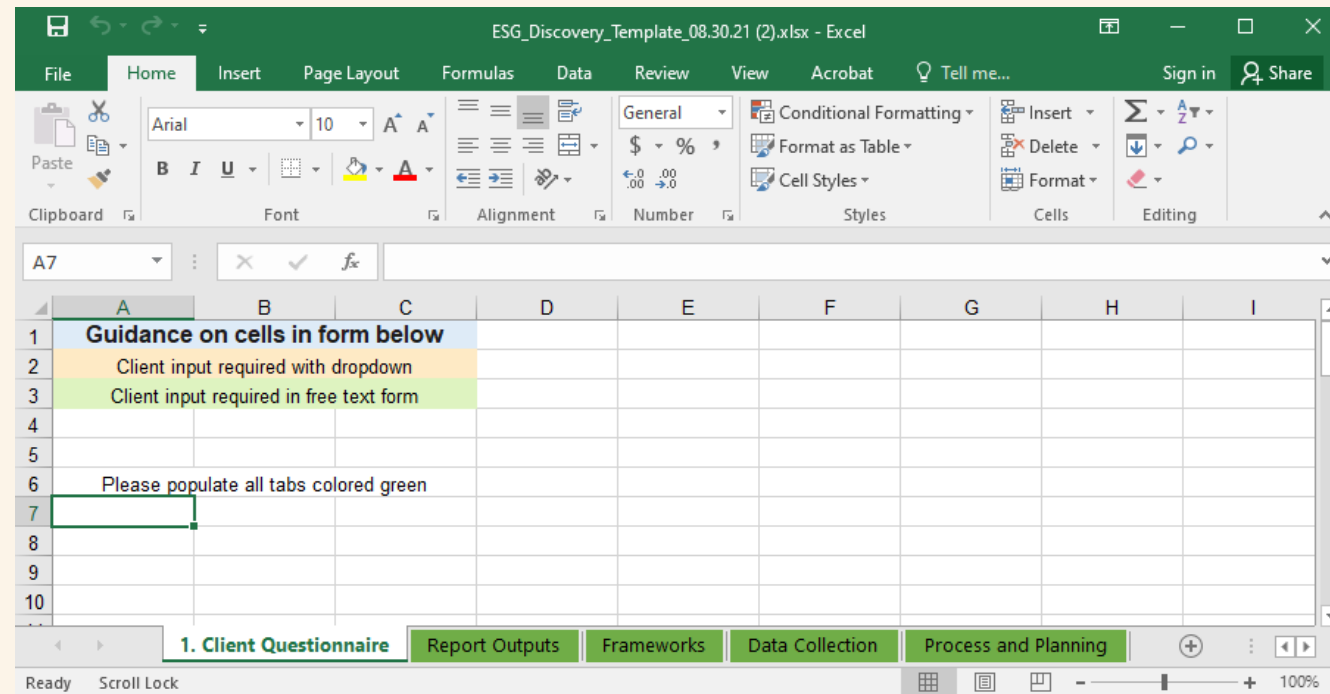
- Tailored solution recommendation, implementation design, & proposal
- Evaluate business impact and fit for go/no-go & Orders



Scoping Questionnaire

Scoping starts with the first interaction with the client/prospect and continues with subsequent interactions:

- Solution Engineer (SE)/Seller start populating questionnaire before/after first discovery
- SE/Seller adds more detail after demo
- SE/Seller share questionnaire with client/prospect for validation and further completion
- SE loads final scoping questionnaire into scoping calculator and hands over to scoping team (next slide)
- Scoping analyst leads scoping call and finalizes the estimates after the solution design/scoping call



