



## DFIN CASE STUDY

How our affordable solution helped one of the world's largest HR consulting firms save time, drive efficiencies, and increase collaboration

**DFIN**  
ActiveDisclosure

**wtw**



## CORPORATE SNAPSHOT

Established 1828, WTW (NASDAQ: WTW), formerly Willis Towers Watson, is one of the world's largest HR consulting and insurance broking firms helping clients around the world by providing data-driven, insight-led solutions in the areas of people, risk, and capital.



**\$8+ billion**

annual revenue



**140 countries**

global presence



**44,000+**

employees world-wide



**S&P 500**

member of influential index



## CHALLENGE

# Boost collaboration globally to streamline and accelerate regulatory filing

With over 44,000 employees across 140 countries, WTW's size and geographic footprint often makes collaborating on regulatory filings time-consuming and cumbersome.

In search of a tool that allowed annual, quarterly, and periodic SEC filings to be easily drafted and reviewed by several teammates simultaneously, this large accelerated filer had a simple goal that had proven elusive: expediting the preparation of SEC compliant regulatory filings through effective collaboration.





SOLUTION

# ActiveDisclosure is Faster, More Intuitive, and Collaborative

WTW was looking to expand its SEC filing team and bring newcomers up to speed fast and efficiently. By migrating to ActiveDisclosure, the company quickly began taking advantage of highly intuitive tools and streamlining processes that had been overly time-consuming in the past. Within days of implementing ActiveDisclosure, a larger filing team was drafting WTW’s upcoming 10-K with speed and precision.



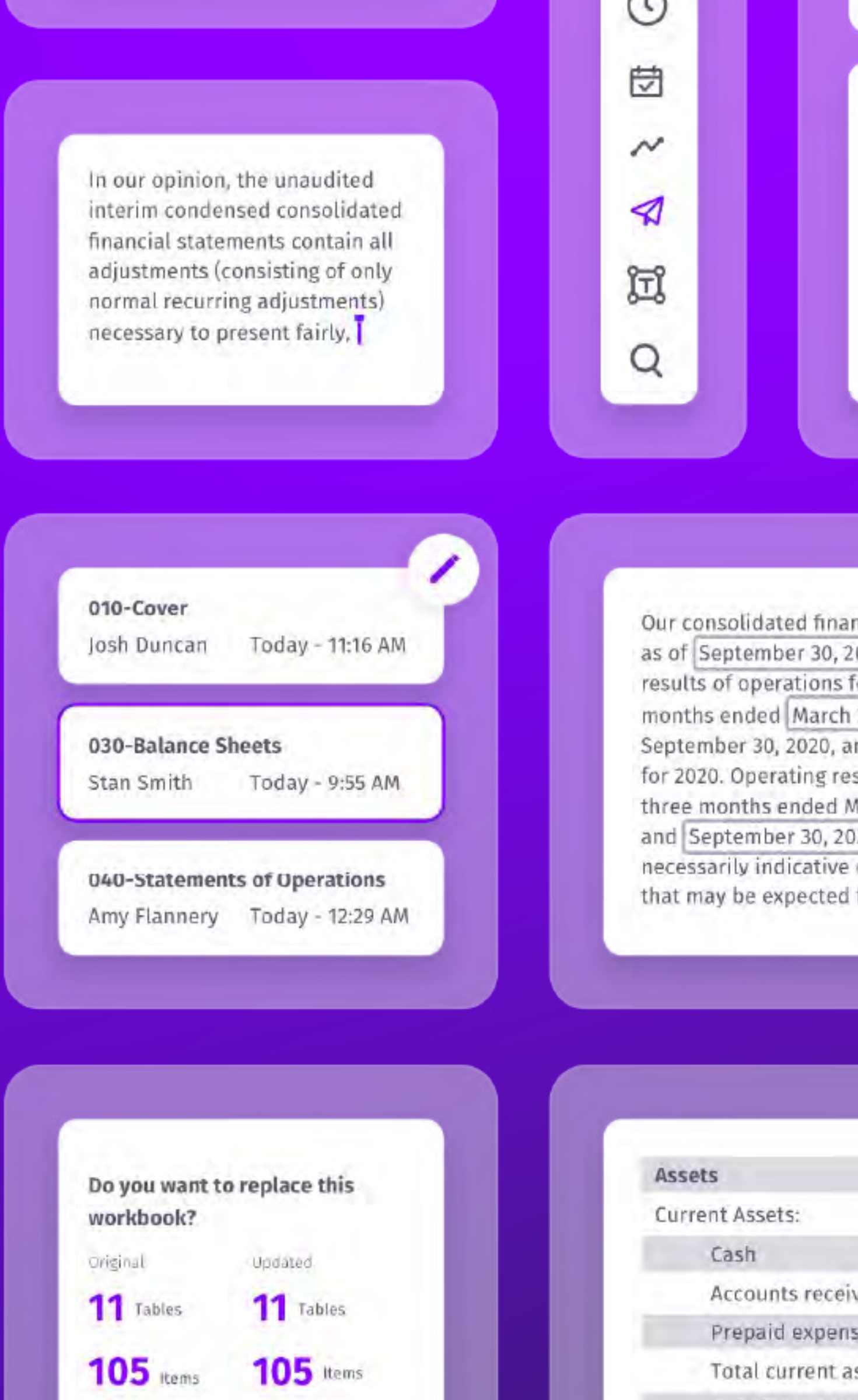
**BOOSTS COLLABORATION**  
Employees in multiple locales draft in tandem



