



Labrador Transparency

# Optimizing Workiva for Private and Newly Public Company Reporting

Delivered by Labrador  
in partnership with  
Harbor View Consulting

# Introduction

Labrador supports private and public companies across the full reporting spectrum—from board and management reporting to capital markets, sustainability, proxy, and financial reporting. We are Workiva’s longest-tenured design and document-execution partner and the first design Managed Service Provider in North America. Our team works directly inside your Workiva workspace to connect data, streamline workflows, and publish with speed and precision.

## How Labrador Supports Private and Public Companies

**Advisory:** Our advisory team brings fluency in SEC rules and investor expectations, reinforced by practical in-house experience. Acting as an extension of your team, we ensure investor and other stakeholder communications convey your story with clarity and strategic impact.

**Information Design:** Our designers apply a reader-focused approach that makes complex disclosure easy to navigate, using clear hierarchy, purposeful structure, and visual logic. We reduce page volume, enhance key messages with graphics, and meet accessibility and ADA standards.

**Workiva Implementation and Optimization:** We configure Workiva for financial, sustainability, and governance workflows; connect ERP/HR/ESG systems; and set up governed linking across reports. With user training and 24/5 production support, we reinforce the value of Workiva by eliminating manual rework, building audit-ready systems, optimizing collaboration between teams and automating the transfer of data from additional tools.

**Publication:** We manage publication across all investor touchpoints, ensuring disclosures land consistently whether filed, viewed online or printed. Our team oversees SEC filings in both iXBRL and courtesy PDF formats, creates interactive and web-native experiences, and produces high-quality print materials.

### Our trusted partners

#### Harbor View Consulting (HVC)

Deep Workiva integration and accounting expertise—ERP/GL mapping, Wdata pipelines, and control-ready workflows.

Learn more:

[harborview-consulting.com/services/workiva](https://harborview-consulting.com/services/workiva)

# How Companies Use Workiva Today

Most large enterprises use only a subset of Workiva’s capabilities. Labrador + HVC help CFO, CAO, and Controller teams progress from SEC-only usage to a connected operating model spanning financials, board, ESG/CSRD, and risk.

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

# The Workiva Opportunity

Typical enterprises underuse 50–70% of their Workiva investment—translating into duplicated effort, external vendor spend, and lost automation.

Underuse Area	Missed Opportunity	How We Unlock Value
<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-Document 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

# Why Private and New Public Companies Should Implement and Optimize Workiva

Companies face growing expectations from investors, lenders, and boards for faster, clearer, and more reliable information. With the right setup and optimization, Workiva can meet all these needs.

Labrador helps companies turn Workiva into a connected, efficient reporting environment that supports better decisions and stronger governance.

## Workiva Implementation and Optimization Journey with Labrador

### Discover and Align

- Current state review
- Define reporting, GRC, ESG
- Data and Integrations
- Workflow and Timeline

### Configure and Connect

- Workspace setup
- Linking data sources
- Reporting and ESG templates
- Automations and workflows

### Enable and Train Teams

- Role based training
- Collaboration best practices
- Permissions and controls
- Hands on working sessions

