

WorkBoard Community Call

January 2023



Agenda

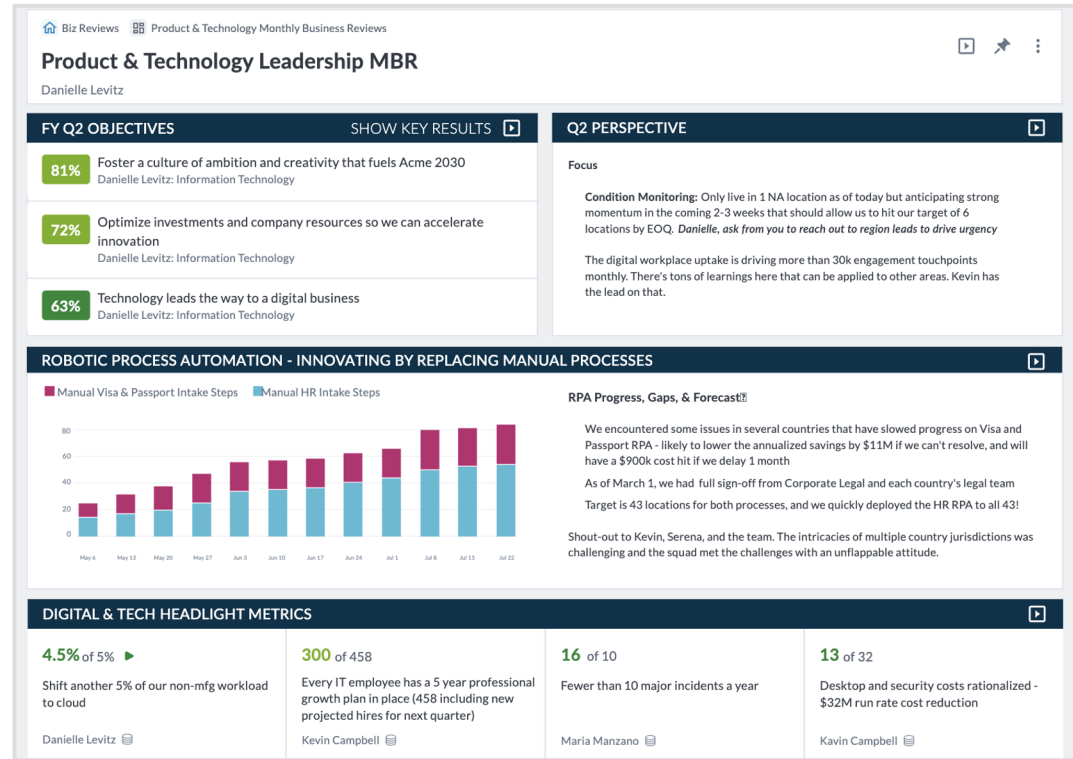
- Biz Reviews Today
- Introducing: Scorecards
- Bring it Together: Have Great MBRs
- Other Delights & Coming Soon

Biz Reviews Today

Digitized Business Reviews

You already have MBRs and QBRs on a regular basis.

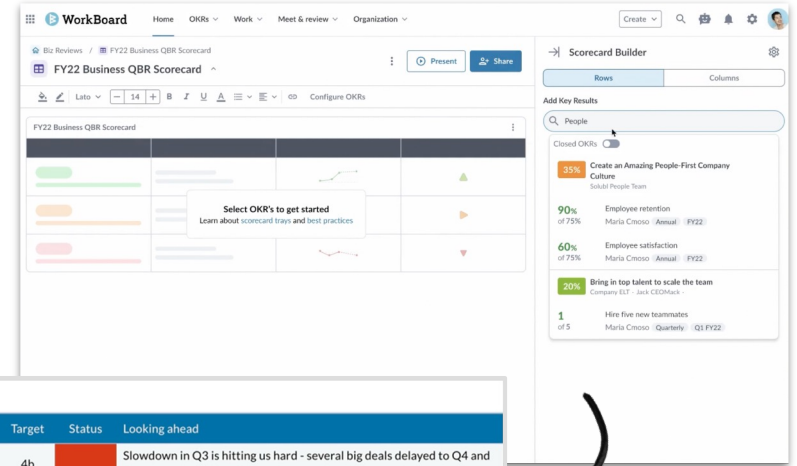
→ Biz Reviews help you **digitize** and **automate** the gathering of critical metrics.



Introducing: Scorecards

Tell Your Story, The Way it Needs to be Told

- The key to a great MBR is the ability to **drive focused discussion** on progress to plan, and the path forward.
- Scorecards give you complete control: Create a **one-page-view** of your results and narrative side by side.
- **Fully customize** your OKR results **dashboards**, and include live Key Result data you can rely on.