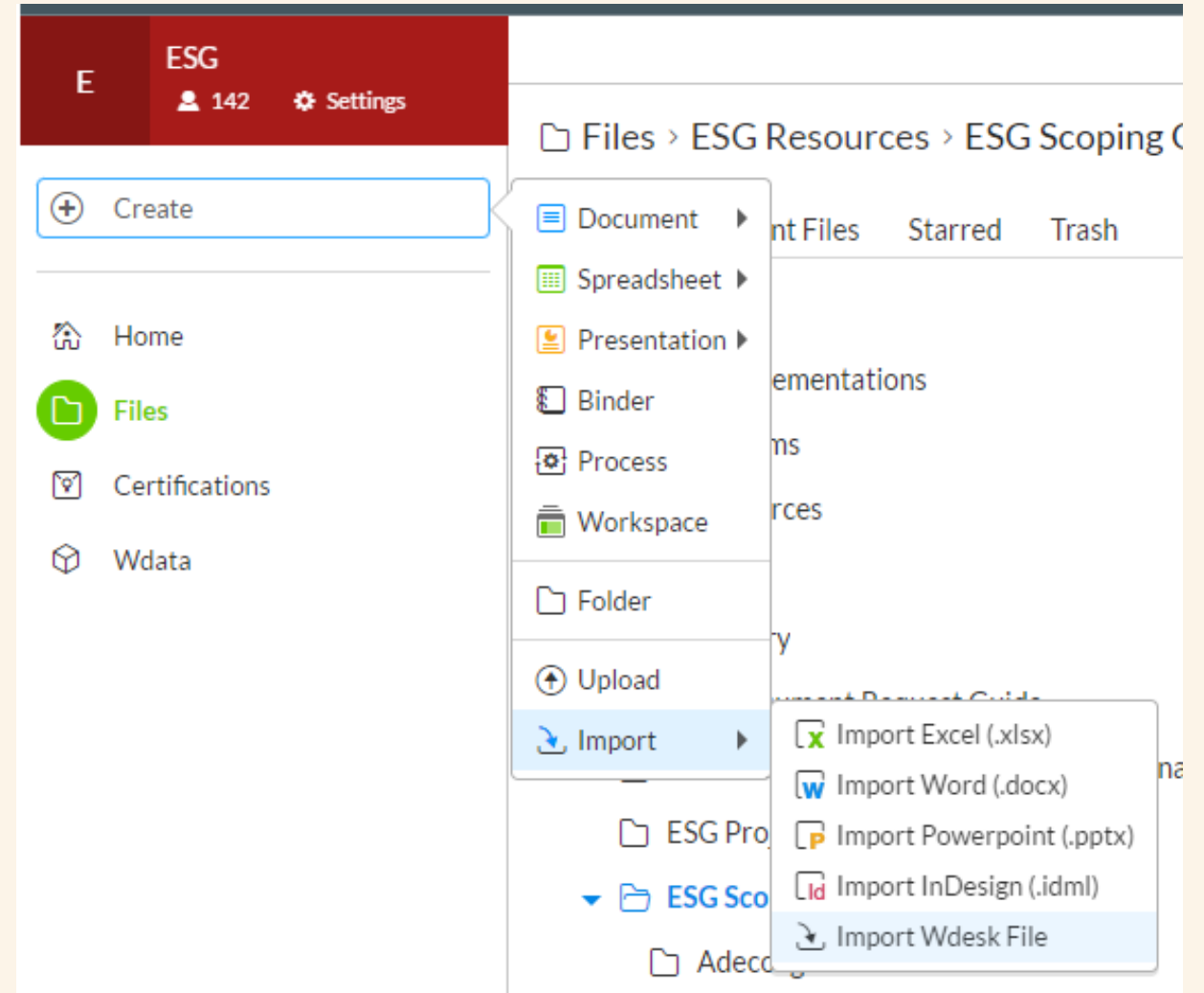
Scoping Calculator - import process

Process

1. Import ESG Scoping Calculator Template.tar.gz file into in Wdesk Home screen
2. Can now utilize within Wdesk for tracking of various scoping projects as desired

Notes

- Calculator does NOT need to be used by partner organization but can provide a helpful resource in scoping implementation projects
- We would be happy to receive feedback on the scoping template-please direct feedback to mark.mellen@workiva.com



Scoping Calculator - update process

Process

1. Import XLSX file into Scoping Calculator Template Spreadsheet in Wdesk
2. Pre-defined calculations will return hours
3. Refine hours by running through 'Hours Calculator' and make adjustments if necessary

Import

ESG Scoping Questionnaire.xlsx

Create new Spreadsheet in a new tab

Add Excel sheets to this Spreadsheet

Overwrite identically titled sheets with new values

Notes

- Calculator will return ballpark estimates only - the scoping analyst will need to validate and refine the results
- Always download the questionnaire from the wiki / partner portal; iterative updates will be made over the next few months

ESG Scoping Calculator

1. Client Questionnaire

Report Outputs

Frameworks

Data Collection

Process and Planning

Input

2. Hours Calculator

Factors

3. Services Proposal

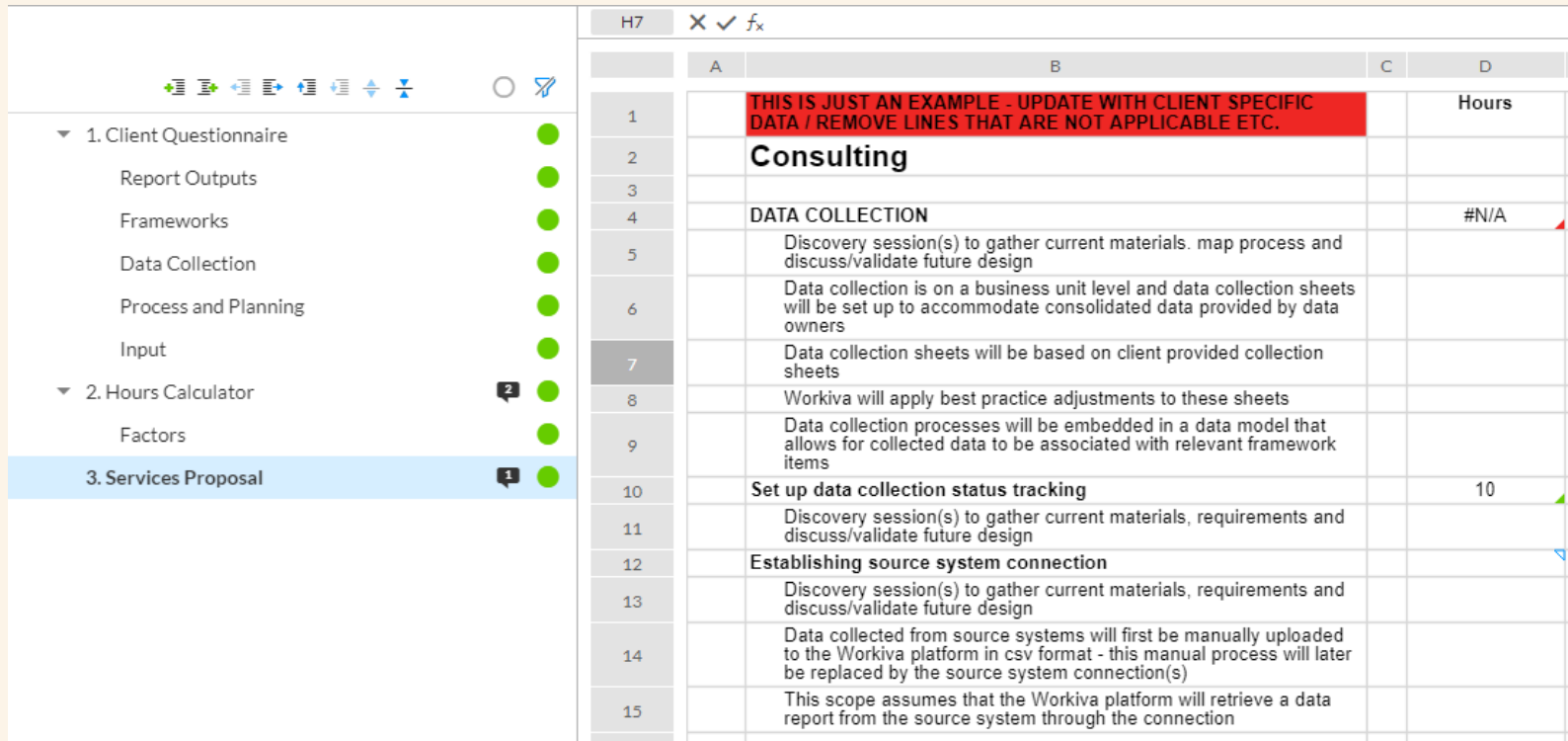
A1 X ✓ fx				
	A	B	C	D
1				
2		GRAND TOTALS		
3			Hours	
4		Document Setup	10	
5		Consulting	30	
6				
7				
8		REPORT(S) SETUP		
9		Please validate numbers below with a visual inspection of the output reports		
10		Reports with +70 pages require a custom scope		
11				
12		Reports	Pages	Languages
13				
14				
15				

