



September WoBo Community Call

Topics Today

1. Active Strategy for the Digital Enterprise
2. Next release
3. The horizon
4. DYKs



The ability to iterate on strategy quickly is now an imperative.

Harvard
Business
Review

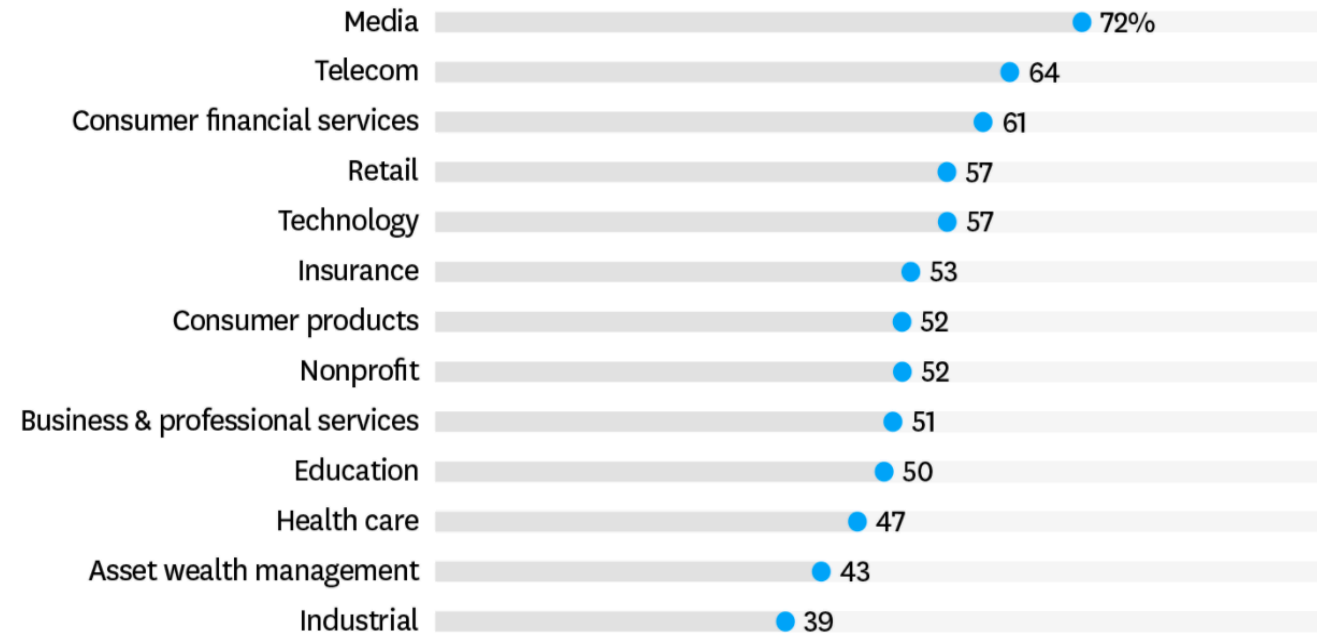
INNOVATION

The Amazon–Whole Foods Deal Means Every Other Retailer’s Three-Year Plan Is Obsolete



Not only does strategy need to evolve faster, people must understand it and engage faster

Executives Who Anticipate Moderate or Massive Digital Disruption in the Next 12 Months, by Industry



**7% of
employees**

**understand the strategy or how to
contribute to it now.**





SOURCE "DIGITAL PULSE 2015," BY RUSSELL REYNOLDS ASSOCIATES

© HBR.ORG

Harvard Business School Press, "The Strategy Focused Organization"



Today most enterprises' strategy is focused on

-  **speed and agility**
-  **data-driven enterprise**
-  **digital**
-  **intelligent automation**

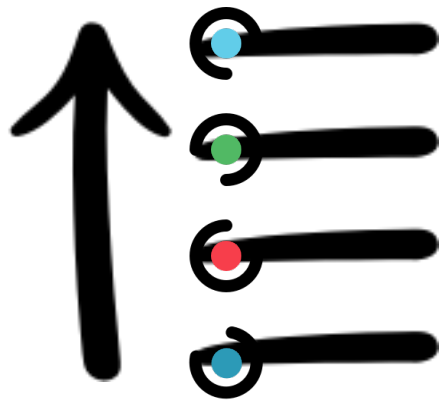
but their approach to operationalizing strategy is **none** of these.



**More PowerPoint, Excel and town halls won't
create more strategic agility and speed.**



Many of you are leaders in the middle, translators of strategic priorities for your teams...




Self disrupt.

Make *your* strategy digital.

Lead, drive and influence with data.

Automate what *you* can.





“We basically unplugged anything that was annual.

In the digital age, sitting down once a year to do anything is just bizarre. Whether it’s doing business reviews or strategic planning, we’re much more continuous.”

- Jeffrey Immelt, GE



**Live the plan.
Evolve the plan.
Repeat at market speed.**



**Refresh plans faster,
align further**



**Measure results
objectively**



**Live the plan in
real time**



**Engage people in
strategic outcomes**



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3. The horizon
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#39

1. Meetings redux
2. Smarter Gantt charts
3. Teamwork dashboard
4. Team bandwidth
5. New WoBot skills and fluency



Let's Meet More Often!



SIDE-BY-SIDE LAYOUT

One column for topics, one for takeaways. Takeaways align with the topic so it's easy to connect the two and easier to move down the agenda.



FAST AGENDAS, MORE OPTIONS

Quickly add objectives, key results, workstreams, action items or files to the agenda – easier to find and pick.



SCHEDULE & SEE AGENDAS IN SLACK

Check your calendar, schedule the meeting, invite people and add/update the agenda – all in slack



MEET NOW

Start an unscheduled meeting anytime in a click – capture the conversation notes and send meeting minutes to everyone on the fly.



LONG NOTES & TAKEAWAYS

Take lengthy notes more easily. Circle back and additional notes to a topic. Takeaways are integrated with their topic on the meeting minutes automatically.



TRACK MEETING ATTENDANCE

Mark off who attends the meeting for better meeting hours calculations and more accurate meeting minutes.



Meeting: K2 Launch Planning

Blue Marina Room

Jul 7 at 10:00am ▾

00:26
Count up

End Meeting



Description ▾

ADD: Objective Key Result Workstream Action Item Attachment

Topics for Discussion

Type a topic

Killer K2 Launch 74%
Marketing: Kim Lou Added by Jonathan N.

Finalize launch campaign schedule and messaging
Jonathan Hu 10:00 am Jul 07

PR Plan Aug 13
K2 Launch Readiness: Emma S. Added by Emma S.

K2 Launch 75% of 100%
Added by Jonathan N.

K2 Launch Event 70%
Lily Grooves: Marketing Added by Jonathan N.

