

# 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



WorkOps Consulting provides best practices to maximize the full benefits of Wdesk.

WorkOps Consulting is one of the first firms and the only partner to offer advanced Wdesk implementation and accounting advisory services that go well 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 Companies can end up with a slow and inefficient deployment, which often results in lower user adoption and outdated setup practices.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.





## Team

### Decorated CPAs with Extensive Wdesk Experience

At the heart of WorkOps is a group of CPAs with over 50 years of combined experience at some of North America's largest public and private companies. Our team of accountants are multi-faceted with a range of technical and financial experience enabling us to serve U.S. and Canadian reporting issuers.

Over their careers, our consultants have led multiple Wdesk implementations and successfully closed over 70 quarter-ends in the platform.

*"We are excited to be embarking on what we believe will be a mutually beneficial partnership with Workiva. Their proprietary technology together with our finance expertise creates a powerful, compelling reporting solution for our clients."*

*Nigel Bunbury, CEO, WorkOps Consulting Inc.*



Nigel Bunbury is WorkOps founder & CEO with over 19 years of finance, controls and process improvement experience in financial services, real estate and public accounting. Mr. Bunbury has led high-performing teams through periods of rapid growth

and transformation at some of Canada's largest public companies, including Royal Bank of Canada, RioCan REIT and GMP Capital Inc. Mr. Bunbury graduated from McMaster University in 2000 having earned an Honours Bachelor of Commerce degree while receiving a scholarship for academic excellence. Mr. Bunbury began his career at KPMG LLP and is a 2001 CPA.



Molly Cotter is a senior principal in the business with over 15 years of accounting, reporting and process improvement experience at multi-national U.S. and Canadian companies. A champion of change management and achieving efficiency, Ms. Cotter has implemented

reporting systems at Canadian Tire Corporation and Emera Inc. and held senior finance roles at companies such as Cott Beverages. Ms. Cotter is widely considered a pioneer in end-user Wdesk model development and her technical expertise and attention to detail are unmatched. Ms. Cotter began her career at PwC and is a 2004 CPA.



Financial reporting is in our DNA.

We understand finance teams because we *are* a finance team.

Call or email for a quote today.

DALLAS OFFICE

1717 N Akard St, Suite 230  
Dallas, Texas United States 75201  
Toll-Free Main: 1-844-WORKOPS  
[www.workopsllc.com](http://www.workopsllc.com)  
[nb@workopsconsulting.com](mailto:nb@workopsconsulting.com)