Our offices and work hours are designed to encourage collaboration, so employees can freely share their ideas. We offer classroom and e-learning programs for employees and continuing education for customers through Wdesk University.

In this report, you will learn about how we work to protect local resources and how our offices and grounds reflect my life-long environmental ethic, including a native prairie and a Monarch butterfly waystation at our headquarters.

We also help our customers save time and conserve other precious resources. Wdesk enables collaboration and control from anywhere with an internet connection, eliminating excess travel and excess paper. Plus, Wdesk helps our customers lower their carbon footprint and waste by reducing printing and delivery of physical documents.

We all need to do what we can to create a more sustainable world.

Marty Vanderpluig

Our company is based on core values of respect, fairness, and compassion. We give our employees the freedom and resources they need, and together we are transforming an industry and improving the lives of our customers, employees, and investors.

We are successful because we listen. We listen to our employees and respond to their needs. We listen to our customers and create cutting-edge solutions. And we listen to both our raving fans and our critics so that we can continue to improve how we do business and how we solve our customers’ problems.

We value all backgrounds, beliefs, and interests, and we recognize this diversity as an important source of innovation. We give our employees the flexibility to achieve a genuine work-life balance so they have time to give back to their communities. With paid-time off for volunteering, hands-on community service projects, and office-based fundraisers, we foster a culture of caring for our surroundings.

Workiva is built for the way people want to work today.
We created our Wdesk platform to transform the way people were managing disparate business data with numerous collaborators, documents, and spreadsheets.

Thousands of organizations, including more than 75 percent of the Fortune 500®, use Wdesk to improve data collaboration, accuracy, and insight into their business data.

Wdesk enables teams to link narrative with numbers, which is critical when reporting to executives and boards.

Our customers are able to connect datasets with a history of every change down to the level of each individual cell.

Wdesk connects numbers, narrative, and supporting files in new and powerful ways—allowing our customers and partners to work smarter, faster, and better together. Inside Wdesk, data is linked together—in spreadsheets, documents, presentations or reports. And it’s powered by one of the fastest, safest, and most sophisticated data-management engines in the world.

Companies of all sizes, state and local governments, and educational institutions use Wdesk to help mitigate risk, improve productivity, and gain confidence in their data-driven decisions.

Flexible and scalable

Our customers love Wdesk because it delivers the speed, flexibility, and usability of common desktop tools with the power and sophistication to address the most complex enterprise reports and processes.

Wdesk delivers the visibility, accountability, and insight to drive productivity and keep everyone on the same page.

Our customers are able to build and shape data-linked reports for whatever they need, whenever they need it.

No other platform in the world links data the way we do.

Customers have linked more than 4 billion data values in Wdesk to ensure data accuracy.

Workiva is changing how people all over the world work together to create and report data with control and accountability.

*Claim not confirmed by FORTUNE or Time Inc. FORTUNE 500 is a registered trademark of Time Inc. and is used under license. FORTUNE and Time Inc. are not affiliated with, and do not endorse products or services of, Workiva Inc.
**Wdata**

Wdata combines new data preparation capabilities with existing connectors and APIs to help our customers more easily capture, enrich, and connect large datasets to Wdesk.

Wdata amplifies the powerful linking, auditability, and control features inside Wdesk to give customers all over the world the tools they need to improve data collaboration, automate downstream reports and analyses, and support finance transformation across their organizations.

Wdata is built for finance teams to gather, prepare, and interpret massive datasets from cloud, on-premise and hybrid structured systems and desktop spreadsheets as well as Wdesk spreadsheets. With an easy, drag-and-drop experience, users are able to centralize data from diverse sources – including systems for enterprise resource planning (ERP), human resources, sales, operations, and governance, risk and compliance (GRC) – into a secure, cloud platform.

Wdata users integrate their external data into Wdesk to perform faster and more reliable reporting and analysis with linking, dynamic commentary, controlled collaboration, granular permissions, and clear audit trails.

**Partner Ecosystem**

From small teams to enterprise-wide projects, Workiva works with our partners to help our customers do more, see more, and know more with Wdesk.

Our consulting and accounting partners offer our customers more services and capabilities to leverage Wdesk to improve a wide range of financial, regulatory, and management functions.

Our technology partners provide data and process integrations to enable our customers to directly connect the datasets they need into a central hub of trusted data. Wdesk gives users the ability to combine narrative with their data, which further amplifies the power of our platform throughout our customers’ organizations.

**Clean Energy**

Workiva is committed to taking every measure to protect natural resources.

