

Workiva AI

Product Strategy & Roadmap

Workiva AI

Core principles that drive our development



Purpose Built

AI should deliver advanced intelligence uniquely tailored to the user's specific needs and seamlessly integrated throughout their workflows.



Human Driven

AI should be designed to augment human expertise, ensuring users retain final control and judgment in critical workflows.



Responsible

AI should be built on a secure, governed foundation, grounded in user's trusted data with a commitment to explainability and auditability.

Workiva AI empowers you to go further, faster with AI you can stake your reputation on



Transform your work
with agents purpose-built for
financial reporting, risk, and
sustainability.

Purpose-built Agents

Intelligent Companion

**Workiva AI as a new teammate
working for you and your work**



Build what you need
with plain language whether
that's a curated knowledge base
or custom agent.

Agent Studio

Knowledge

**AI assistance guided by your process,
built into Agent Studio**

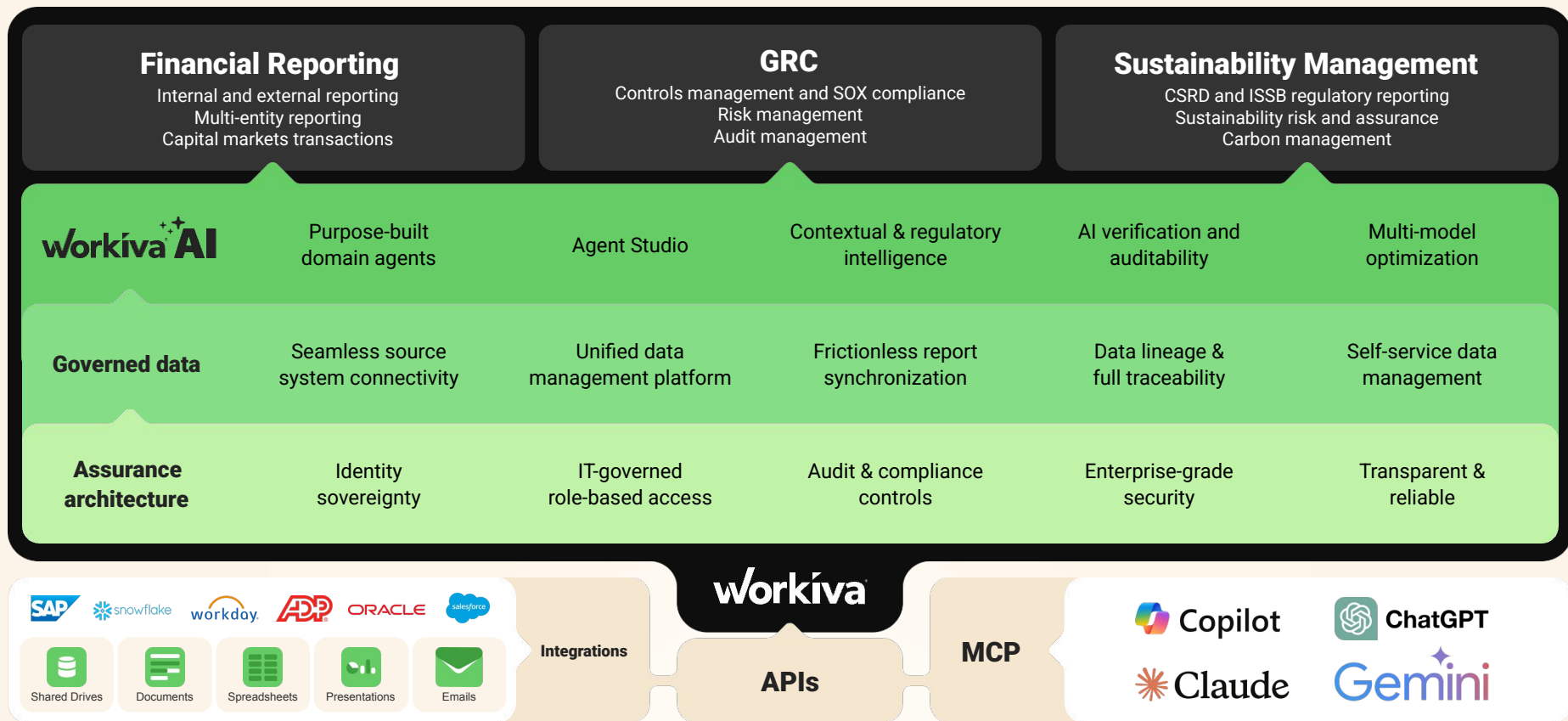


Extend your ecosystem
with a governed connection to
Workiva without losing lineage
or provenance.

