

WORKOPSCONSULTING

Advanced Wdesk Setup & Support

Financial Reporting
Made Easy





Wdesk by Workiva

Award-winning cloud-based platform
Wdesk by Workiva has transformed the way businesses prepare their financial and management documents. Wdesk:



Allows instant real-time collaboration



Saves time by streamlining workflow



Reduces reporting risk



Enables better, more confident decisions



Improves data accuracy and consistency

WorkOps Consulting

An Advanced Certified Wdesk Implementation Partner



Toronto-based firm WorkOps Consulting provides best practices to maximize the full benefits of Wdesk. WorkOps Consulting is one of the first CPA firms and the only Canadian company to offer advanced Wdesk implementation support and accounting advisory services that go beyond a basic financial statement setup.

Decrease Risk

It's no secret that the stakes for public companies are high. Reporting incorrect, incomplete or untimely information increases the risk of poor decision-making, legal liability, reputational damage and a weakened competitive position.

WorkOps has teamed up with Workiva to help companies address their technology, compliance and reporting process needs in a single comprehensive solution.

Improve Efficiency

Our 45 years of combined experience has shown that in-house Wdesk implementation of sensitive reporting documents like MD&A often takes on a 'see what works best' approach. Companies can end up with a slow and inefficient deployment, which often results in lower user adoption and outdated setup practices. Our setup is fast, efficient and non-intrusive, minimizing disruption to busy reporting teams.

Save Time

Streamlining the last mile of finance means reinvesting time savings resulting from shorter report production cycles into more powerful analytics. And better analytics mean more accurate management reports, budgeting and forecasting models, executive reporting and MD&A documents. Our goal is to save your business time without sacrificing completeness, accuracy and control.

Services

The launch of Wdesk has made the lives of accountants much easier. But finding the right technology is only half the answer when it comes to financial process improvement and better workplace collaboration.

To maximize the benefits of Wdesk, WorkOps Consulting has teamed up with Workiva to provide CFO offices a complete 'all-in-one' solution.

Our services for Wdesk include:

Single source document setup & linking in Wdesk
MD&A, financial statements and notes, earnings releases, investor decks, debt and equity offering documents, MICs, AIFs, Audit Committee presentations, and board packages

Source link migration in Wdesk from workbooks to spreadsheets

Source data inventorying supporting published amounts and disclosures

Setup of appropriate project, document and section security permissions

Creation of best practice project roll forward
Functionality for automated dates, rounding, historical data & line captioning

Data validation setup and optimization of source/destination linking

Creation of relevant SOX internal control documentation

Partial or full automation of the data pull from your general ledger system to Wdesk



Hands-on staff training to mitigate key person risk once the reporting solution is in live production.

CFO's and Controllers can confidently redeploy resources in support of other important projects knowing their Wdesk implementation will be best-in-class from beginning right through to training and deployment.



