workboard

WoBo New Features and Enhancements

October 2017

Topics Today

1. Meetings
2. WoBot
3. 1on1s
4. Capacity and Workload
5. Team Gantts

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
Marketing: Kim Lou
74%
Added by Jonathan N.

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

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

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

K2 Launch Event
Lily Grooves: Marketing
70%
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 comppetitors that focuses on predictive technologies and solving problems of the future. We should dial back and ficus 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

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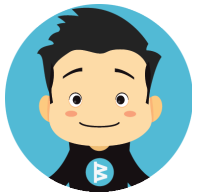
20 Questions you can ask WoBot



and this isn't even everything...

Get my open meetings

Reschedule today's meetings

Create a meeting for tomorrow with Romona at 2:00 pm

Schedule a meeting now

How is [Person] doing on objectives?

How am I doing on objectives?

Get my [green|red] goals?

Can I update my KRs?

Show my [google| outlook |office365] calendar

Get my 1on1 meetings

Get my meetings for next week

Do I have a meeting tomorrow?

Setup a 1on1 meeting with Amy

Can I see my red action items?

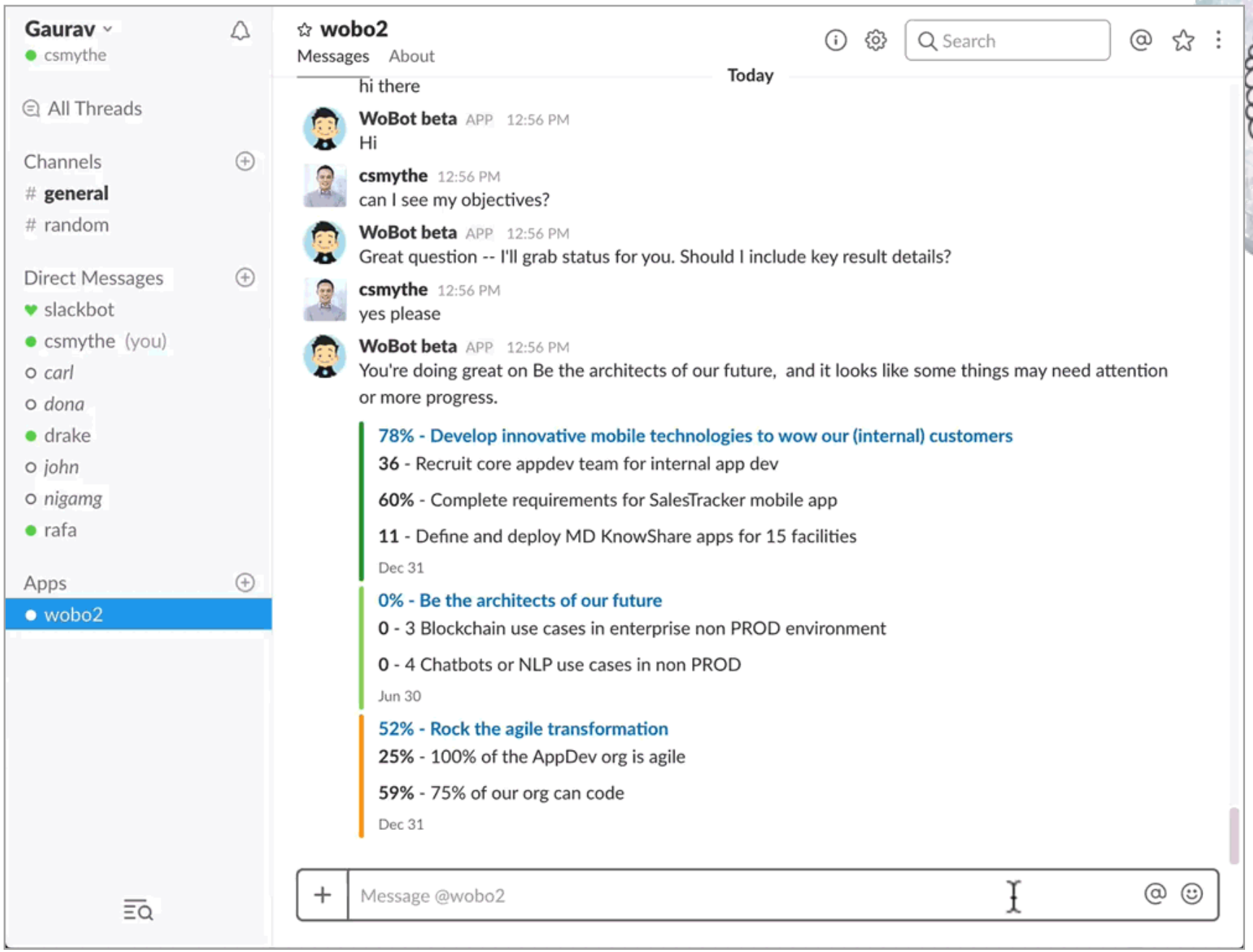
What are my action items due today?

