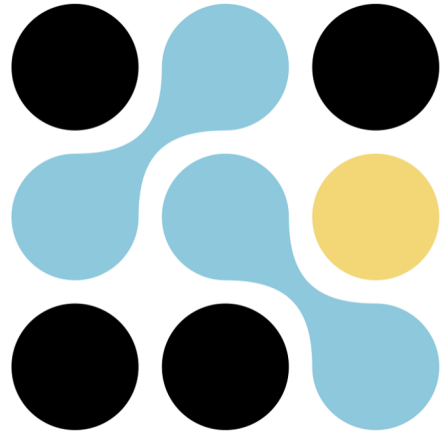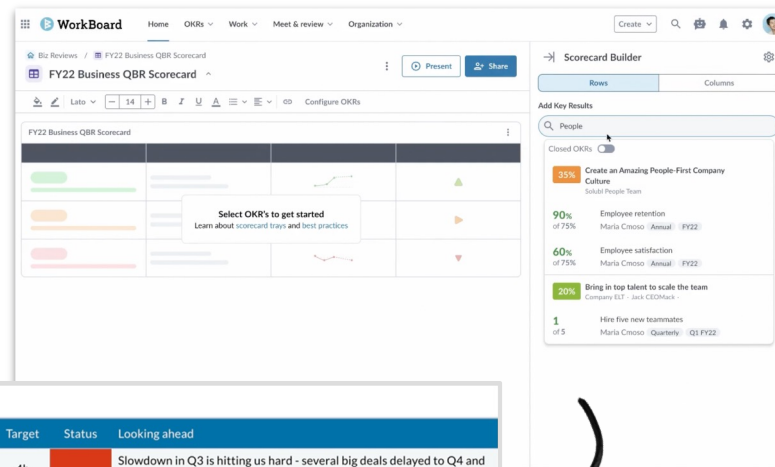# WorkBoard Community Call

March 2023

**WorkBoard**

# Agenda

- Gaining visibility with WorkBoard Scorecards

- How teams use WorkBoard in Microsoft Teams

- Sneak peek: My OKRs page & new canvases coming soon

- Deepen your expertise

# Gaining visibility with WorkBoard 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.

# Build a Scorecard in 5 Minutes



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

# Add Narrative and Context



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



**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

# Scorecard Roadmap

## Recently added (Jan- Feb 2023)

- ✓ **Hide RAG colors** from Actual field option
- ✓ **Duplicate** SCs
- ✓ Column names can be empty
- ✓ Collection **play all** includes SCs
- ✓ Drill thru hover to underlying Os and KRs
- ✓ **IFrame** SCs into a Biz Review
- ✓ Improved **text narrative truncation** and editor experience
- ✓ **As Of** option for many fields: display the progress as of a specific date
- ✓ Make a SC your **start page**

**Usability**

- ✓ Improved side-panel editor discoverability
- ✓ Removed the empty state dash as default
- ✓ Improved daggers to adjust column width and height

## Coming Soon (March - April 2023)

- ✓ **Sort By any Column (auto sort)**
- ✓ Add a **Free Text Rows**
- ● **Email notifications** when SCs are shared
- ● Improved sharing:
  - ○ Sharing with a team
  - ○ **Sharing with everyone in the org**
- ● Additional fields: **Team, OKR owner, OKR % Progress, Committed status** & more
- ● **Print-friendly view**: Export to PDF
- ● **Create** a SC **in a Collection**
- ● 📈Sparkline field: KR progress chart
- ● **Proper formatting** of % and Currency data

**Usability Focus**

- ● Zoom and resizing interaction improvements
- ● Present mode sizing improvements
- ● Scrolling interaction improvements
- ● Setting row height for all rows
- ● Adding time frame chips to all key results

## Later (May 2023+)

- ● **Multi-period Sets:**
  - ● create side-by-side comparisons in a SC Row
  - ● **QoQ views** for KRs from different Os
- ● **Embed SCs** into a **Biz Review**
- ● Display Actuals as MoM%, QoQ%
- ● Calculations: SUM, AVG, etc.
- ● Keyboard copy and paste on cells
- ● Improve zoom interactions
- ● Export to multiple formats
- ● Text augmentation (to modify or simplify key result name)

*Outline of current project plan - subject to change*

WorkBoard

8

# Highlight Your Most Critical Metrics

- New: Sort by column feature

- Bring your most important KRs to the top of your scorecard with a few clicks, or select any column to drive the sort order of the whole scorecard.

