

# 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

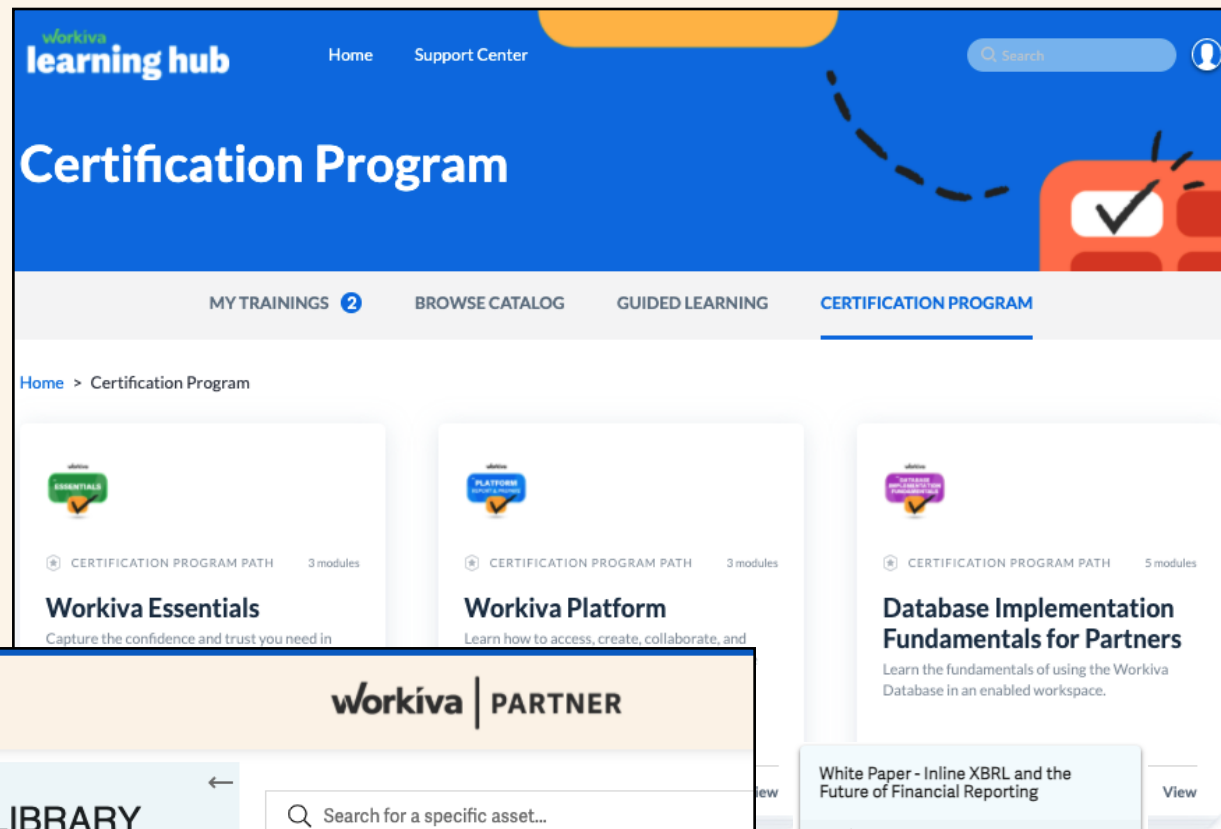
**Thursday, November 11 at 2 p.m. ET**

Management Reporting in the Workiva Platform

# Other Training Opportunities

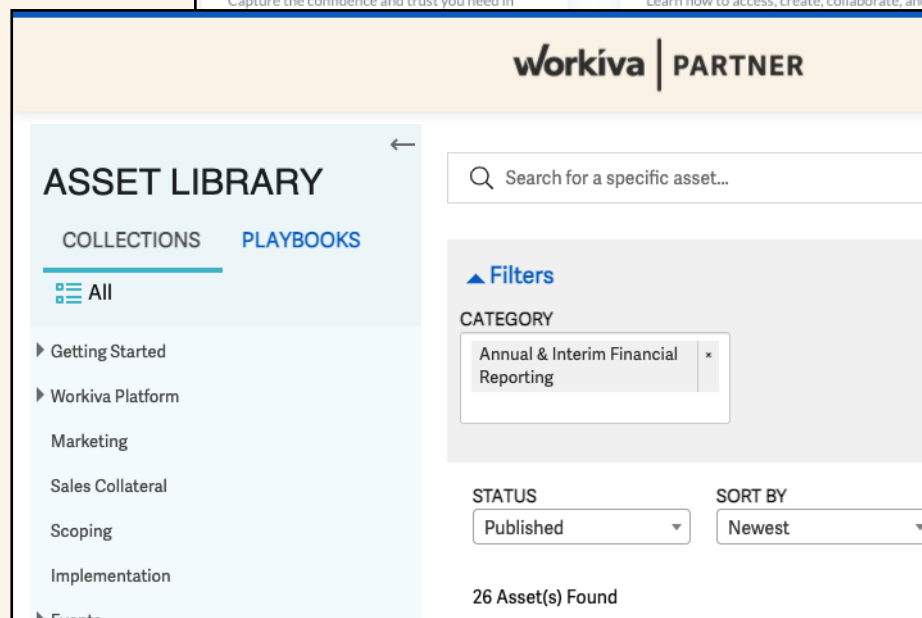
## 1 [Learning Paths](#) | Certification Program

- 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"

2

To: **Everyone** ▾

Type message here...