Workiva MCP

**Your own AI agent team,
collaborating through Workiva MCP**

The Workiva Platform: Go further, faster with AI built for trust



Workiva AI | Planned Innovations



Intelligent Companion updates

Strengthen global accessibility, context awareness, and response traceability; introduce session history.



Tie-Out Agent

Run data checks to ensure consistency and flag potential issues in your document.



Audit Report Agent

Generate final reports summarizing audit details, results, and findings.



Knowledge

Curate a persistent knowledge base with project-specific instructions and data.



Roll Forward and Prep Agent

Automate your process with guided workflow and customizations.



Remediation Agent

Generate issue descriptions and root-cause aligned action plans.



MCP

Connect to Workiva data with governance, controls, and permissions fully intact.



XBRL Tagging Agent

Streamline tagging with human-in-the loop.



Sustainability Peer Benchmarking

Query peer disclosures and see instantly how others report on the same topics.



Agent Studio

Customize existing agents or build new agents in plain language, no expertise required.



Report Generation Agent

Create a new document from scratch in just a few clicks with guided steps.



Sustainability Reporting Projects

Manages your sustainability report end to end, from scoping through disclosure, with a full audit trail.



Benchmarking Insights Agent

Analyze peer filings to surface suggestions and identify gaps with traceable sources.



Policy Management Agents

Automate policy creation, first level reviews, and regulatory alignment.



Regulatory Reporting Agent

Streamlines the end-to-end reporting process for regulatory forms, like BEA & US Census surveys



Platform



Intelligent Finance



Intelligent GRC



Intelligent Sustainability



Intelligent Builder



Corporate Regulatory Reporting

Available Now

Generally Available

Global Companion

Grounded in your data

Every answer is drawn from the files, data, and workflows already in the Workiva platform, so responses are specific and traceable

Get answers in context

Ask questions about your reports, filings, data, and processes in natural language and get immediate, grounded answers without switching tools

From any angle, across any report

Whether you're preparing an SEC filing, closing a statutory cycle, or reviewing disclosures, get immediate, grounded answers

The screenshot displays the Workiva AI Demo interface. On the left, a document viewer shows the 'Front Cover' of the '2024 Annual Report' with the Workiva logo. In the center, a data table titled 'Emissions' compares 2023 and 2024 data across three scopes. On the right, a chat interface titled 'Fr Peer Benchmarking: Getti...' provides a detailed analysis of Workiva's performance relative to peers, including a 'Notable Differences' section and a 'Conclusion'. Below the chat, a 'What's next?' section offers options to ask a follow-up question, create a document, or start a new analysis.

	2023	2024
1 Emissions		
2 Scope 1	258	209
3 Scope 2: Location Based	1,686	1,648
4 Scope 3	17,857	19,722
5		
6		

Notable Differences

Workiva and OneStream both frame MD&A around SaaS-style recurring revenue growth, platform expansion, and customer adoption, but OneStream places greater emphasis on ARR, SaaS-versus-license mix, and partner-led implementation economics. Workiva provides more discussion of external regulatory and policy uncertainty affecting specific solution demand, especially sustainability and capital markets-related offerings. DFIN differs most from the other two peers because its MD&A reflects a hybrid model with software, tech-enabled services, and print/distribution, making volume trends, sales mix, and operational cost control more prominent than pure subscription expansion.

Conclusion

The peer disclosures show a broadly consistent focus on recurring software revenue, customer expansion, and disciplined investment in product and go-to-market capabilities. Workiva and OneStream present clearer SaaS-growth narratives, while DFIN offers a more mixed-model disclosure with stronger emphasis on operating discipline and segment performance. Overall, the disclosures are detailed and decision-useful, though the business-model differences *↓ Scroll to latest ↓* materially affect how performance is framed and measured.

What's next?

Type your response...