Get my top priority action items?

Get my sub action items

How is [Person] doing on action items?

How am I doing on [Workstream Name] workstream?


Gaurav
csmythe
All Threads
Channels
general
random
Direct Messages
slackbot
csmythe (you)
carl
dona
drake
john
nigamg
rafa
Apps
wobo2
wobo2
Messages
About
Search
Today
hi there
WoBot beta APP 12:56 PM
Hi
csmythe 12:56 PM
can I see my objectives?
WoBot beta APP 12:56 PM
Great question -- I'll grab status for you. Should I include key result details?
csmythe 12:56 PM
yes please
WoBot beta APP 12:56 PM
You're doing great on Be the architects of our future, and it looks like some things may need attention or more progress.
78% - Develop innovative mobile technologies to wow our (internal) customers
36 - Recruit core appdev team for internal app dev
60% - Complete requirements for SalesTracker mobile app
11 - Define and deploy MD KnowShare apps for 15 facilities
Dec 31
0% - Be the architects of our future
0 - 3 Blockchain use cases in enterprise non PROD environment
0 - 4 Chatbots or NLP use cases in non PROD
Jun 30
52% - Rock the agile transformation
25% - 100% of the AppDev org is agile
59% - 75% of our org can code
Dec 31
Message @wobo2

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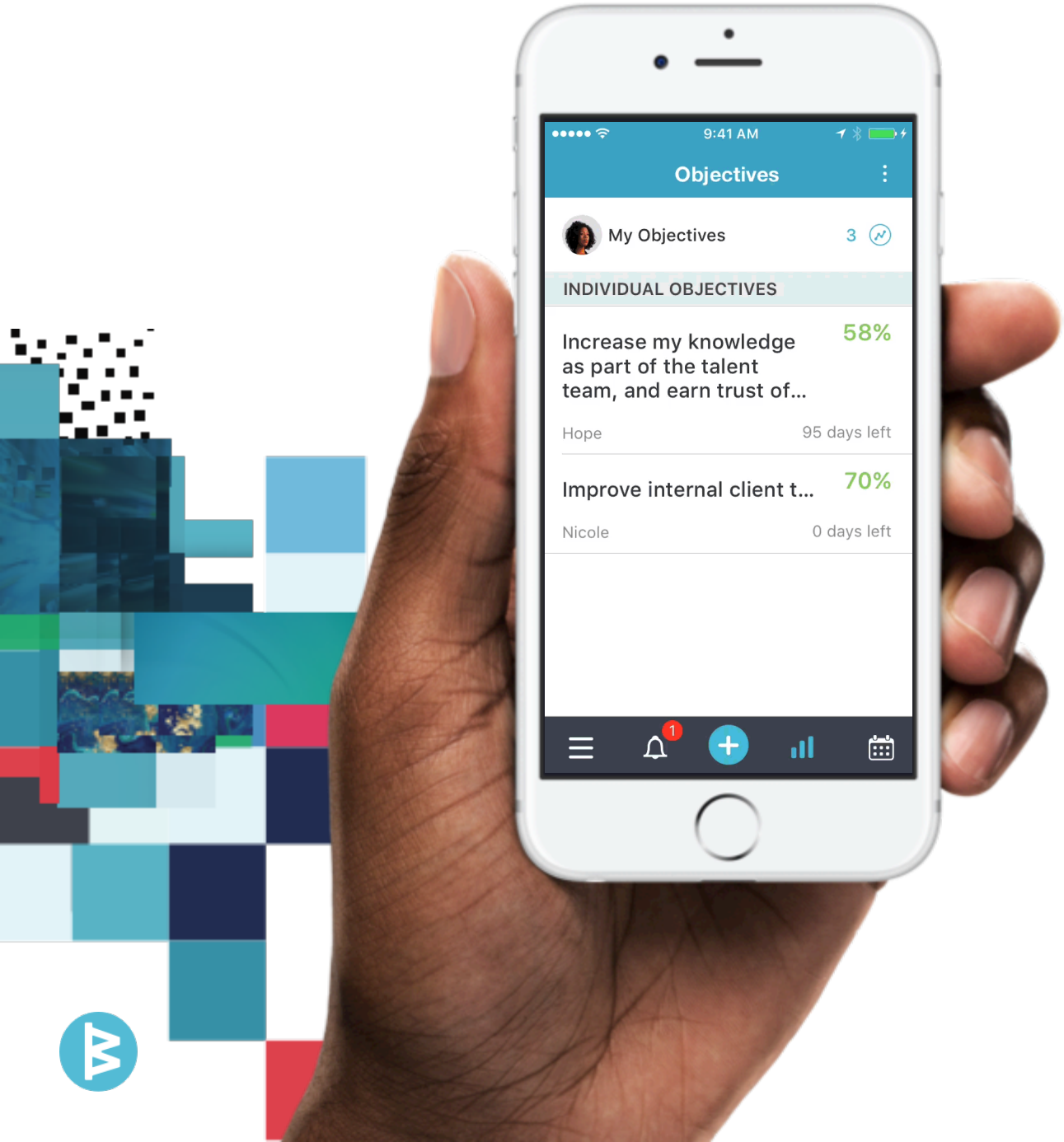