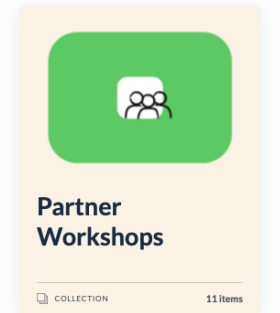
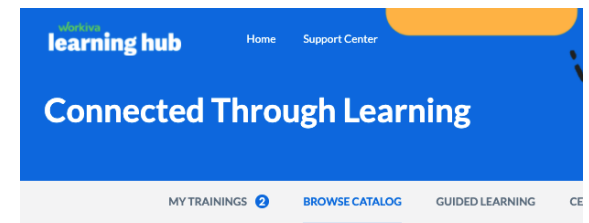


File



1

Click here



# Today's Speakers



**Josh Gertsch**

Director of Product Marketing



**Amanda Ellsworth**

Senior Product Marketing  
Manager



**Jake Akers**

Senior Solution Engineer



# Agenda

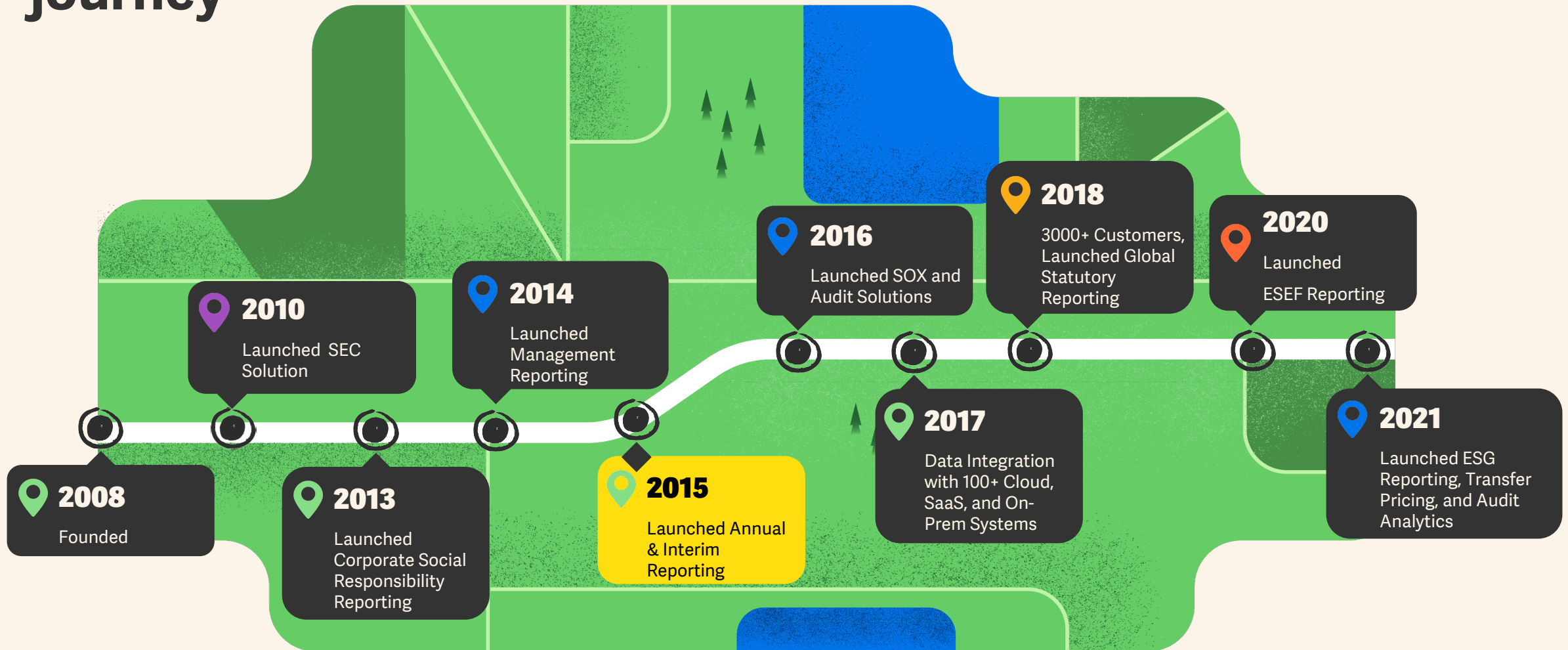
**1** Annual & Interim Reporting Solution

