

Welcome!

The Partner Workshop will begin at 2 p.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

Private Company Financial Reporting in the Workiva Platform

Josh Gertsch
Director of Product
Marketing
Workiva

Amanda Ellsworth
Senior Product
Marketing Manager
Workiva

Jake Akers
Senior 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

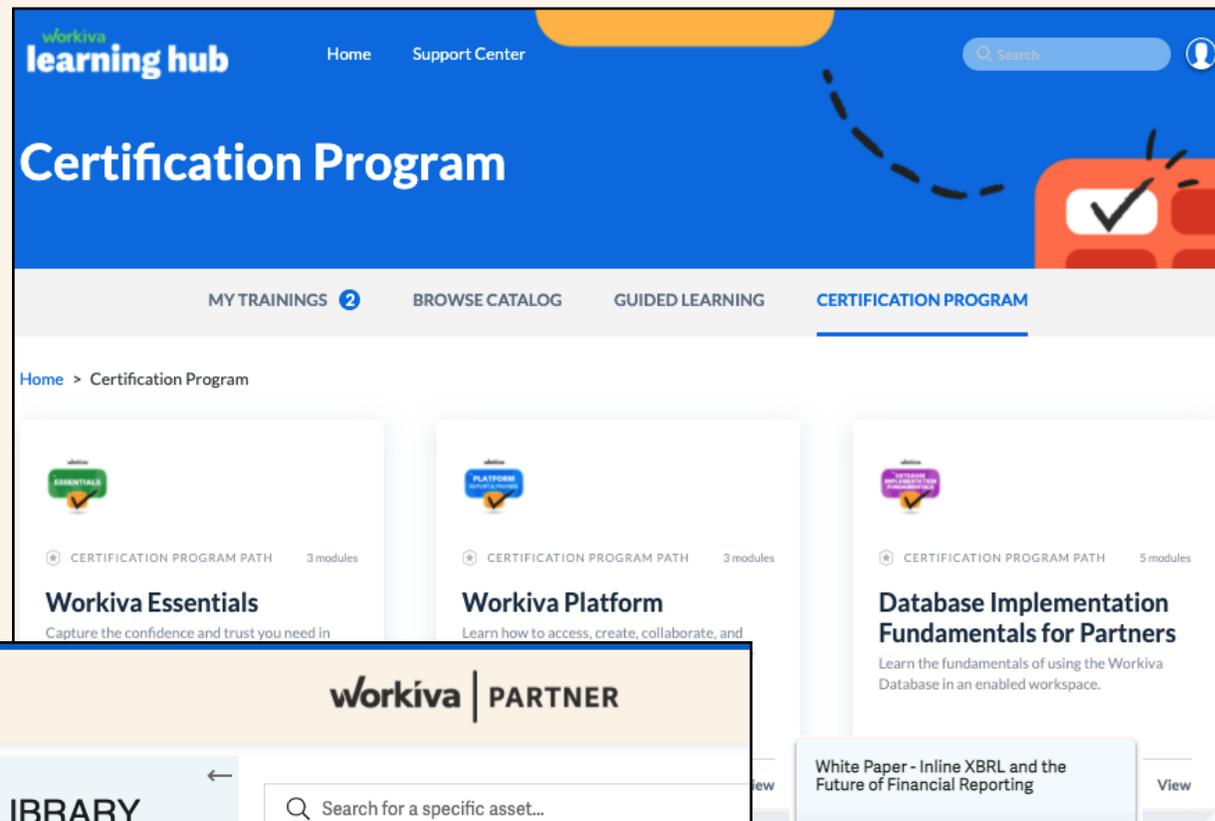
Thursday, November 11 at 2 p.m. ET

Management Reporting in the Workiva Platform

Other Training Opportunities

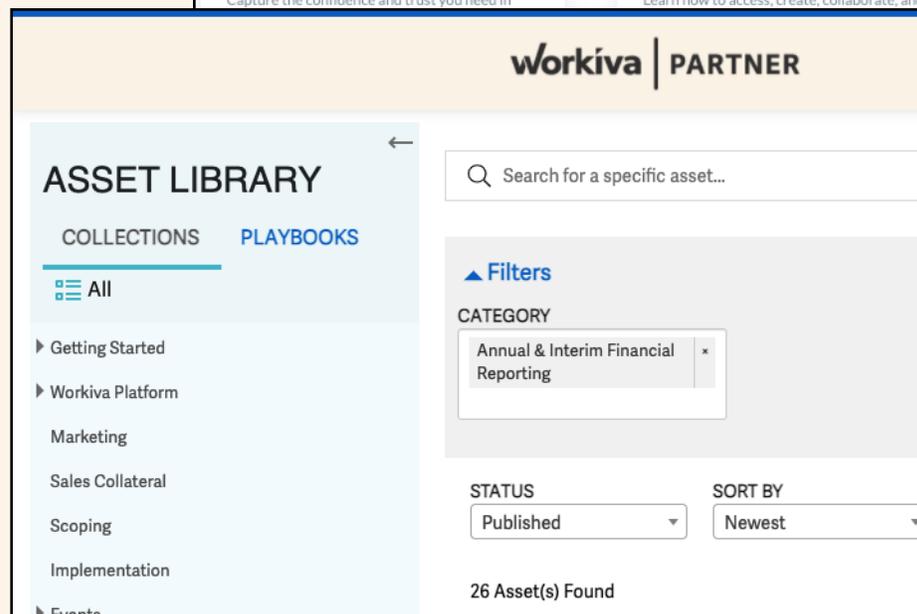
1 [Learning Paths](#) | Certification Program

- Workiva Essentials
- Workiva Platform
- Wdata



2 [Partner Portal](#) | Asset Library

- Partner Workshops
- News & Updates



partnersupport@workiva.com

Q&A



Mute



Stop Video



Participants



Chat



Share Screen



Record

Send your question to "Everyone"



To: **Everyone** ▾

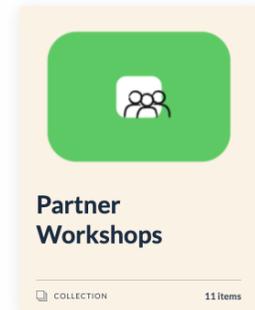
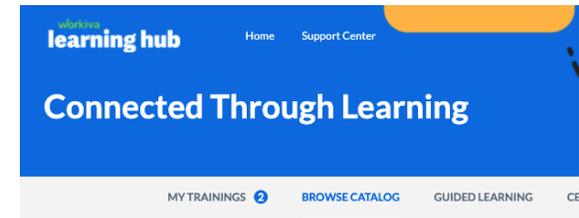
Type message here...