On Cal Train this morning, Hope checks in on her objectives and prepares for her upcoming 1on1.

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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 ORKS & 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

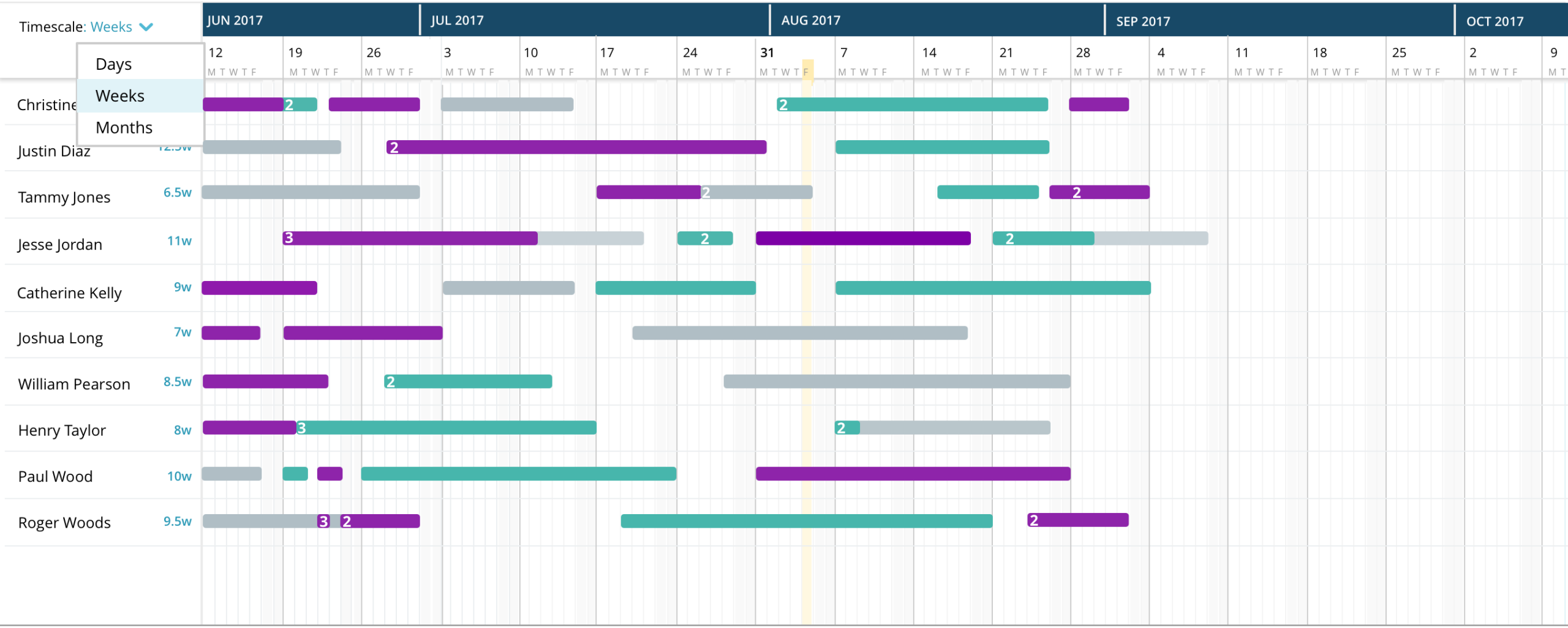
Set and factor planned vacation time in capacity calculations – these won't show as available bandwidth.