- Adjust row height to fit your need

# Tailor the View of Your Content

- Add a free text row to use as dividers and merge and aggregate data within the scorecard

# How teams use Microsoft Teams

# Mondays: Calibrate & Kickstart Your Week in Microsoft Teams

At the start of the week, you'll receive a snapshot of the priorities for the week from WorkBoard in Microsoft Teams. This snapshot shows what the team should focus on for the coming week.

- Shows you where to focus for the week

- Helps you understand risks and where you need data

- Simple messages make sure you don't even have to leave Microsoft Teams
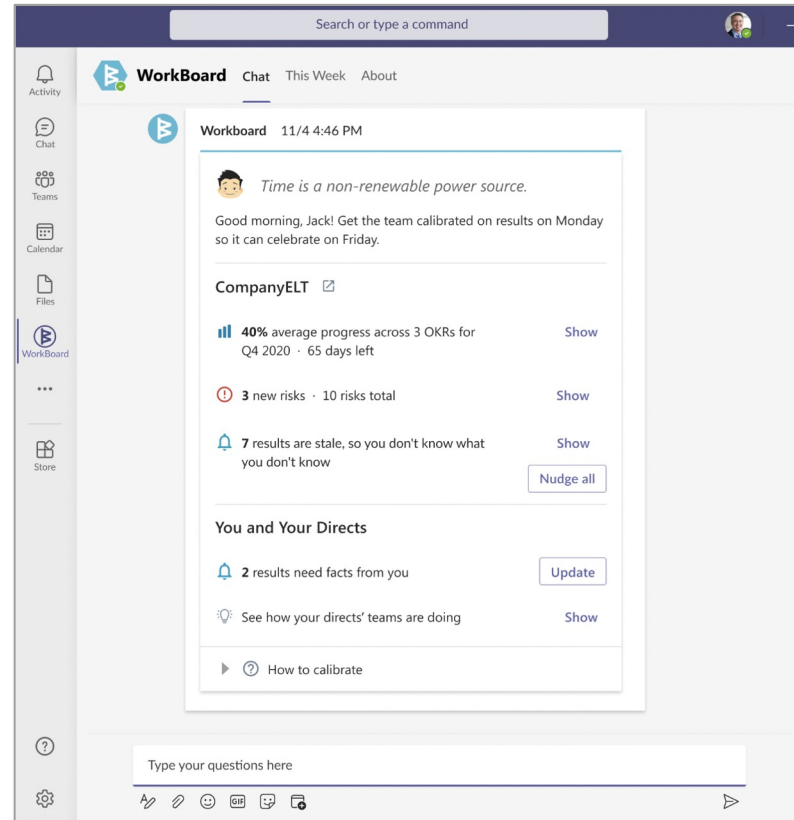
# Fridays: Celebrate Your Wins in Microsoft Teams

After focusing and driving towards your outcomes through the week, you and your team can savor your wins at the week's end.