Services Proposal Template Verbiage

The Discovery Template includes a 'Service Proposal' section.

This will need to be adjusted based on client specific requirements.

The Proposal can be used to provide additional context around the number of hours scoped and set the right expectations. Additionally, the content can be used in a proposal presentation



The screenshot shows a spreadsheet interface with a sidebar on the left and a main grid on the right. The sidebar lists sections: '1. Client Questionnaire', '2. Hours Calculator', and '3. Services Proposal'. The '3. Services Proposal' section is selected and contains a list of tasks with green status indicators. The main grid shows columns A, B, C, and D. Row 1 has a red header: 'THIS IS JUST AN EXAMPLE - UPDATE WITH CLIENT SPECIFIC DATA / REMOVE LINES THAT ARE NOT APPLICABLE ETC.' with 'Hours' in column D. Row 2 is 'Consulting'. Row 3 is empty. Row 4 is 'DATA COLLECTION' with '#N/A' in column D. Row 5: 'Discovery session(s) to gather current materials. map process and discuss/validate future design'. Row 6: 'Data collection is on a business unit level and data collection sheets will be set up to accommodate consolidated data provided by data owners'. Row 7: 'Data collection sheets will be based on client provided collection sheets'. Row 8: 'Workiva will apply best practice adjustments to these sheets'. Row 9: 'Data collection processes will be embedded in a data model that allows for collected data to be associated with relevant framework items'. Row 10: 'Set up data collection status tracking' with '10' in column D. Row 11: 'Discovery session(s) to gather current materials, requirements and discuss/validate future design'. Row 12: 'Establishing source system connection'. Row 13: 'Discovery session(s) to gather current materials, requirements and discuss/validate future design'. Row 14: 'Data collected from source systems will first be manually uploaded to the Workiva platform in csv format - this manual process will later be replaced by the source system connection(s)'. Row 15: 'This scope assumes that the Workiva platform will retrieve a data report from the source system through the connection'.

	A	B	C	D
1		THIS IS JUST AN EXAMPLE - UPDATE WITH CLIENT SPECIFIC DATA / REMOVE LINES THAT ARE NOT APPLICABLE ETC.		Hours
2		Consulting		
3				
4		DATA COLLECTION		#N/A
5		Discovery session(s) to gather current materials. map process and discuss/validate future design		
6		Data collection is on a business unit level and data collection sheets will be set up to accommodate consolidated data provided by data owners		
7		Data collection sheets will be based on client provided collection sheets		
8		Workiva will apply best practice adjustments to these sheets		
9		Data collection processes will be embedded in a data model that allows for collected data to be associated with relevant framework items		
10		Set up data collection status tracking		10
11		Discovery session(s) to gather current materials, requirements and discuss/validate future design		
12		Establishing source system connection		
13		Discovery session(s) to gather current materials, requirements and discuss/validate future design		
14		Data collected from source systems will first be manually uploaded to the Workiva platform in csv format - this manual process will later be replaced by the source system connection(s)		
15		This scope assumes that the Workiva platform will retrieve a data report from the source system through the connection		

ESG Template SOW

The Statement of Work Template has a combination of:

- Boiler-plate descriptions
- Customizable descriptions (highlighted in yellow)

ESG Template SOW

First page (placeholder)

Additional terms

Scoped Services

Fixed Fee Services

ADDITIONAL TERMS:

Scoped Services

SCOPED SERVICE(S)

Workiva will perform the following scoped Service(s) for Customer in accordance with their associated descriptions.

Consulting: https://www.workiva.com/consulting_2303

Summary Scope of project*











1. Reports (Documents/Presentations) in scope**
 - a. *Client Name* Integrated Report - Document
 - b. *Client Name* ESG Highlights - Presentation
 - c. *Client Name* Materiality Report - Document
 - d. KPI Protocol - Document
2. Framework indices / questionnaires / rating surveys in scope**
 - a. GRI content index - Document
 - b. SASB content index - Document
 - c. WEF content index - Document
 - d. SDG content index - Document
3. Data collection process
 - a. Aggregated data level / input by data owners
 - b. No source system connections to Workiva platform
 - c. Status tracking of data collection process
4. Framework mapping to support the following frameworks/questionnaires/surveys
 - a. GRI
 - b. SASB
 - c. SDG
 - d. CDP
 - e. TCFD
5. Workiva platform enablement and training
 - a. Basic Workiva platform training (online learning hub)
 - b. Document management and editing training
 - c. Annual roll-forward documentation training
 - d. Data model documentation and training
6. Project management