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workiva
AMPLIFY

Available in Early Adopter Program (EAP)

Knowledge

Custom knowledge base

Creates and manages persistent, reusable custom knowledge bases composed of Workiva documents and uploaded content

Dynamic updates

Automatically updates when source files or connected folder contents change, maintaining continuous version accuracy without manual rework

Permission aware

AI-generated responses only access and reference content the requesting user is explicitly authorized to view

The screenshot displays the 'Knowledge' section of the Workiva interface. At the top right, there is a '+ Create knowledge base' button. Below this, a banner invites users to 'Take a tour of how to build a knowledge base and use it in Workiva AI.' with a 'Take a tour' button. The main section is titled 'Knowledge bases' with a sub-header 'Knowledge base limit: 4/50'. It includes a 'Filters' button and a search bar. A table lists four knowledge bases with columns for Name, Description, and Created By. Each row has a three-dot menu icon on the right. At the bottom right, it shows '1-4 of 4' and navigation arrows.

Name	Description	Created By
Competitors Earnings Call Transcripts	This knowledge base contains earnings call transcript...	Jake Akers
ER Prep KB	This knowledge base constrain my peer filer transcrip...	Jake Akers
ER Prep Knowledge Base	This knowledge base constrain my peer filer transcrip...	Jake Akers
Regulatory Intelligence Assistant	You are a regulatory intelligence assistant for a water ...	Brittany Jones

Agent Studio

No-code workflow builder

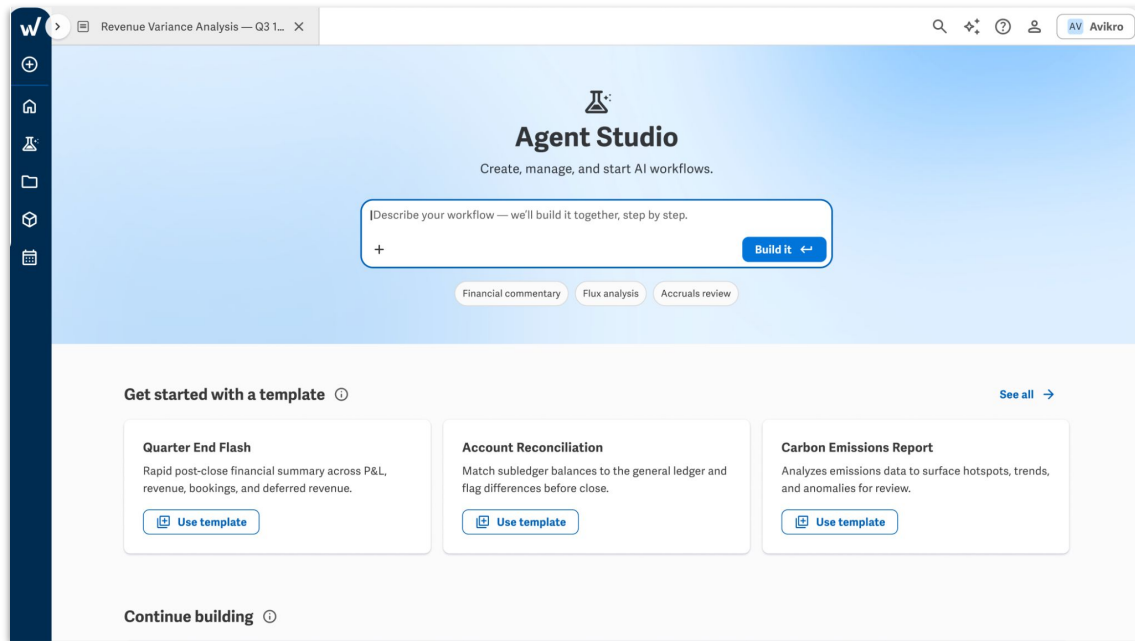
Describe a workflow in plain language and AI generates a structured, executable plan

Saved & shareable agents

Build once, reuse every period—workflows are saved as durable, team-wide experiences that eliminate manual re-prompting and ensure consistent outputs across collaborators

Governed AI execution

Every agent runs within the Workiva platform's governed reporting environment, with full auditability of AI actions and human control at every decision point



Early Adopter Program

Workiva MCP

Make Workiva data available in your Enterprise AI tool via open MCP.

Works with Claude - more Enterprise AI tools to come!

