

Are We There Yet? How Self-Driving Work Can Finally Help You Achieve Finance Transformation

Steve Soter
Workiva

Ricky Priory
Deloitte

Jonathan Gregory
Hershey

March 30, 2022



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Webinar Features and CPE Credit

Q&A

Asking Questions



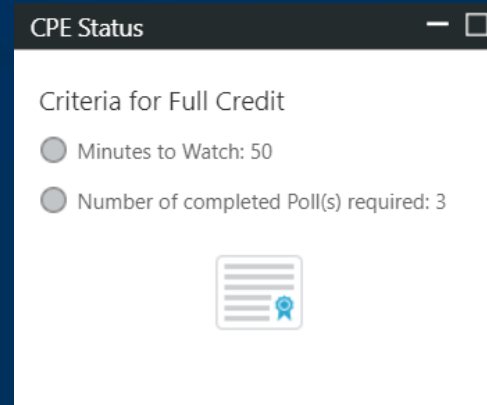
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Help



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Moderator

Adam Larson, DES
Senior Manager of
Educational Technology Enablement
IMA



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Featured Presenter

Steve Soter
Industry Principal,
Accounting & Finance
Workiva



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Steve Soter's Biography

- Steve Soter is Senior Director of Product Marketing and Accounting Industry Principal at Workiva. Previously, Steve served as an accounting leader in multiple roles including Vice President and Controller for Backcountry.com, a private equity owned, online retailer of outdoor products, and as the Director of SEC Reporting for Overstock.com (NASDAQ: OSTK), a \$2 billion revenue, online retailer of home goods and blockchain technology company. His experience includes multiple acquisitions, debt offerings, an IPO, and the world's first digital debt and equity offering (by Overstock).
- Steve is the Executive Advisor of the SEC Professionals Group, and a former member of the US XBRL Data Quality Committee. He began his career as an auditor in public accounting, received his Accounting degree from the University of Arizona, graduating summa cum laude, and received a Master of Accountancy and Information Systems degree from Arizona State University.

Featured Presenter

Jonathan Gregory, CPA, CGMA
Director, External Reporting & Technical
Accounting
The Hershey Company



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Jonathan Gregory's Biography

- Jonathan Gregory is currently the Director, External Reporting & Technical Accounting for The Hershey Company (NYSE: HSY). Jonathan joined Hershey in 2016 and leads the process for filing Forms 10-Q, 10-K and 8-K with the Securities and Exchange Commission. He is also responsible for conducting technical accounting research for the Company and supports the Chief Accounting Officer on a variety of technical matters. Previously, Jonathan held accounting and finance positions at Healthcare Services Group, Inc. (Nasdaq: HCSG), BioTelemetry, Inc. (Nasdaq: BEAT), and Ernst & Young.
- Jonathan received his undergraduate degree in Accounting from St. Joseph's University, his MBA from Syracuse University, is a Certified Public Accountant (CPA) in Pennsylvania and a Chartered Global Management Accountant (CGMA).

Featured Presenter

Ricky Priory
Senior Manager
Deloitte Services LP



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Ricky Priory's Biography

- Ricky Priory is a senior manager with Deloitte Services LP and has over 20 years of industry and consulting experience serving clients in the Financial Services, Consumer and Energy industries. He is focused on a broad range of engagements and serves as a trusted advisor helping clients visualize the possibilities and drive process improvement, efficiency and automation enabled by technology.
- Ricky is part of Deloitte's global alliance with Workiva, which focuses on digitizing and optimizing the process of reporting with a focus on financial, statutory, management and regulatory reporting and governance.

Learning Objectives

1. Discuss how self-driving work simplifies day-to-day tasks and fundamental processes.
2. Identify repetitive, manual processes within your organization that can be improved or automated.
3. Determine how your accounting and finance departments can enable self-driving work through technology.

Agenda

1. Introduction
2. What is Self-Driving Work?
3. Elements of Self-Driving Work
4. Outcomes of Self-Driving Work
5. Q&A



What is Self-Driving Work?