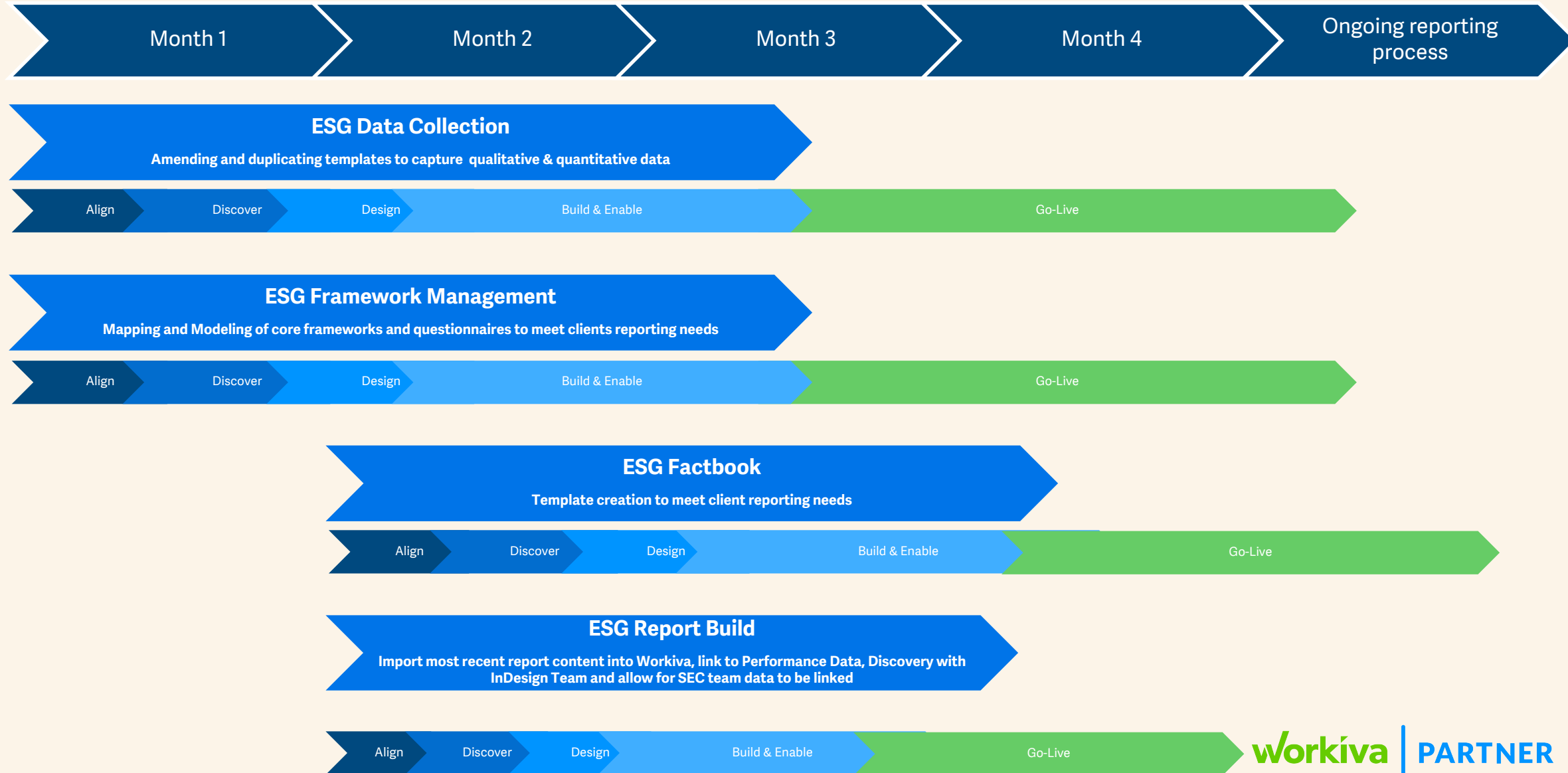
Implementation Planning

Implementation Options & Outcomes

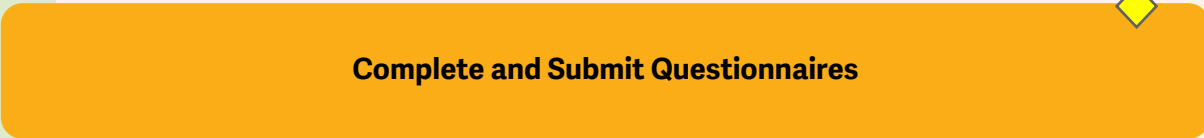
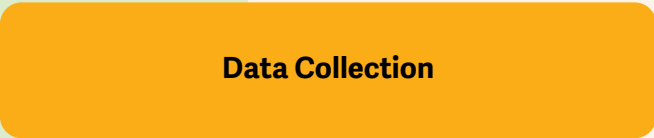
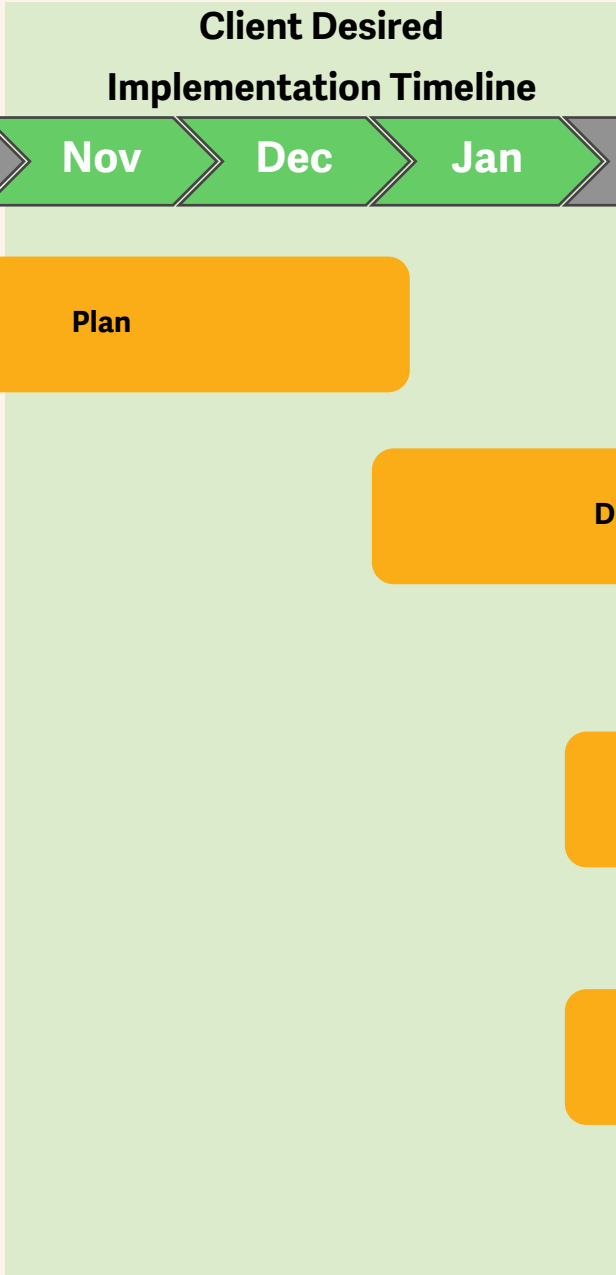
Indicative Example - for discussion

		Accelerated Delivery	Standard Delivery	Advanced Delivery
		5-7 weeks	6-8 weeks	12-14 weeks
Frameworks / Questionnaires <i>(timelines assume customer has documentation of material indicators and a high-level mapping across in-scope frameworks)</i>	2 Frameworks + 1 Questionnaire			
	3 Frameworks + 3 Questionnaires			
Data Collection	No data collection templates			
	Consolidated data collection templates			
	Granular data collection templates			
	Data integration			
Report Output	Report structure/outline only			
	Fully designed report			

Workiva *Implementation Timeline - illustrative*



ESG Reporting Cycle



2021 Reporting Cycle with Workiva

Project Plan Template

Standard project plan template

- Following our stages of onboarding and deliverables breakdown for ESG
- Sequentially structured
- Can be used to delineate responsibilities between client, partner and Workiva
- Dependencies and milestones marked

The screenshot displays an Excel spreadsheet titled "ESG - Project Plan Template - Partners". The spreadsheet is organized into columns for Partner, Working, and Client, with rows detailing tasks, milestones, and dependencies. The table structure is as follows:

	Partner	Working	Client	Dependency
Stage 1	Lead role	Support	Lead role	
Milestone 1.1: Opportunity Won				
1.1.1 Engagement letter or SOW are signed	Partner contracting			
1.1.2 Resourcing assigns relevant resources (Project manager, build experts, ESG SMEs, etc)	Partner resourcing			
Milestone 1.2: Knowledge Transfer				1.1 Completed