Scorecard				
Needle movers for the market	Actual	Target	Status	Looking ahead
\$4B Revenue FY22	1.52b	4b	Red	Slowdown in Q3 is hitting us hard - several big deals delayed to Q4 and pipeline looks healthy - expecting a turnaround
85% Gross Margin by End of Year	82%	85%	Red	Fixed costs are crushing us here. Leases in our NY and Austin run out in Q2 and should provide a bump we need if all else stays constant
Internal promotions to director+ level	976	1.5k	Orange	This has never been more important to retain talent. We'll hit this and make sure it's included in company comms
85% revenue retention in our target customer segments (GRR)	84%	85%	Orange	Leading indicator for Revenue--need to do better and have a plan to course correct
85 Tier 1 and Tier 2 logos renewed	52	85	Orange	Leading indicator for Renewals--need to do better and have a plan to course correct
Operating Margin	7.2%	10%	Green	N/A
NPS	70	75	Green	Market leader in this category
\$1.9B Renewals	1.87b	1.9b	Green	Market has reacted neutral to price increases which is encouraging; price increasing outpacing impacts of inflation on COGS



How to Build a Scorecard

Get Started

The screenshot displays the WorkBoard interface for editing a scorecard. The main area shows a grid with three rows of placeholder scorecards. A central tooltip reads: "Select OKR's to get started. Learn about [WorkBoard Scorecards](#) and [best practices](#)".

The right-hand panel, titled "Edit Scorecards", contains a search bar with "ARR" entered. Below the search bar, a list of key results is shown:

- 58% FOCUS on the right market segments with stand-out value. Jack CEOmack · Company ELT
- 100% of 110% 110% of new customer bookings (ARR) are from customers in our target segments. Joe Smarts
- 88% We are a lean mean revenue driving machine always winning. Joe Smarts · Sales
- 1.3b of 366m \$366M Bookings (ARR). Joe Smarts
- 64% We pull out all the stops to get the right customers to buy. TJ Thompson · Digital Growth

Numbered callouts 1, 2, and 3 highlight the scorecard title, the "Edit Scorecards" button, and the search bar respectively.

1. Name your scorecard
2. Use the side-panel editor to build and edit your scorecard
3. Search to pull in key results as rows

Build out Your Scorecard

Biz Reviews / Q2 Revenue Scorecard

Q2 Revenue Scorecard

Present

Scorecard

Key Result name	Actual	Target	Narrative
110% of new customer bookings (ARR) are from customers in our target segments	100%	110%	-
85% revenue retention in our target customer segments (GRR)	83.47%	85%	We are in a competitive bid for the renewal of Globex after a change in exec leadership.
Affiliate marketing drives \$10m ARR	5m	10m	-
\$366M Bookings (ARR)	1.3b	366m	-
Drive gross revenue retention (GRR) above 83%	87	83	-

Edit Scorecards

Rows (5) Columns (4)

- Key Result name
- 123 Actual
- 123 Target
- Narrative

+ Add column

Search for key result attributes

- 123 Initial Value
- Owner
- RAG Rating

4. Switch to columns on the side-panel editor to choose which fields to pull in

5. Select additional attributes to pull in as columns (ex. last comment, owner etc.)

6. Rename, reorder and format headers as needed

7. Add executive summary narrative and context alongside live result data

Format, Share, and Present

Biz Reviews / FY23 Q4 Revenue Scorecard

FY23 Q4 Revenue Scorecard 9 Present

Key Result	Actual	Target	Owner	RAG Rating	Narrative
110% of new customer bookings (ARR) are from customers in our target segments	100%	110%	Joe Smarts	■	-
\$366M Bookings (ARR)	1.3b	366m	Workboard Worker	■	-
Affiliate marketing drives \$10m ARR	5m	10m	TJ Thompson	■	-
2% ARR derived from self-sign up	0.75%	2%	Manny Admina	■	-
85% revenue retention in our target customer segments (GRR)	83.47%	85%	Jack CEOMack	■	Mitigating risk for Globel renewal w/ exec onsite. Have tapped Tom L to help the negotiations.
\$4B Revenue FY21	1.52b	4b	Jack CEOMack	■	-

Scorecard

Rows (6) Columns (6)

Add Key Results Closed OKRs

Search by name, owner, team or tag

- 58%** **FOCUS on the right market segments with stand-out value**
Company ELT Quarterly Q2 2022
- 100%** of 110% **110% of new customer bookings (ARR) are from customers in our target...**
Joe Smarts
- 83.47%** of 85% **85% revenue retention in our target customer segments (GRR)**
Jack CEOMack
- 88%** **We are a lean mean revenue driving machine always winning**
Sales Quarterly Q2 2022
- 1.3b** of 366m **\$366M Bookings (ARR)**
Workboard Worker

8. Use advanced settings to adjust font size and background colors
9. Favorite, share and present your scorecard; add it to an MBR or QBR collection from the kebob menu

Let's build one together!