### Implement Workiva

#### Private Company Finance

- SEC reporting
- Management Reporting
- Multi-entity and consolidated reports

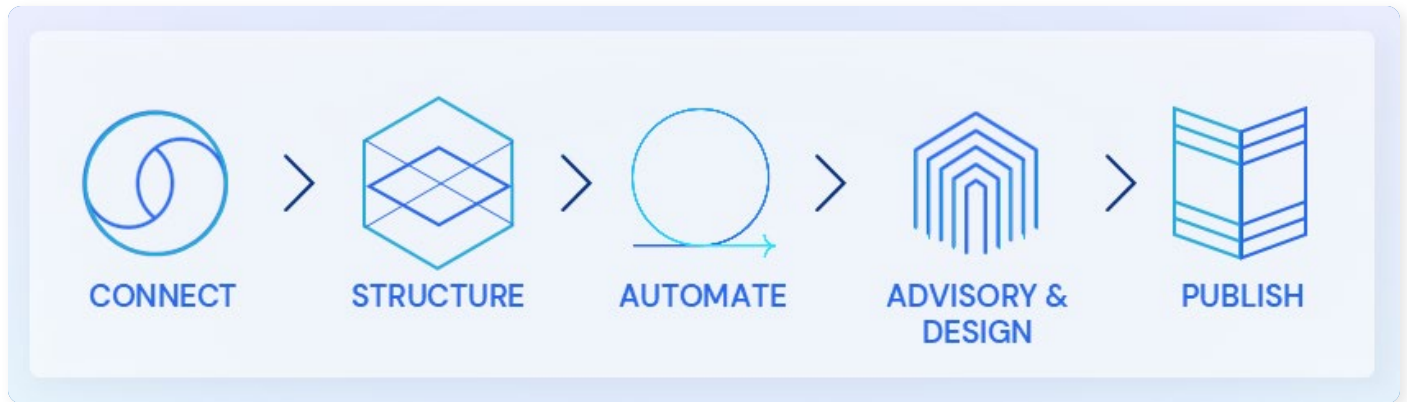
#### Sustainability

- ESG reporting
- Carbon accounting
- CSRD readiness



## The Effective Implementation

We set up one governed workspace across Finance, Legal, HR, and Operations with repeatable workflows and templates. The journey follows a clear pattern:



## The Value of Optimization

As companies grow and reporting needs shift, Workiva evolves with them. Optimization ensures:

- Automated roll-forwards and governed templates reduce cycle time
- Cleaner documentation for auditors, lenders, and rating agencies
- Granular permissions and traceable edits across Finance, Legal, and IR
- Investor-ready outputs for private rounds or IPO preparation
- Single source of truth across ERPs, HR, and treasury—no manual reconciliation
- Faster decisions via live dashboards and linked narratives


**Harbor View Consulting partners with Labrador to stand up Wdata pipelines, ERP/GL mappings, and control-ready workflows that hold up under audit.**

# Why Labrador

As Workiva’s first design and execution partner, Labrador combines platform mastery with deep reporting and information design expertise to help private and newly public companies build Workiva environments that are efficient, reliable, and scalable. **Workiva, done right, is a backbone for accuracy, consistency, and growth.**

## Contents

The following pages highlight disclosures prepared by Labrador in Workiva for companies at every stage of their journey, from private companies to recent listings and mature issuers.




COBANK  
2024 Sustainability Report  
Growing Rural America

**CoBank**



ENHANCING LIVES  
for a Better World  
2023 Sustainability Report

**CNG**



2025  
NOTICE OF ANNUAL MEETING  
AND PROXY STATEMENT

**GE Vernova**




Part I  
Item 1. Business

**Johnson & Johnson**



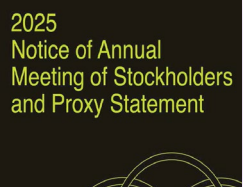
Kenvue  
Proxy Statement  
2025

**Kenvue**



2025 Cooperative Impact Report  
Building a Better World Through Cooperatives

**NCBA**



2025  
Notice of Annual Meeting of Stockholders and Proxy Statement

**Robinhood**



solventum  
2025 Annual Meeting of Shareholders and Proxy Statement

**Solventum**

Private Company Disclosures

# CoBank

CoBank, a leading cooperative bank serving agribusiness and rural infrastructure providers, needed a reporting solution that could streamline complex disclosures while maintaining clarity for stakeholders. By leveraging Workiva and Labrador’s design expertise, CoBank achieved a unified reporting environment that supports transparency and efficiency across its private company disclosures.

## What we did

- Advisory
- Copywriting
- Information Design
- Workiva design implementation
- Publication

Read the Report 



Private Company Disclosures

# CNG

CNG, a leading producer of high-performance packaging films, needed a reporting solution that could keep pace with its complex operations and growing compliance requirements. Labrador partnered with CNG to implement Workiva and deliver disclosures that combine technical accuracy with clear, investor-friendly design—ensuring transparency across private company reporting.

## What we did

- Advisory
- Copywriting
- Information Design
- Workiva design implementation
- Publication