**2** Solution Positioning

**3** Partner Involvement

**4** Demo

# An amazing journey







# A&I Solution

# Complexity...

Record    Close    Consolidate    Analyze    Report    Stakeholders

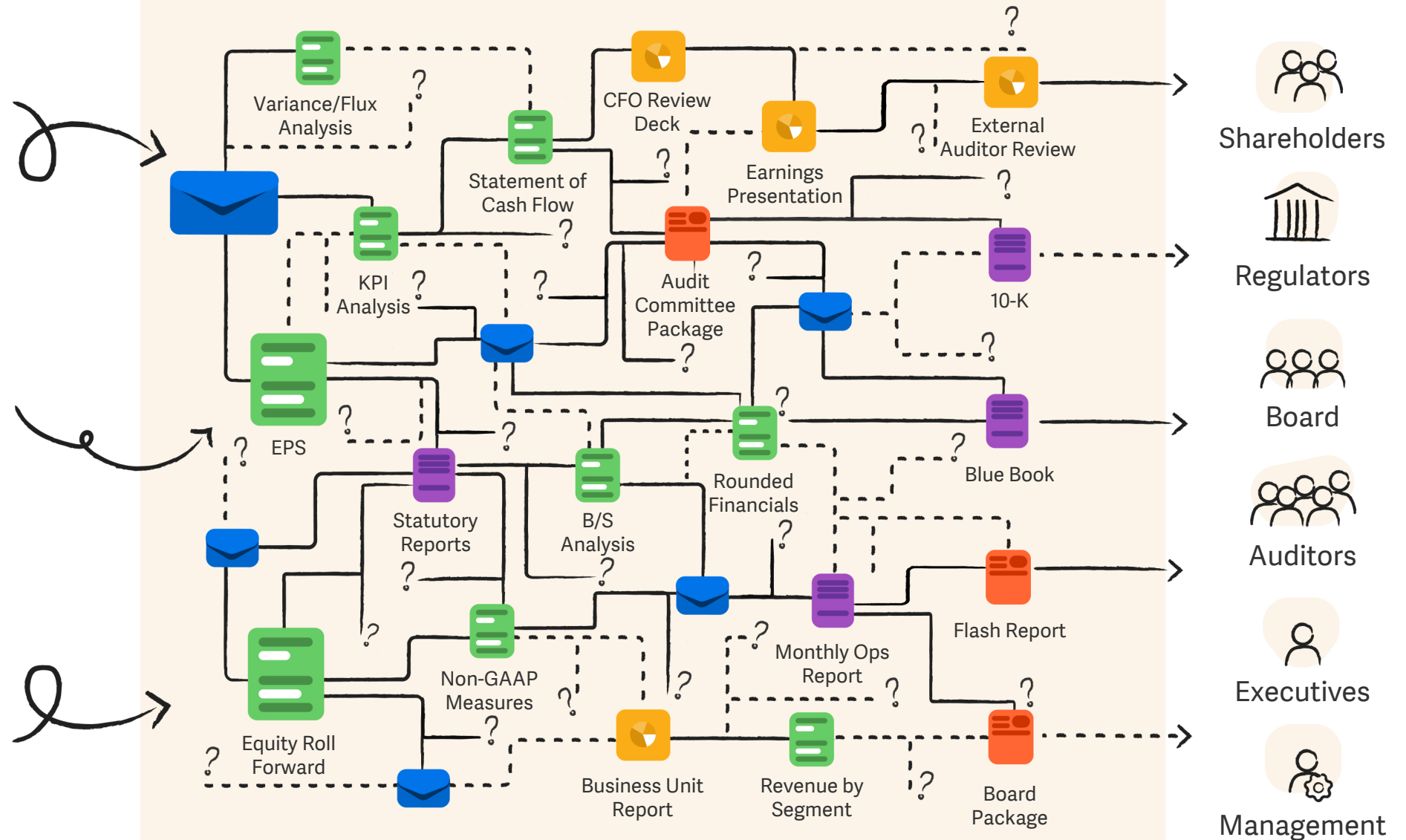
ORACLE®

SAP

workday.

BLACKLINE

salesforce



# Future state

Record

Close

Consolidate

Analyze

Report

Stakeholders

ORACLE®

SAP®

workday.

