WorkBoard Community Call

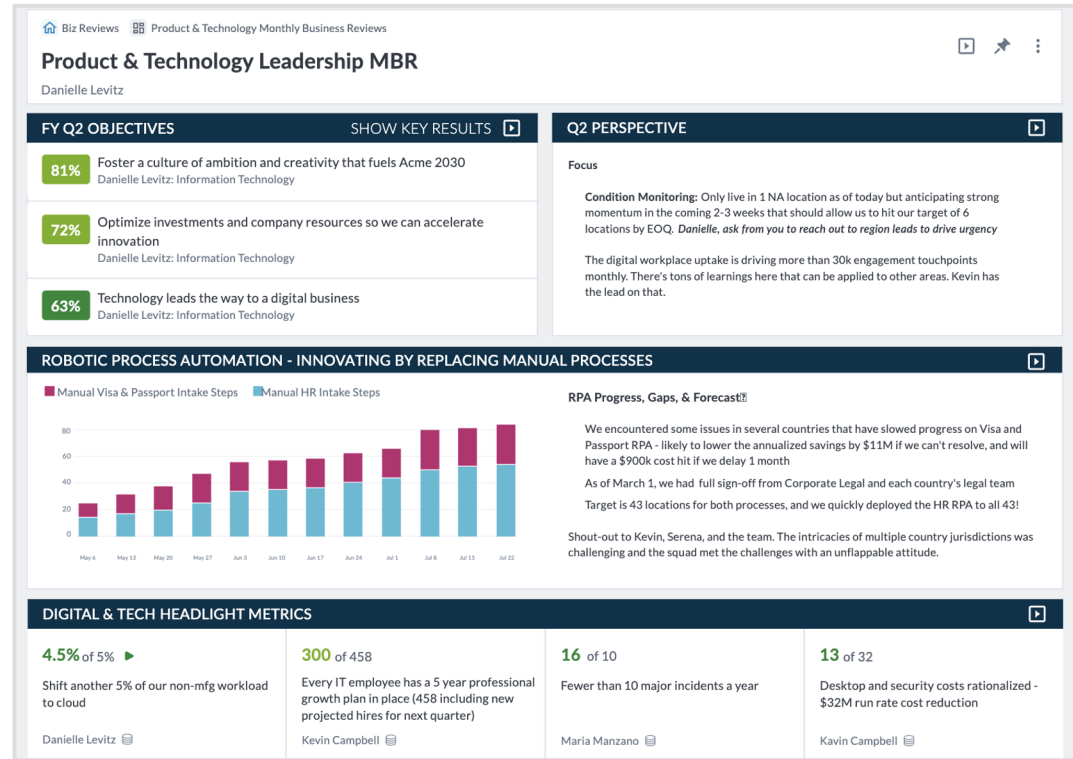January 2023

WorkBoard

Agenda

- Biz Reviews Today

- Introducing: Scorecards

- Bring it Together: Have Great MBRs

- Other Delights & Coming Soon

Biz Reviews Today

Digitized Business Reviews

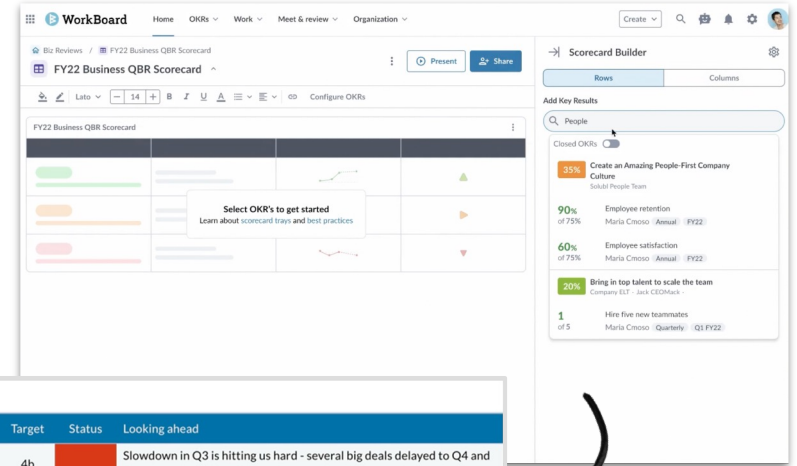You already have MBRs and QBRs on a regular basis.

➔ 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.