Takeaways and Notes

Type a takeaway

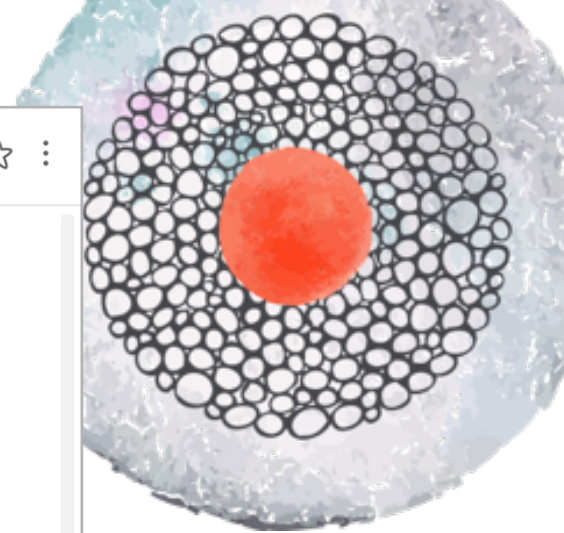
General Launch Plan - Team we will be covering the following areas:
- Website & Blog (will include resource)
- Social Media & Email Marketing
- Post launch webinar
Kim Lou 10:25 am Jul 07

Draft customer announcement to send August 15
Kim Lou 10:25 am Jul 07

We need to realign our messaging to the sales vision and messaging. The messaging needs to focus on digital transformation and the fast pace of change in the current market environment.
There is a real opportunity to use recent market developments and disruptions to our advantage. There is a lot of marketing campaigns from our competitors that focuses on predictive technologies and solving problems of the future. We should dial back and focus on how we can solve today's market problems with our messaging.
Tim Dawson 10:18 am Jul 07

Jennifer will be on vacation until July 14 - social campaign will launch July 15. Kim and Tim will coordinate and create campaign this week.
Tim Dawson 10:18 am Jul 07

Invite 25 additional customers to participate in pre-launch beta.
Emma Smith 10:05 am Jul 07



Gaurav ▾
● csmythe

All Threads

Channels

- # **general**
- # random

Direct Messages

- ♥ slackbot
- csmythe (you)
- carl
- dona
- drake
- john
- nigamg
- rafa

Apps

- wobo2

☆ **wobo2**
Messages About

Today

WoBot beta APP 12:57 PM
September 25-1, 2017

Monday, Sep 25 10:30am

sync in wobo

E-Staff Weekly
Monday, Sep 25 3:00pm

sync in wobo

K2 Campaign Planning
Monday, Sep 25 1:00pm

sync in wobo

K2 Campaign Planning
Monday, Sep 25 1:00pm

Chris

prepare agenda ask for topic & takeaways

csmythe 12:57 PM
Change name to K2 Launch Campaign Planning

WoBot beta APP 12:57 PM

K2 Launch Campaign Planning
Monday, Sep 25 1:00pm

Chris

prepare agenda ask for topic & takeaways

+ Reschedule to tomorrow at 1pm @ 😊

bold _italics_ ~strike~ `code` ``preformatted`` >quote



Marcom Team Meeting

Monday, June 8 at 12pm



Sonia Mayflower

The purpose of this meeting is to catch up on all activities and decide how to best allocate what is left in the marketing budget.

MEETING MINUTES



Killer K2 Launch

Lily Grooves: Customer Success

70%

Added by Jonathan N.

- Leverage agile frameworks to provide a robust synopsis for high level overviews. Iterative approaches to corporate strategy foster collaborative thinking to further the overall value proposition. Organically grow the holistic world view of disruptive innovation via workplace diversity and empowerment.
 - Bring to the table win-win survival strategies to ensure proactive domination
 - Capitalize on low hanging fruit to identify a ballpark value added activity to beta test.

Emma Smith 10:25 am Jul 07, 2017



K2 Launch Readiness

Lily Grooves: Customer Success

45%

Added by Jonathan N.

- Capitalise on low hanging fruit to identify a ballpark value added activity to beta test. Override the digital divide with additional clickthroughs from DevOps. Nanotechnology immersion along the information highway will close the loop on focusing solely on the bottom line.

John Norway 10:25 am Jul 07, 2017



Complete Product launch plan

John Norway 10:25 am Jul 07, 2017

Emma S. Aug 20



Draft Budget Outline

- Discuss at next quarter meeting

John Norway 10:25 am Jul 07, 2017

✈ Cut spend by 10%

John Norway 10:25 am Jul 07, 2017

✈ Add final Q1 Budget to Bob

John Norway 10:25 am Jul 07, 2017



Emma S. Aug 13

Added by Jonathan N.



K2 Launch Press Release Campaign

Lily Grooves: Customer Success

▼ 45%

Added by Jonathan N.



Interactive Time Scale on Team and Workstream Gantts



SELECT YOUR TIME HORIZON

View all workstreams or work within a workstream by days, weeks, or months. It's interactive so zoom in or out.



SORT ITEMS ON GANTT CHART

Sort workstream timelines by priority, start or end date, or alphabetical order. Sort team timelines by alphabetical order.



SEPARATE TIMELINE & DASHBOARD

Workstream summary status is back on its own dashboard. Neat, tidy and the way you liked it. See the narrative inline.



COLOR SHOWS PROJECT HEALTH

Gantt bars show project health at a glance. Set health on the workstream view or the dashboard view.



All Workstreams Executive Team

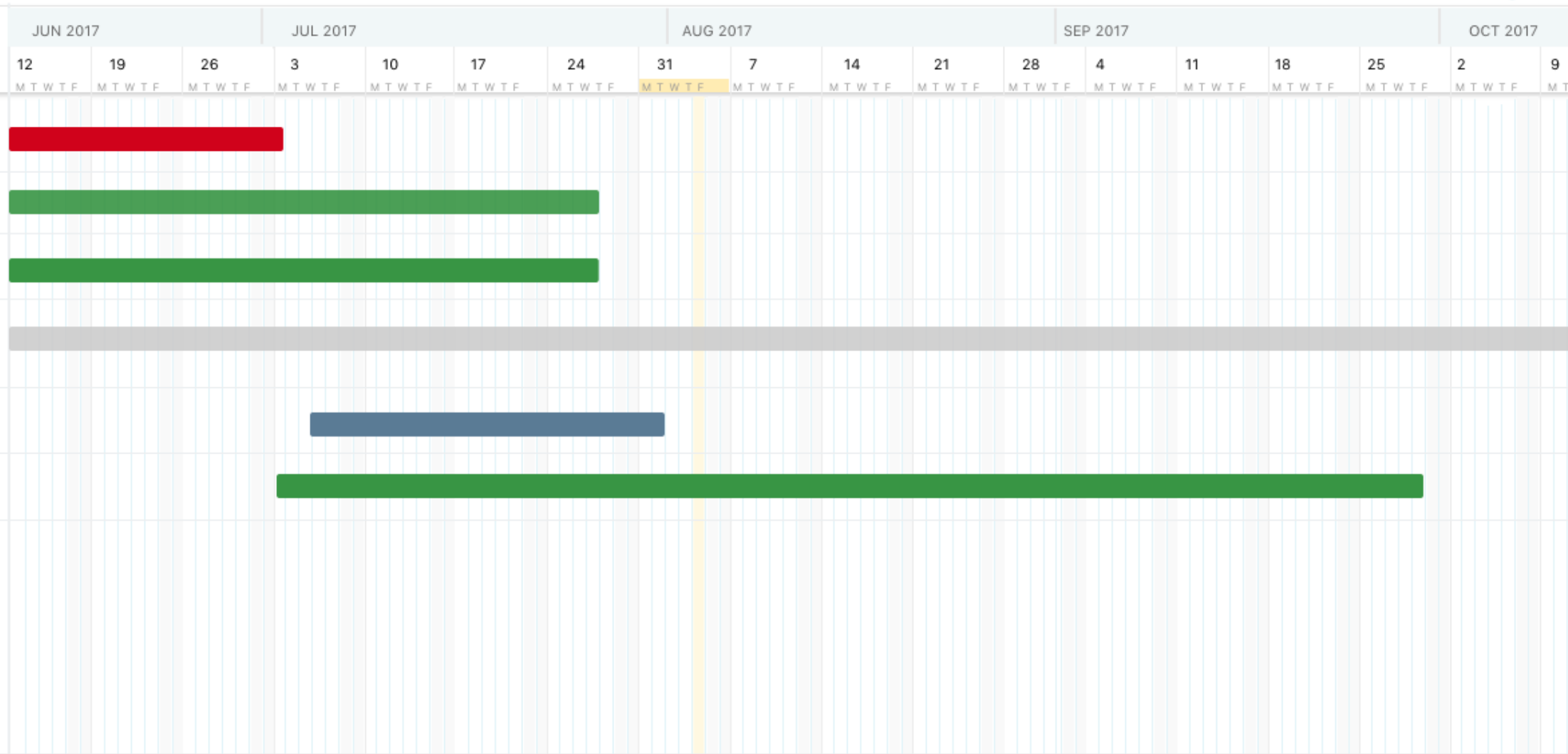
[8 Workstreams](#) [23 Action Items](#) [2 Objectives](#) [Weekly Snapshots](#) [Roster](#)