BLACKLINE

salesforce

workiva®

Connected and Transparent



Collaborative,  
Consistent, Continuous



Shareholders



Regulators



Board



Auditors

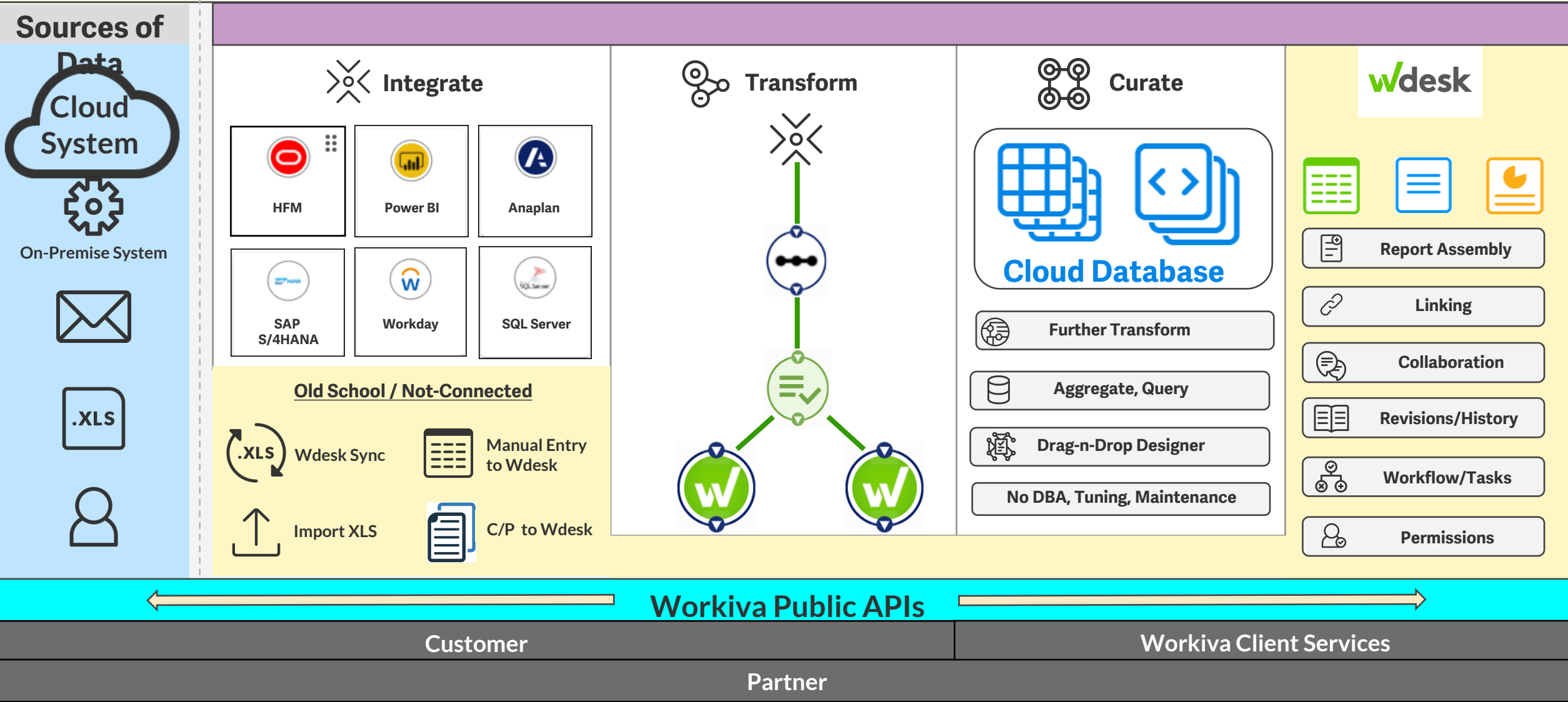


CEO



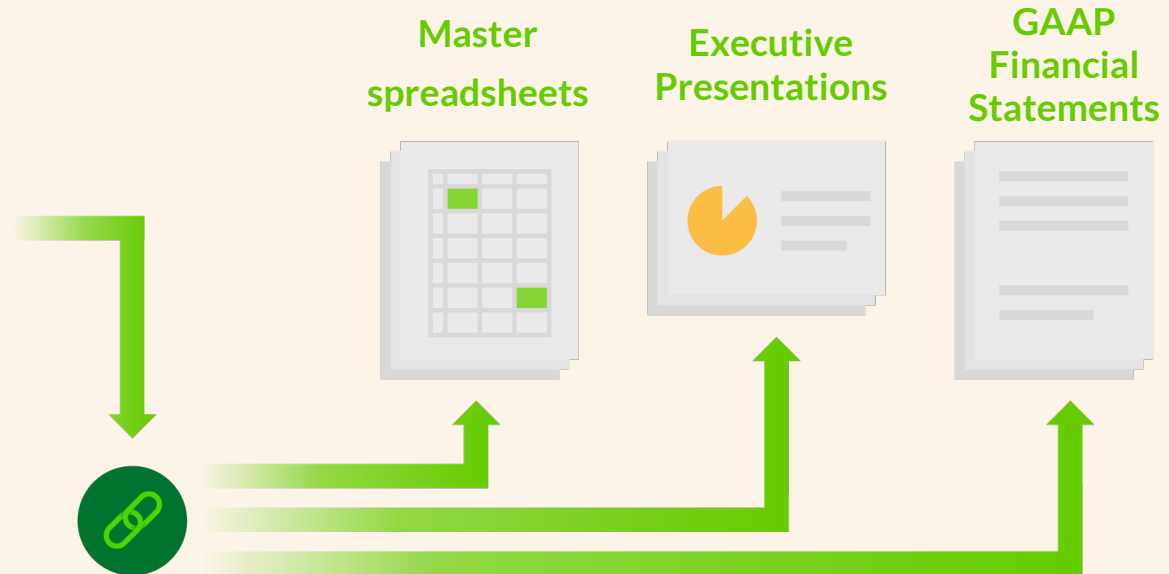
Management

# 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        |
| <b>Total</b> | <b>\$ 1,605</b> | <b>\$ 6,042</b> | <b>\$ 4,437</b> |

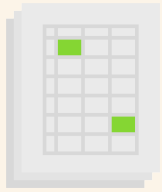


- **Dynamic documents**
- **Automate routine processes**
- **Complete audit trail**
- **Easy-to-use and familiar**