File



Click here



Today's Speakers



Josh Gertsch

Director of Product Marketing



Amanda Ellsworth

Senior Product Marketing
Manager



Jake Akers

Senior Solution Engineer



Agenda

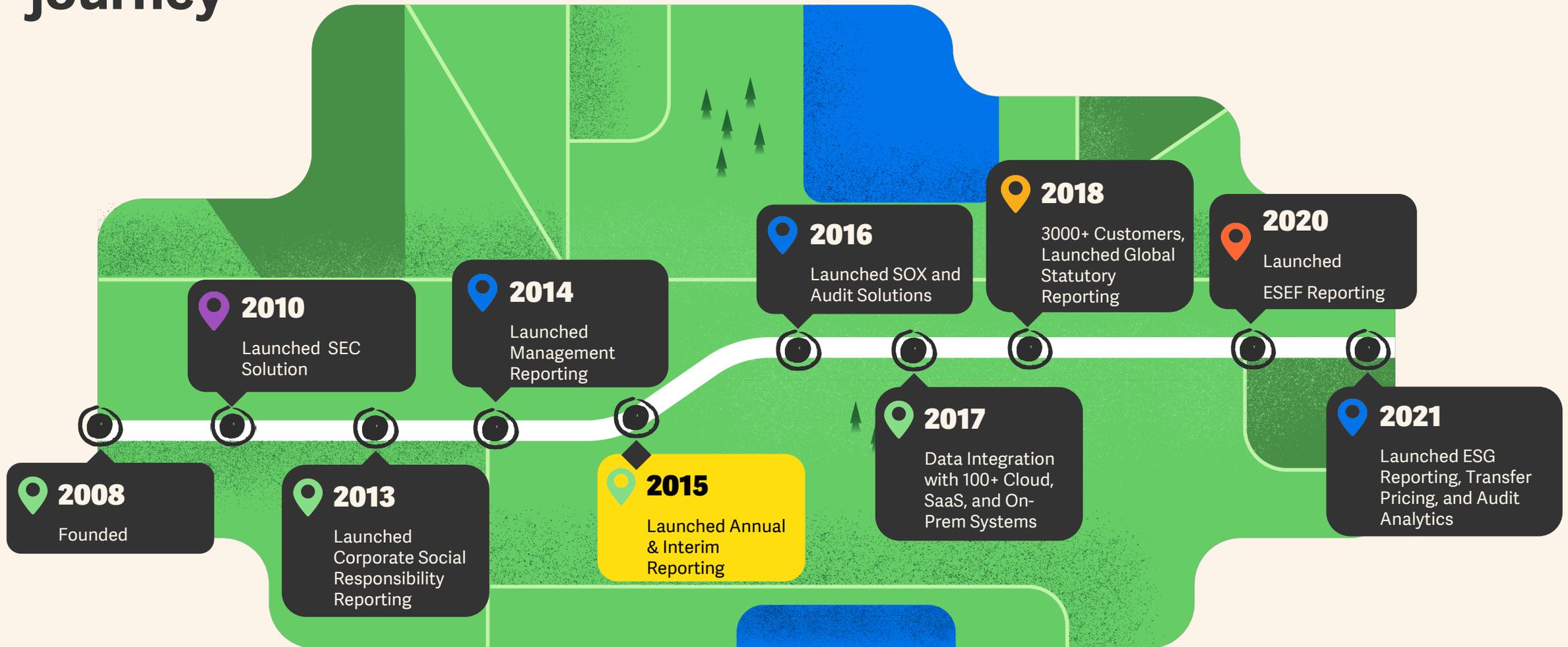
 **1** Annual & Interim Reporting Solution