We built our Wdesk platform to enable collaboration and control from anywhere with an internet connection, eliminating excess travel and excess paper. Plus, Wdesk helps our customers lower their carbon footprint and waste by reducing printing and delivery of physical documents.

One of our cloud providers is Amazon, which has a long-term commitment to achieve 100 percent renewable energy usage for its global infrastructure footprint. As an AWS customer, we use 84 percent less power and utilize a 28 percent cleaner power mix, for a total reduction in carbon emissions of 88 percent by using the AWS Cloud instead of operating our own data centers.

Google, our other cloud provider, has an infrastructure that is entirely carbon-neutral. Their data centers consume 50 percent less energy than the typical datacenter. In 2017, Google will purchase 100 percent renewable energy to match consumption for their global datacenter operations.
Security and Reliability

The largest enterprises in the world trust us with their most sensitive data, and we take that responsibility very seriously. Wdesk employs stringent data security, reliability, integrity, and privacy practices. In addition to our regular customer security assessments, we aggressively test the security of our operations by subjecting them to continuous and ongoing penetration and vulnerability testing. The quality of our data security efforts is validated by our annual completion of an independent audit process using the SSAE 16 standard. The annual SSAE 16 examination includes coverage of security controls through performing SOC 1 Type 2 and SOC 2 Type 2 audits.

We recently achieved FedRAMP’s Authorization to Operate, which further demonstrates our commitment to improving processes and ensuring the security of our customers’ data.

Customer-driven innovation

We don’t just develop technology; we listen to our customers and create solutions to meet their needs. We create light-weight data elements that store numbers and text so they can quickly be found and used in multiple ways.

We employ Agile Software Development methods that place customers at the heart of the design process. This includes constant collaboration and iteration that delivers new software functionality at a very fast pace.

At Workiva we are consistently recognized for our innovation, which wouldn’t be possible without the talented and dedicated employees and customers who are responsible for our success.

Workiva History

We founded WebFilings in 2008 to change the way corporations were managing and reporting business data. We released our first cloud-based solution in 2010 at a time when most companies were hesitant to place their trust in the cloud. That quickly changed.

Our Wdesk platform caught on like wildfire. Companies big and small adopted Wdesk because for the first time, they could collaborate with control and accountability.

We changed our company name to Workiva in 2014 to keep pace with growing demand for our solutions from finance, regulatory compliance, risk, and audit teams.

Today, Wdesk is modernizing how people work across thousands of organizations around the globe, including more than 75 percent of the Fortune 500®.
Our culture is based on an innate caring and understanding of our customers’ needs. Our customers love our personal attention to detail and how we respond to them around the clock.

Our customer satisfaction scores are greater than 95 percent, which confirms that we are trusted partners. When we receive poems, cards, and gifts from our customers, we know we are making lasting improvements.

We help our customers be more efficient in ways that save time and conserve resources.

95% customer satisfaction score*  96% revenue retention rate*

We love our customers, and they love us back.

More than 1,600 customers earned CPE credits at our 2017 user conference.

*As of June 30, 2018

Trusted partners

We help accounting, finance, compliance, risk, audit, and operations teams manage business data that has to be gathered from many different departments, often across disparate locations. Our customer success managers essentially become embedded in our customers’ teams as they work together through all the processes and controls necessary for high-stakes business processes, reporting, and decision-making.
Wdesk is paperless

Wdesk helps our customers lower their carbon footprint and waste by reducing printing and delivery of physical documents. In 2017, customers reviewed Wdesk documents 869,814 times, saving an estimated 4,721,791 printed pages. This represents a savings of 299 trees.

The technology behind Wdesk also helps customers be more efficient. Users streamline complex data collection and reporting processes that normally require large investments of time and resources. With Wdesk, customers work seamlessly with colleagues from around the world in an efficient, secure, and controlled environment. Wdesk can be accessed from anywhere with an internet connection, saving on transportation and other costly means of legacy-style financial controls and collaboration.

We host our annual user conference so our customers can learn from us in person, network with peers, and develop professionally. In 2017, our conference offered 75 breakout sessions, and more than 1,600 people earned over 13,000 CPE credits. In 2017, we gave away 500 ForestNation tree kits to encourage our customers to spread some green. ForestNation also plants matching trees in developing countries.

Our user conference allows us to work face-to-face with our customers to continue incorporating their ideas and requests into Wdesk. They help drive the evolution of Wdesk.

Wdesk saved over 4.7 million pages from printing in 2017.

We built Wdesk to save our customers time, money, and other resources so they can spend more time on what matters most.
Our workplace is an accepting environment, where employees can freely share ideas and opinions.