- **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

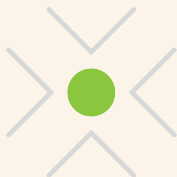


Data preparation

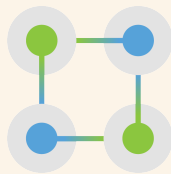
## Connectivity and Automation



Office importers



APIs & Connectors



Process Builder



Linked data

## Advanced Capabilities



Direct  
Commenting



Real time  
Collaboration



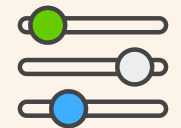
Tasking



Audit Trail



Support  
documentation



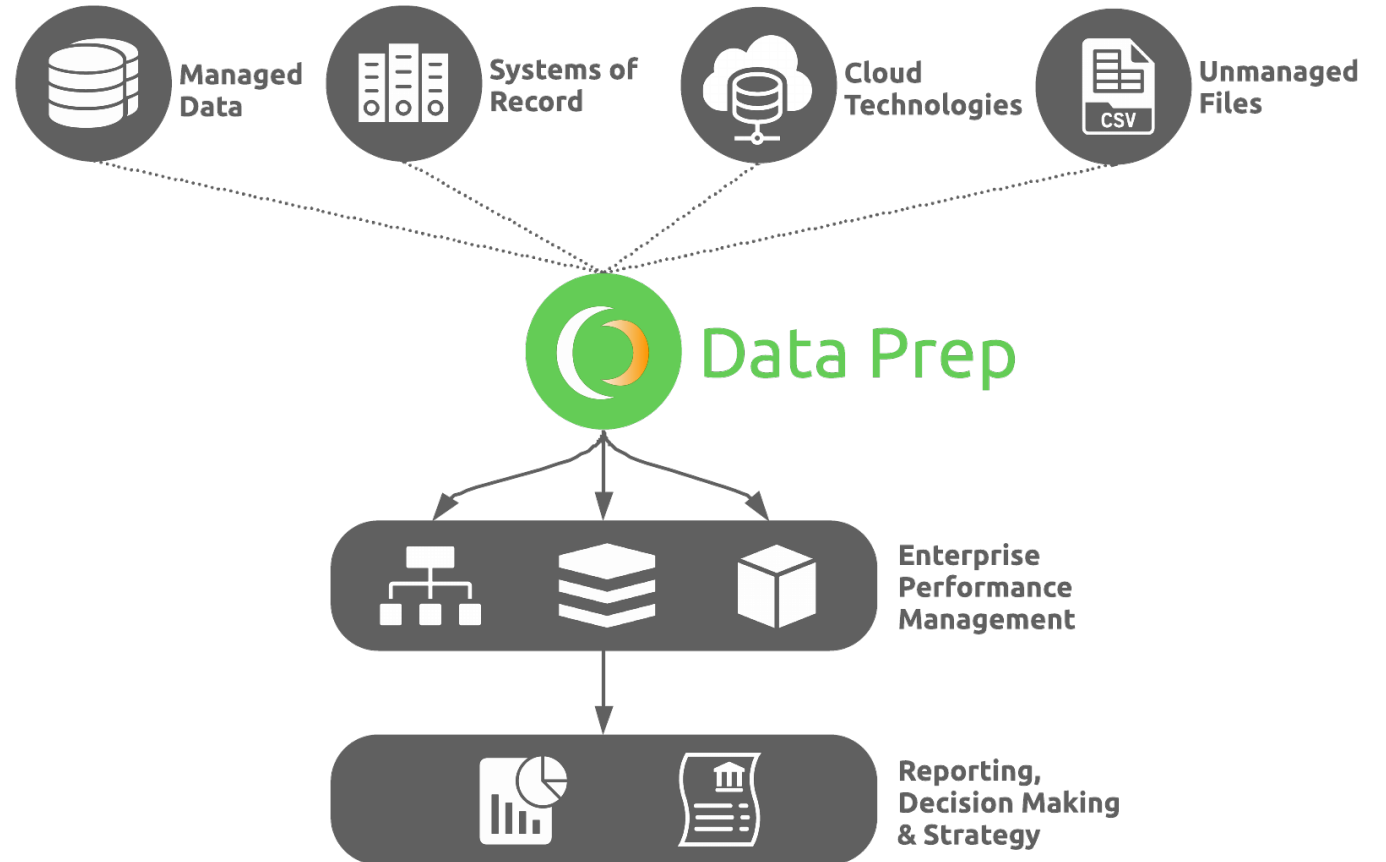
Security and  
Control

# 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

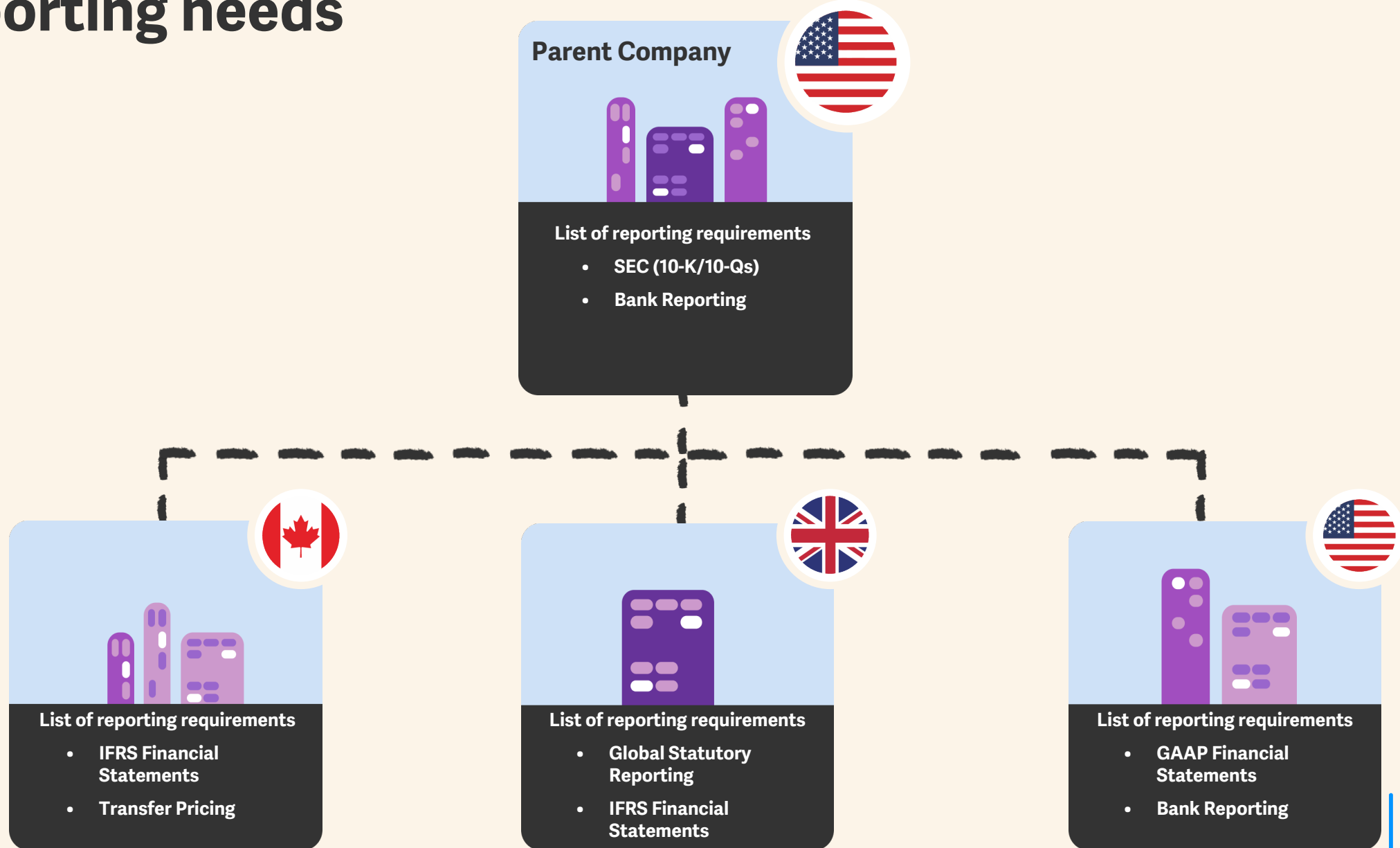


## SOX Compliance

### Manage risk

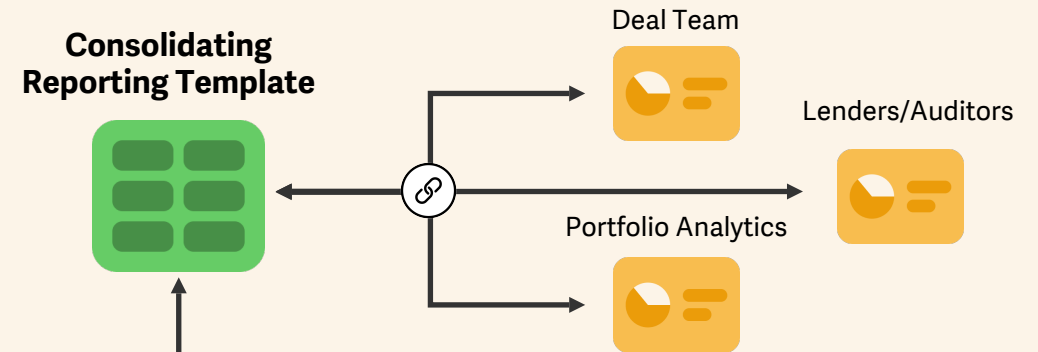
Document workflow, evidence, and certifications for complete transparency and audit defense