Read the Report 



Recent Public Company Disclosures

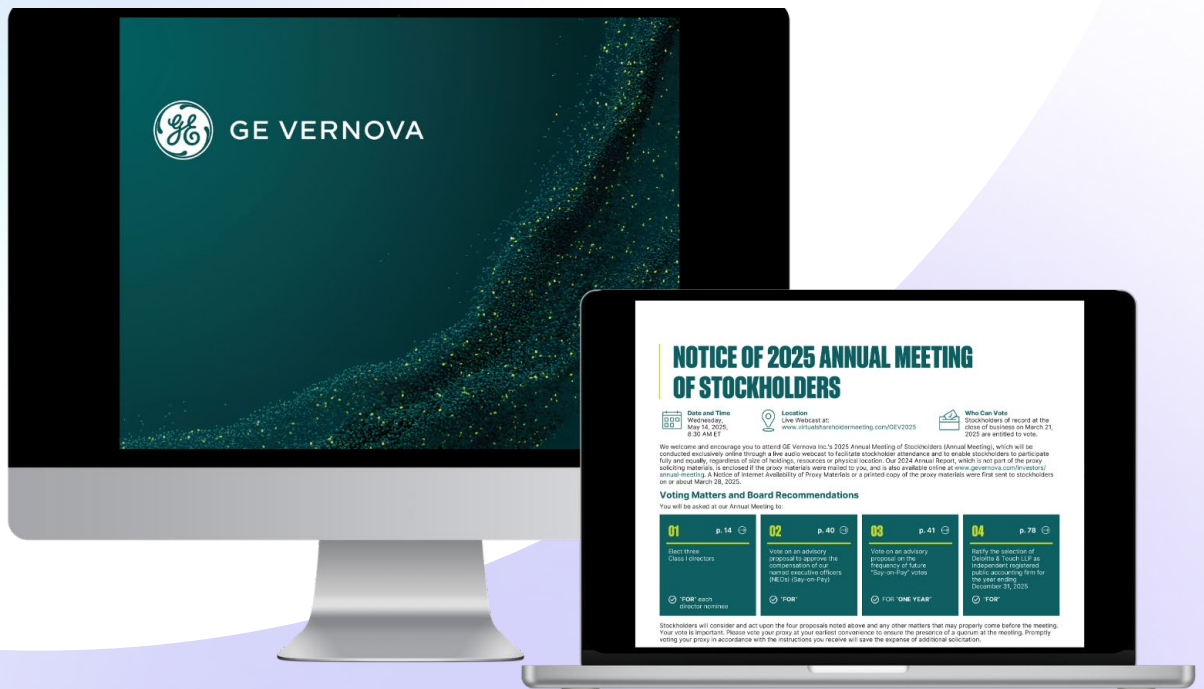
# GE Vernova

Following its recent public listing, GE Vernova sought to establish a strong foundation for investor communications. Labrador helped the company transition to Workiva, creating a scalable reporting framework that aligns with regulatory requirements and reinforces GE Vernova’s commitment to transparency.