1.2.1 Share documentation used during pre-sales (slides, notes, scoping, etc.)	Partner team			
1.2.2 Internal Sync with Workiva team (to potentially include Seller, SE, & CSM)	Partner team			
1.3.1 CSM, Sales and Partner team to prepare Welcome Call deck	Partner team			
Milestone 1.4: Welcome Call with client				1.3 Completed
1.4.1 Walk Client through welcome deck	Partner PM	CSM		
1.4.2 Discuss source documentation PSC list with Client	Partner PM			
1.4.3 Discuss/schedule Weekly Project Status Calls with Client	Partner PM			
1.4.4 Discuss/schedule Discovery Calls with Client	Partner PM			
1.4.5 Request list of workspace admins and initial users to add to workspace	Partner PM	CSM		
Milestone 1.5: Post-welcome call actions				1.4 Completed
1.5.1 Follow-up email with call / meeting schedule summary	Partner PM			
1.5.2 Share source documentation PSC list with Client	Partner PM			
1.5.2 Add users Client Account and Workspace	NA Workiva CSM	CSM		
1.5.3 Prepare and share draft project plan	Partner PM			
1.5.4 Assign users to relevant learning hub sessions	NA Workiva CSM	CSM		
Milestone 1.6: Customer Delivery of Documents (dependent on scope)				
1.6.1 ESG Report				
1.6.2 Data collection templates and source documentation				
1.6.3 ESG Framework mappings and questionnaires				
Milestone 1.7: Schedule training sessions				
1.7.1 Schedule training sessions	NA Workiva CSM	CSM		
Workspace Admin Training	NA Workiva CSM	CSM		
Document Training	NA Workiva CSM	CSM		
Process Admin Training	NA Workiva CSM	CSM		
Data Approver Training	NA Workiva CSM	CSM		
Data Provider Training	NA Workiva CSM	CSM		

Document Request Guide Template

Baseline Document Request Checklist - can be customized with more client specific detail

- Follows the defined breakdown of deliverables
- Provides context around the reason for the Document Requests