[Timeline](#) [Narrative](#)

Legend

Timescale: **Weeks** ▼























































- Days
- Weeks**
- Months




All Workstreams Executive Team

[8 Workstreams](#)
[23 Action Items](#)
[2 Objectives](#)
[Weekly Snapshots](#)
[Roster](#)

[Timeline](#)
[Narrative](#)

	Global eCommerce Sales Carl Chagoyan		12  4  34 		RISK 		Jan 1, 2017 - Apr 30, 2017 
	SaaS offering and delivery Jonathan Hu		3  5  12 		OK 		Start  - End  
	Security and Compliance Jonathan Hu		4  23 		GOOD 		Jan 1, 2017 - May 15, 2017 
	Operational excellence Carl Chagoyan		25 		RISK 		Start  - Jun 30, 2017 
	2017 Budget Emma Smith		4  5  11 		GOOD 		May 1, 2017 - End  
	Global eCommerce Sales Carl Chagoyan		12  7 		RISK 		Apr 1, 2017 - Apr 30, 2017 

This is going to be great. Quis doctus ius no, nec veniam dolorum detracto ne. Vim et zril cotidieque, ad nec iisque utroque. Diam facilis erroribus in usu. Omnis altera sea ei, nominavi copiosae has ea. Mei ea corpora adipiscing. Duo ea bonorum oportere vulputate, ei duis summo ancillae ius, an magna populo eripuit has. 

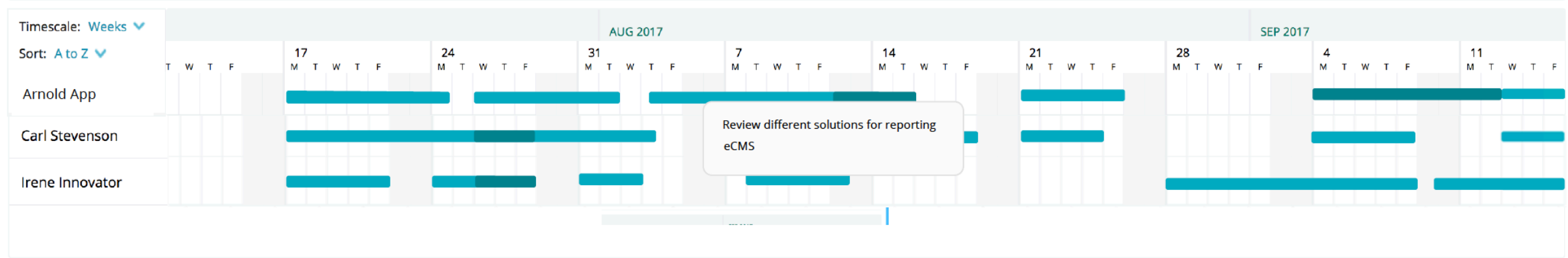
Cloud Application Candidates Information Technology & Services

Jun 14,2017 - Dec 30,2017 FAST ▲ OK ▶ P1 2 🔴 9 🔴 5 🔵 11 👤 57% ▾

Timeline

Board View 11 List View Recent Activity 2 Objectives Files

Filter ▾



BACKLOG

- Follow up on eCMS migration
Arnold App Sep 29 '17
- Follow up
Carl Stevenson Sep 27 '17
- Inventory and profiles for all Finance apps
Percy Program Sep 14 '17

NEXT

- Deploy PatientPredictor at AWS
Arnold App Sep 27 '17
- Runbook for data and app migration to cloud
Arnold App Sep 30 '17
- Assess features, scalability and price of ER analytics apps
Carl Stevenson Jul 12 '17

IN PROGRESS

- Determine whether there are commercial cloud options to replace the PatientPredictor system.
Arnold App Oct 26 '17
- Review Last Candidate List
Irene Innovator Aug 23 '17
- Draft list of cloud transition candidate apps

DONE

- Review the candidate contract
Carl Stevenson Feb 08 '17
- Help Desk solutions -- feature/function survey
Irene Innovator Feb 01 '17
- eCMS
Arnold App Aug 31 '17

Team Bandwidth: Do Work That Matters Most



SEE & COMPARE WORKLOAD

Using duration of action items, new charts show team members' load over time. Visualize by week, month, and quarter timelines



VIEW WORKLOAD FOR OKRS & PRIORITIES

See time allocated by priorities and OKR-aligned work; assess capacity for a set of workstreams or OKRs.



FIND AVAILABLE CAPACITY

See who has bandwidth and who's tapped out to make better decisions about new projects.



ASSESS TRADE OFFS IN REAL TIME

Adjust time horizon, priority levels and OKR alignment and instantly see individual's load for that time and selection.



VIEW BANDWIDTH BY PERSON

View individual's work by workstream, total weeks of work and open bandwidth for a given time period.



VACATION & HOLIDAYS

Set and factor planned vacation time in capacity calculations – these won't show as available bandwidth.