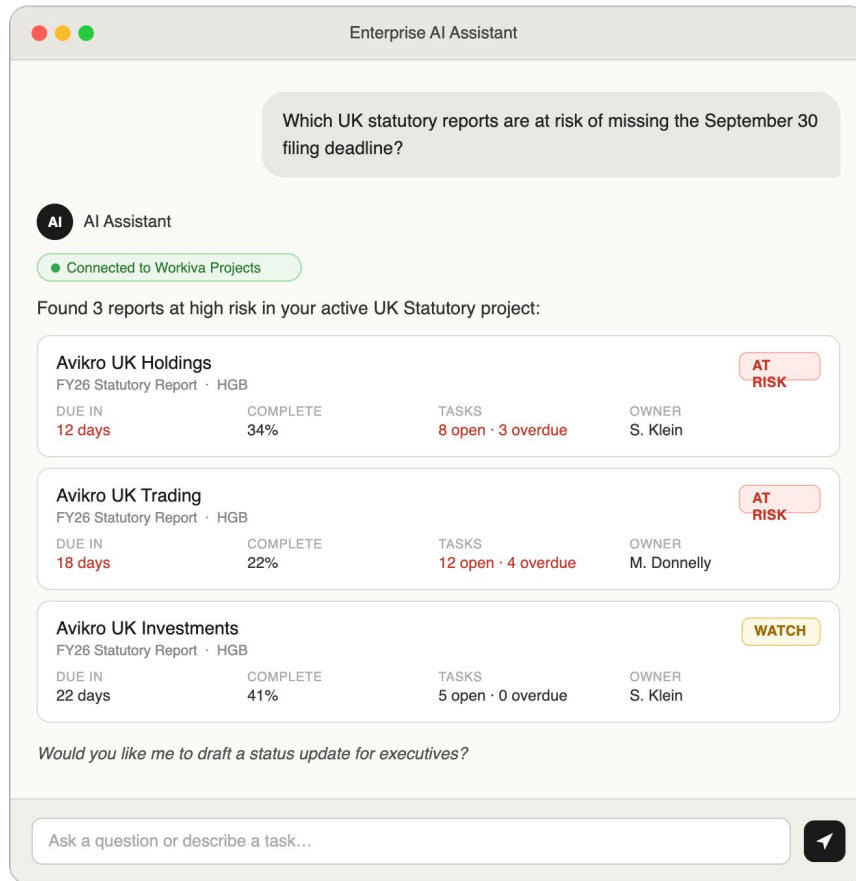
Connect once via open MCP standard

Ask questions from anywhere

Executives and stakeholders get real-time status summaries on your reporting progress without ever logging into Workiva

Workiva stays the trusted system of record

AI tools surface your data but don't store it - your reporting continues to live in Workiva



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workiva
AMPLIFY

Workiva MCP



Their AI reads Workiva data for analysis



Under existing permissions



Claude connector at launch

API Documentation MCP

Build time. For your engineers.



Grounds an agent in our real API spec



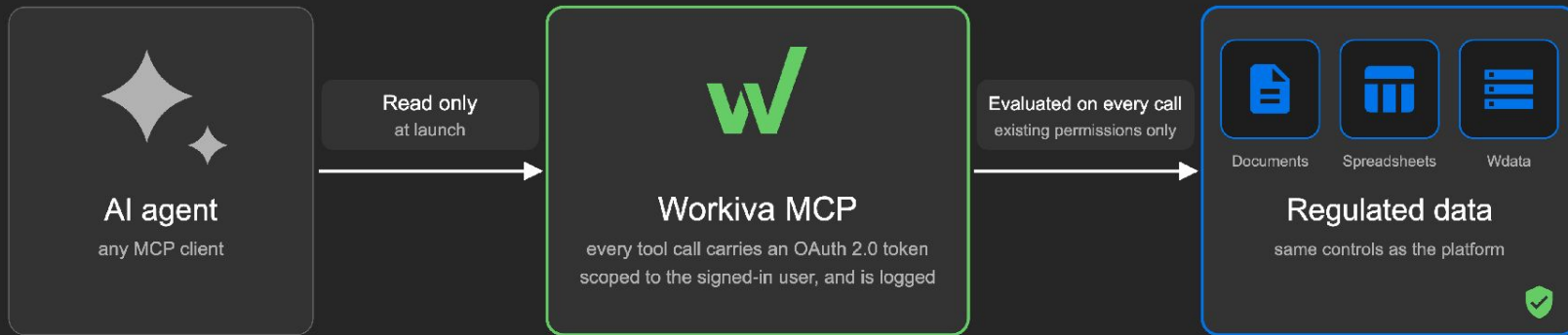
Any MCP client, any IDE



No auth. Works today.

