

Workiva AI is evolving from an assistive experience into **context-aware, workflow-native intelligence** for finance, risk, and sustainability teams—helping teams move faster while maintaining oversight and confidence.

Recent innovations sharpen day-to-day collaboration: the **Intelligent Companion** now works side-by-side in documents with stronger awareness of what you're working on, and expanded file intelligence brings richer inputs—including Office files and images—so responses are more relevant and precise. We also introduced more embedded domain assistance, including standards-aware guidance and research that supports higher-quality analysis inside the platform.

Planned innovations take the next step toward more **specialized, high-value workflow execution**—including customer-defined knowledge bases, streamlined tie-out and consistency checks, guided benchmarking, and faster evidence analysis to support audit-ready work.

Looking ahead, our vision is **intelligent orchestration**—where AI helps coordinate end-to-end work across teams and systems so organizations can deliver reporting and assurance outcomes with less manual effort, greater consistency, and stronger control. The result is faster cycles, higher-quality outputs, and increased confidence in how decisions and disclosures are produced.



Collaborative Agentic Augmentation

AI intelligently automates complex, manual tasks by augmenting human expertise with a connected agentic eco-system.



Contextual Integrated Intelligence

AI is integrated throughout your workflows, contextually grounded in your trusted data, with the ability to enhance with expanded data sets.



Trusted AI Governance

AI is designed for human oversight and control across all intelligent frameworks for explainability, auditability, and confidence.

Recent Innovations

✦ Intelligent companion enhancements

- Collaborate side-by-side in documents with persistent context and styled rich-text insert
- Build Wdata SQL queries using natural language (no SQL training required)

✦ File intelligence enhancements

- Reference images and Office file types in conversations with intelligent companion.

📄 SEC filing intelligence

- Search and generate insights from the latest SEC filing data using natural language.

🌐 ISSB intelligence

- Ask natural language questions about real-time ISSB standards.

🌐 ESRS intelligence

- Ask natural language questions about real-time ESRS standards.

🏠 Risk and control intelligence

- Search, inspect, and analyze existing controls and risks using natural language.

🏠 Flowchart visualizer

- Translate written content / documentation into flowchart visuals with the click of a button.

🏠 Control creator

- Streamline control design and documentation with AI-powered assistance.

🏠 Control performance step creator

- Generate well-structured control performance steps from existing documentation.

🏠 Remediation insights

- Identify potential blockers or changes in status with AI generated insights list.

Planned Innovations

✦ Intelligent companion enhancements

- Experience faster, higher quality chats with streaming responses, show thinking and response citations.

✦ Custom intelligence

- Create custom, persistent knowledge bases to use in natural language conversation with AI.

📄 10K tie-out agent

- Perform data consistency checks on financial data ensuring confidence in results.

📄 Benchmarking insights

- Compare your disclosures to your peer group and identify similarities and gaps.

🌐 ASRS intelligence

- Prompt ISSB Intelligence knowledge base to clarify IFRS disclosure requirements

🏠 Evidence analyzer

- Analyze evidence provided for audit samples for completeness, and flag for potential issues.



For more information on Workiva AI security, please visit workiva.com/security

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