Workload & Bandwidth

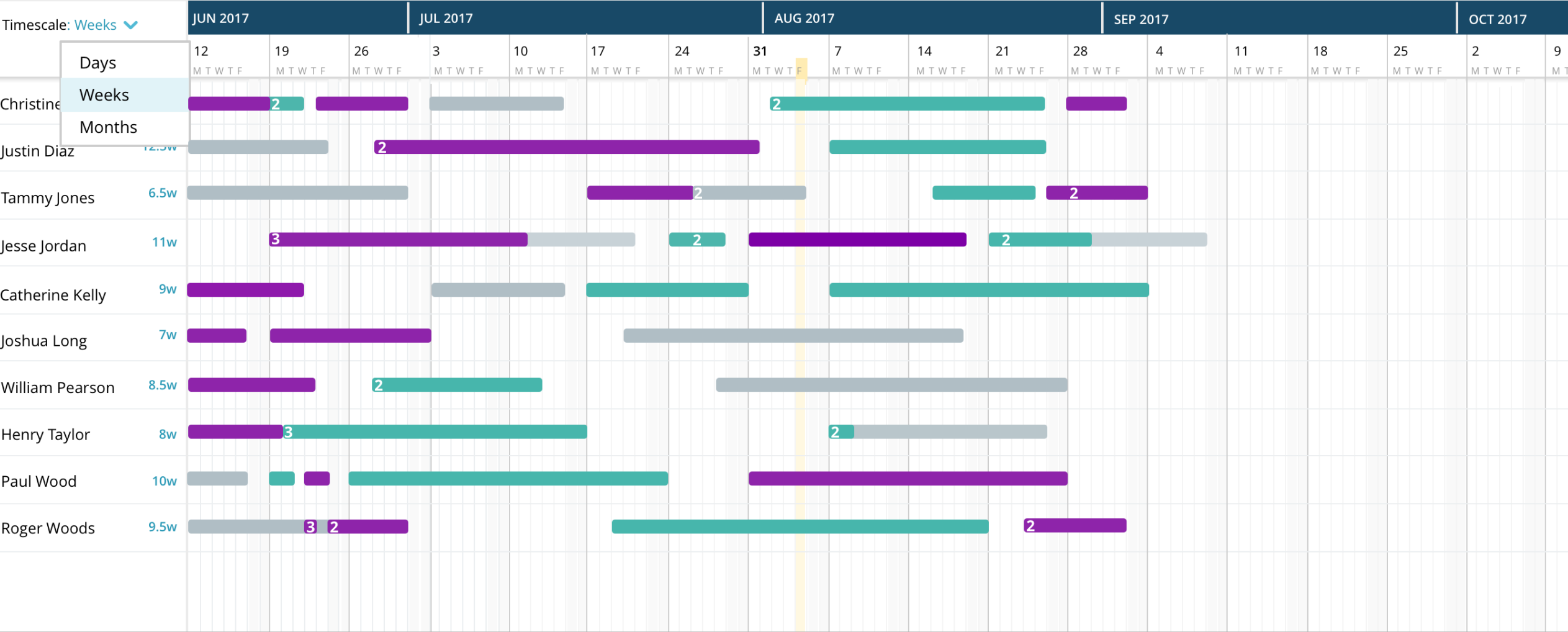


For Period: [Jun 1, 2017](#) to [Sep 30, 2017](#) 16 weeks Total Load

Status:

Priority:

Filter by: [People](#) | [Objectives](#) | [Workstreams](#)



Workload & Bandwidth



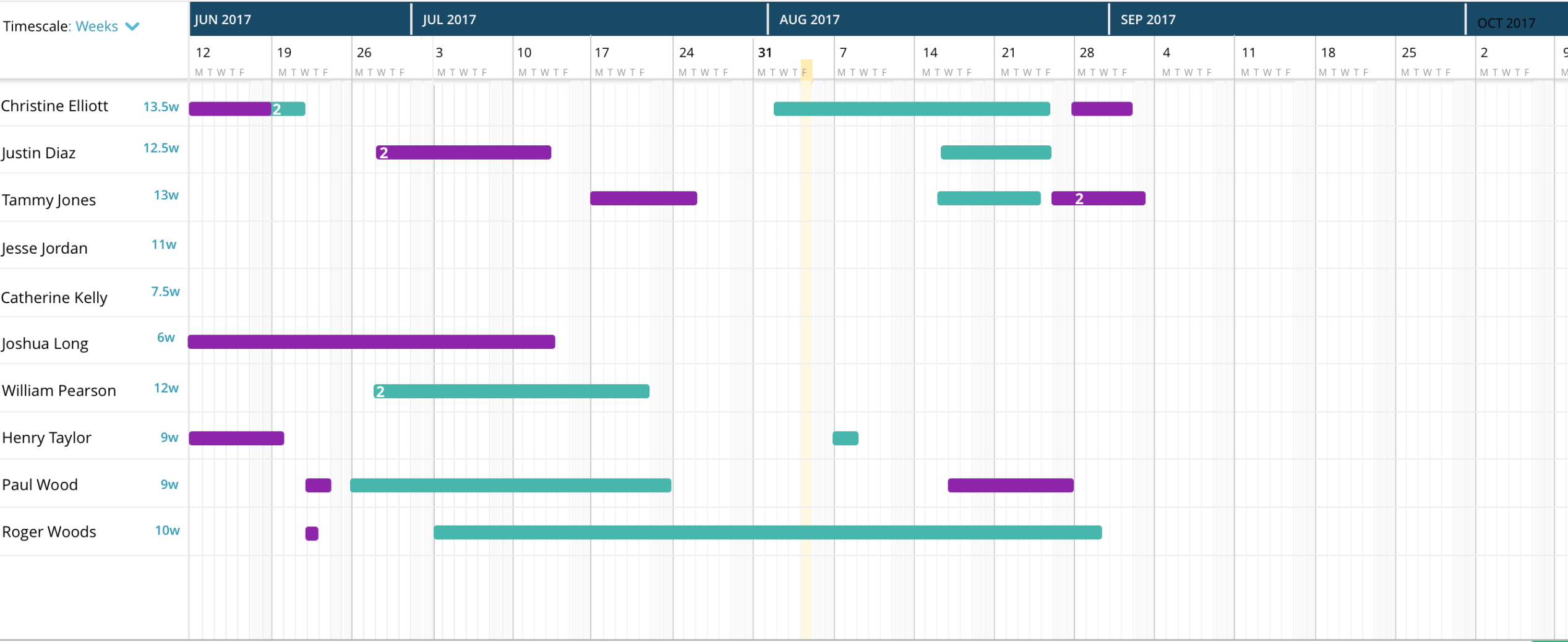
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Workload & Bandwidth



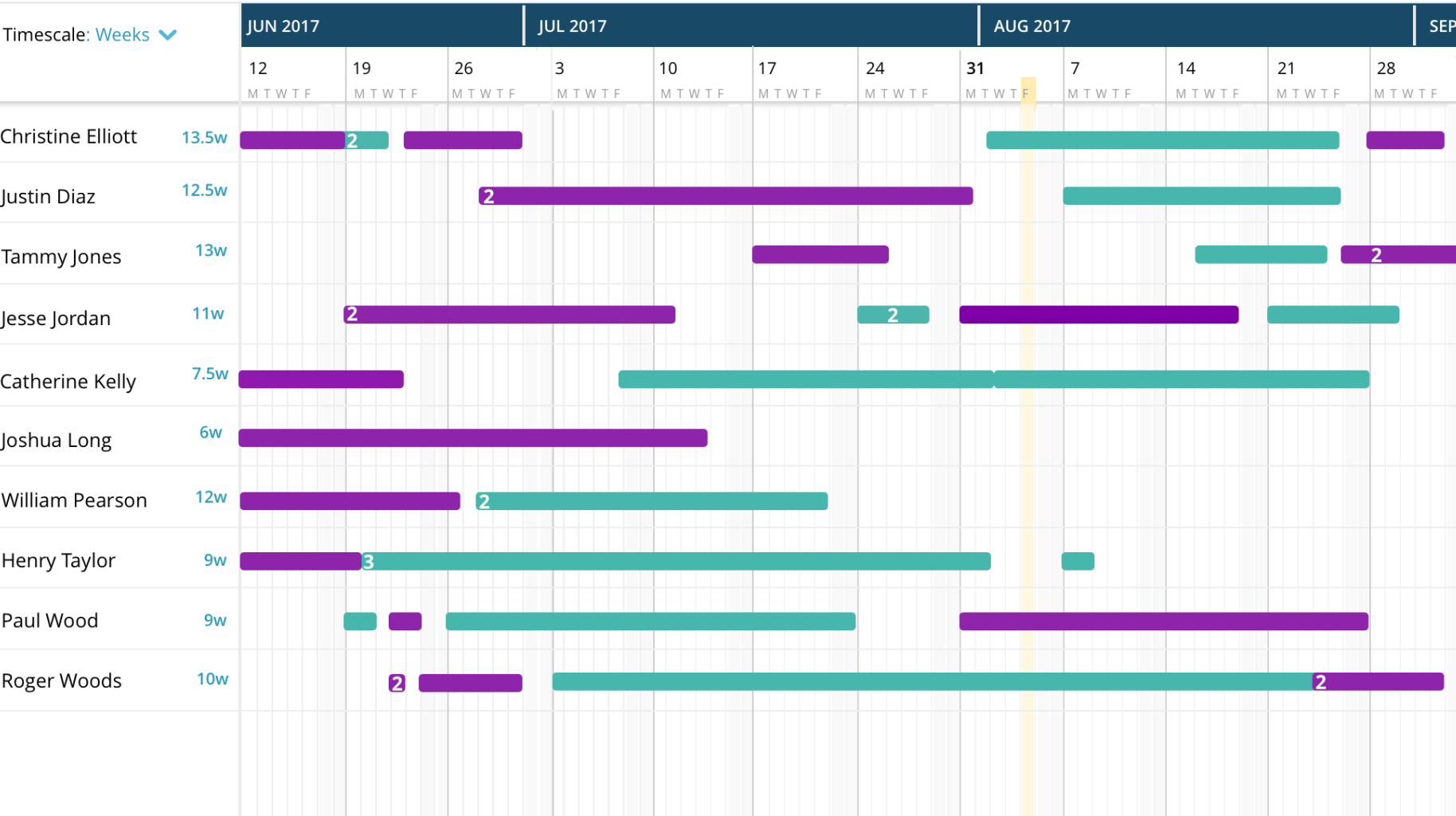
For Period: Jun 1, 2017 to Sep 30, 2017 16 weeks Total Load

