



Labrador Transparency

# Workiva Optimization

Transform Your Reporting Process in Workiva — Labrador helps companies unlock accuracy, speed, and collaboration across every disclosure.

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# Introduction

In 2017, Labrador became Workiva’s sixth partner in the world, and since we have supported many of the world’s leading public companies in Workiva. Today, we operate the largest and most experienced Workiva support team globally, providing year-round assistance that makes the platform easier to use and more effective for every user.

Labrador is one of Workiva’s **longest tenured and most experienced partners**.

**300+ Workiva customers trust Labrador**, including 50 S&P 100 companies.

Labrador has integrated and optimized **100,000+ pages in Workiva**.



Our specialists streamline reporting processes, reduce the cost of disclosure preparation, and eliminate errors and silos between teams. Combining deep knowledge of Workiva with Labrador’s expertise in information design, we ensure that disclosures are not only accurate and compliant—but also clear, readable, and actionable for management, investors, and regulators.

# How Companies Use Workiva Today

Many Fortune 500 companies use only a fraction of their Workiva investment. Labrador helps CFOs, Chief Accounting Officers, and Controllers move beyond compliance to achieve full connectivity across filings, investor materials, and reports — improving accuracy, efficiency, and collaboration enterprise-wide.

~ 60–70% of Workiva clients

### Basic / Compliance Usage

- Focused almost entirely on SEC reporting (10-K, 10-Q, 8-K).
- Documents are uploaded but not deeply linked across sections.
- Limited use of data linking (numbers are copy-pasted manually or rekeyed).
- Little or no cross-functional collaboration (Finance and Legal work in silos).
- Design, formatting, and publishing still done offline (Word/PDF loops).

#### How Labrador Helps

By implementing full Workiva linking, templates, and automated refreshes — saving days of manual work every quarter.

~ 20–25% of Workiva clients

### Intermediate / Connected Reporting

- Linkage between financials, proxy data, and ESG KPIs within the platform.
- Use of Projects and Permissions to manage workflows.
- Some integration of Workiva Certifications for SOX controls.
- Reports still exported for design externally, losing live data linkage.

#### How Labrador Helps

Labrador sets up and designs natively in Workiva — applying branded design elements while maintaining live linking and version control.

~ 5–10% of Workiva clients

### Advanced / Enterprise Connectivity

- Use of Wdata, APIs, and Integrations (ERP, ESG data, HR systems).
- Management reporting, board decks, and sustainability disclosures generated dynamically.
- Workiva used for multiple workflows (Controls, ESG, Audit, Legal, Finance).

#### How Labrador Helps

Labrador helps clients extend Workiva to new domains:

- Capital Markets disclosures
- Governance and risk dashboards
- Internal board reporting and executive summaries
- ESG/Sustainability reports
- Climate compliance (CSRD, SEC, ISSB)

# The Workiva Opportunity

Typical Workiva clients underutilize 50–70% of their license potential. For a Fortune 500 company spending ~\$250K annually on Workiva, this underutilization can mean **\$100K–150K in unrealized value** (duplicated staff hours, duplicated software, external vendor fees, lost automation).

Underuse Area	Missed Opportunity	How Labrador Helps
<b>Adoption &amp; Enablement</b>	Slow learning curve; shadow files proliferate	Role-based onboarding, office hours, and 24/5 support
<b>Data Integration (Wdata/APIs)</b>	No system connectors; manual refresh & reconciliation	Stand up Wdata tables; ERP/HR/ESG mappings; governed pipelines with refresh cadence
<b>Cross-Documents Linking</b>	Re-keys cause inconsistencies across artifacts	Source tables and synchronized content blocks across filings and decks
<b>In-Platform Design</b>	Exported design breaks live links and version control	Branded templates and layout directly in Workiva to retain linkage and XBRL
<b>Cross-Team Workflows</b>	Finance/Legal/IR in silos; redundant reviews	Shared templates, roles, and approvals with traceable change history
<b>Narrative Consistency</b>	Divergent language across reports	Centralized narrative libraries; controlled reuse across channels
<b>Post-Season Reuse</b>	Rebuild from scratch each year	Reusable frameworks, tables, and dashboards with roll-forwards

# Workiva by Labrador — Case Studies

Labrador helps leading public companies streamline and enhance their disclosures in Workiva. Our support combines design, technology, and process expertise to deliver connected, branded, and efficient reporting solutions. Learn more from our online [Look Book](#).