# Workiva can help with standalone financial reporting needs

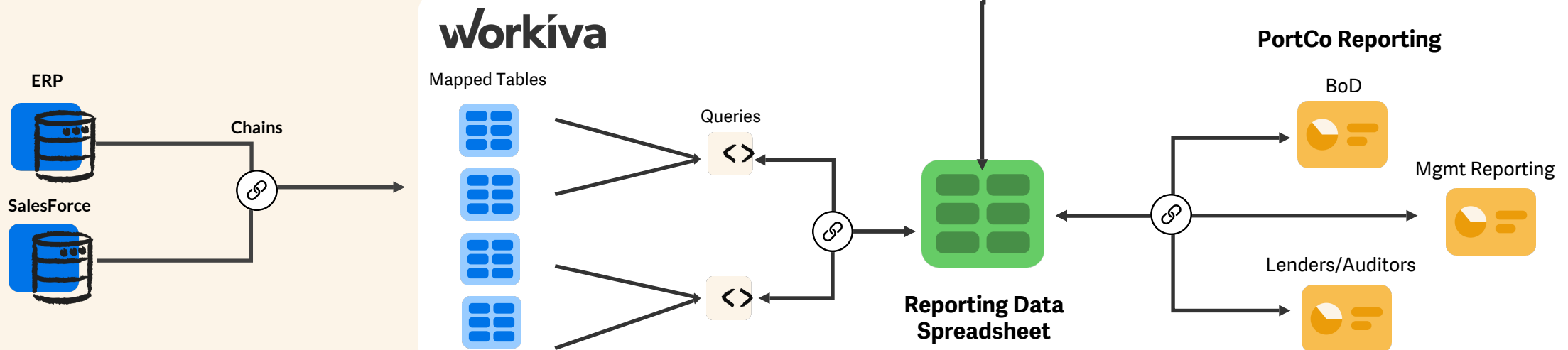


# Future state with Workiva streamlines reporting to all portfolio company and private equity stakeholders

## Private Equity (Owner) Reporting



## PortCo Reporting





# 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



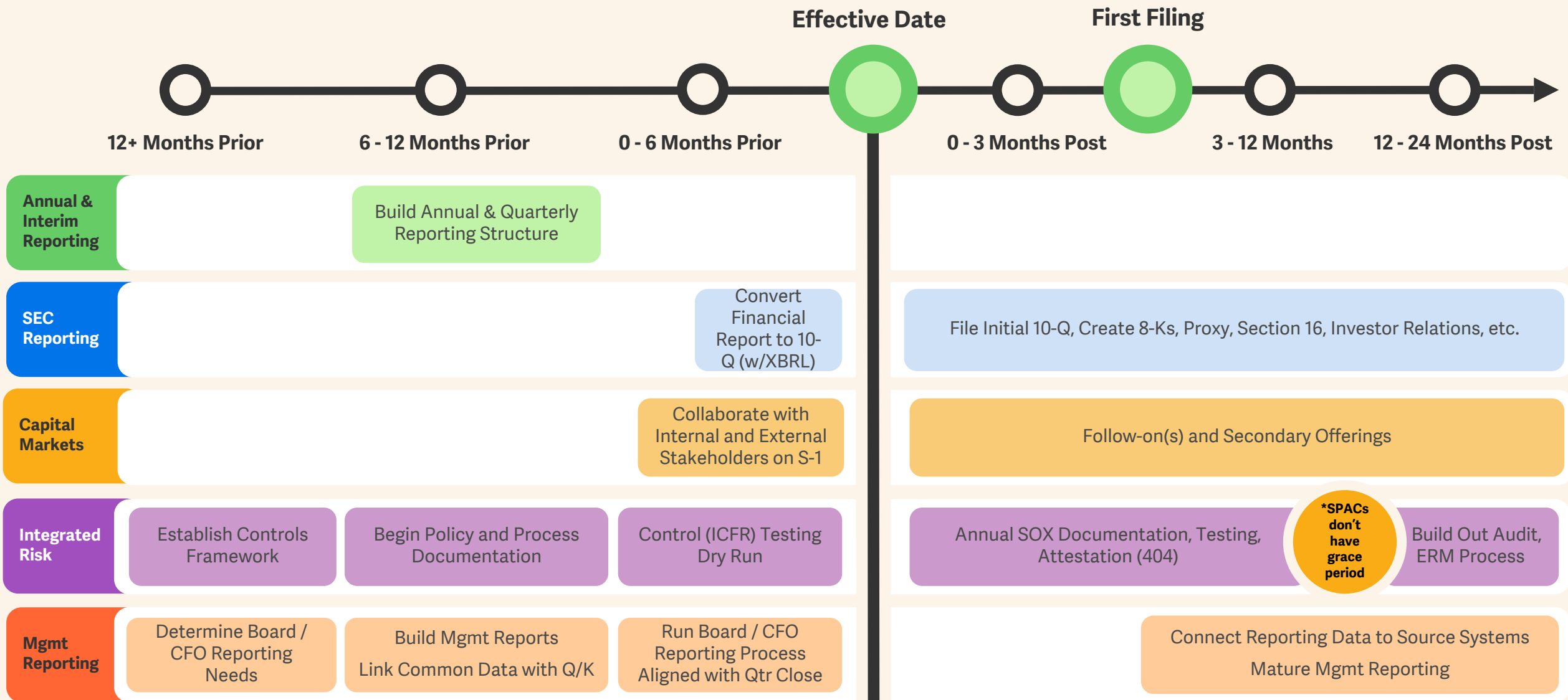
- Project Plan
- Carry out solution model design
- Assignment of Project Resources
- Host solution delivery & walk through with customer

## Enablement



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

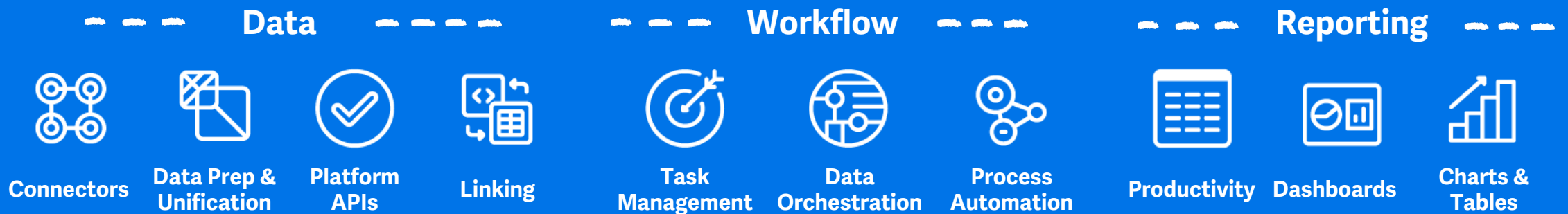
# Example Private to Public Journey with Workiva