Workload & Bandwidth

For Period: Jun 1, 2017 to Sep 30, 2017 16 weeks Total Load *Status:* *Priority:* *Filter by:* People | Objectives | Workstreams

Timescale: Weeks

- Days
- Weeks
- Months



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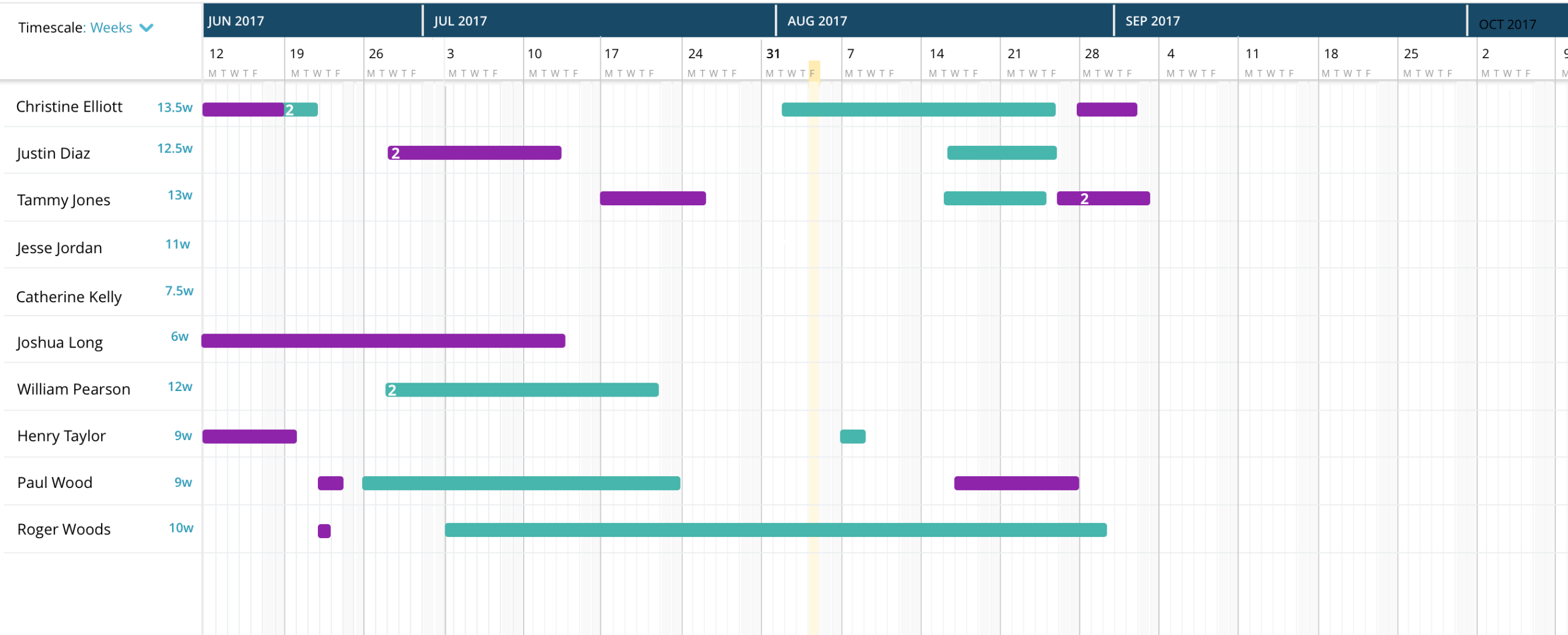