How to Build a Scorecard

Get Started

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) |

- **Tr** Key Result name
- **123** Actual
- **123** Target
- **⊏⊐** Narrative

⊕ Add column

🔍 Search for key result attributes

123 Initial Value

⚲ Owner

G 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

Scorecard: **FY23 Q4 Revenue Scorecard**

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		-

Edit Scorecards

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

WorkBoard | 10
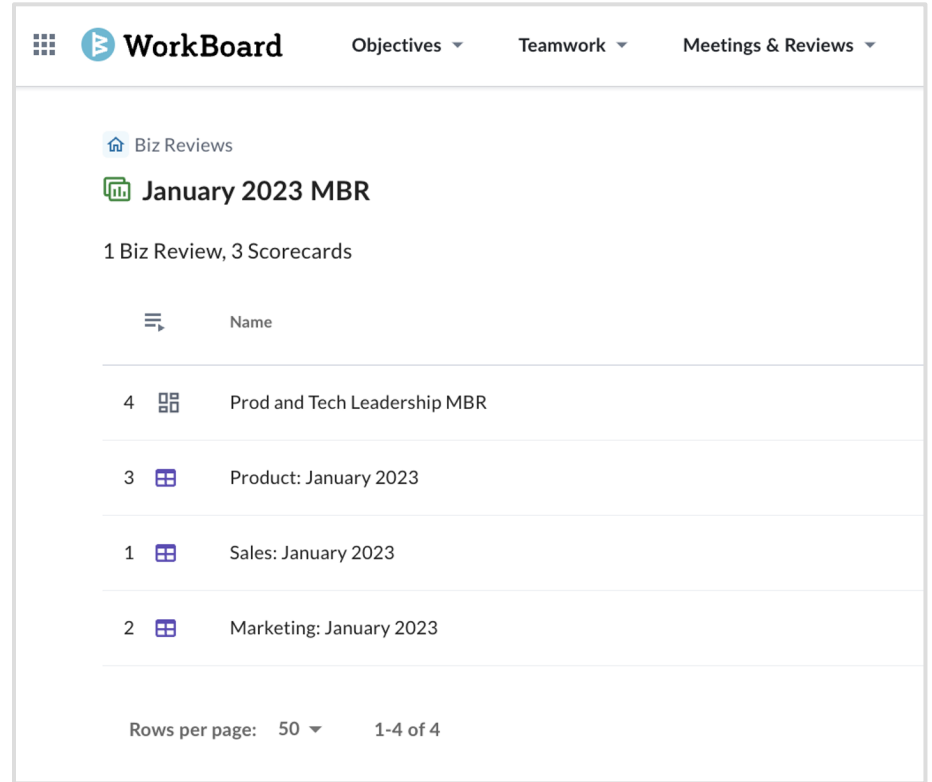
Let's build one together!

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

WorkBoard   Objectives ▾   Teamwork ▾   Meetings & Reviews ▾

🏠 Biz Reviews

📊 **January 2023 MBR**

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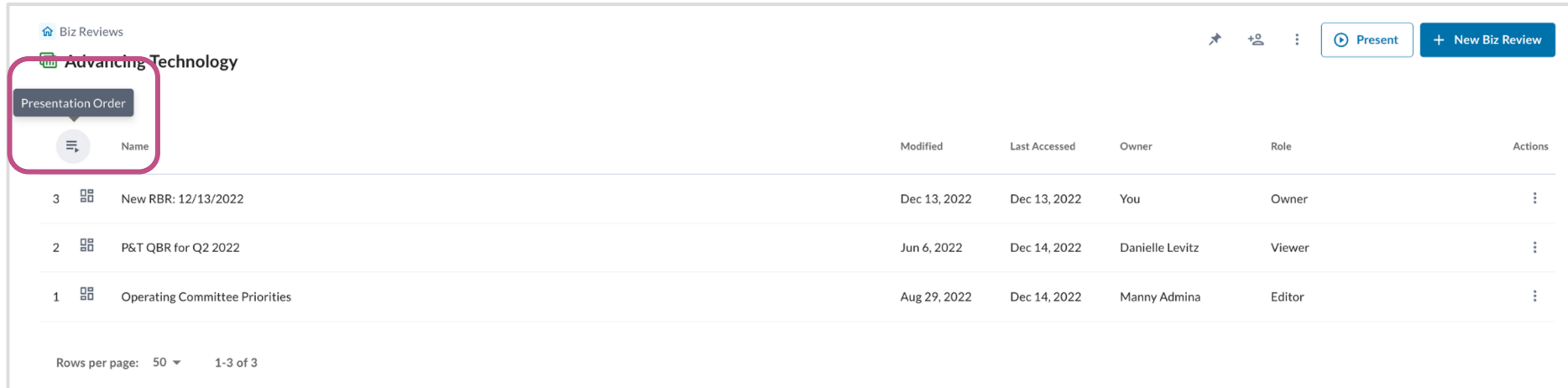
	Name
4	Prod and Tech Leadership MBR
3	Product: January 2023
1	Sales: January 2023
2	Marketing: January 2023

Rows per page: 50 ▾   1-4 of 4

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.

