Commercial Roadmap

As of Q3 2025

workiva AI

Workiva AI will redefine how users leverage the Workiva platform with agentic intelligence designed for finance, risk, and sustainability teams. Every quarter users can expect significant enhancements in contextual integrated intelligence, collaborative agentic augmentation, and AI governance.

Recent innovations in Workiva AI are transforming the intelligent companion into a seamless and intuitive collaborator, deeply aware of your work to help you accomplish critical tasks with greater speed and precision. This deep contextual awareness allows it to provide personalized recommendations based on your open document, help you build and fix SQL queries in Wdata, and even automate inspection of your risk and control program to identify gaps or overlap. As a major new enhancement, the intelligent companion is also gaining access to third-party data sets, with ESRS intelligence being the first to provide more specialized assistance with peer benchmarking, research, and disclosure drafting and alignment.

Planned innovations for later this year will strengthen collaborative agentic augmentation with features specialized for solution-specific workflows. For finance teams, features like SEC filing intelligence will accelerate insight generation and narrative drafting. Audit and risk teams gain a suite of new solutions designed to accelerate tasks like control creation and documentation, with features such as the flowchart visualizer that can translate written content into a visual workflow with a single click. And sustainability teams gain ISSB intelligence that will provide users with insights and disclosure alignment to new standards.

As we look ahead to future innovations in 2026, you can expect to see the continued maturity of our AI strategy with a significant move toward increasing specialized automation with reinforced human oversight. We will expand our agentic ecosystem with additional extensions and agentic experiences that will include automated benchmarking and validation capabilities for SEC reporting and disclosure generation for compliance with financial reporting and sustainability regulation and requirements.

Forward-looking directional roadmap. Subject to change at Workiva's discretion. Copyright © 2025 Workiva Inc.

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 awareness and rich text insert.
- Build SQL queries to access your Wdata using natural language.

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

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

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

Planned Innovations

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

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

Control performance step creator
- Generate well-structured control performance steps from existing documentation.

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

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

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

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

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

◇ Intelligent Platform   📄 Intelligent Finance   🏛 Intelligent GRC   🌐 Intelligent Sustainability