Status:

Priority:

Filter by: [People](#) | [Objectives](#) | [Workstreams](#)

Timescale: [Weeks](#)



Filter by work aligned to objectives:

- Select All
- Be the Best leader in the Market and delight our customers
 - Data Infrastructure
 - Sales Tools
 - Customer Success
- Technology and infrastructure well oiled machine
 - Automation and Systems
 - Global Operations
 - Data Integrity

Show

Workload & Bandwidth



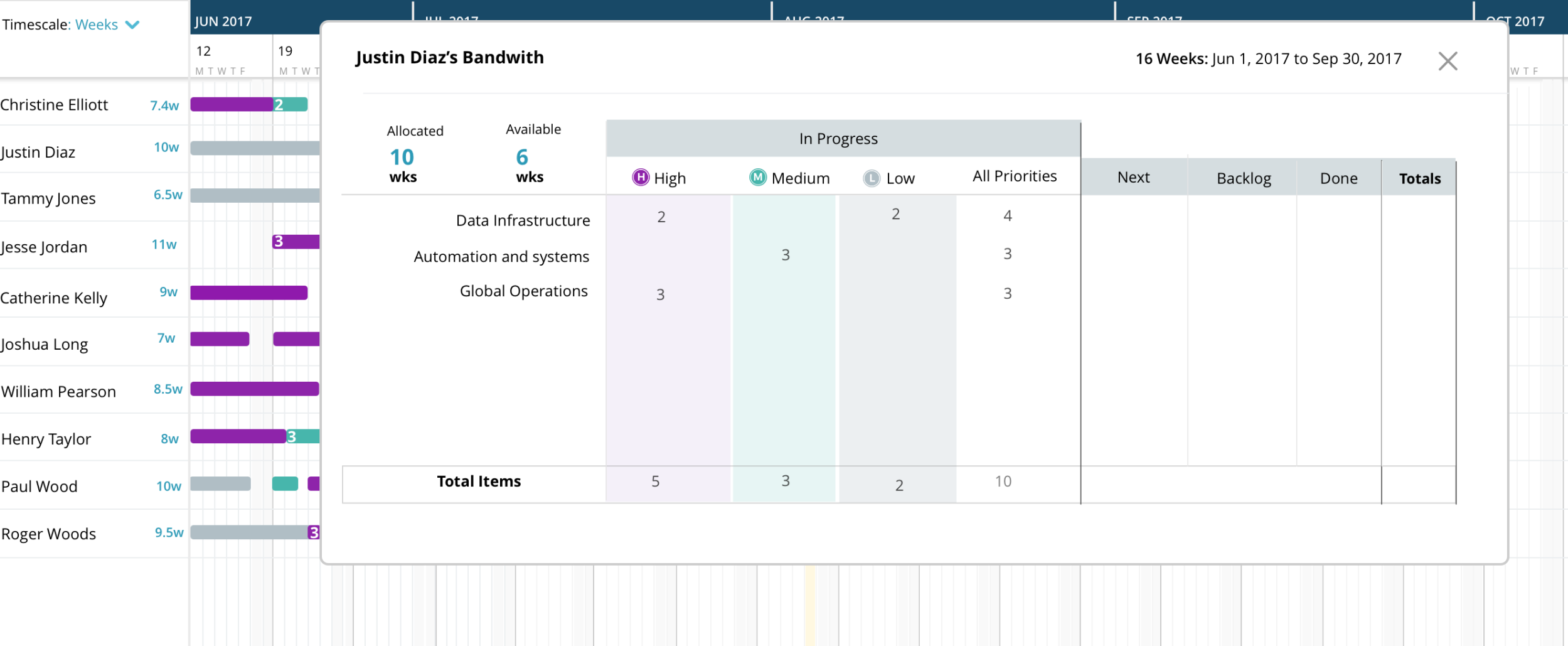
For Period: **Jun 1, 2017** to **Sep 30, 2017** 16 weeks **Total Load**

Status:

Priority:

Filter by: [People](#) | [Objectives](#) | [Workstreams](#)

Timescale: **Weeks** ▾



Justin Diaz's Bandwith

16 Weeks: Jun 1, 2017 to Sep 30, 2017

	Allocated 10 wks	Available 6 wks	In Progress				Next	Backlog	Done	Totals
			H High	M Medium	L Low	All Priorities				
Data Infrastructure			2		2	4				
Automation and systems				3		3				
Global Operations			3			3				
Total Items			5	3	2	10				




WoBot Skills & Fluency

1. Smarter about your timezone so the Monday/Friday reminders come at better times
2. Hit snooze and he'll come back later
3. Smarter syntax on most elements (OKRs, action items and workstreams)
4. All new conversations on meetings
 - ✓ Check calendar, schedule, reschedule, invite people, change names, add/see agenda
 - ✓ Find all meetings with Dick and Jane
 - ✓ Schedule when you, Dick and Jane are all available



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Share Your Running Business Review



CREATE MULTIPLE BIZ REVIEWS

Organize several RBRs for different parts of the business, product line or organization.



INVITE OTHERS TO CONTRIBUTE

Allow others to publish items to a single RBR – use for huddles, management reviews or group dashboards.



GLOBAL BUSINESS REVIEWS

Set up one or more RBRs that are global – visible to everyone in your part of the organization.



SELECTIVELY SHARE AN RBR

Share one or more of your RBRs with select individuals; decide whether they are viewers or editors.



