

A new standard in reporting efficiency.

WorkOps Consulting specializes in providing Workiva clients best practices in customized document setup, implementation, training and integration services in all areas of the finance organization. We create value by building Workiva reporting platform solutions that drive better analytics and bigger returns on time.

## Areas of Workflow Automation



Budgeting,  
Planning &  
Forecasting



SEC  
External  
Reporting



Fund &  
Statutory  
Reporting



Performance  
Reporting



Cash Flow  
Models



Executive  
Dashboards  
& Board Reports

### Our Approach

Through our proven Wdesk link-building approach and easy-to-use designs, we connect your data to a single source enabling highly automated, scalable reporting solutions that integrate seamlessly with existing processes and eliminate many common reporting challenges.

### Results-Oriented

Shorter productions cycles. Better cost savings. Our client-centric CPA consultants consistently deliver intelligent, well-designed Wdesk solutions that empower finance teams, giving them the opportunity to enhance and scale all aspects of their financial reporting.

- ✔ Customized document setup
- ✔ Minimal business interruption
- ✔ Big 4 Firm industry CPAs
- ✔ Full training and documentation
- ✔ No conflict of interest issues
- ✔ High user adoption and ROI



Automated document assembly



Greater accuracy and control



Enhanced reporting & analytics



Eliminate costly publishers



Up to 60% productivity gains



Reduced overtime and stress

## But Don't Take Our Word For It...Read What Our Clients Have To Say!



*"Our 6K and 40F filings were manually prepared with disparate inputs. WorkOps brought everything together in Wdesk, transforming our entire document assembly process. And using their validation checker has virtually eliminated all manual tick and tie. I highly recommend them for your next Wdesk reporting project."*

Stephen Ball, Sr Manager External Reporting & Accounting Policy



*"WorkOps created an extensive data collection model that largely automated a previously time-consuming and manual process for us. They also created FP&A and monthly accounting models in Wdesk that are not only very effective, but allow for greater control and transparency in our day-to-day reporting."*

Michelle Francis  
Director Financial Reporting



*"The team at WorkOps were a joy to work with and each consultant is professional and efficient in their approach. I was surprised by the speed with which they created our financial statement model in Wdesk. In the end, they exceeded our expectations and created tremendous value for our organization."*

Alexandra Lefebvre  
Consolidation Accountant



*"WorkOps created a spreadsheet and document set housing both quarterly and annual periods, and dynamically linked everything together. We went from multiple departments with tedious disclosure tie-outs to a single, streamlined production process. The workflow transformation and resulting efficiency gains have been truly amazing."*

John Peellegoda  
Treasurer

## The WorkOps Advantage

- ✔ Track record of multiple successful reporting project implementations that is unmatched
- ✔ Benefit from maximum time savings, cost reductions and internal control improvements
- ✔ Big 4 Firm CPAs with extensive reporting backgrounds from leading employer organizations
- ✔ Unintrusive implementation process so teams can maintain focus on their regular work
- ✔ Our training program ensures everyone is comfortable working in the new Wdesk solution



Email for a complimentary quote or demo today!  
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www.workopsconsulting.com

www.workopsllc.com