## S&P 100 Diversified Healthcare Company

### Opportunity

An S&P 100 diversified healthcare company wanted to present all SEC filings in Workiva—from 10-K to proxy—using its corporate brand, typography, and visual standards. The goal: to strengthen investor trust and reduce the cost and complexity of managing multiple disclosure formats.

### Workiva by Labrador Solution

- Implemented the company's new brand design system directly within Workiva.
- Applied a consistent, linked style sheet across all SEC filings to ensure a single source of truth.
- Established cross-report linking and synchronized content blocks to eliminate manual updates and version errors.

### Outcome

**The client achieved a unified, investor-ready disclosure suite that reflects its brand in every report. Workspaces are easier to use, with fewer formatting steps and stronger data consistency—reducing reporting effort and cycle time across the enterprise.**

## S&P 500 Hospitality Company

### Opportunity

An S&P 500 hospitality company sought to extend its use of Workiva beyond SEC filings to its quarterly investor presentation decks. These decks, traditionally produced in PowerPoint, required manual updates each quarter, creating inefficiencies and higher risk of error. The company wanted to streamline updates, ensure data consistency with SEC filings, and maintain brand alignment.

### Workiva by Labrador Solution

- Implemented investor presentation templates directly within Workiva, linking data, charts, and narratives to source files (10-Q, 10-K, earnings release).
- Established cross-document linking so financial tables and KPIs updated automatically across filings and investor materials.
- Applied Labrador's branded information design principles to align investor decks with the company's broader disclosure suite.

### Outcome

**The company achieved a single connected reporting environment for both regulatory and investor communications. Investor decks now reflect complete data integrity, updated in minutes rather than days, and aligned visually with the company's corporate brand.**

## Global Medical Technology Company

### Opportunity

A global medical technology company sought to modernize its ESG reporting by transitioning production to Workiva. Its sustainability disclosures were managed across multiple spreadsheets and design tools, leading to version-control issues and limited integration with financial reporting workflows. Leadership wanted a single environment for collaboration, accuracy, and design consistency—without expanding internal workload.

### Workiva by Labrador Solution

Delivered through Labrador's Managed Service Provider (MSP) model, our team:

- Implemented the ESG Report natively in Workiva, connecting narrative, data, and visuals within one auditable workspace.
- Linked ESG metrics and narrative content to source systems and prior disclosures to ensure consistency and traceability.
- Applied Labrador's design system to create a clean, branded, investor-ready ESG document exportable directly from Workiva.
- Provided year-round support, allowing the client's sustainability team to focus on content and analysis while Labrador managed production and design updates.

### Outcome

**The company now produces a fully integrated ESG Report within Workiva—aligned with financial filings, brand standards, and sustainability frameworks. Through the MSP model, the company reduced its internal reporting burden, eliminated manual versioning, and achieved a more reliable, faster, and scalable ESG disclosure process.**



## Labrador Transparency

### About Labrador Transparency

Labrador Transparency exists to offer the science of transparency to corporations wishing to communicate effectively with their readers.

Our experienced and passionate team is composed of attorneys, designers, project managers, thinkers, and web developers. We collaborate together around a process that encompasses drafting, editing, designing, and publishing across all digital and print channels.

We are thrilled that communications prepared by Labrador Transparency have contributed to trustful relationships between our clients and their readers, whether investors, employees, or other stakeholders.

In turn, our commitment to our clients has resulted in meaningful long-term relationships with some of the most respected public and private companies in the world.

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