The trust layer between AI and regulated data

HOW EVERY REQUEST IS AUTHORIZED



WHAT IS TRUE AT LAUNCH

Workiva MCP



Read only

Reads documents, runs queries. No create, edit, delete.



Claude connector

The supported, tested path on day one



DCR + OAuth 2.0

Any client supporting both can connect



Existing identity

The same permissions the person already has



ON THE ROADMAP

Where this goes next



Write capability, still in customer research



Copilot and ChatGPT support on the roadmap



Broader toolset coverage across the platform

Subject to change.

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What's Next?

In Development

Chat History

Keep Work Moving

Put down and pick up your work with Companion as it works for you. Log-in and see your last session automatically.

Run Multiple Agents

Launch and run multiple agents in parallel to get more done in the same time.

Get Notified When it Matters

Workiva AI can run in the background, notifying with in-app cues to indicate it's ready for your attention to keep the ball moving.

Fr Peer Benchmarking: Getting Started Help

Chat history

Fr Peer Benchmarking: Gettin...

Sustainability Operations Narr...

Disclosure Generator: Draft R...

Disclosure Generator: Draft R...

Disclosure Generator: Water C...

Disclosure Generator: Water C...

Disclosure Generator: Draft R...

Workflows

Open settings

Support Center

Terms of Use

Donnelley Financial Solutions, Inc.

10-K | 2026-02-17 | ITEM 7: Management's Discussion and Analysis of Financial Condition and Results of Operations

"Net sales for the year ended December 31, 2025 decreased by \$14.9 million, or 1.9%, to \$767.0 million from \$781.9 million for the year ended December 31, 2024, including a \$0.8 million, or 0.1%, incre..."

Copy

Peer Disclosure Summary Report

Filing Type: 10-K

Report Item: MD&A

Companies Analyzed: 3 peers

Peer Companies: WORKIVA INC, OneStream, Inc., Donnelley Financial Solutions, Inc.

Executive Summary

Across the three peers, MD&A disclosures emphasize software-led business models, growth in recurring or subscription-style revenue, and continued investment in product development, go-to-market capacity, and customer expansion. Workiva and OneStream reported strong revenue growth driven by subscription and SaaS momentum, while Donnelley Financial Solutions reported lower total net sales but improved operating performance through software growth in selected offerings and cost discipline.

Key Themes and Trends

- Recurring software revenue remains central to the business model. Workiva described its multi-tenant SaaS platform and annual and multi-year subscription contracts as the core of its model. OneStream stated that software revenue represented 94% of total revenue in 2025 and that SaaS contracts have accounted for more than 90% of new customers since 2023. Donnelley Financial Solutions highlighted software solutions alongside tech-enabled services and print/distribution, with software net sales increasing even as print and distribution declined.
- Growth is driven by customer expansion, solution adoption, and enterprise penetration. Workiva

What's next?

Ask a follow-up question Create a Workiva document Start a new analysis

Type your response...

Cancel Send

AI-generated content. Verify for accuracy.

Future Innovations

Productivity and trust increases across the platform so finance, risk, and sustainability teams can go faster without sacrificing outcomes they can trust.

Open, Connected Intelligence

Expand MCP access to the AI tools your teams already use, so provenance and lineage remain intact throughout the end-to-end process.

Configurable AI

Give teams and admins the controls to shape how AI behaves, from role-based experiences and agent templates to model selection and approval policies.

Autonomous Workflows

Chain agents together across the full reporting lifecycle — from roll forward to filing — with flexible interaction models like chat, review gates, and guided handoffs, so teams stay in control of how much they delegate and when

Structured Data

Turn Workiva into your intelligent data foundation, powering natural language exploration, native BI dashboards, and custom AI experiences built on a single governed data layer.

Deep Domain Intelligence

Deepen the expertise behind Workiva AI across accounting standards and a regulatory landscape that never stops shifting.

Trusted AI

Strengthen lineage tracking, chain of custody, and audit trails, so every AI action can stand up to the highest level of scrutiny.