

**Deloitte.**

**workiva**

Deloitte leverages Workiva—a cloud platform for data collaboration, reporting, and compliance—to streamline and automate finance and management reporting tasks. Workiva is part of Deloitte’s Controllershship portfolio, which helps enhance efficiency by simplifying traditionally manual processes.



## Approach

### **CURRENT-STATE REPORTING PROCESS**

- Multiple versions of the truth
- Lack of data alignment
- Inability to reuse and scale materials
- Limited or no automation and self-service reporting
- Limited security and governance

### **FUTURE-STATE REPORTING PROCESS**

- End-to-end reporting transparency for single version of the truth
- Improved consistency
- Simple collaborative tools
- Multiple reporting views from the same data
- Built-in disclosure requirements
- Direct systems integration and embedded audit trail
- Data access restricted by role
- A system for storing and verifying internal controls

## Use cases



### **FINANCIAL**

- SEC disclosures
- Annual and interim reporting
- Private reporting



### **MANAGERIAL**

- Board reports
- Flash/KPI reporting
- Business unit and/or domain reporting



### **REGULATORY**

- Sustainability management
- Tax
- SOX/Internal Audit
- Global statutory reporting
- NAIC insurance reporting



### **INDUSTRY-SPECIFIC**

- Oil and gas
- Life sciences/pharmaceuticals
- State/local, federal
- Consumer/retail

## Why Deloitte and Workiva?

Our dedicated Workiva team comprises an essential blend of accounting, finance, and tech savvy. But that's just one of the reasons our alliance works.

-  **History.** We have been working together since 2016 and are one of Workiva's most experienced alliances.
-  **Collaboration.** Our close relationship ensures effective co-delivered outcomes.
-  **Wide domain experience.** Across 20+ use cases in regulatory, statutory, financial, GRC, and other reporting domains.
-  **100+ professionals,** all of whom are certified to implement Workiva modules.
-  **Global network.** US and member firms include EMEA, APAC, and LATAM.
-  **Flexible staffing** to enable blended team models.
-  **Offshore capability** to provide more efficiency globally.
-  **Informed methodology** for implementing Workiva that leverages our advisory and accounting backgrounds.

## Workiva Global Partner of the Year for five consecutive years (2020–2024)



## READY TO UNLOCK YOUR ORGANIZATION'S DIGITAL POTENTIAL WITH WORKIVA?

### CONTACT US

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