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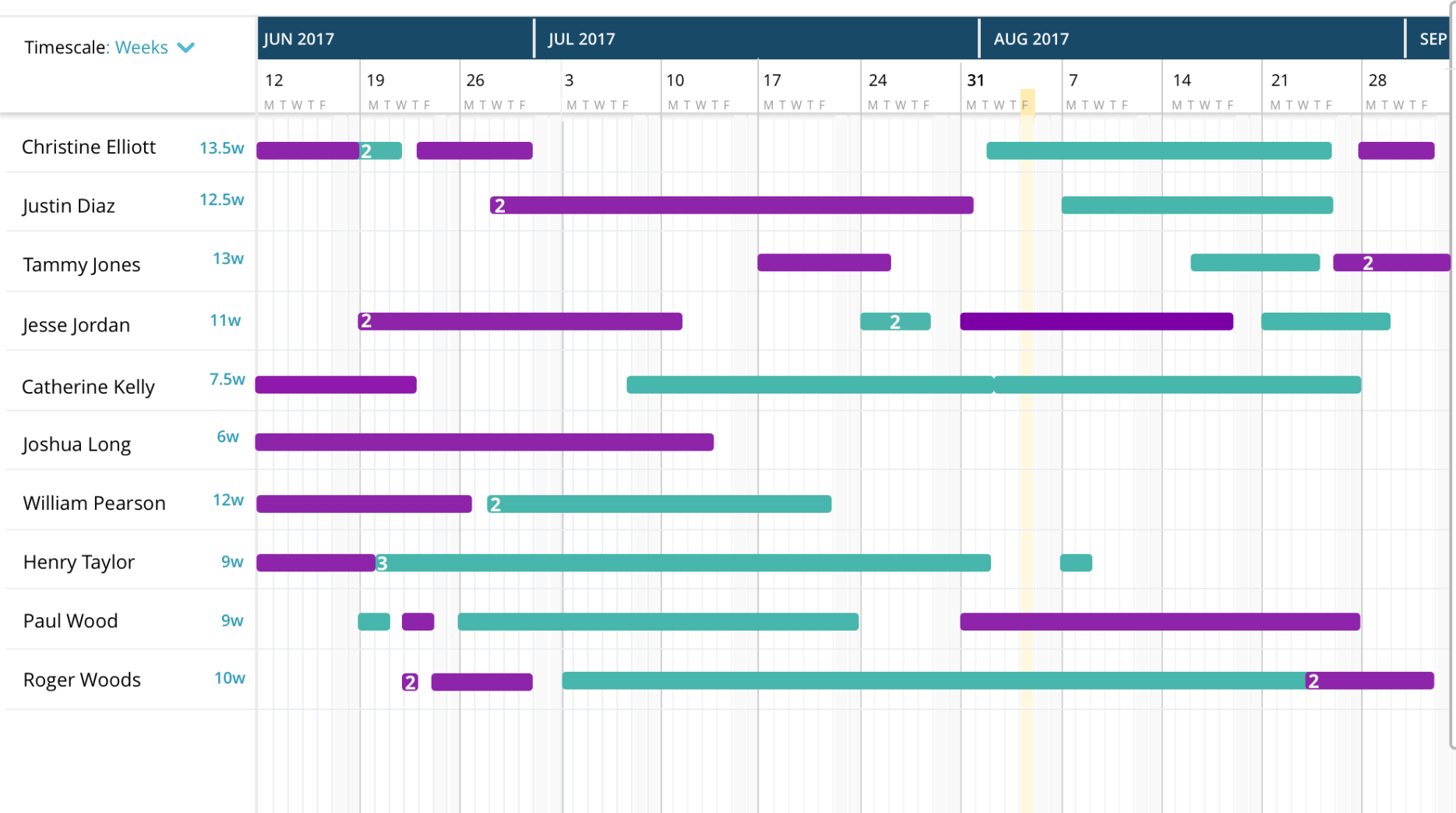

Filter by work aligned to objectives:

- [ ] Select All
- [x] **Be the Best leader in the Market and delight our customers**
  - [x] Data Infrastructure
  - [x] Sales Tools
  - [x] Customer Success
- [ ] **Technology and infrastrucure 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

JUN 2017 | JUL 2017 | AUG 2017 | SEP 2017 | OCT 2017

12 (M T W T F) 19 (M T W T) 9 (W T F M T)

Christine Elliott	7.4w
Justin Diaz	10w
Tammy Jones	6.5w
Jesse Jordan	11w
Catherine Kelly	9w
Joshua Long	7w
William Pearson	8.5w
Henry Taylor	8w
Paul Wood	10w
Roger Woods	9.5w

Justin Diaz's Bandwith

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

Allocated **10 wks** Available **6 wks**

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

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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