 **2** Solution Positioning

 **3** Partner Involvement

 **4** Demo

An amazing journey

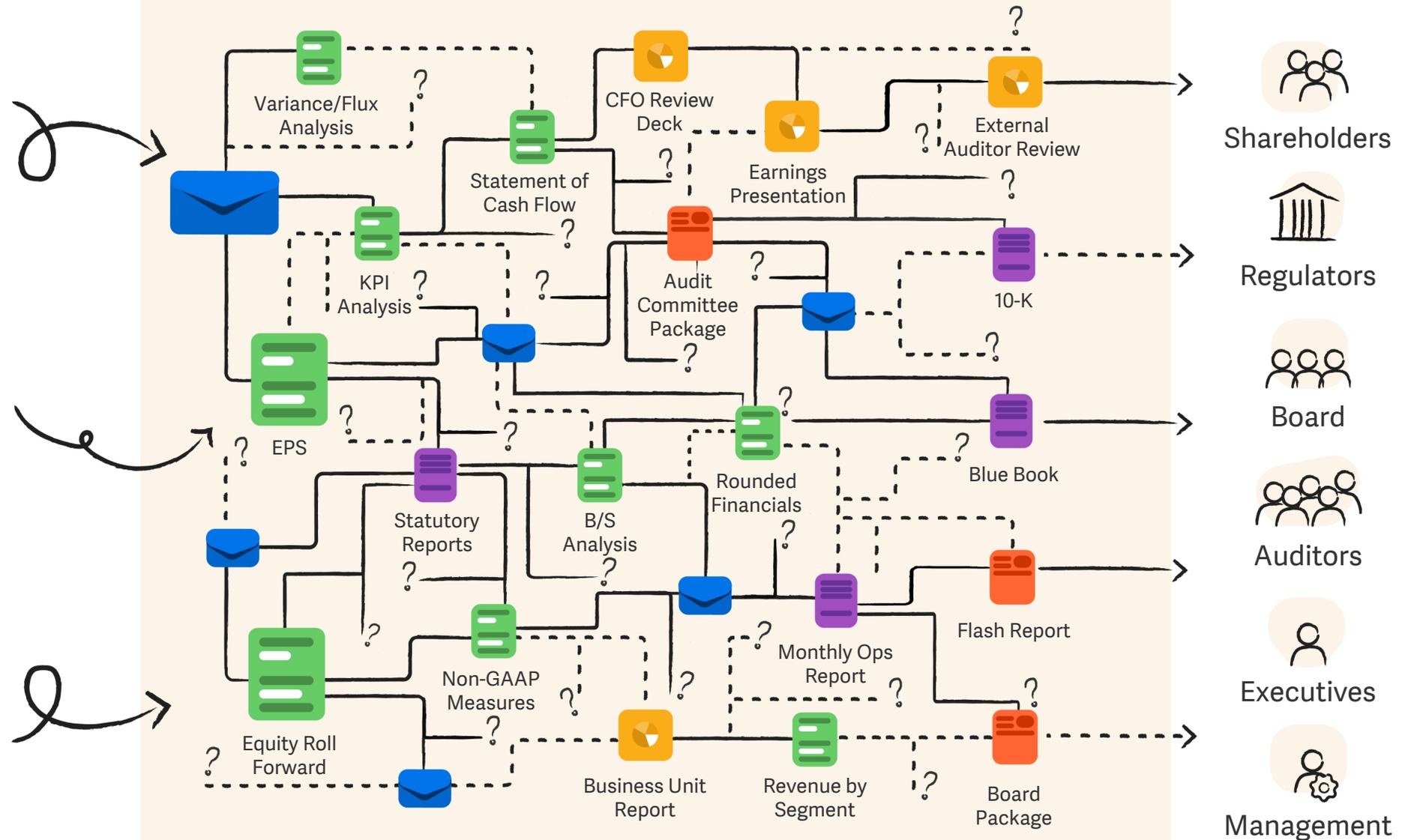




A&I Solution

Complexity...

Record Close Consolidate Analyze Report Stakeholders



Future state

Record

Close

Consolidate

Analyze

Report

Stakeholders

ORACLE®

SAP®

workday.