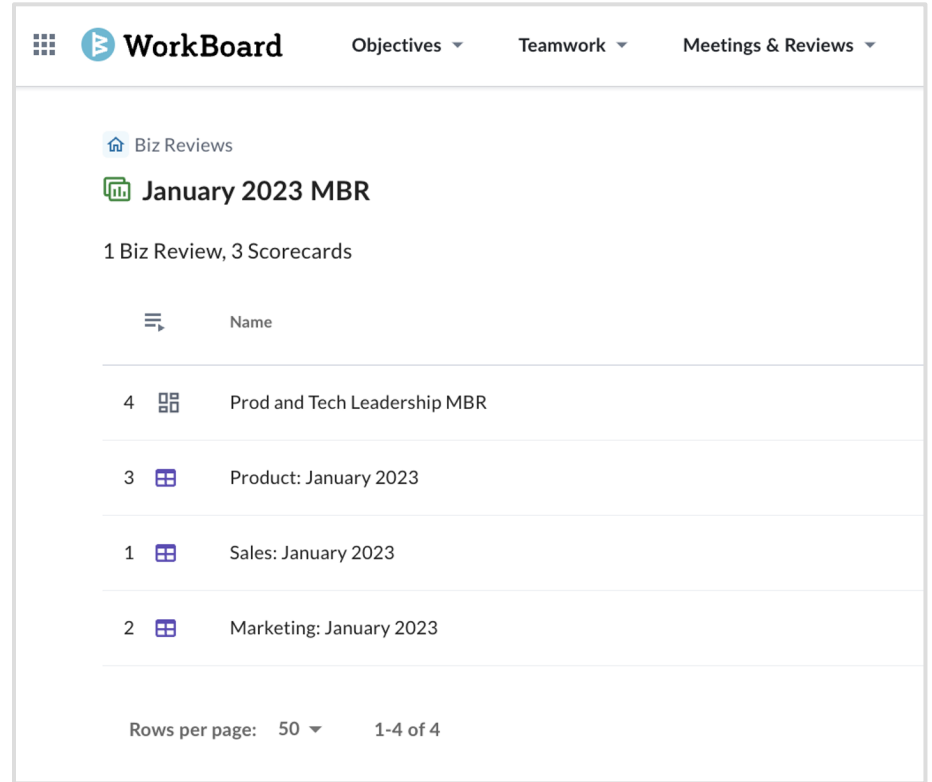
Using Scorecards in Your Next MBR

Your Next MBR

1. **Build** a Scorecard
2. Show other content alongside your Scorecard by **embedding it in a Biz Review**
3. **Collate** all your MBR content into a single Collection of Scorecards and Biz Reviews
4. **Present** your Collection as a single presentation
5. **Recycle & reuse** the Scorecard for your next MBR

Example: January 2023 MBR Collection

- Sales Scorecard
- Marketing Scorecard
- Product Scorecard
- Product & Technology Biz Review



The screenshot displays the WorkBoard interface. At the top, there is a navigation bar with the WorkBoard logo, a grid icon, and three dropdown menus: "Objectives", "Teamwork", and "Meetings & Reviews". Below the navigation bar, the main content area shows a "Biz Reviews" section with a home icon. Underneath, there is a "January 2023 MBR" section with a calendar icon. Below this, it states "1 Biz Review, 3 Scorecards". A table lists the items:

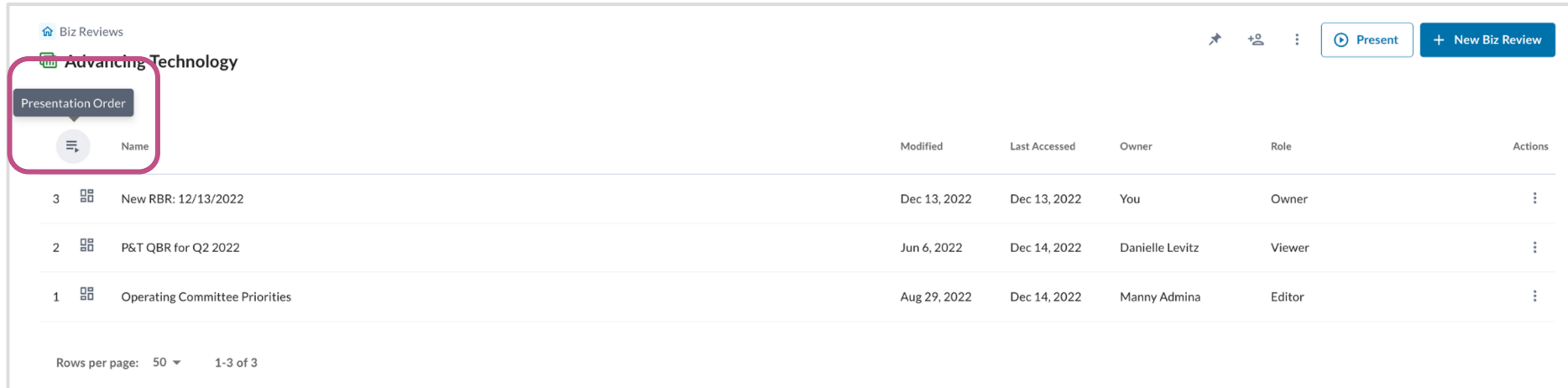
	Name
4	Prod and Tech Leadership MBR
3	Product: January 2023
1	Sales: January 2023
2	Marketing: January 2023

At the bottom of the table, there is a "Rows per page: 50" dropdown and "1-4 of 4" pagination information.

Play All: Easily Arrange and Present all Your Content

Present a Collection of Biz Reviews & Scorecards as a Single Biz Review

- **Set the MBR agenda:** Set the Presentation Order to sequence Biz Reviews in Present mode
- **Exclude backup material** from main presentation.



The screenshot shows the 'Biz Reviews' section in the WorkBoard interface. The header includes a home icon, 'Biz Reviews', and a search icon. Below the header is the title 'Advancing Technology'. A 'Presentation Order' dropdown menu is highlighted with a red box, showing a list of review items. The main content is a table with columns for Name, Modified, Last Accessed, Owner, Role, and Actions. The table contains three rows of review items. At the bottom, there is a pagination control showing 'Rows per page: 50' and '1-3 of 3'.

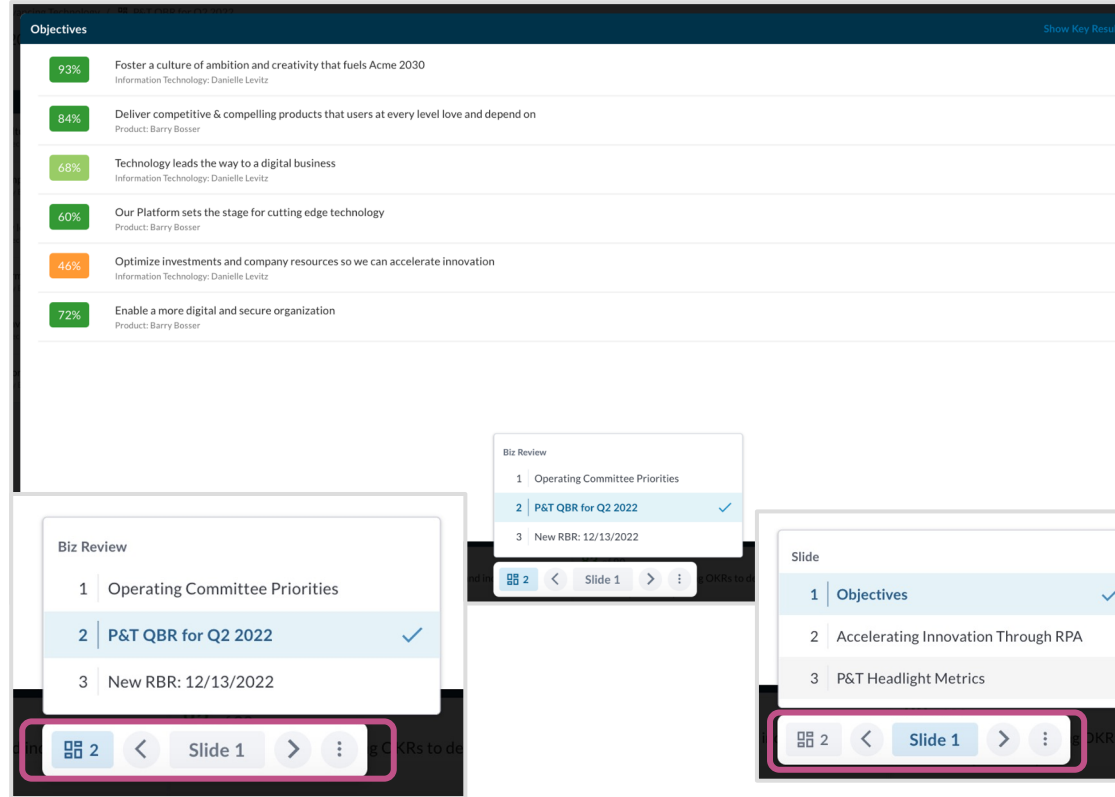
	Name	Modified	Last Accessed	Owner	Role	Actions
3	New RBR: 12/13/2022	Dec 13, 2022	Dec 13, 2022	You	Owner	⋮
2	P&T QBR for Q2 2022	Jun 6, 2022	Dec 14, 2022	Danielle Levitz	Viewer	⋮
1	Operating Committee Priorities	Aug 29, 2022	Dec 14, 2022	Manny Admina	Editor	⋮