Self-Driving Work Is...



People Focused



Building Block Approach

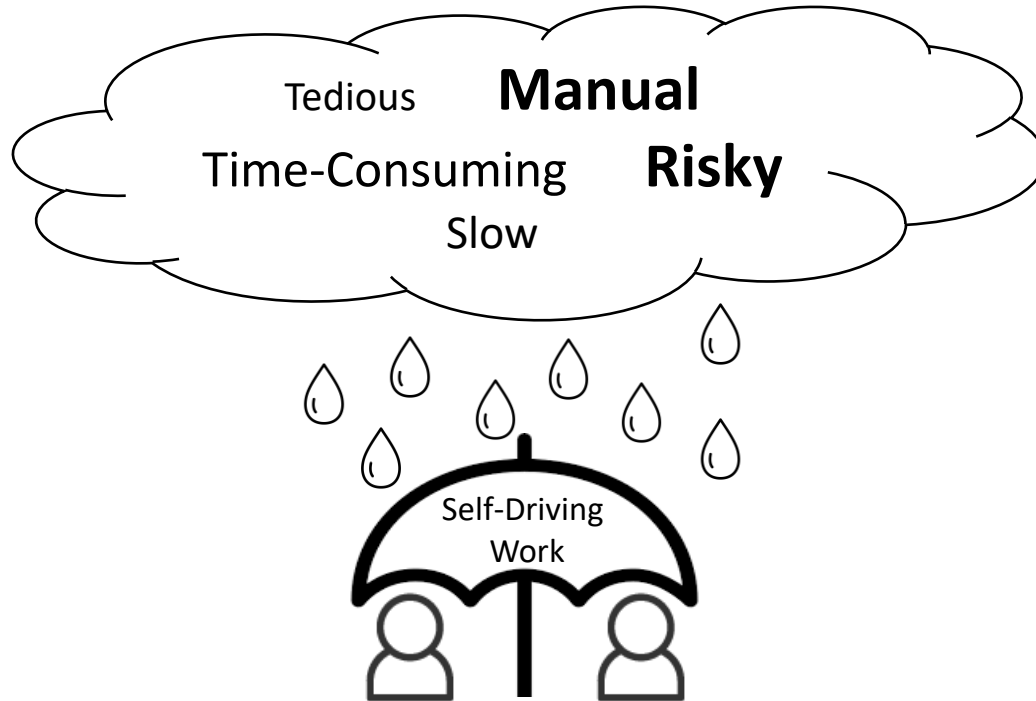


Tech Enabled



Efficiency vs Risk

Self-Driving Work: People over Process



Poll Question 1:

How far has your team progressed in its finance transformation journey?

- a. We haven't even begun
- b. We are just getting started
- c. We have a few new processes in place, but are still working on it
- d. We are in a good place with our finance transformation

Poll Question 1 Results: (Placeholder)