BLACKLINE

salesforce

workiva®

Connected and Transparent



Collaborative,
Consistent, Continuous



Shareholders



Regulators



Board



Auditors

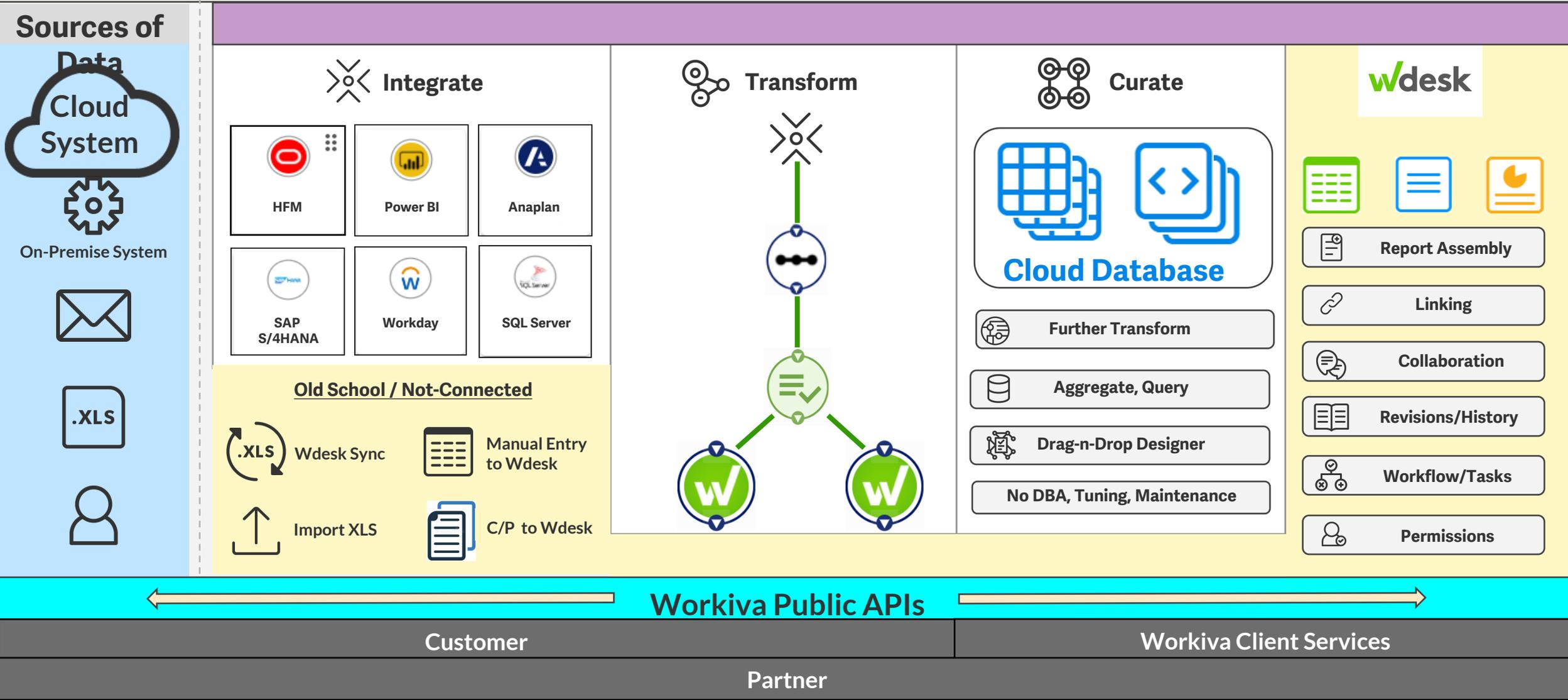


CEO



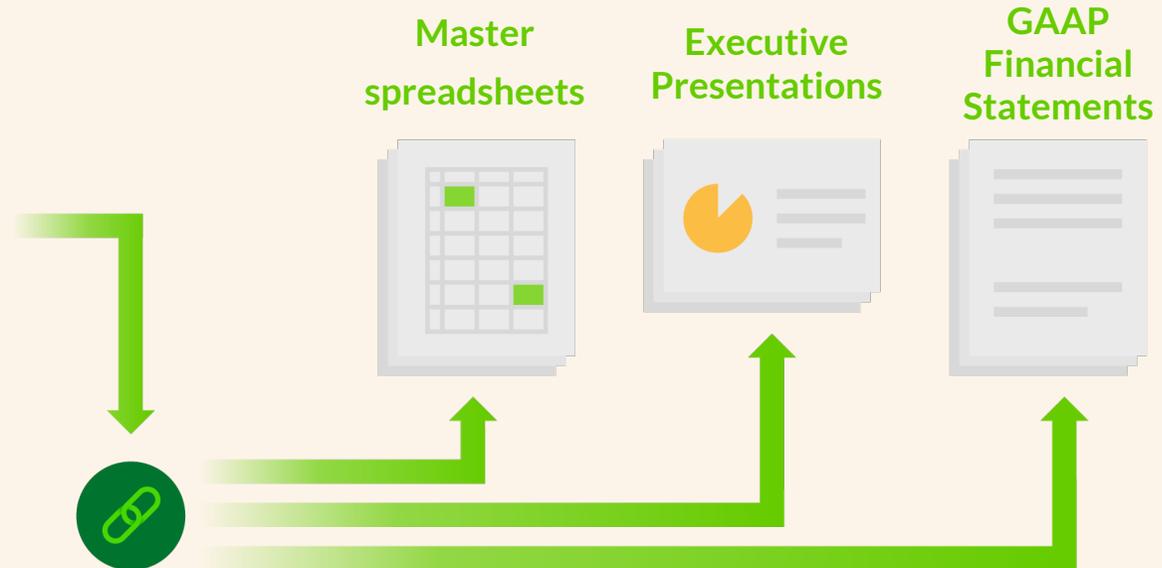
Management

Workiva Platform for Connected Reporting



Streamline Financial Reporting with Workiva

Insurance	Country A		
	2017	2018	Variance
Life	\$ 366	\$ 374	\$ 8
Property	\$ 365	\$ 220	\$ (145)
Other	\$ 874	\$ 5,448	\$ 4,574
Total	\$ 1,605	\$ 6,042	\$ 4,437



- **Dynamic documents**
- **Automate routine processes**
- **Complete audit trail**
- **Easy-to-use and familiar**

- **Control collaboration across teams**
- **Version control and content management**
- **Customized professional services and support**
- **Multiuse business reporting platform**