Rows per page: 50 ▾ 1-3 of 3

New Tools for a Flawless Presentation Experience

Introducing new **PowerPoint-Quality** presentation controls.

- **Transition seamlessly** between Biz Reviews in Present mode
- **Jump between** any **Biz Review** or **Scorecard** in Collection
- **Jump between** any **Tray** in current Biz Review

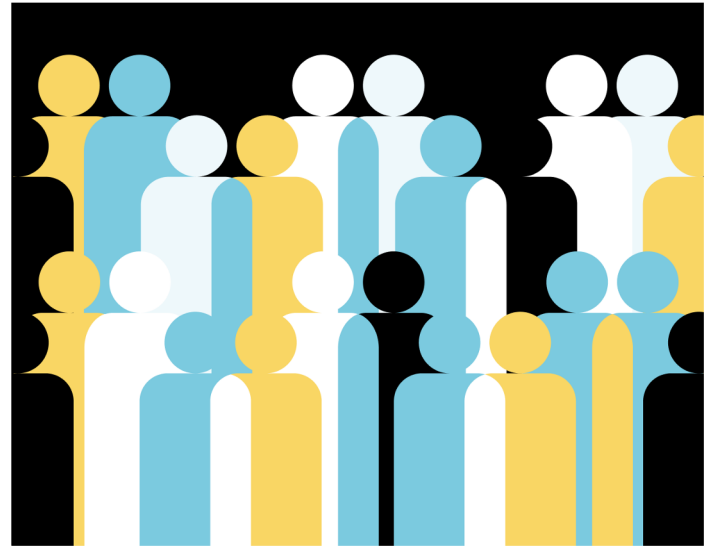


2023 Community Calls

Community Calls: Save the Date(s)!

**Our next Community Call is
February 22.**

Make sure to [sign up](#) for all our monthly calls so you don't miss a single one!



Our 2023 Live Event Lineup

Join other strategy operation leaders, P&L owners, and results management leaders like yourself in an opportunity to share perspectives on strategy execution, build new connections, and learn from each other.

Schedule:

Feb. 7	Strategy Execution Leader Meeting - Silicon Valley
Mar. 2	Strategy Execution Leader Meeting - Chicago
Mar. 23	Strategy Execution Leader Meeting - London
Apr. 14	CIO Round Table - New York City
May 18	Accelerate Spring & SEE Awards
Jun. 22	Accelerate Europe - London



Join our Upcoming Classes



Class	Description	Dates	How to Sign Up
Outcome Method Mindset	Learn about OKRs and the Outcome Mindset in 1 hour	<ul style="list-style-type: none">● February 1st at 1:00pm PT● February 8th at 6:00pm PT	learn.workboard.com
OKR Fast Pass Course	Build your OKR expertise in 3 hours	<ul style="list-style-type: none">● February 1st at 8:00am PT● March 1st at 8:00am PT● April 5th at 8:00am PT	learn.workboard.com
OKR Coach Certification	Become a certified OKR coach	<ul style="list-style-type: none">● January 24th & 26th at 8:00am PT● February 2nd and 3rd at 8:00am PT● February 7th and 9th at 8:00am PT● February 14th and 16th at 8:00am PT	learn.workboard.com
Results Management Leader Certification	Learn how to lead your organizations alignment, accountability, and OKR operating cycle to ensure you achieve strategy faster	<ul style="list-style-type: none">● Winter Cohort launches January 18th	https://lp.workboard.com/2023-winter-rme.html

Poll: Do you think Scorecards will enable you to run smarter more efficient reviews?

What are you curious about?

Thank you

