Connected Planning and Performance Management
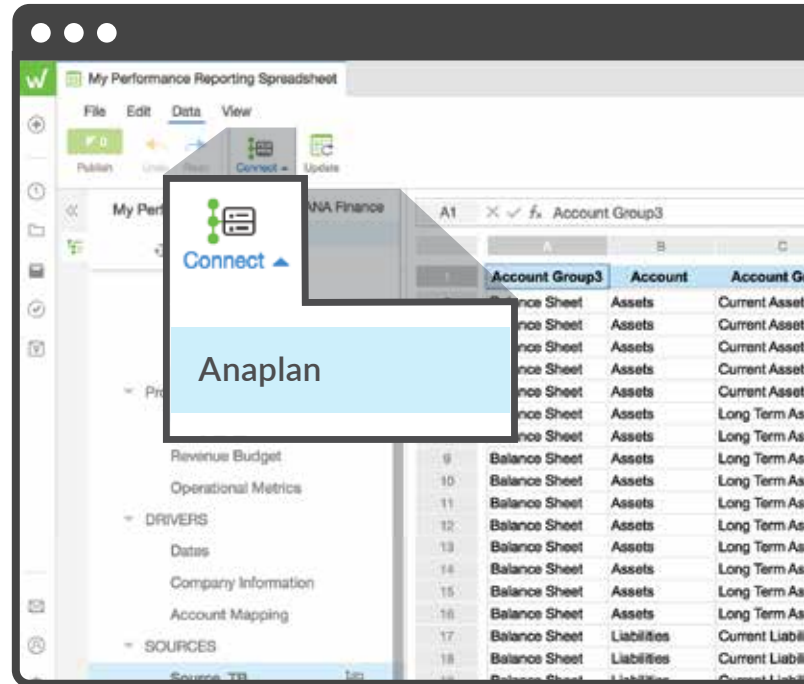
Drive finance transformation in the cloud

Workiva and Anaplan have partnered to provide a connected and comprehensive cloud solution for finance and accounting professionals.

Workiva delivers Wdesk, an easy-to-use cloud platform that modernizes reporting, compliance, and broader enterprise use cases. Over 3,000 organizations use the platform for SEC reporting, financial reporting, and performance reporting.

Anaplan is a planning and performance management cloud platform used by over 850 organizations for strategic planning, budgeting, forecasting, operational planning, analysis, financial consolidation, and reporting.

Both solutions have been recognized by Gartner as leaders in their respective cloud performance management magic quadrants.

Finance transformation

The connected Wdesk and Anaplan cloud platforms support the transformation of finance and accounting processes. Add value throughout the financial reporting and FP&A life cycle—from close through disclose and planning through presentation. The combined solutions automate and simplify the actuals, budget, variance, and management reporting processes.

Financial reporting

More than 3,000 organizations trust Wdesk with their SEC filings and broader financial reporting activities. Wdesk simplifies EDGAR and XBRL in report creation, review, and disclosure processes. With the connected solution, financial statements and data from Anaplan are integrated into Wdesk to add narrative to filings, management reports, and investor presentations.

Financial planning and analysis

Anaplan is the market leading platform for planning, budgeting, and forecasting. The integration with Wdesk supports the creation of timely reports with reliable narrative, and the combination of actuals, targets, and forecast data. With Wdesk, users create, collaborate, and publish polished reports, digital reporting books, and presentations.

Regulatory compliance

Wdesk solves complex compliance and regulatory reporting requirements for some of the world's most sophisticated organizations. Anaplan delivers advanced modeling and planning capabilities for industry-specific use cases. The connected solutions provide comprehensive capabilities to connect modeling and scenario planning with reporting and disclosures.

Workiva

Flexible data management

Structured and unstructured data is easily brought into Wdesk and creates a central and connected set of data. Use and reuse that information to provide a consistent set of documents and reports.

Version control

Wdesk eliminates check-out systems, email trails, and handwritten notes. An audit trail is created and saved for every change. All edits leave a record for greater transparency.

Data consistency

Reporting information lives within Wdesk and is connected across the platform. When changes occur, users trust that numbers and narrative are automatically updated without manual work.

Workflow and tasking

Work better together. Assign and respond to tasks in your data, documents, and reports. Create approvals, reviews, requests for documentation, or other tasks specific to your working group.

About Workiva

Workiva (NYSE:WK) delivers Wdesk, an intuitive cloud platform that modernizes how people work within thousands of organizations, including over 70 percent of the 500 largest U.S. corporations by total revenue. Wdesk is built upon a data management engine, offering controlled collaboration, data connections, granular permissions, and a full audit trail. Wdesk helps mitigate risk, improves productivity, and gives users confidence in their data-driven decisions. For more information, visit workiva.com.

Anaplan

Connected planning

Accelerate enterprise cloud planning for strategic and corporate plans, annual budgets, and forecasts. Plan by any time bucket—day, week, period, year—and across multiple currencies.

Flexible, user-owned business rules

Utilize simple, real-language formula creation with no coding. Drag and drop for different hierarchy rollups, add new currencies, change chart of accounts, and update business rules with no dependence or burden on IT.

Versions and scenarios

See multiple versions for comparison, with centralized control for consistent versioning companywide. Leverage unlimited scenarios for proactive comparative insight and better choices.

Top-down and bottom-up

Dynamically cascade strategic plans by key dimensions to align plan, budget, and forecast. Build budgets bottom-up while viewing targets to improve collaboration and reduce iterations.

About Anaplan

Anaplan is a planning and performance management cloud platform. The platform is used by over 800 organizations for strategic planning, budgeting, forecasting, operational planning, analysis, financial consolidation and reporting. With Anaplan's cloud-based platform, corporate objectives align with operating plans that can be adjusted in response to market events—empowering finance to help the business make better decisions by anticipating the future.

To learn more, **visit workiva.com and anaplan.com**

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workiva.com | info@workiva.com | 888.275.3125