The Workiva Connected Platform

Powerful tools



Spreadsheets



Documents



Presentations



Data preparation

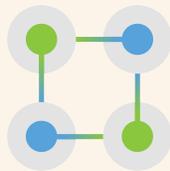
Connectivity and Automation



Office importers



APIs & Connectors



Process Builder



Linked data

Advanced Capabilities



Direct
Commenting



Real time
Collaboration



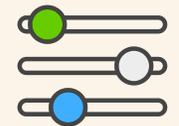
Tasking



Audit Trail



Support
documentation

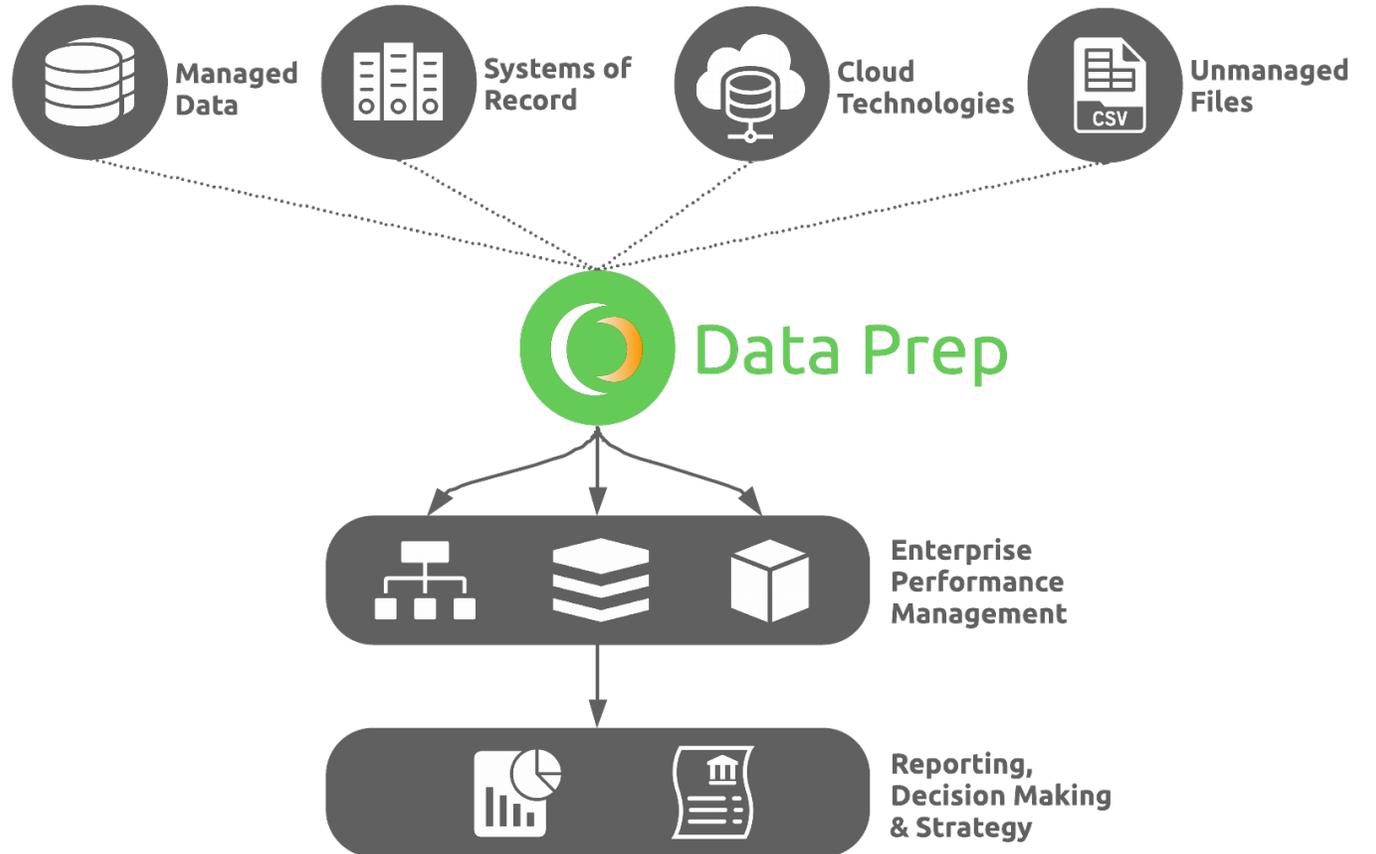


Security and
Control

How Does the Acquisition of OneCloud's Technology Assist Workiva in the R2R Process?

- ✓ With **Workiva Integration Chains**, business users can easily and securely build powerful integration and automate workflow.
- ✓ With **Workiva Data Prep**, business users have access to an easy, intuitive, and interactive interface to harmonize data between systems.

Integration Chains





Solution Positioning

Workiva from Private to Public

Private

IPO

Public



Financial Reporting + Management Reporting

Ensure accuracy and efficiency

Connect data across quarterly and annual reports, investor reports, board presentations, CFO decks, and more



IPO Planning and Execution

Streamline your IPO

Create a secure workspace for your external advisors and enable a faster S-1 filing



SEC Reporting

File with confidence

Trust the market leader in SEC reporting—support for 357 form types including 10-Q/10-K, 20-F/40-F, 6K/8K, proxy, investor relations, Section 16, and more



SOX Readiness Assessment

Modernize your risk assessment

Leverage a framework for risk and controls



Capital Market Transactions

Faster, more accurate deals

Reduce risk in M&A transactions, debt and equity offerings, and other '33 Act deals with 24/7 service throughout drafting, filing, printing, and distribution

