

# Learn How Much More Workiva Can Do for You

## Workiva Reporting Health Check



To ensure you realize the full potential of your Workiva solution, our certified professionals perform a detailed review of your team's use.

We identify opportunities for improvement and deliver a detailed presentation outlining our recommendations.

### The Health Check focuses on:



#### Data Gathering

We analyze your data-gathering process and use of best practices to save time and errors.



#### Preparation

We review the formatting and reporting (formula) structure of your source documents for compliance with industry standards.



#### Review

We audit your file review process for built-in functionality that maximizes efficiency and enables timely feedback to the finance/budget team.



#### Finalization

We review all reports (including financial report documents and assembly steps) for process optimization.



#### Publishing

We inspect published reports for improvement opportunities and analyze PDFs for ADA compliance.

### You Receive:

Our experts will provide your team with a comprehensive presentation and one-hour consultation to discuss our findings/analysis—identifying areas for improvement and offering detailed recommendations for

product usage and performance enhancement. Finally, we'll recommend any additional tools/actions needed to optimize your reporting processes.

# Why Choose Us?

## Public sector process improvement is all we do.

Our expertise and experience in public-sector finance, budgets, and internal auditing is unmatched. While our competitors provide a wide array of services for a variety of industries, our sole focus is improving and automating business processes for people just like you.

## We bring all the expertise of a large consultancy, with the specialized attention of a boutique firm.

When we say we put our clients first, we mean it. Our 99.8% client-retention rate reflects that commitment. Your dedicated FHB team of CPAs, programmers, graphic designers, and project managers will bring the right skills, tools, experience, and time to ensure your project's sustained success.

*"F.H. Black has the best consultants I have seen in my whole career. Not only are they IT experts, but they know the accounting side."*



Dongmei Li, CPA, CPFO  
Deputy Controller at Chicago Public Schools

*"We looked at quite a few solutions, probably 8 or 9 different platforms over 6 to 7 months...FHB answered all our questions and steered us in the right direction."*



Daniel Emerson  
Budget Manager at Deschutes County, Oregon

## You can count on an unbiased software recommendation.

FHB does not accept any referral fees or commission from software companies. We invest heavily in research and testing of leading industry tools. Once we've assessed your unique needs, we'll recommend the best solution available to meet them.

## We help overworked teams get their lives back.

Our process improvements can eliminate 50-75% of your organization's low-value, manual work—giving your staff the precious gift of time and putting work-life balance within reach.

*"[In previous years] I was here a lot of evenings making sure everything looked right and tied together correctly. We didn't have that this year; [after FHB's implementation] I didn't find myself working any evenings or weekends."*



Kathleen Smith,  
Finance Manager at the City of Fort Wayne, Indiana



### Our Team



### Our Experience



### Our Results

- CPAs and technology experts
- Budget book, ACFR, and CANFR award reviewers
- Across every time zone in the US and Canada

- 50+ yrs in public sector finance
- 80 yrs in public sector auditing
- 100+ yrs in IT consulting
- 30+ yrs developing custom solutions

- 700+ satisfied clients
- 1,000+ CPA-led projects
- 99.8% client retention



Contact us today to discuss your needs and how we can help!