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
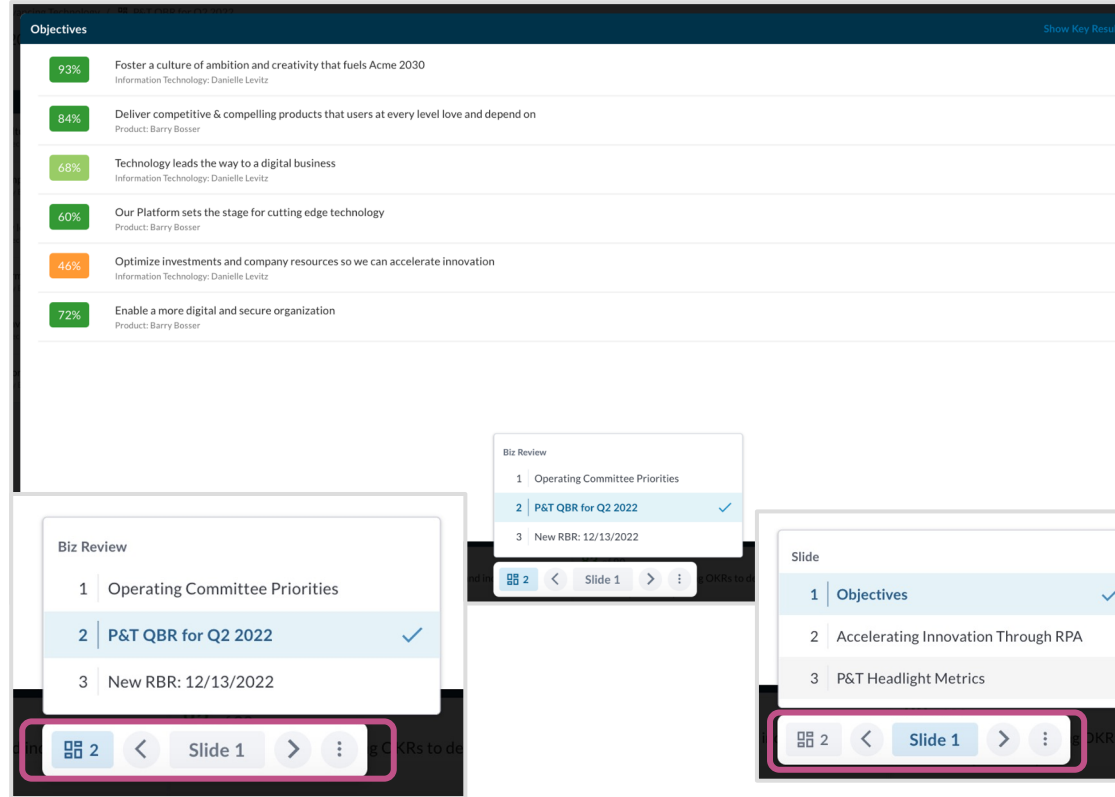
2023 Community Calls

Community Calls: Save the Date(s)!

Our next Community Call is February 22.

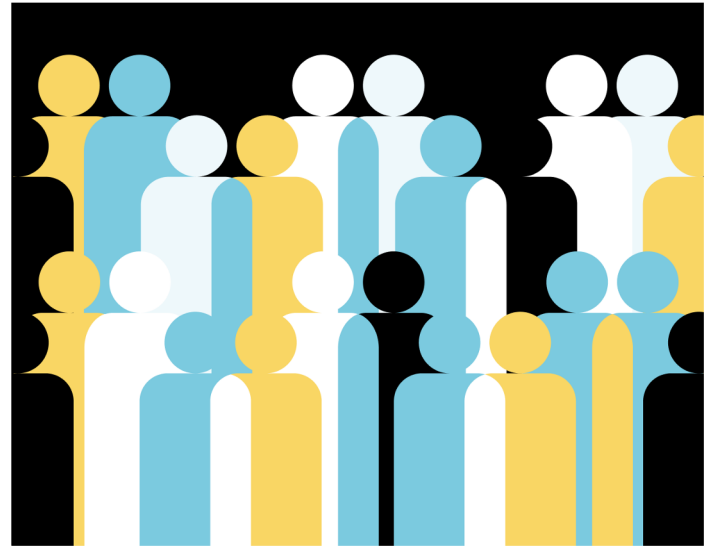Make sure to [sign up](#) for all our monthly calls so you don't miss a single one!

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	• 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	• 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	• 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	• 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