1+3. Data Collection & Factbook	2. Frameworks / Standards / Surveys	4. Reporting Outputs	People
<p>3.1. Existing data collection templates that are used for a) quantitative data collection b) qualitative data collection or combined. <input type="checkbox"/></p> <p>3.2. Central factbook in which all collected ESG data is consolidated/stored (if available) <input type="checkbox"/></p> <p>3.3. Guidance on how data collection sheets relate to specific framework indicators (if available) <input type="checkbox"/></p>	<p>2.1. Document and spreadsheet(s) for each scoped framework with full listing of material items for each framework (filled out with prior year's responses if available) <input type="checkbox"/></p> <p>2.2. Document and spreadsheet(s) for each scoped questionnaire/survey with full listing of material items for each framework (filled out with prior year's responses if available) <input type="checkbox"/></p> <p>2.3. Framework-to-framework mapping (if available) <input type="checkbox"/></p>	<p>1.1. Prior year's version of all output reports in scope of the project <input type="checkbox"/></p> <p>1.2. Style guide associated with each output report (i.e. brand guidelines, style sheet) <input type="checkbox"/></p>	<p>5.1. List of key team members on this project with an assigned lead for the following areas: <input type="checkbox"/></p> <ul style="list-style-type: none">• Reports• Frameworks• Data Collection <p>5.2. Prepare overview of periods of downtime, unavailable key team members and holidays <input type="checkbox"/></p>
<p>Note(s)</p> <ul style="list-style-type: none">• If some of these items are combined in a single file, please provide your Workiva team with sufficient information to locate each individual item.	<p>Note(s)</p> <ul style="list-style-type: none">• If some of these items are combined in a single file, please provide your Workiva team with sufficient information to locate each individual item.	<p>Note(s)</p> <ul style="list-style-type: none">• If no prior year example exists, please provide draft/template/skeleton structure of report• Please provide in editable format (.docx)	

ESG Deliverable Workstreams

1. Data Collection

2. Frameworks / Standards / Surveys

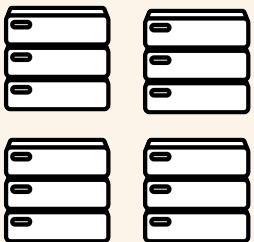
3. Factbook

4. Reporting Outputs

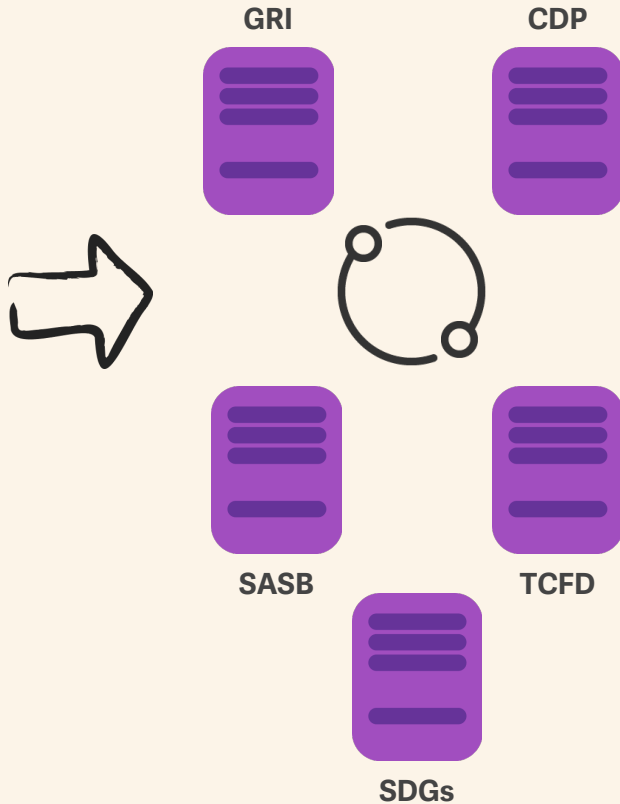
1.1 Unstructured Data



1.2 Source System Connections

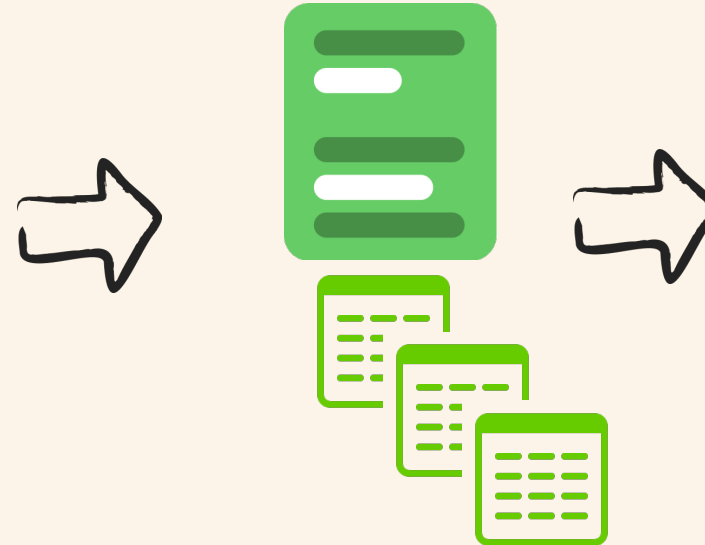


2.1 Framework Content & Data Mapping

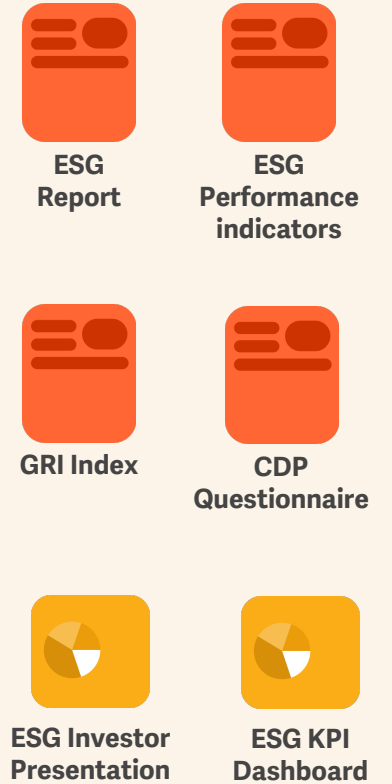


3.1 Central Factbook

Performance tables & Indices



4.1 Reports



Names of reports, frameworks, questionnaires and standards above are examples and not representative of the scope of the project.