CHOOSE WHAT TO INCLUDE

Select specific action items to include on shared RBRs. Show just KRAs, just objectives, or just workstreams to customize for a unique dashboard or report – a fast way to create a custom report



+ Add RBR

My Running Business Reviews

Personal RBR

Global Sales RBR

NA Sales

Q4 Sales

RBRs shared with me

Global Sales

Emma Watson

EMEA Sales

Carl Chaeovan

Marketing RBR

Carl Chagoyan

RBR - Global Sales

Carl Chagoyan

8

<p>6 of 10</p> <p>Complete major milestones to go live on new payroll system this quarter</p>	<p>6% of 30%</p> <p>Improve customer retention by 30%</p>	<p>20% of 100%</p> <p>Close 10 data centers in the US</p>	<p>80 of 180days</p> <p>Reduce onboarding time form 180 days to 100</p>	<p>8 of 35</p> <p>Recruit core appdev team</p>
<p>6 of 10</p> <p>Deploy 10 lightweight innovative apps for our North America front office and Canada</p>	<p>4 of 64</p> <p>Response time (hours)</p>	<p>76 of 100</p> <p>100 validated opportunities for K2 in the pipeline</p>		

OBJECTIVES

- 25%** Transform hiring experience for hiring managers and candidates in North America

Executives: Victor VP

Carl C: We may need to adjust for losses on Q2, lets discuss.
- 18%** Improve the customer experience to improve satisfaction, cross sales and retention

Innovative Applications: Carl Chagoyan
- 56%** Secure, protect and manage data the way our customers expect

Software Development: Carl Chagoyan
- 43%** Shed our legacy infrastructure to lower costs

Infrastructure: Jonathan Hu

Emma S: We are looking really good on this one team! - updated Gross Profit to 530.69
- 67%** Streamline the process and provide expert timely legal services to the business

Innovative Applications: Carl Chagoyan
- 98%** Enable our LOB teams to be effective anywhere and everywhere with key apps

IT Leadership: Allen Bart

WORKSTREAMS

- 63%** Global eCommerce Sales

Sales: Carl Chagoyan

2 4 34 Jun 30, 2017
- 74%** SaaS offering and delivery

Development: Jonathan Hu

3 5 12 Jun 30, 2017
- 23%** Security and Compliance

23 Jun 30, 2017

HOT BOX

- Close out 5 data centers in Canada **25%**

Jonathan Hu
- Save \$3 million in dev costs **0.5m**

Jonathan Hu

of 3m
- Execute 2H16 marketing investment to deliver \$28M in pipeline for 1H17 **4m**

of 28m
- Approve sales offers **Aug 1**
- Carl Chagoyan Performance **2**

ACTION ITEMS

- Approve sales offers

Pipeline Q3 2017: Joshua Stewart

May 14, 2017
- Review solutions for downtime fixes

Critical Bugs: Grace Richards

May 14, 2017
- Scalability solutions for 1000+ users

Expansion: Walter Russell

May 15, 2017
- Approve Marketing branding plan for SaaS offering

Sales efforts: Joyce Bryant

May 24, 2017



BIZ REVIEW

Biz Review Close



MY WORK

+ Add RBR



TEAM WORK

My Running Business Reviews



OBJECTIVES

- Personal RBR
 - Global Sales RBR
 - NA Sales
 - Q4 Sales



MEETINGS

- RBRs shared with me
 - Global Sales
Emma Watson
 - EMEA Sales
Carl Chagoyan
 - Marketing RBR
Carl Chagoyan

RBR - Global Sales 8 👤

Carl Chagoyan

<p>30.44m ▲ of 57.5m Global Revenue</p>	<p>2 ♥ of 10 Have you met with a customer this quarter?</p>	<p>13.08m ▲ of 24.5m BKT total EMEA Revenue</p>	<p>17.36m ▲ of 33m BKT total North America revenue</p>	<p>76 ▶ of 100 100 validated opportunities for K2 in the pipeline</p>
<p>138 ▶ of 150 SQLs</p>	<p>60% ▲ of 100% K2 launch goes according to plan</p>	<p>36.06m ▶ of 52m Increase revenue 10% in Q3</p>	<p>5.3 ▲ of 8 NPS of 8</p>	<p>6 ▼ of 10 10 Evangelist interviews</p>
<p>8 ▲ of 15 New logos in EMEA</p>	<p>4 ♥ of 8 Wins in Insurance segment</p>	<p>42.5m ▲ of 50m 50 million in services revenue</p>	<p>14 ▲ of 24 24 Beta Customers on K2</p>	<p>76 ▶ of 100 100 validated opportunities for K2 in the pipeline</p>
<p>90 ▶ of 125 K2 Demos completed</p>	<p>52 ▲ of 90 K2 Pilots in T1 Accounts</p>			





BIZ REVIEW

Biz Review

Close



MY WORK

+ Add RBR



TEAM WORK

My Running Business Reviews

Personal RBR

Global Sales RBR

NA Sales

Q4 Sales



OBJECTIVES

RBRs shared with me



MEETINGS

Global Sales
Emma Watson

EMEA Sales
Carl Chagoyan

Marketing RBR
Carl Chagoyan

RBR - Global Sales

Carl Chagoyan

8 👤

OBJECTIVES

- 54%** **The Quarter We Blow It Up!**
NA Sales: Joe Robbins
Joe R: Services for new campaign and analytics support at GMT *updated 50 million in services revenue to 4850000*
- 69%** **Expand EMEA sales by 30% this quarter**
EMEA Sales: Audrey Chauvier
- 57%** **Build customer relationships and advocacy to support our market strategy**
Marketing: Mary Cmoso
- 56%** **Revenue across BKT line of products**
Business Development: Charlie Damon
- 43%** **Set the bar on innovation with K2 and move to the front of the pack**
Executive Team: Jack Anderson
Barry B: Added Metlife, Geico and BNY to the beta this week. *updated Customers on K2 beta to 3*
- 67%** **Grow faster than our competitors**
Executive Team: Jack Anderson
- 83%** **Make the K2 Launch the most successful in our history!**
Marketing: Mary Cmoso
- 87%** **Drive demand and build the sales pipeline**
Marketing: Mary Cmoso





Biz Review

Close

+ Add RBR



My Running Business Reviews

Personal RBR

Global Sales RBR

NA Sales

Q4 Sales

RBRs shared with me

Global Sales

Emma Watson

EMEA Sales

Carl Chagoyan

Marketing RBR

Carl Chagoyan

RBR - Global Sales

Carl Chagoyan

8 👤

Share your RBR



Custom message:

Please view or edit objectives, key results, workstreams and action items to this RBR.

Share with organization

Search by team or person

Samuel Robinson

View Edit X

William Daniels

View Edit X

Brenda Greene

View Edit X

Diane Butler

View Edit X

Walter Lawson

Edit View X

Kevin Castro

View Edit X

Scott Rogers

View Edit X

Share

6 ▲

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6 ▶

Depl

our ?

OBJ

25

18

56

43

67

98

WOR

63

74%

SaaS offering and delivery

Development: Jonathan Hu

3 R 5 X 12 I Jun 30, 2017

33%

Security and Compliance

Development: Jonathan Hu

23 I Jun 30, 2017

65%

Selling and merchandising

Emma Smith

34 I Jun 30, 2017

50%

Operational excellence

Carl Chagoyan

5 X 27 I Jun 30, 2017

0days

ding time form 180 days

8 ▶ of 35

Recruit core appdev team

T BOX

Close out 5 data centers in Canada

25%

Jonathan Hu

Save \$3 million in dev costs

0.5m

Jonathan Hu

of 3m

Execute 2H16 marketing investment to deliver \$28M in pipeline for 1H17

4m

of 28m

Approve sales offers

Aug 1

Carl Chagoyan

Performance 2

ACTION ITEMS

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Pipeline Q3 2017: Joshua Stewart

May 14, 2017

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May 14, 2017

Scalability solutions for 1000+ users

Expansion: Walter Russell

May 15, 2017

Approve Marketing branding plan for SaaS offering

Sales efforts: Joyce Bryant

May 24, 2017

Data centers identified for closing in this quarter

Infrastructure: Walter Russell

May 28, 2017





Let data flow more easily!