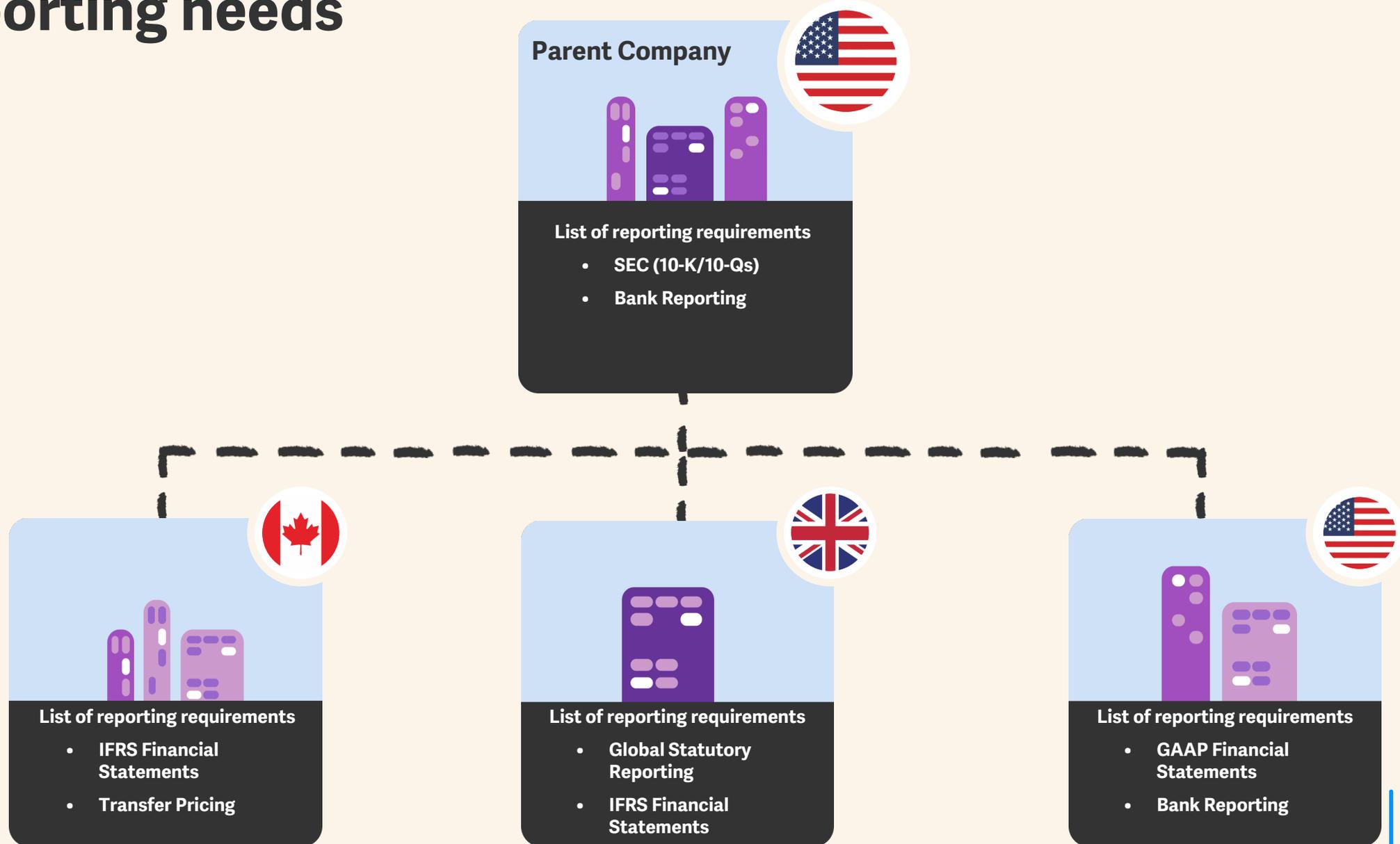


SOX Compliance

Manage risk

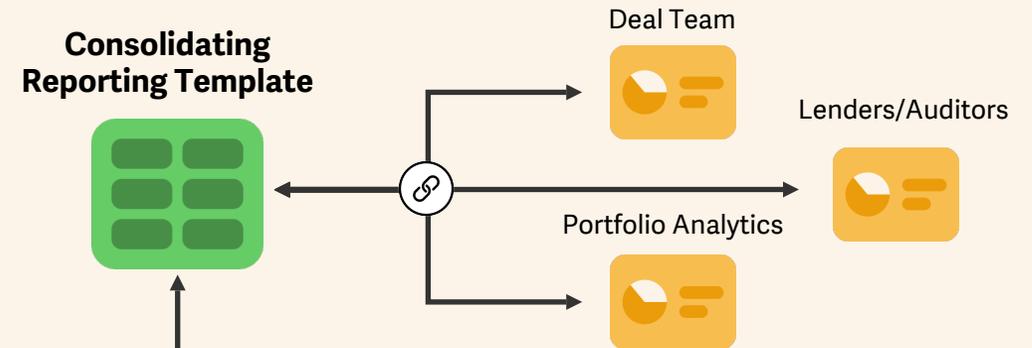
Document workflow, evidence, and certifications for complete transparency and audit defense

Workiva can help with standalone financial reporting needs

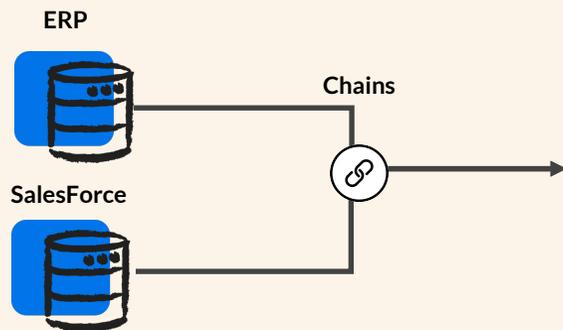


Future state with Workiva streamlines reporting to all portfolio company and private equity stakeholders

Private Equity (Owner) Reporting



PortCo Reporting



workiva

Mapped Tables



Queries



Reporting Data Spreadsheet

PortCo Reporting

BoD



Mgmt Reporting



Lenders/Auditors





Partner Involvement

Partners are Critical to Success!

Consulting



- Understand Business Objectives & Goals
- Technology GAP Assessment
- End-to-end Process Design

Sales



- Value Proposition
- Scoping
- Pricing & Packaging
- Product & Service Delivery Timeline
- SOW

Integrations



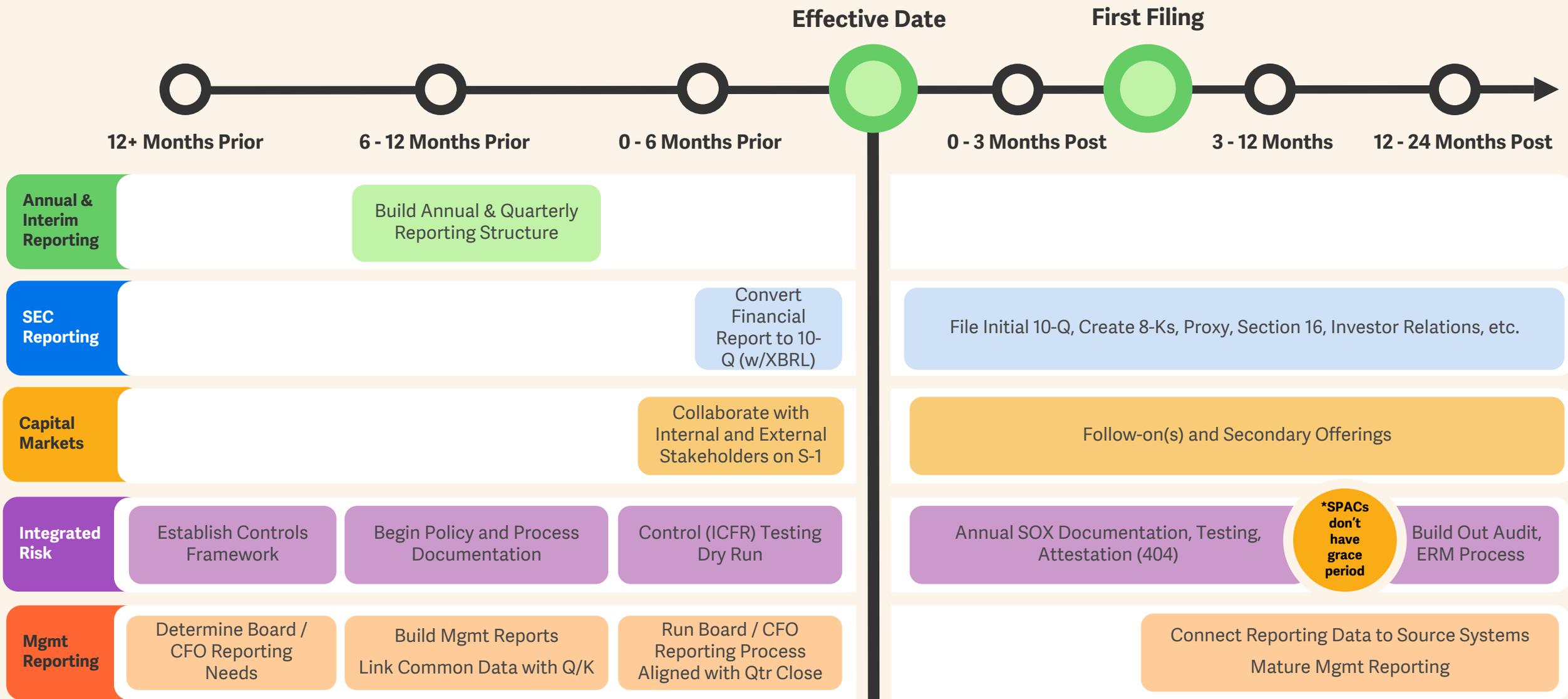
- Project Plan
- Carry out solution model design
- Assignment of Project Resources
- Host solution delivery & walk through with customer