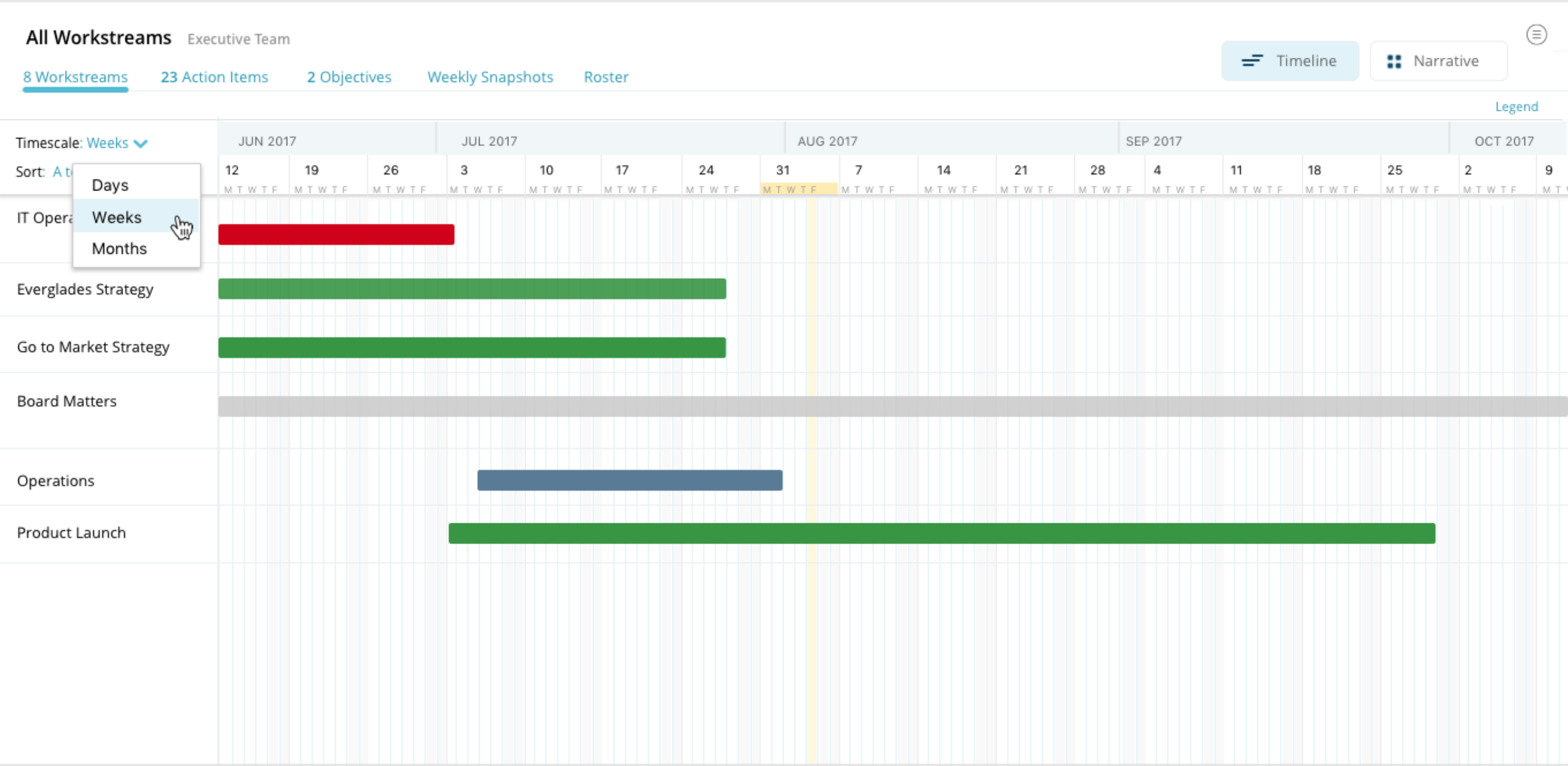
Sort workstream timelines by priority, start or end date, or alphabetical order. Sort team timelines by alphabetical order.