On Fridays, you will get a message that highlights:
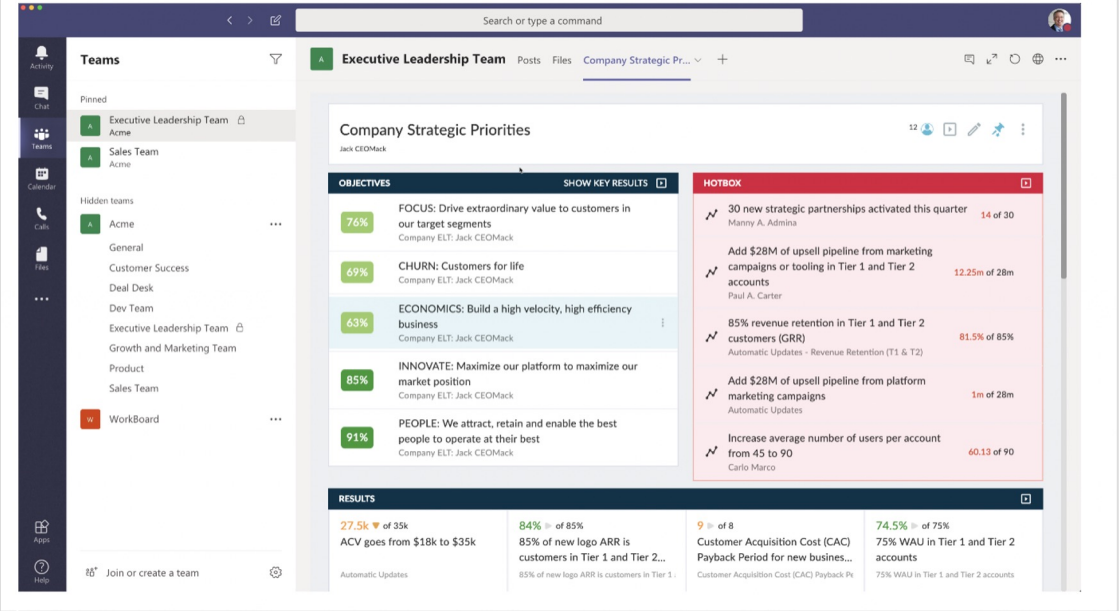
- Your team's victories this week

- How they progressed toward their results and how engaged

- How focused they were this week.
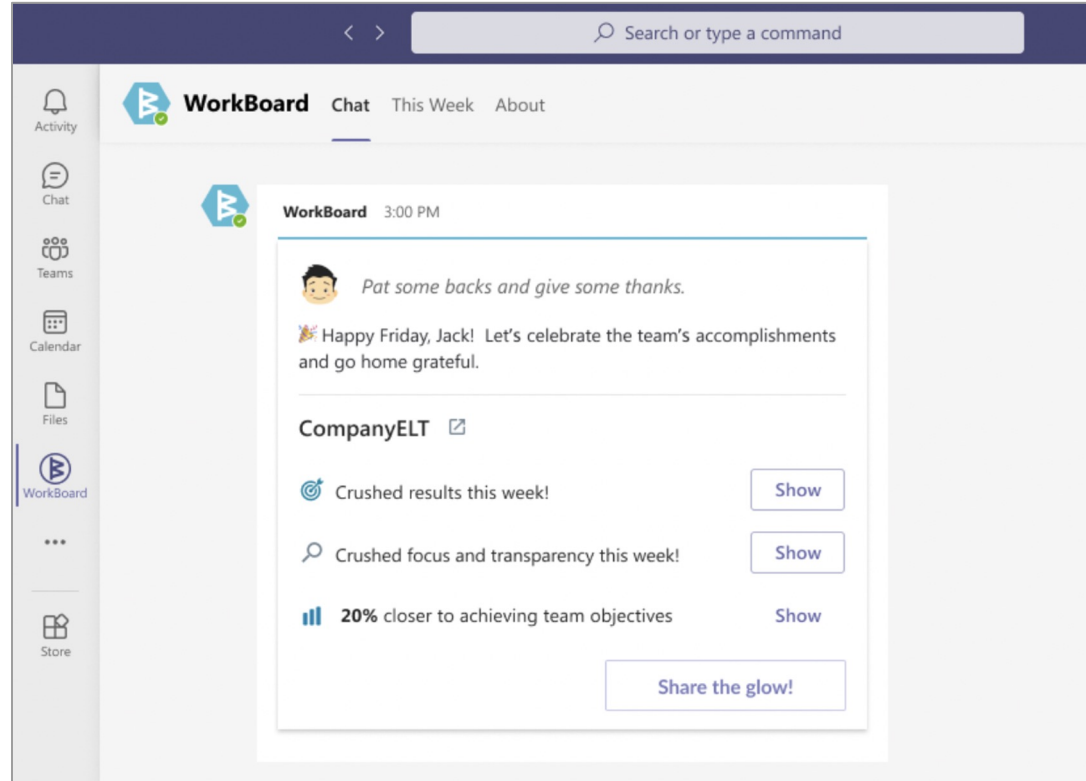
# Add WorkBoard Tabs to Your Microsoft Teams Channels

You can add WorkBoard Tabs in your Team Channels easily with Microsoft Teams, to see Meetings, Biz Reviews and Workstreams that the Team is working on.