Process flow in Workiva - Technical

ESG TEMPLATE (as basis / customization per project)

CUSTOM

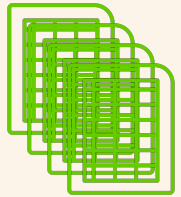
Gather



Processes: Data Owner Notification and Tracking



Framework Mapping



Data Collection Templates



Structured data sources

Organize



Framework Mapping Table



Data Aggregation Table(s)



Aggregation Query

Review



ESG Fact Book Spreadsheet



GRI Framework



SASB Framework



TCFD Framework



SDG Framework



CDP Questionnaire

Consume

- Pre-built templates for core frameworks and KPI/Performance Tables
- All data provided through connected sheets with mapping applied - Single Source of Truth

7



Final Report(s)

- CSR Report
- Individual Framework/Questionnaire
- Internal Dashboards/KPI Trackers



CDP XLS Submittal
SS Export → CDP Portal

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Data Collection

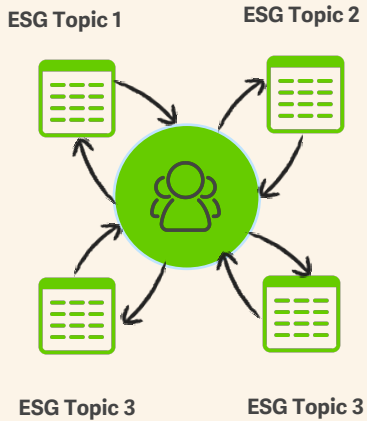
1. Data Collection

2. Frameworks / Standards / Surveys

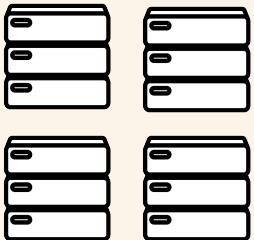
3. Factbook

4. Reporting Outputs

1.1 Unstructured Data



1.2 Source System Connections



1. ESG template data collection and workflow

- Conduit to store and tag collected data
- Connected Processes will kick off the data collection with an email to the data provider
- Permissioned Granular data collection templates being mapped at the disclosure level
 - 1-1 data points used to populate disclosures
- Typically, what you see reported in a framework index or summary table, flexibility to get more granular
- ESG Data Lakes or source system confirmation
 - Using source system data reports as the starting point
 - Further data manipulation in Wdesk

2. Performance indicator data points

- Breakdown of above mentioned aggregated data points
- Typically, represented in performance report tables
- Require more prescribed data collection mapping
- Will need to be created on the basis of client provided examples (per project)
- Example: GHG calculation

Frameworks/Standards/Surveys

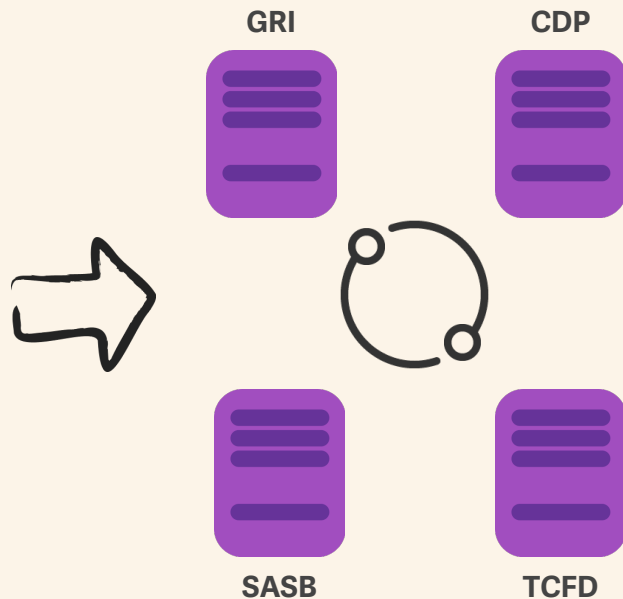
1. Data Collection

2. Frameworks / Standards / Surveys

3. Factbook

4. Reporting Outputs

2.1 Framework Content & Data Mapping



Frameworks

Proprietary Framework mapping guidance on core five partner frameworks and questionnaires:

- GRI, SASB, TCFD, CDP, SDG

Questionnaire and Customizable Mapping Template build out with client; examples:

- Ecovadis, DJSI, Bloomberg, etc.

Disclosure level mapping with the ability to add custom granularity

- Disclosure Level mapping
 - Ready to report numbers; aggregated numbers
 - Less room for interpretation
- Data point mapping - custom addition
 - Time-consuming - Most prescribed level of data
 - Adding tags from the Data Collection template to the framework mapping items Spreadsheet

Factbook

1. Data Collection

2. Frameworks / Standards / Surveys

3. Factbook

4. Reporting Outputs

ESG Fact Book

This will be used to stage the all types of data collected including:

- Metric specific data points, one level deeper than the disclosure level
- Disclosure level data, used to satisfy framework disclosures and questionnaires

This goes hand in hand with the (custom) granular data collection sheets we set up for clients per project - the level of data that is reported needs to be accounted for in what the data collection can facilitate.