We believe diversity is an important source of intellectual thought, varied perspective, and innovation, and we value all backgrounds, beliefs, and interests.

We employ a Human Asset Management approach that puts our employees first, listens to their voices, and responds to their needs. This extra care for our employees gets passed on to our customers every day.

**Efficient Mobile Workplace**

Workiva is a digital and mobile workplace, allowing employees to work from remote locations. One in five employees is a telecommuter, which helps conserve fossil fuel that would otherwise be consumed by transportation.

**Recent Human Asset Management initiatives:**

- New hire onboarding program
- Manager development program
- New manager mentoring
- PTO donation policy
- First annual Employee Learning Week
- New group volunteer projects
- Women in Sales affinity group
- Enhanced benefits for employees in Canada and the Netherlands
- Flexible work arrangements pilot program
Always learning

An educated workforce is essential to our growth. The Workiva Learn Center is our in-house, e-learning curriculum designed to keep employees up-to-date on industry and technology topics. New courses are based on employee feedback and courses continuously evolve. In 2017, employees spent over 22,000 hours learning soft skills, technical skills, and leadership skills.

Employees spent more than 22,000 hours learning new skills in 2017.

Employees have a voice

Workiva maintains an accepting and listening culture. “First Friends” are assigned to new hires to help them on a personal level. Employee volunteers serve as culture ambassadors and are trained to be the go-to person in each office. They are equipped to help share knowledge among our office locations and nurture the Workiva culture with fun, office-based events.

Our award-winning company intranet, called Connect, allows employees to freely express thoughts and share common interests. Connect empowers employees by providing a forum for interaction and for disseminating valuable resources.

In 2017, 136 students participated in our internship program, which included group mentoring, professional development workshops, challenges, and events in addition to working alongside our teams.

Our relationship with universities is also a pipeline for talent that often joins our full-time workforce. Our headquarters is centered in a hub of technology, engineering, and biomed companies in the Iowa State University Research Park in Ames, Iowa. We also have strong connections to Arizona State University, and we are located in the ASU Sky Song complex, a collective for fast-growing companies. Similarly, our teams in Bozeman, Montana have close ties to Montana State University.

Diversity and Inclusion

Diverse experiences, perspectives, and backgrounds are critical to our culture of innovation. We encourage teams to develop understanding and respect for each other and find creative ways to work through differences.

We created the Workiva Diversity and Inclusion Committee to foster diversity, educate employees and create and maintain affinity groups.

Diversity and Inclusion

Women in Tech
It Takes a Village — Parenting
EDIT — Ethnic Diversity in Tech
Veterans
Rainbow — Workivians of Different Identities, Orientations, and Allies
Women in Sales

Workiva office locations
Ames
Amsterdam
Boulder
Bozeman
Charleston
Chicago
Columbus
Dallas
Denver
London
Missoula
New York City
Philadelphia
Saskatoon
Sault Ste. Marie
Scottsdale

Nurturing students

In 2017, 136 students participated in our internship program, which included group mentoring, professional development workshops, challenges, and events in addition to working alongside our teams.

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In 2017 we held our first Employee Learning Week, dedicated to aligning our professional development programs with our company’s goals and objectives. Over 800 employees joined 22 different live and on-line training courses, workshops, presentations, and panel discussions.

1,408 employees took 45 courses in The Learn Center, our in-house e-learning curriculum.

Workiva Affinity Groups

Women in Tech
It Takes a Village — Parenting
EDIT — Ethnic Diversity in Tech
Veterans
Rainbow — Workivians of Different Identities, Orientations, and Allies
Women in Sales
Workiva Diversity and Inclusion Statement

Workiva cultivates a work environment that encourages fairness, teamwork, and respect among all employees. We value diversity of backgrounds, beliefs, and interests, and we recognize them as an important source of intellectual thought, varied perspective, and innovation.

We are firmly committed to maintaining a work atmosphere in which people of diverse backgrounds, beliefs, and interests may grow personally and professionally. Fostering a diverse workplace provides an inclusive environment for our employees, thereby increasing engagement, empowerment, and satisfaction. We believe this environment best positions us to meet the needs of our customers.

Collaboration Culture

Hard work is rewarded at Workiva. Teams are encouraged to schedule regular team outings and retreats to celebrate successes and build camaraderie. We also support entertaining programs across our offices that encourage teamwork and nurture innovation.

Our annual Maker’s Challenge is a team-based competition in which employees leverage their wits, ingenuity, and style to plan and execute solutions to predetermined challenges. These challenges include puzzles, culinary contests, and engineering feats.