1. Click Teamwork from the main menu
2. Select Teams from the dropdown
3. Select one of your team chats in Microsoft Teams.
4. At the top of the Team chats page, click on the + sign.

# Bring WorkBoard into Your Chat Conversations

- Pull WorkBoard Objectives directly into a chat you're having with a colleague by using @WorkBoard and then typing the name of your Objective.

- Outside of your Team Channels you can chat with the WorkBoard app directly. Submit a command and the WorkBoard app will come back with an answer.

- Don't know the WorkBoard App Commands? Type 'Help' in the search box with the WorkBoard App to get a list of them.
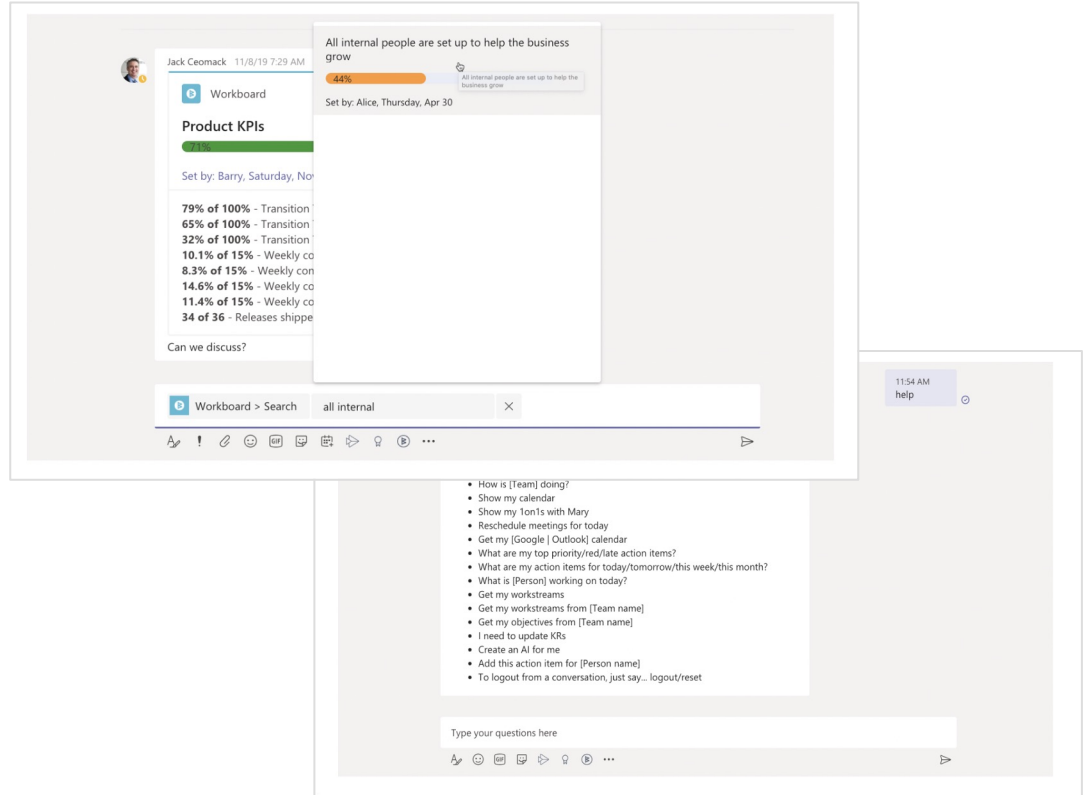
# Enable MS Teams at Scale Across Your Organization

- Teams admin can install and enable the WorkBoard application at scale for all provisioned WorkBoard users, so each user doesn't have to activate the integration individually.