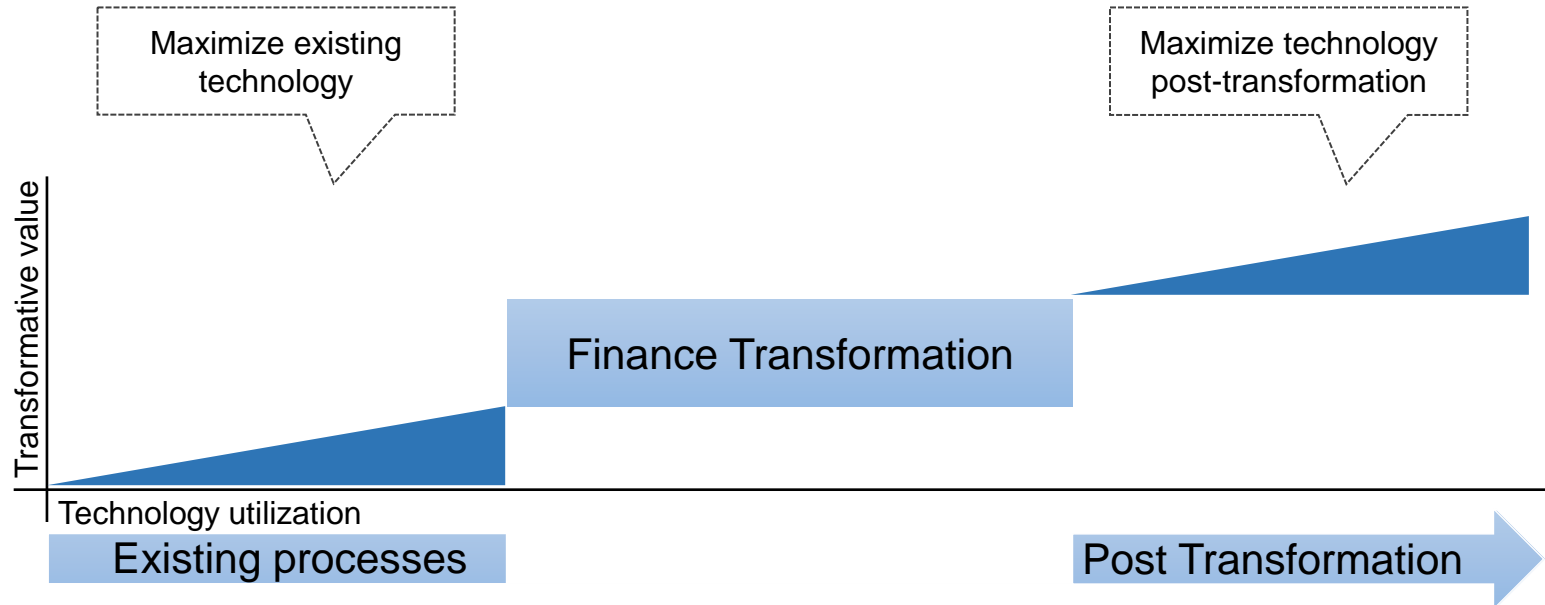
Self-Driving Work: Building Block Approach



VS



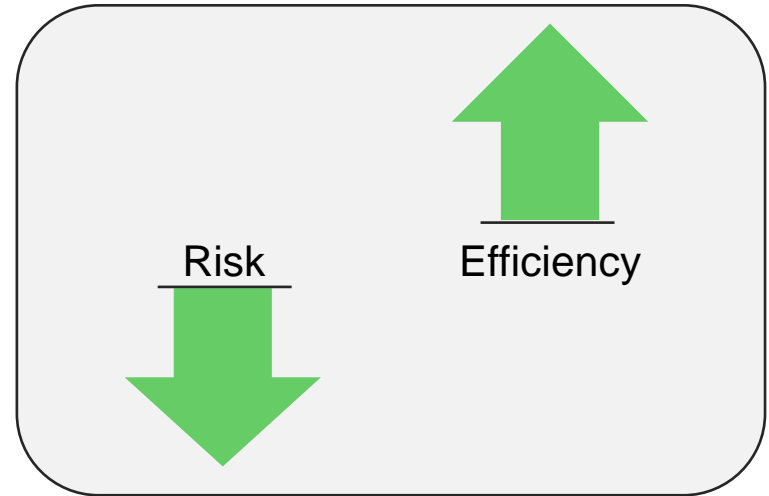
Self-Driving Work: Technology Enabled



Self-Driving Work: Risk vs. Efficiency



Status Quo Process



Self-driving work

Elements of Self-Driving Work



Connect



Transform



Report



Automate

Poll Question 2:

What role will technology play in your finance transformation journey?