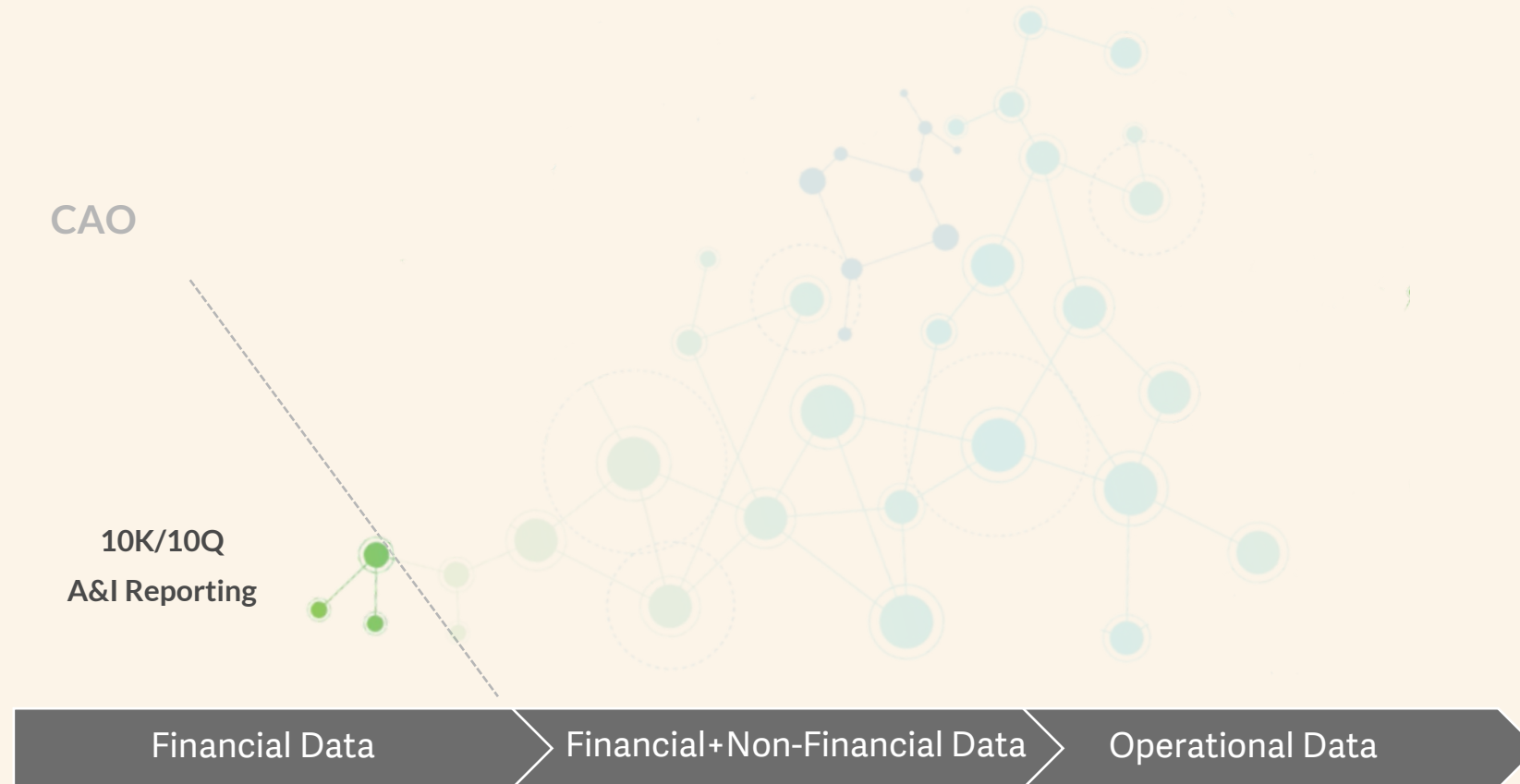
\*Emerging Growth Companies have separate, longer grace periods for Integrated Risk via SPAC deals