# On the Horizon

# Coming 1H 2023

**Beta starting in mid March**

The new My Objectives page is designed to help you:

➔ **Take immediate action** on your results that require focus, attention or celebration via Action Cards.

➔ **Keep your results top of mind** with Key Results I Own and Objectives I Own/Contribute To sections

➔ **Stay in the loop and contribute to the conversation** taking place with Results Feed

➔ **Lend a hand or celebrate great progress** with your Direct Reports or Teams

➔ **Stay aligned with Leadership priorities** and understand how your work matters

➔ And so much more!

*Let us know if you're interested in participating in a **beta!***

# Live Demo of My OKRs Page

# OKR Setting Canvases

WorkBoard's OKR Canvas is an enriched whiteboard that helps teams set and align higher quality OKRs faster

- **Canvas makes OKR brainstorming easy,** collaborative, and inclusive.

- **Built in coaching improves the conversation**

- **Notes from retros are important signals** for team as they think and plan for their next cycle OKRs

- **Seamless publishing** from the canvas, no manual transcription

# Planning and Mapping OKR Execution

Quarterly reset of OKRs
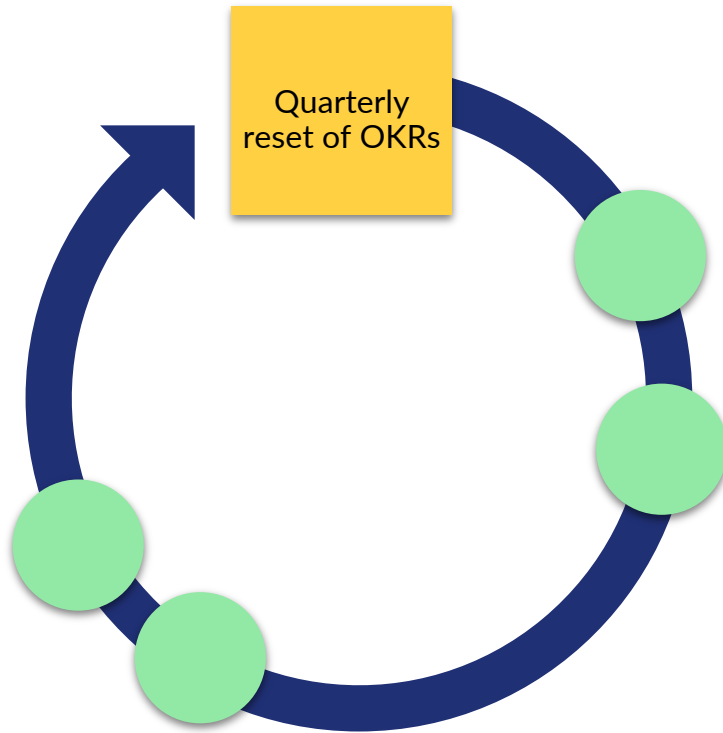
Brainstorm on how to team & achieve OKRs

- Open-ended ideation
- Mid-quarter team retro/check-in
- Brainstorm around Blockers & prioritization

# Brainstorm and Retros

Explore, discuss and ideate on how to best move the needle on objectives, results and actions with a seamless flow from data to decision, and back to actionable data.

➔ Create and invite people to collaborate on a canvas

➔ Use structured retro templates to run team retrospectives

➔ Bring their objectives, planned and actual results, and actions onto a Canvas and in the flow of team discussions