## What we did

- Advisory
- Information Design
- Workiva design implementation
- Publication

Read the Report 



Mature Public Company Disclosures

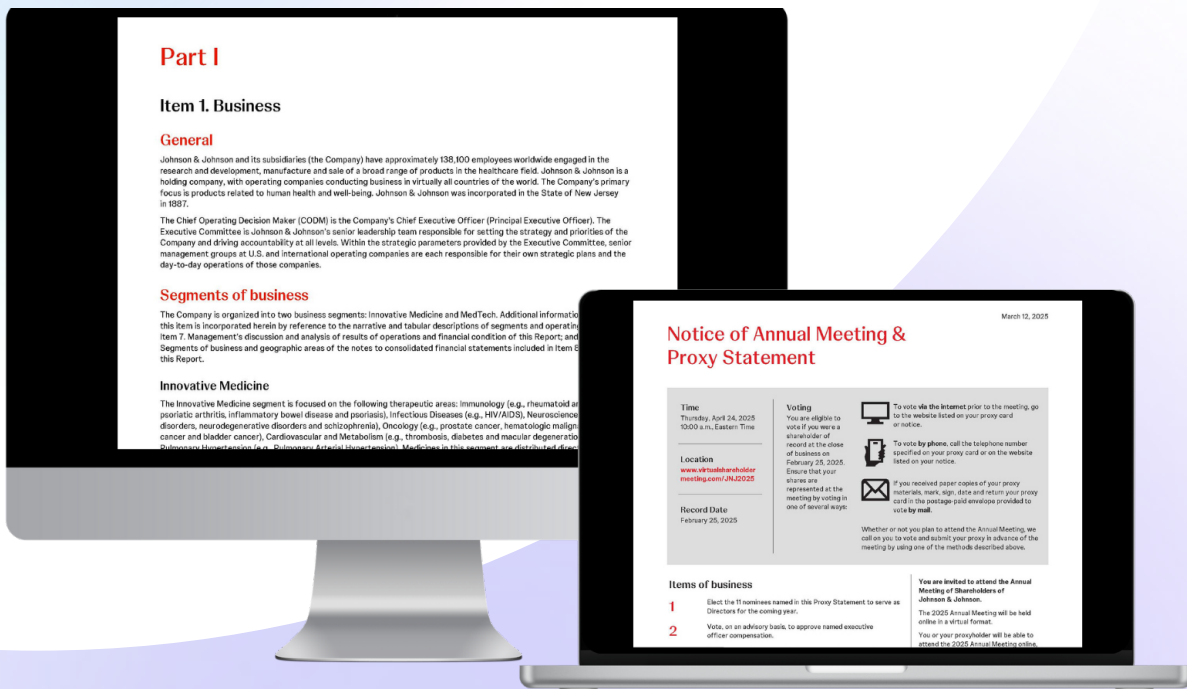
# Johnson & Johnson

For a mature public company like Johnson & Johnson, consistency and precision in reporting are paramount. Labrador worked closely with J&J to optimize their Workiva environment, enabling seamless integration of financial and proxy disclosures while elevating design for a clear, investor-friendly experience.

## What we did

- Advisory
- Information Design
- Workiva design implementation and optimization
- Publication

Read the Report 



Recent Public Company Disclosures

# Kenvue

As a newly public company, Kenvue needed to quickly adapt to heightened reporting expectations. Labrador supported Kenvue with advisory and design services in Workiva, delivering disclosures that balance compliance with compelling storytelling for stakeholders.

## What we did

- Advisory
- Information Design
- Workiva design implementation
- Publication

Read the Report 



Private Company Disclosures

# NCBA

The National Cooperative Business Association (NCBA) champions cooperative enterprises across industries, promoting economic empowerment and community development. To support its mission, NCBA needed a reporting solution that could deliver clarity and consistency for stakeholders. Labrador implemented Workiva and designed disclosures that align with NCBA’s values of transparency and trust, ensuring accurate and accessible reporting.

## What we did

- Advisory
- Copywriting
- Information Design
- Workiva design implementation
- Report Publication and [Website](#)

Read the Report 



Recent Public Company Disclosures

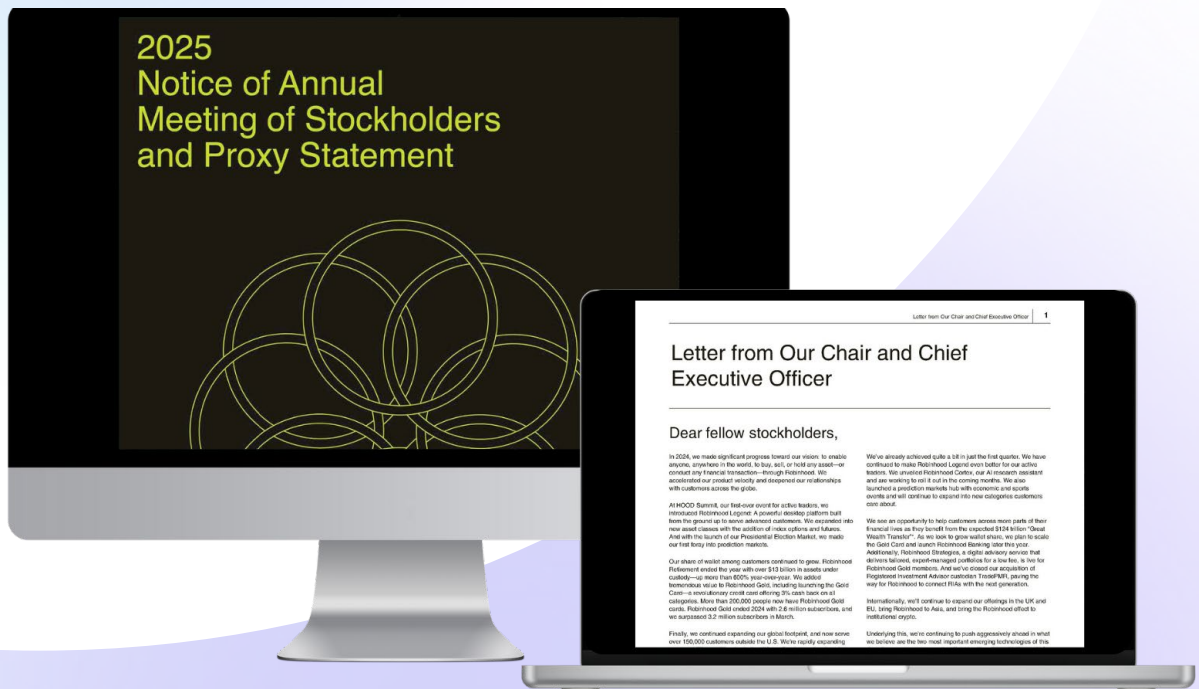
# Robinhood

Robinhood’s rapid growth and public market presence demanded a reporting approach that could keep pace with evolving investor expectations. Labrador partnered with Robinhood to deliver Workiva-enabled disclosures that combine accuracy, agility, and engaging design.