1. Workstream **integrations** with JIRA, Asana, GitHub and other apps
 - ✓ Choose which items to include (issues, tickets, stories, tasks, projects, etc). Epic level integration with Jira.
 - ✓ Continuous or one time
 - ✓ Detail or metadata: the items themselves or just stats like completion percentage and counts
 - ✓ Use as source for OKR updates, in capacity plan, on meeting agendas and on RBRs
2. “Public” workstreams: share once with everyone in the org
3. Visual improvements on reports and report options
4. Boards on mobile
5. Continuous refinement of KR data chain



Topics Today

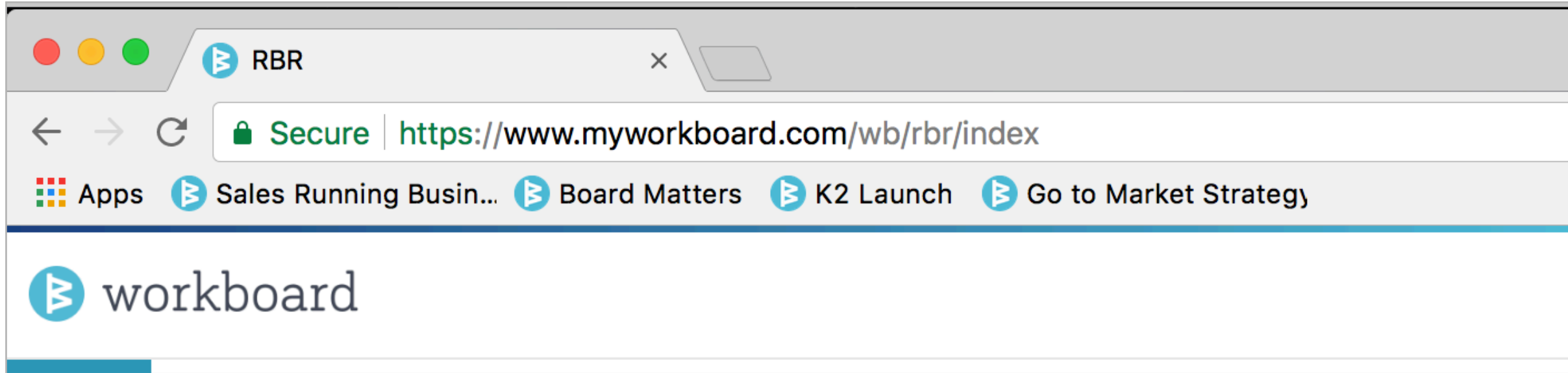
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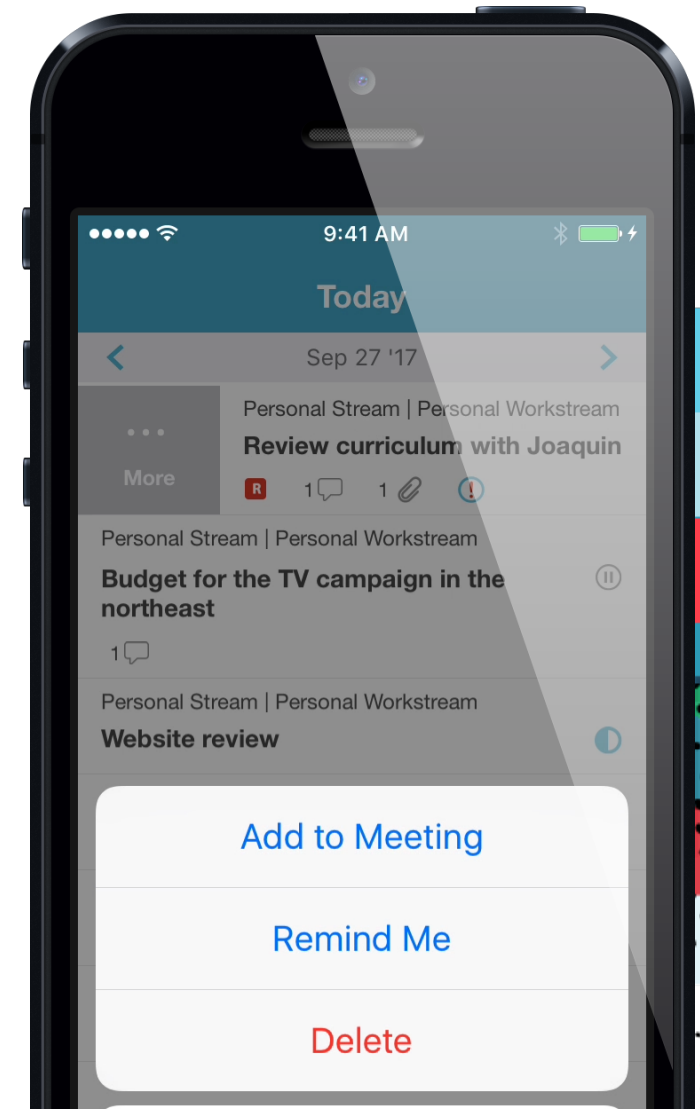
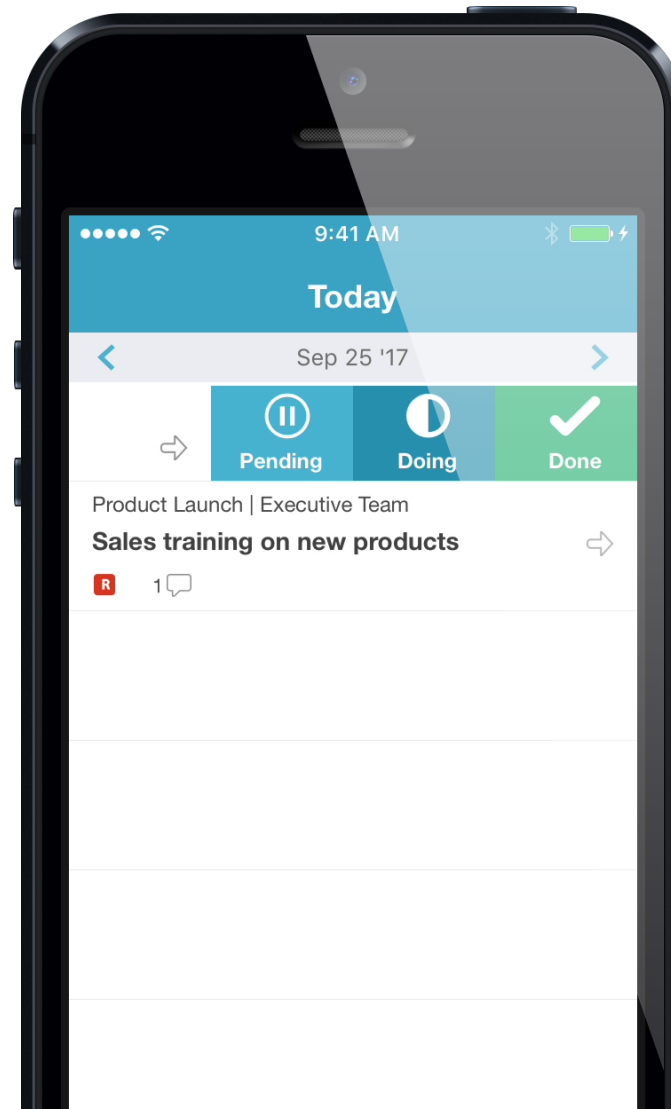
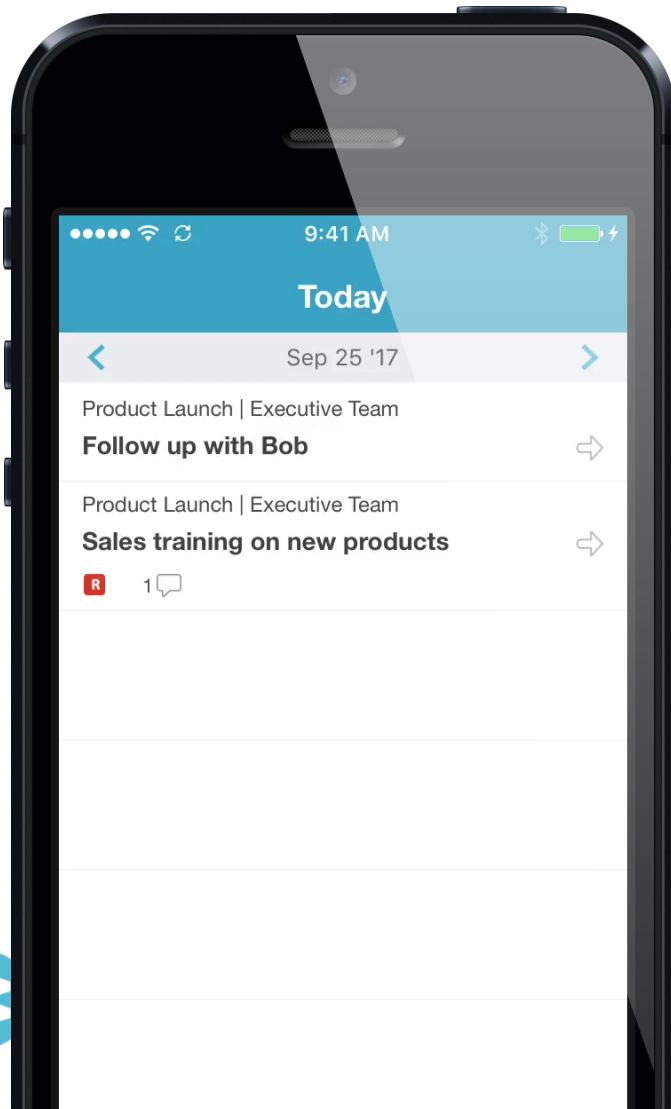