Healthy choices

We place a priority on health and fitness. We offer gym facilities and memberships and serve healthy food items throughout our offices. Employee wellness programs include smoking-cessation programs, health screenings, and fitness education.

One fundraiser involved numerous teams of three competing against each other as they logged designated fitness goals over a three-week course. Activities have also ranged from simple things as drinking water or logging meals on an app to running six miles or attending a crossfit gym. Individuals accrued points for each activity, and at the end of the giving campaign, the team with the most overall points won.

Employees viewed 793,000 Connect intranet pages in 2017.
The League of American Bicyclists has designated Workiva as a bronze level bicycle-friendly business. After being recommended by multiple local advocates in cities where Workiva has office locations, a rigorous application process, and a well-established history of commitment to sustainability and personal fitness, the League bestowed a four-year award to Workiva. One year in to the designation, the League offered Workiva the opportunity to apply for a higher rating as a result of our leadership in creating a bicycle friendly communities.

**Home grown**

At our headquarters, we source products from local farmers wherever possible. During peak growing season, we harvest produce daily from our organic garden to supplement meals in our employee Café.

We are resource-conscious and consume over 80 percent of the food we make. We donate the remainder to local food pantries through established channels that allow perishable food donations.
communities

At Workiva, we focus our charitable efforts on technology entrepreneurship, career advancement for students, and community-wide programs that include arts and culture organizations, business alliances, and community chambers.

We are also proud to sponsor business incubators and state technology associations to help people develop their ideas into viable businesses at all stages.

We believe in nurturing the next generation of scientists, engineers, and entrepreneurs and support a variety of professional development sessions and events for students throughout the year.

We also encourage people from diverse groups to work in the software industry. We visit local high schools and universities to teach students about the many benefits of a career in science, math, and engineering.

dsmHack

Every year dsmHack holds a continuous, 48-hour hackathon to help local nonprofit organizations solve their technology problems. This event partners technology developers, designers, and project managers with selected nonprofits. Twelve Workiva employees volunteered their time and skills during the 2017 dsmHack to develop websites and apps.

Over the course of two sleepless days, hackathon members planned, built, rebuilt, and finally produced a functional website for the Refugee Alliance and a working app for the Iowa Architectural Foundation. They had a lot of fun and gratification from accomplishing so much in such a short period of time.

“It was an awesome experience to be developing a project while your customer is cheering you on at every step of the way.”

— Mark R., Workiva Engineer
Scottsdale Coding Challenge for Students

Workiva R&D teams in our Scottsdale office host monthly coding challenges and meet-ups with local clubs, university students, and experts in the tech industry. They have built a thriving and diverse community that helps students create cutting-edge technology and share knowledge.

During the first meeting, Workiva engineers hosted 52 Arizona State University students from the University’s Software Developers Association, Women in Computer Science, and Mobile Developers groups for a coding challenge.

The challenge involved a fun JavaScript game developed by Workiva engineers. Students had a limited amount of time to pass game levels of increasing difficulty.

Where we live and work

At Workiva, multiple office-based fundraisers are a fun way for teams to build camaraderie and give back to their communities.

The annual United Way campaign is one way our employees support local charities in the U.S. In 2017, we raised over $50,000 for United Way through a variety of events including a pie-in-the-face competition, fun runs, game tournaments, bake sales, and pledges.

Ames employees hosted two blood drives with the local LifeServe Blood Center. We supplied 65 units of blood with the potential to help 195 patients.

Taking time to give back

We give our employees the flexibility to achieve a genuine work-life balance so they have time to give back to their communities. Volunteer Time-off (VTO) is a recent initiative that encourages employees to spend time on projects they care about outside the office. Each employee receives eight hours of VTO to use throughout the year.

Helping People in Need

In Ames, employees donated nearly 300 items of clothing, over 130 pounds of food, and 152 toys to the MICA Food Pantry, Toys for Tots, and the Ballard Clothing Closet to help hundreds of families with children better prepare for the Iowa winter.

Denver employees served meals to the homeless at Denver Rescue Mission.

Scottsdale employees supported “Adopt A Family” during the holidays and provided numerous gifts and basic necessities for a single mom with four children.

Dallas employees volunteered at Brother Bill’s Helping Hands, which is a local food pantry in an area where more than 30 percent of families live below the federal poverty level.

Bozeman employees assembled Thanksgiving boxes for a local food bank. Over the holidays, they also collected gifts, food items, and gas cards for two families in the “Adopt a Family” program.