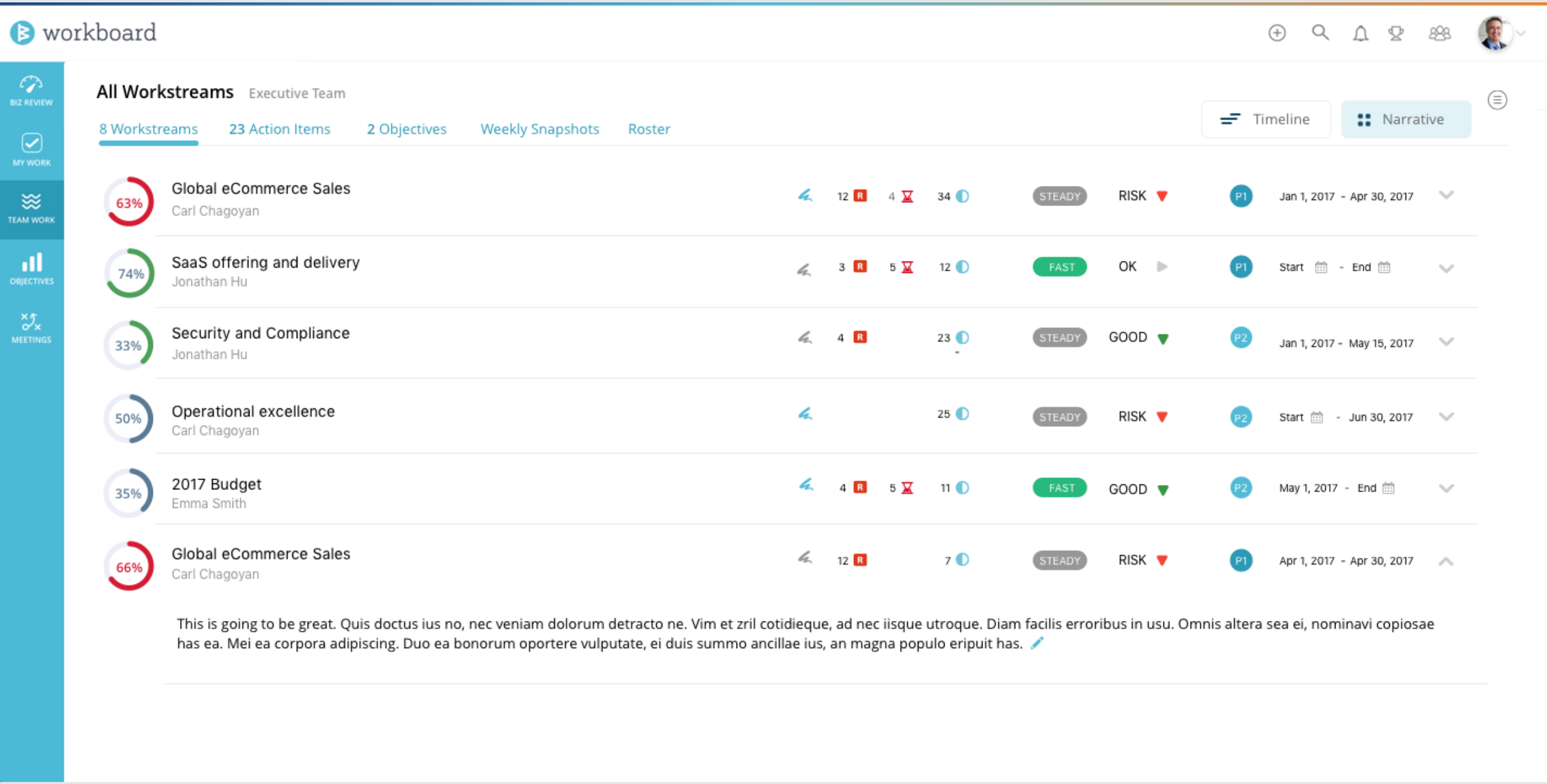
SEPARATE TIMELINE & DASHBOARD

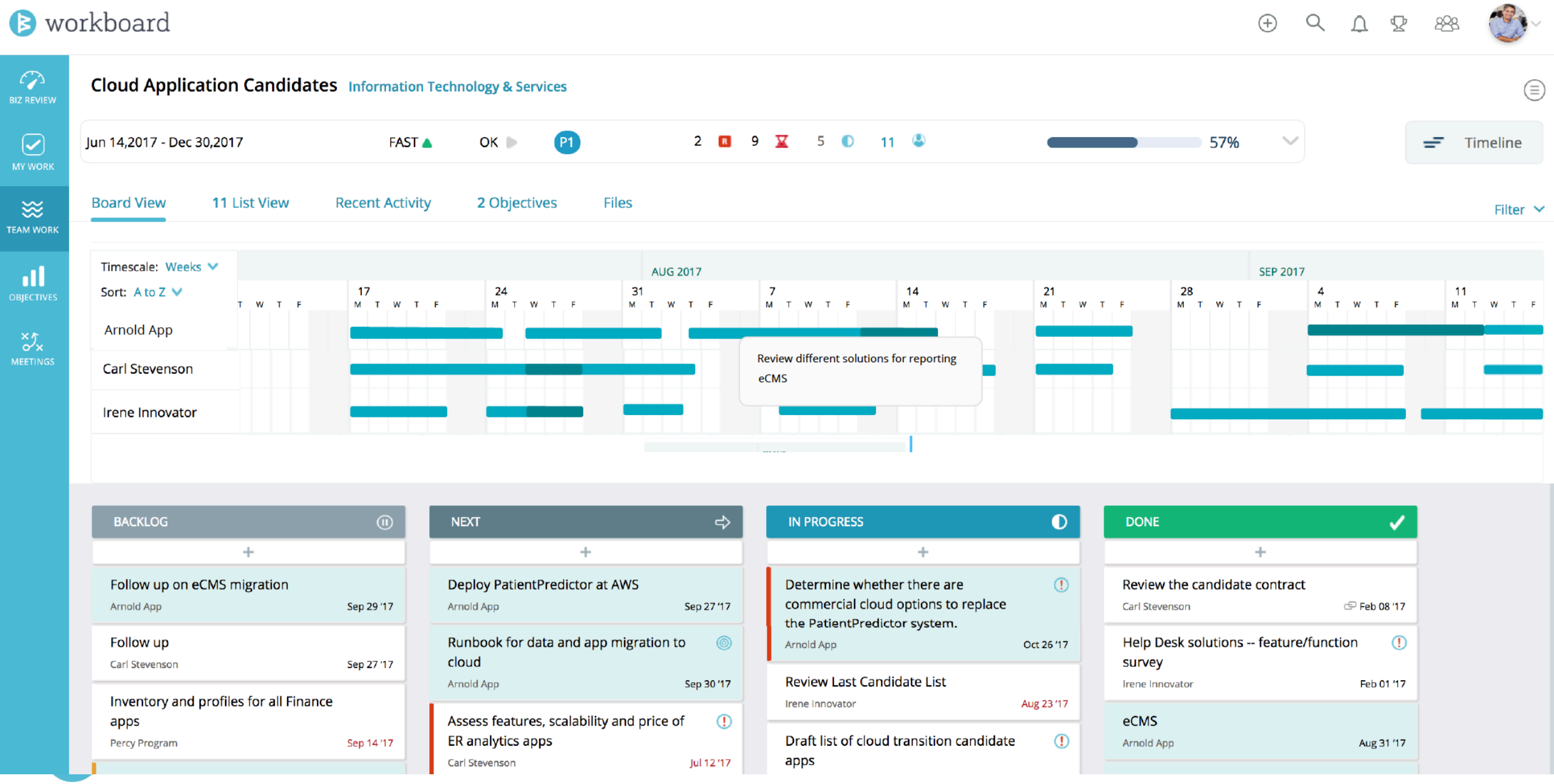
Workstream summary status is back on its own dashboard. Neat, tidy and the way you liked it. See the narrative inline.

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
Sort: A t
Days
Weeks
Months
JUN 2017
JUL 2017
AUG 2017
SEP 2017
OCT 2017
12
19
26
3
10
17
24
31
7
14
21
28
4
11
18
25
2
9
IT Opera
Everglades Strategy
Go to Market Strategy
Board Matters
Operations
Product Launch


workboard
BIZ REVIEW
MY WORK
TEAM WORK
OBJECTIVES
MEETINGS
All Workstreams
Executive Team
8 Workstreams
23 Action Items
2 Objectives
Weekly Snapshots
Roster
Timeline
Narrative
63%
Global eCommerce Sales
Carl Chagoyan
12 R
4
34
STEADY
RISK
P1
Jan 1, 2017 - Apr 30, 2017
74%
SaaS offering and delivery
Jonathan Hu
3 R
5
12
FAST
OK
P1
Start - End
33%
Security and Compliance
Jonathan Hu
4 R
23
STEADY
GOOD
P2
Jan 1, 2017 - May 15, 2017
50%
Operational excellence
Carl Chagoyan
25
STEADY
RISK
P2
Start - Jun 30, 2017
35%
2017 Budget
Emma Smith
4 R
5
11
FAST
GOOD
P2
May 1, 2017 - End
66%
Global eCommerce Sales
Carl Chagoyan
12 R
7
STEADY
RISK
P1
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.


workboard
BIZ REVIEW
MY WORK
TEAM WORK
OBJECTIVES
MEETINGS
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
Timescale: Weeks
Sort: A to Z
AUG 2017
SEP 2017
Arnold App
Carl Stevenson
Irene Innovator
Review different solutions for reporting eCMS
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