



Workiva Consulting Services

Overview

Our experienced team has helped modernize the way many of our 3,000+ customers work. We offer best practices and expertise for compliance reporting, financial reporting, and data collaboration. As your team's partner, we help identify issues, provide process design suggestions, and find opportunities to help you reach your objectives.

How It Works

1. A process discovery and a full program evaluation determine the goals and structural requirements for the solution.
2. Based on what is found during the process discovery phase, an initial design is created in Wdesk to establish proposed process improvements and outline how these solutions can help meet the requirements of your project.
3. Your consultant reviews, validates, and provides design revisions based on customer feedback and additional learnings. Review and feedback are repeated until a design and solution meets all requirements.
4. Our team builds out the full project based on the agreed project design and establishes the document creation, data aggregation, linking, and reporting automation within our platform.
5. Your consultant reviews the final project with the user, providing training and instructions to move forward.

Available Consulting Services

Process Audit and Improvement

Our dedicated consultants review current processes, documents, workbooks, linking structure, and source data—both inside and outside of Wdesk. Our team outlines recommendations for process optimization and opportunities to leverage additional Wdesk functionality to meet business goals and reporting requirements.

Internal Audit and Controls Management

Solutions Architects conduct discovery sessions to outline business processes and recommend an optimized reporting design and document architecture within Wdesk. Our consultants perform high-level design and application planning to maximize effectiveness for you and your processes.

Enterprise Risk Management

Our consultants work to identify and transition your information into Wdesk risk assessment templates. Three consulting package options provide a standardized, yet flexible approach to achieving your reporting objectives.

Data Preparation

Transform how you gather, prepare, and enrich data, and connect that data to Wdesk. With Wdata, you can connect, explore, and understand massive datasets from structured systems or desktop spreadsheets. Solutions Architects will leverage Spreadsheets and Connected Sheets to enable you to instantly update downstream reports, documents, and presentations.

Regulatory Risk Reporting

In collaboration with your team, our consultants construct a process that is repeatable and sustainable while promoting the data quality that global regulators demand.

Performance Reporting

Our consultants help map your data structure in Wdesk, reducing time to report creation.

Insurance Statutory Reporting

Our consultants lead workshops and interviews with your team to map shared data, building an optimized project architecture. Manual updates and data checks are minimized, so more time is spent on value-added work.

Contact your sales representative for more information about consulting services.

sc20180716-j 56262

The information contained herein is proprietary to Workiva and cannot be copied, published, or distributed without the express prior written consent of Workiva © 2018.