**SAVES TIME**  
Intuitive tools speed implementation and usage



**24/7/365 EXPERT SUPPORT**  
Round-the-clock expert team helps ensure smooth onboarding





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We are pleased with how much time we saved moving to new ActiveDisclosure. Having transitioned before our last 10-K process began, implementation took just a few days and we were able to get right to work. The tool was very intuitive, letting us easily expand the contributing team and train them quickly. The functionality supports our working remotely and drafting changes as a team. It's now become effortless for one team member to make edits while others follow along on their screens and suggest changes.

**ELIZABETH WARE**

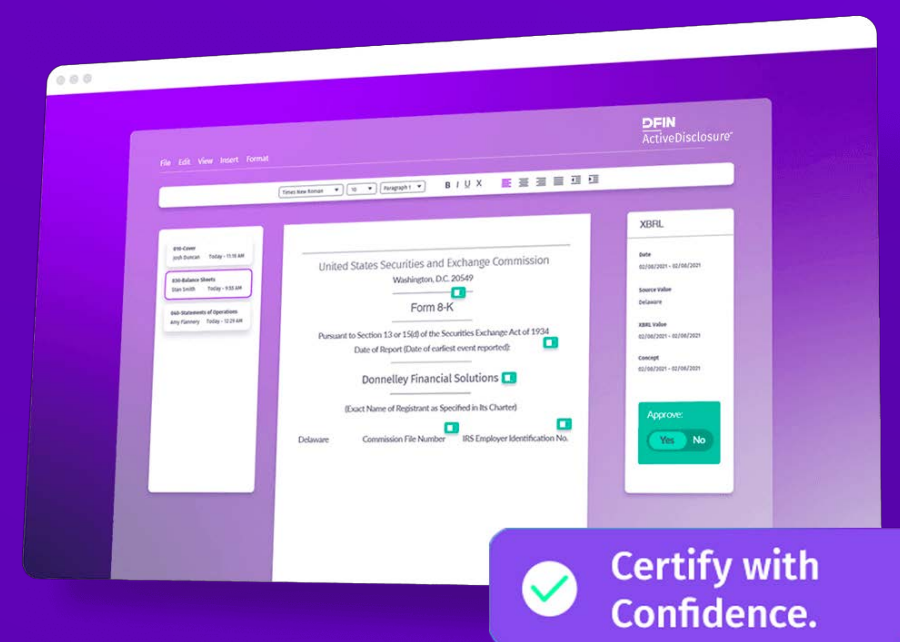
Assistant Controller – Consolidations,  
Reporting and Technical Accounting





# Affordable ActiveDisclosure Boosts Collaboration with Greater Functionality

ActiveDisclosure is purpose-built with advanced capabilities for fast, accurate reporting. By seamlessly integrating Excel and other data sources, clients that use our secure platform save time, reduce errors, and lower overall costs.



## PURPOSE-BUILT

Core tools you need for successful SEC filing and financial reporting, without extra functionalities you'll never use



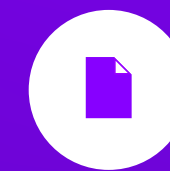
## INTUITIVE

Easy-to-use software with no costly add-ons, hidden costs or annual upsells



## EFFICIENT

Streamlines reporting with features like data linking, commenting, Intelligent iXBRL tagging, and more



## CONNECTED

Simple integration to your current data sources and tech stack (e.g. Excel/MS Office, ERP)



## EXPERT-DRIVEN

24/7/365 support by DFIN financial and SEC reporting experts dedicated to your success



## SECURE

Best-in-class, built-in security tools ensure mitigation of data and risk



# Get in touch

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