3.1 Central Factbook

Performance tables & Indices



Consists of the following elements:

- Connected Sheet to aggregation query
- Ready to link Framework Indices utilizing formulas from the connected sheet
- KPI and Performance table templates - enable clients to generate key tables
- Ad-hoc Query templates - can be used to extract data for ad hoc data requests, agnostic of framework
- Mapping across frameworks

Reporting Outputs

1. Data Collection

2. Frameworks / Standards / Surveys

3. Factbook

4. Reporting Outputs



4.1 Reports

Two types of report builds and outputs:

1. InDesign focused build:

- Foundational build focusing on reoccurring indices, tables, graphs and narratives
- Important factors: Outline and Style Guide
- Client's design team will have the ability to export an InDesign file for seamless Workiva → Design Formatting
- Build utilizes consulting hours for a basic build

2. Full Document Set-up:

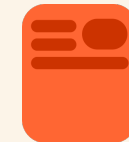
- Used for ESG reports that are light on formatting
- Common in emerging clients
- COA ticket for Doc Set-up
- **Some copywriting partners may own document set-up and formatting



ESG
Report



ESG
Performance
indicators



GRI Index



CDP
Questionnaire

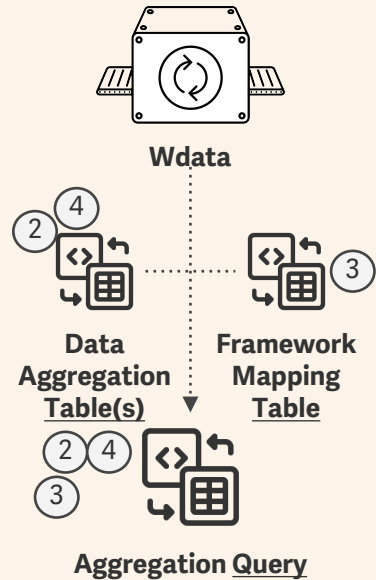


ESG Investor
Presentation



ESG KPI
Dashboard

Process flow in Workiva - Technical - Wdata



Core Components of Wdata Build

Primary Data Collection table

- A single table where we capture all data points based on unique codes; queries will distinguish between qualitative and quantitative data

Framework Items table

- Single table that takes in the Framework Mapping sheet as a dimension set
- Flexibility to seamlessly add custom framework mapping on top

Aggregation and Mapping Query

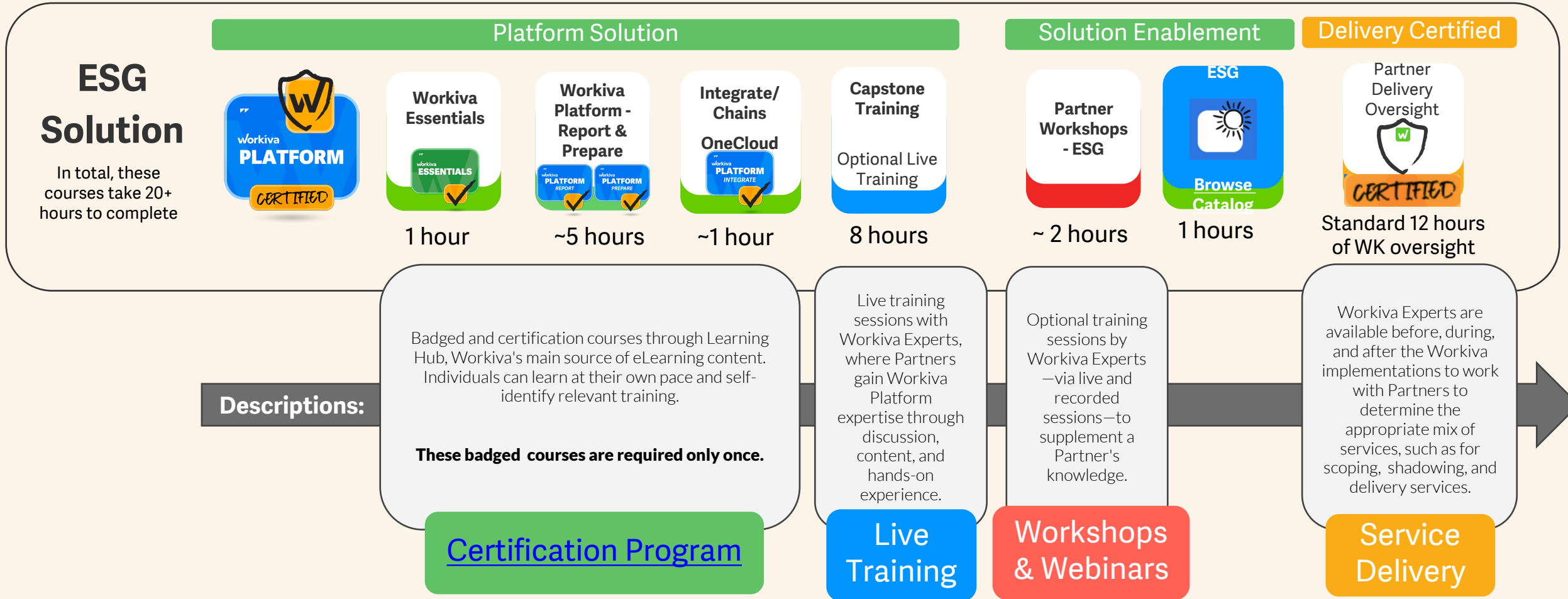
- Single Query to aggregate data and another to display mapping across frameworks
- Investigate if additional queries are needed for more granular data / source system data for fact book

Drilldown and Period-over-period Views

- Prebuilt Views to help with the drill-down of current and prior data

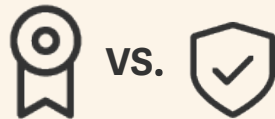
Workiva | Partner Enablement

For both functional and implementer roles, the learner progression is as follows:



Badges

Awarded for successfully completing each course outlined in a learning path to signify an individual's time and effort to increase their Workiva acumen.



Certification

Awarded for successfully passing a certification exam after a learning path is completed to signify an individual's demonstration of applied skills/competencies.

-Question-