3 DYKs: Did you know?

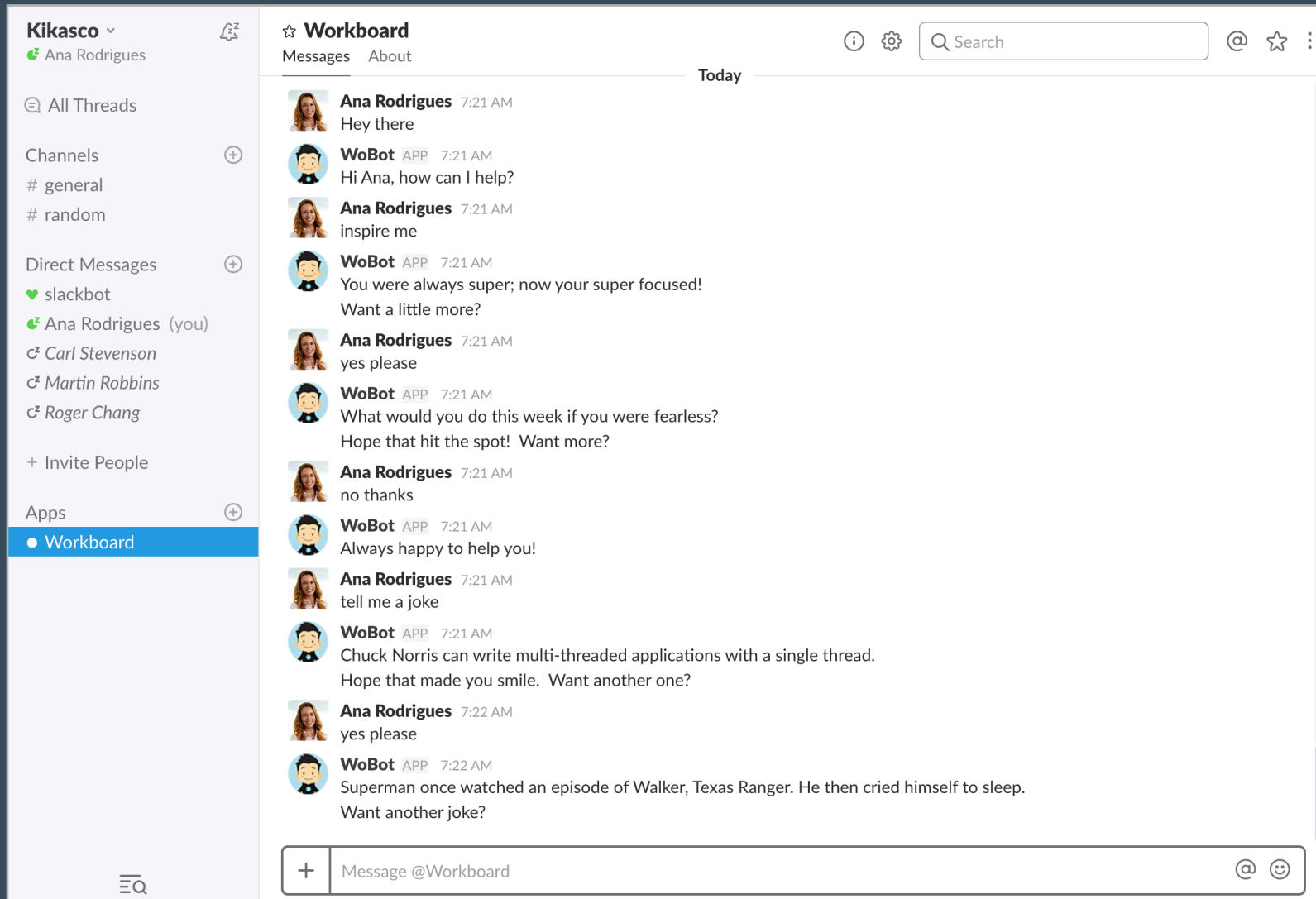
Browser bookmarks work for your favorite workstream and project boards.



What do you need to do today is right here - Swipe day to day, mark it done, set reminders



WoBot tells pretty good jokes and gives tweet-length pep talks. (Invite WoBot to team channels.)



The screenshot shows a Slack interface for a channel named "Workboard". The left sidebar shows the channel is selected. The main area displays a conversation between Ana Rodrigues and WoBot. The messages are as follows:

- Ana Rodrigues: Hey there
- WoBot: Hi Ana, how can I help?
- Ana Rodrigues: inspire me
- WoBot: You were always super; now your super focused! Want a little more?
- Ana Rodrigues: yes please
- WoBot: What would you do this week if you were fearless? Hope that hit the spot! Want more?
- Ana Rodrigues: no thanks
- WoBot: Always happy to help you!
- Ana Rodrigues: tell me a joke
- WoBot: Chuck Norris can write multi-threaded applications with a single thread. Hope that made you smile. Want another one?
- Ana Rodrigues: yes please
- WoBot: Superman once watched an episode of Walker, Texas Ranger. He then cried himself to sleep. Want another joke?


The bottom of the screen shows a message input field with a plus sign on the left and a search icon on the right.





Questions & Feedback?

What do we have right?
What did we miss?



**Thank you for the opportunity to
support your success!**