## What we did

- Advisory
- Information Design
- Workiva design implementation
- Publication

Read the Report 



2025  
Notice of Annual  
Meeting of Stockholders  
and Proxy Statement

Letter from Our Chair and Chief Executive Officer

Dear fellow stockholders,

In 2024, we made significant progress toward our vision to enable anyone, anywhere in the world, to buy, sell, or hold any asset—we conduct any financial transaction—through Robinhood. We accelerated our product velocity and deepened our relationships with customers across the globe.

At HOOD Summit, our first-ever event for active traders, we introduced Robinhood Ledger, a powerful, flexible platform built from the ground up to serve advanced customers. We expanded into new asset classes with the addition of index options and futures. And with the launch of our Presidential Election Market, we made our first foray into prediction markets.

Our share of wealth among customers continued to grow. Robinhood Platform ended the year with over \$1.3 billion in assets under custody—up from over \$600 million in 2023. We added 10 million new users to Robinhood Gold, including launching the Gold Cash—a new advanced credit card offering 2% cash back on all categories. More than 200,000 people now have Robinhood Gold cards. Robinhood Gold ended 2024 with 2.6 million subscribers, and we surpassed 3.2 million subscribers in March.

Finally, we continued expanding our global footprint, and now serve over 100,000 customers outside the U.S. While rarely occurring,

We've already achieved quite a bit in just the first quarter. We have continued to make Robinhood Ledger even better for our active traders. We unveiled Robinhood Cash, our AI research assistant and are working to roll it out in the coming months. We also launched a prediction markets hub with economic and sports accounts and will continue to expand into new categories customers care about.

We saw an opportunity to help customers across more parts of their financial lives as they benefit from the expected \$1.6 trillion "Global Wealth Transfer." As we look to grow wealth globally, we plan to scale the Gold Card and launch Robinhood Banking over the year.

Additionally, Robinhood Strategies, a digital advisory service that delivers tailored, expert-managed portfolios for a low fee, is set for Robinhood Gold members. And we've closed our acquisition of Edgepoint Investment Advisor customer TransferWise, paving the way for Robinhood to connect Erika with the next generation.

Internationally, we'll continue to expand our offerings in the UK and EU, bring Robinhood to Asia, and bring the Robinhood ethos to institutional clients.

Underlying this, we're continuing to push aggressively ahead in what we believe are the two most important emerging technologies of this

Recent Public Company Disclosures

# Solventum

## 2025 Proxy Statement

Solventum's Proxy Statement reflects its commitment to governance and shareholder engagement. Labrador provided design and Workiva implementation that transformed regulatory content into a clear, accessible document aligned with best practices.

## What we did

- Information Design
- Publication
- Workiva design implementation

Read the Report 



Recent Public Company Disclosures

# Solventum

## 2024 Sustainability and Social Impact Report

For its 2024 Sustainability and Social Impact Report, Solventum aimed to showcase progress on ESG priorities while meeting emerging disclosure standards. Labrador delivered a visually compelling report through Workiva, ensuring accuracy, transparency, and a strong narrative for stakeholders.

### What we did

- Advisory
- Information Design
- Workiva design implementation
- Publication

Read the Report 





## Labrador Transparency

### About Labrador

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.

### Contact

Labrador Transparency  
1737 Ellsworth Industrial Blvd NW Suite E-1  
Atlanta, GA 30318  
(404) 688 3584

### About Harbor View Consulting

Harbor View Consulting is a premier business advisory firm dedicated to helping organizations navigate complex challenges and achieve sustainable growth. Our team of seasoned professionals brings decades of experience across various industries, delivering tailored solutions that drive measurable results.

We combine deep industry expertise with innovative thinking to help our clients transform their operations, optimize performance, and capitalize on new opportunities. Our collaborative approach ensures that we not only address immediate challenges but also build lasting capabilities within our client organizations.

Copyright © 2026 by Labrador Transparency

All rights reserved. No part of this publication may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written permission of the publisher, except in the case of brief quotations embodied in critical reviews and certain other noncommercial uses permitted by copyright law.