- a. Technology won't play a role
- b. It will play a role, but we're not 100% sure where it will end up
- c. It will be critical!
- d. Technology and people will be evenly split
- e. I wish we were doing finance transformation...maybe next year

Poll Question 2 Results: (Placeholder)

Connect

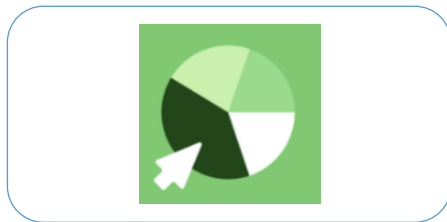
- “No code” integrations
- Data lineage transparency
- Data tables and queries



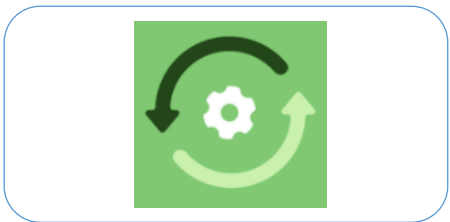
Connect



Transform



Report



Automate

Transform

- Format, match or combine data, regardless of the source
- Complete audit trail



Connect



Transform



Report



Automate

Report

- Single link to many destinations
- Collaboration with full access permissions



Connect



Transform



Report



Automate

Poll Question 3:

What department does your role reside in?

- a. Accounting
- b. Finance
- c. Audit/Internal Controls
- d. Other

Poll Question 3 Results: (Placeholder)

Automate

- Automatic update and extraction of data
- Automatic data transformation tasks
- Automatic report refreshes
- Workflow and change history



Connect



Transform

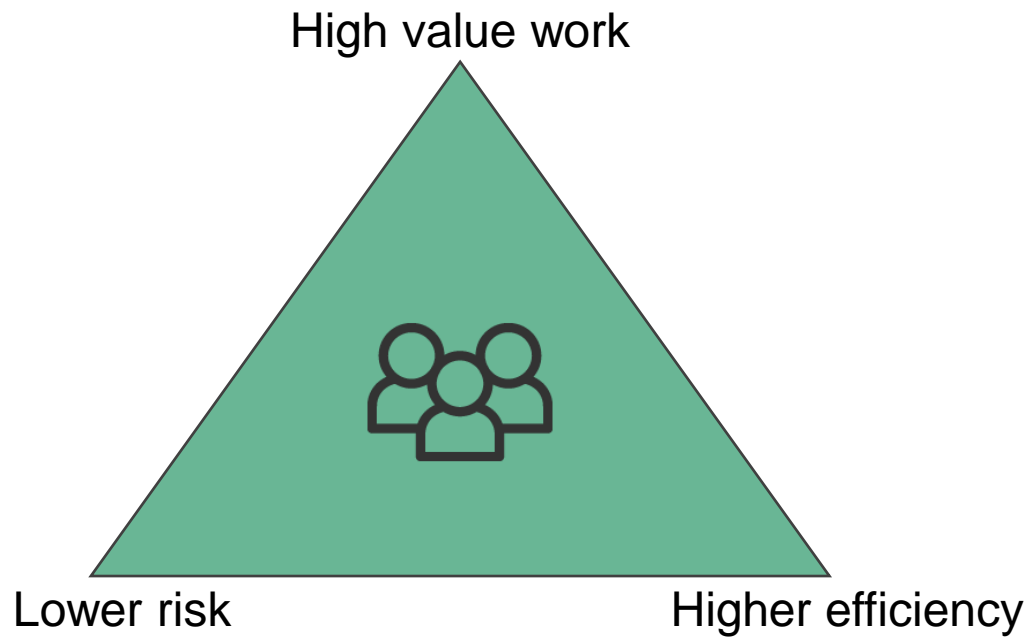


Report



Automate

Outcomes



Poll Question 4:

How excited are you to incorporate self-driving work practices into your own role?

- a. I'm pumped!
- b. I think I'm excited, but still need to learn.
- c. I'm not too sure about this...
- d. Let me keep my old ways please!

Poll Question 4 Results: (Placeholder)

Questions and Answers



Steve Soter
Sr. Director of Product
Marketing & Industry Principal
Workiva



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Deloitte Services LP



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Technical Accounting
Workiva



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Thank You to Our Featured Presenters!



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Deloitte Services LP



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Technical Accounting**
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or
- Click the link in your post-event e-mail

► Please print a copy of the CPE certificate for your records.

► Your CPE credit will be automatically recorded in your transcript.

Thank you!

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