Enablement



- Customer Welcome & Onboarding
- Re-confirm aims, objectives, and targeted outcomes
- Workshops

Example Private to Public Journey with Workiva



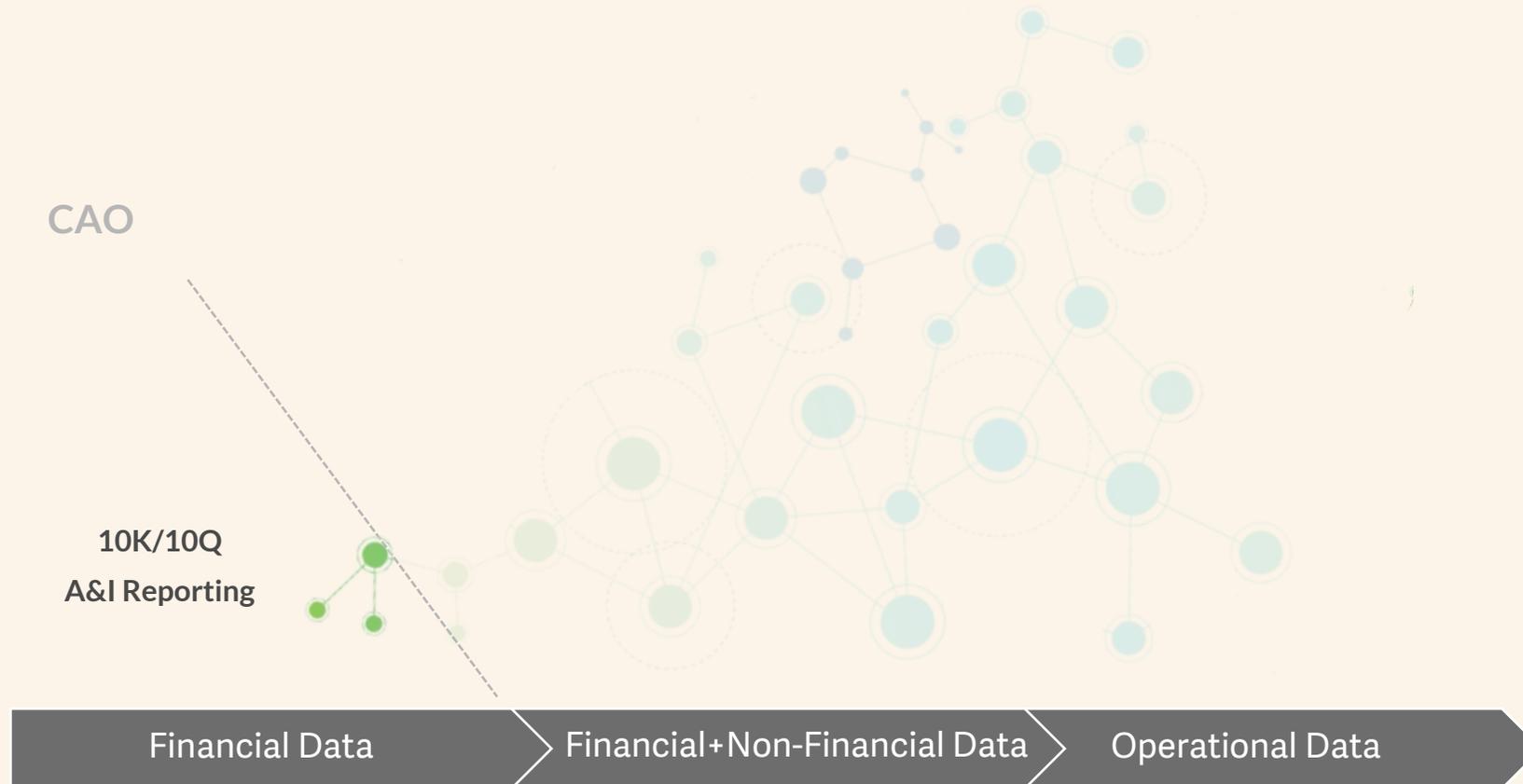
*Emerging Growth Companies have separate, longer grace periods for Integrated Risk via SPAC deals