## Our unified cloud platform: data, workflow, and reporting

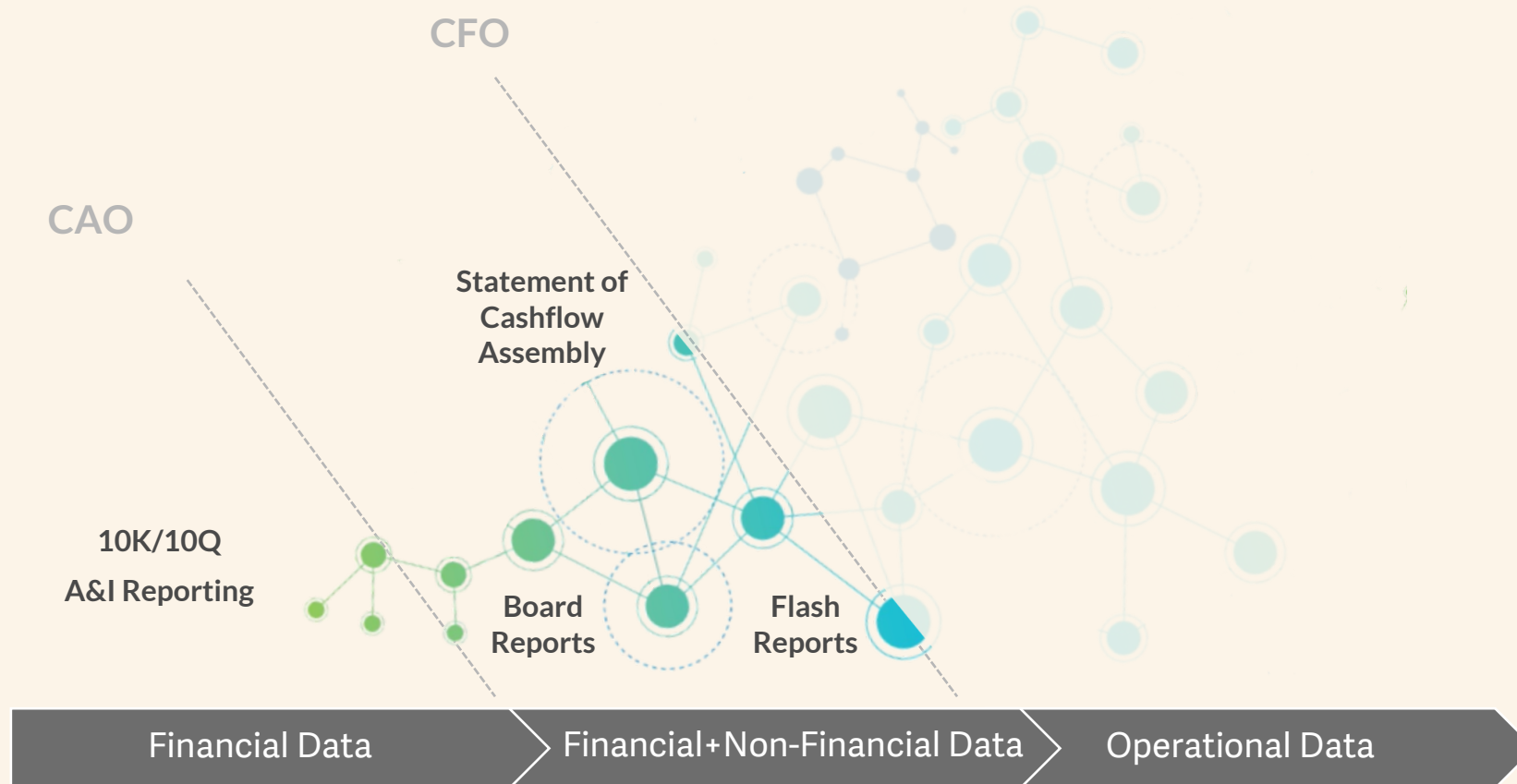


# It all started by delivering real transformation and value

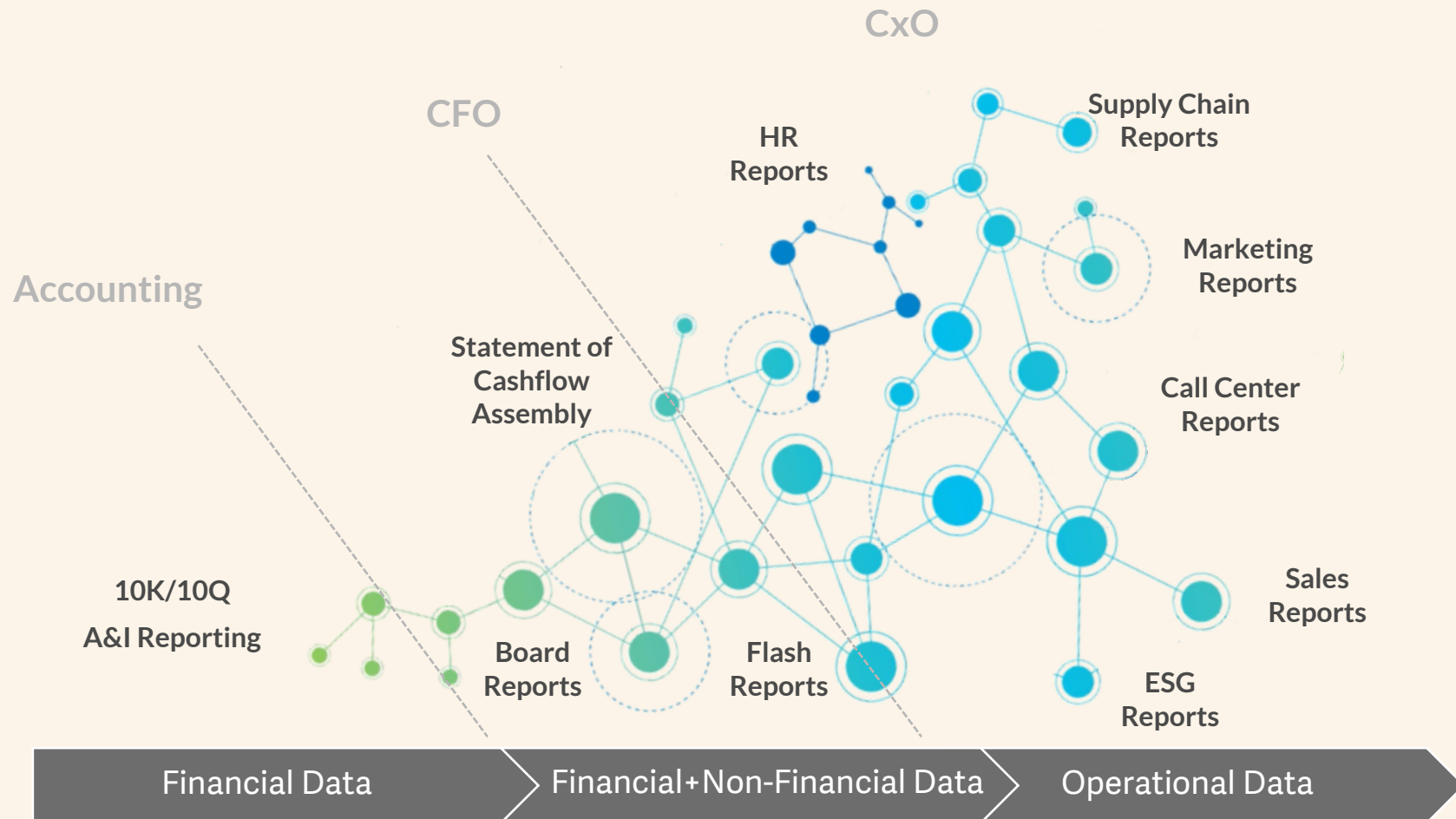




# Leveraging network effects to expand into teams



# Extending the same benefits beyond the CFO



# Demo