Our Professional Services team in Scottsdale spent a day packing meal boxes at the nonprofit, Feed My Starving Children, to provide meals to children worldwide. Our employees packaged 176 boxes of food, which will provide 38,016 meals and feed 104 Nicaraguan children for a year.

Our Customer Success teams joined with our Sales and Engineering teams in Scottsdale to donate household items, toys, and money for a family they adopted through the Salvation Army. Donations helped the family buy groceries, pay bills, and stock their new home with furniture and cleaning supplies.

Helping Jamaican Children

While attending a sales incentives trip, more than 50 employees from the Sales team spent the day improving the Jamaican Content Basic School. Workiva volunteers painted the school and added playground courts and games. They also planted a garden and donated and organized supplies for the schoolchildren.

Trails and Trees

Our employees planted 3,000 saplings with the Story County Conservation Board in February and planted 150 trees in Ames on Earth Day in April.

Volunteers spent a day in April and October cleaning up Workiva’s adopted section of the High Trestle Trail, a 25-mile trail system that runs through central Iowa. The trail includes an iconic 1/2-mile, 13-story high bridge across the Des Moines River valley, one of the largest trail bridges in the world.

“Really awesome coding challenge. I thought it was going to be an algorithmic coding challenge and was pleasantly surprised.”
— Arizona State University student

“VTO is a triple win because it serves local nonprofits, shares our talents, and supports fellow employees.”
— Emily W., Workiva Legal Team
At home on the prairie

The Workiva headquarters in Ames, Iowa are twin buildings with sweeping roof lines that mimic the waves of prairie grass that fill the grounds. In addition to growing more than 10,000 native prairie plants, we maintain habitat for birds and butterflies to flourish in our gardens. Nine bluebird nest boxes offer avian respite on our campus. We maintain substantial amounts of milkweed, nectar plants, shelter, and other necessary amenities to support Monarch conservation.

Energy-efficient, north-south windows are oversized to maximize natural daylight and reduce electricity use. Above-grade insulation improves heating and cooling efficiency. Inside and out are a variety of locally sourced and environmentally friendly materials, such as coverings of Iowa limestone and recycled aluminum. Many furnishings, including carpet, are cradle-to-cradle recyclables.

Our hospitable, mobile atmosphere is designed to make daily work and collaboration enjoyable in relaxed settings. We often work outside on our patio with furniture made from recycled plastics.

We have nine car-charging stations for commuters with electric cars at our Ames headquarters, and a rack full of Workiva bicycles for employees.

Our Ames Café has state-of-the-art, energy-efficient appliances. We partner with local farmers and Community Supported Agriculture programs to source food, and we pick from our organic herb and vegetable gardens, which are within steps of our Café.

The Cloud is Green

As a cloud-based software company, Workiva prints very little paper. At our headquarters, our trash goes to the Ames Resource Recovery Plant, where 70 percent of the waste generates electricity for the municipal utility.

Electronic waste is one of the fastest growing sectors of solid waste in the U.S., and we follow strict guidelines when disposing electronic devices. In Ames, we responsibly recycled 403 laptops, 80 monitors, and 5 printers in 2017.

Water

Prairie grasses and other plants grow densely throughout our Iowa campus to reduce topsoil erosion from nearby streams. Bioswales in the parking lot help filter out oils and other debris that would otherwise flow directly into the storm-water system.

We also pay close attention to water usage. Our solar-powered irrigation system has sensors that measure the moisture content of soil and only water the grounds when it is needed. Water conservation systems are also incorporated in our buildings, including a dish-washing system that recycles its water.

Waste

In 2013, we committed to reduce our carry-off waste by 30 percent over three years. We exceed our goal and reduced waste by 42 percent in that time period, which ended in 2016. Since then, we have continued to find ways to reduce waste and recycle materials wherever possible, such as phasing out disposable cups at all offices, composting a portion of food waste from office kitchens, and composting paper products, which are certified BPA free.

Workiva is certified as a Monarch Butterfly Waystation by Monarch Watch.

More than 10,000 native prairie plants flank our headquarters to provide wildlife habitat, conserve topsoil, and filter pollutants from entering a nearby stream.
We created our sustainability report by first using Wdesk integrated workbooks and data collection templates to track and gather data from multiple sources.

A Wdesk word-processing document was then created to write the text. Data from the workbook was linked within the text, providing accuracy and transparency in the collected information. Directed comments were used among collaborators to clarify messages.

To aid in the design and review process, Wdesk binders were used across team members for commenting and mark-ups.

Wdesk certifications were used to get final sign-off from multiple teams and executive management. The file was then exported from Wdesk into a format for publishing on our website.