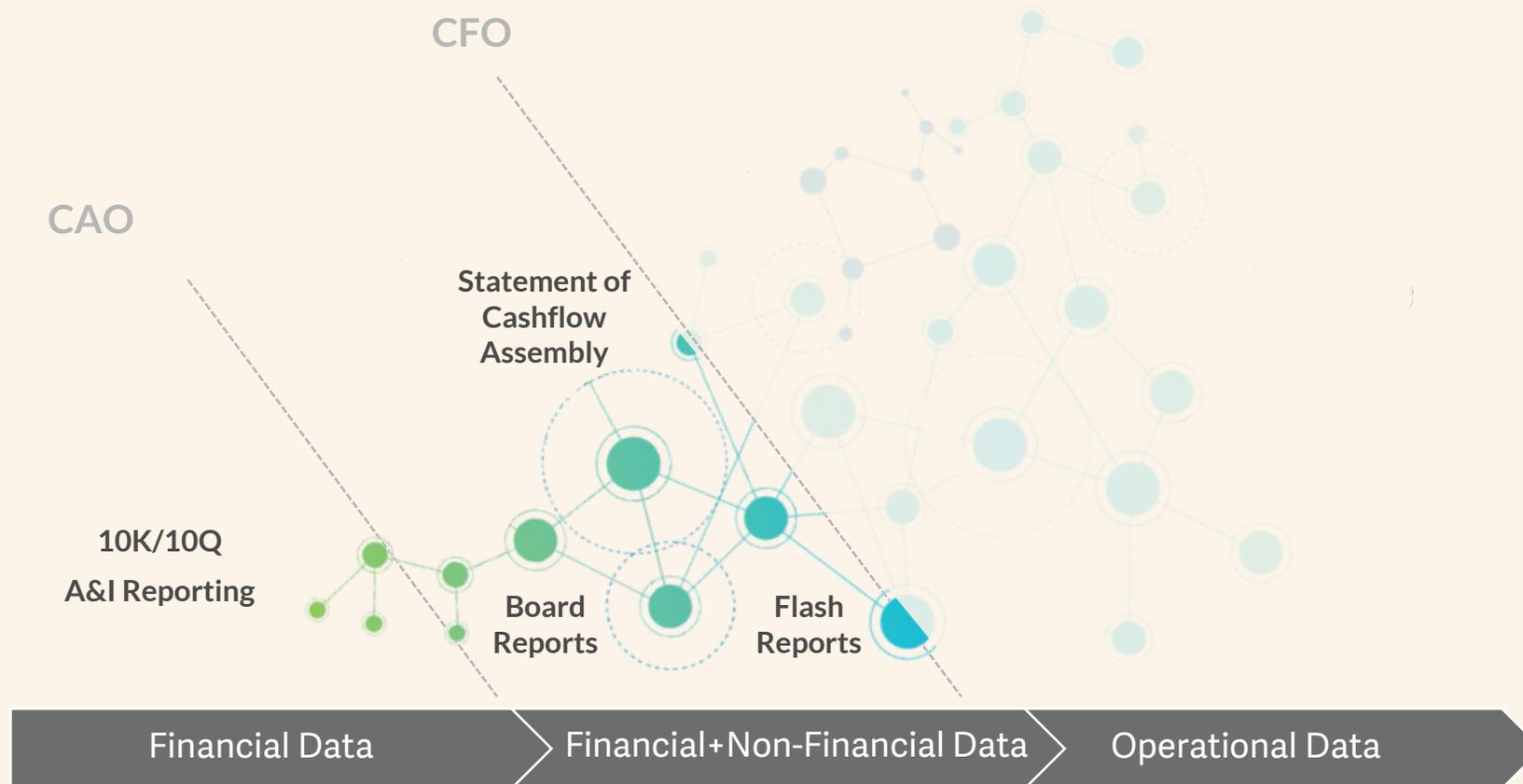
Our unified cloud platform: data, workflow, and reporting



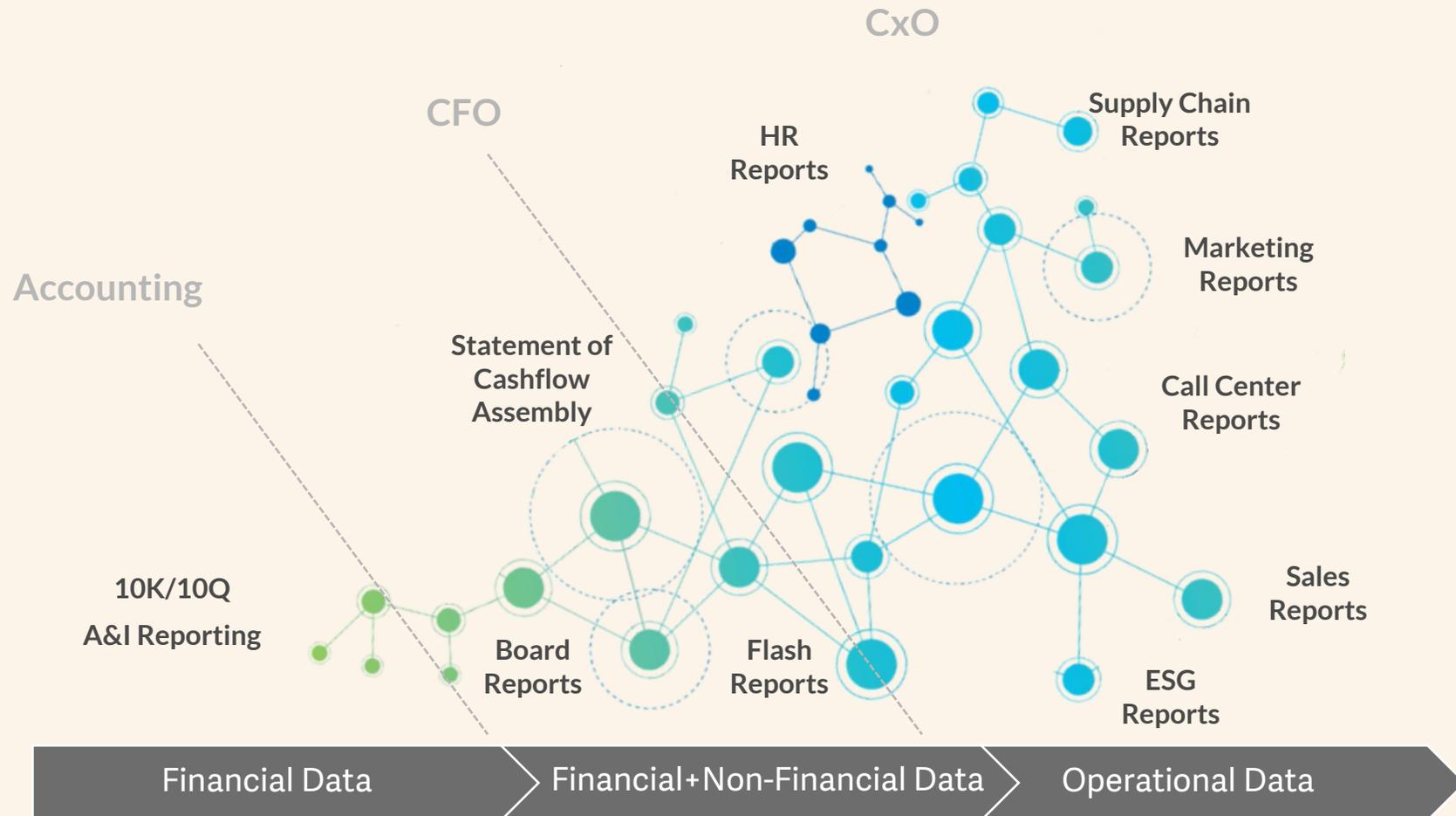
It all started by delivering real transformation and value



Leveraging network effects to expand into teams



Extending the same benefits beyond the CFO



Demo