➔ Turn ideas generated during brainstorming into action items that are transparent and trackable
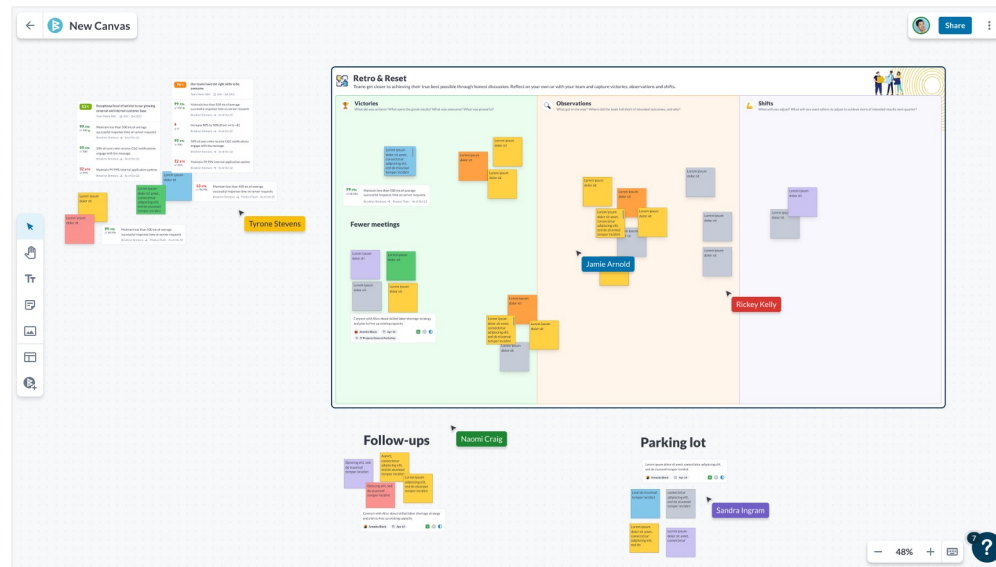


*Let us know if you would be interested in participating in the **beta of the new experience.***

# Opportunities to deepen your own expertise

# Upcoming Courses

| Class | Description | Dates | How to Sign Up |
|---|---|---|---|
| **NEW! Advanced OKR Coach Certification** | For experienced OKR Coaches: Take the next step on your journey as a key influencer helping to mature your organization's OKR program. | • May 3/4 at 9am PT | learn.workboard.com |
| **NEW! for Product and Engineering teams: Maximizing Product Value and Outcomes** | Learn how to use OKRs to drive focus on what matters most for the product roadmap and business value realization. | • May 17 at 10am PT | learn.workboard.com |
| **Outcome Method Mindset** | Learn about OKRs and the Outcome Mindset in 1 hour | • April 5 at 1pm PT<br>• April 12 at 6am PT | learn.workboard.com |
| **OKR Fast Pass Course** | Build your OKR expertise in 3 hours | • April 5 at 8am PT | learn.workboard.com |
| **OKR Coach Certification** | Become a certified OKR coach | • April 4/6 at 1pm PT<br>• April 11/13 at 1pm PT<br>• April 18/20 at 8am PT & 9am CET<br>• April 25/27 at 1pm 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. | • Spring Cohort launches April 18 | workboard.com/rme-certification |

WorkBoard | 24

# WorkBoard Learn

**New and Improved** *Welcome to WorkBoard* **Course -** *Launched March 1st*

- Includes a new lesson dedicated to Scorecards and a comprehensive Knowledge Check Quiz.

- Recommended for all new WorkBoard users!

**Digital Operating Rhythm Courses -** *Launching this week!*

- *Managers: Launch Your Digital Operating Rhythm*

- *Individuals: Launch Your Digital Operating Rhythm*

**Check it out and share with your teams!**

- US: https://learn.workboard.com
- EU: https://learneu.workboard.com
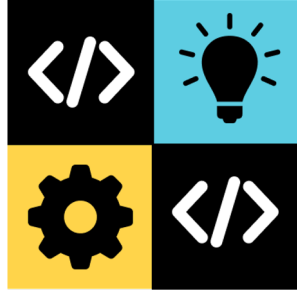
# Our 2023 In-Person Event Lineup

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: | |
|---|---|
| May 2 | Strategy Execution Leader Meeting - Denver |
| May 10 | Strategy Execution Leader Meeting - Atlanta |
| June 15 | Strategy Execution Leader Meeting - Munich |
| Jun. 2023 | Strategy Execution Leader Meeting - London |
| Sep. 2023 | Accelerate Europe - London |
| Oct. 2023 | Accelerate US |

**Register now for the May 2nd event in Denver.**
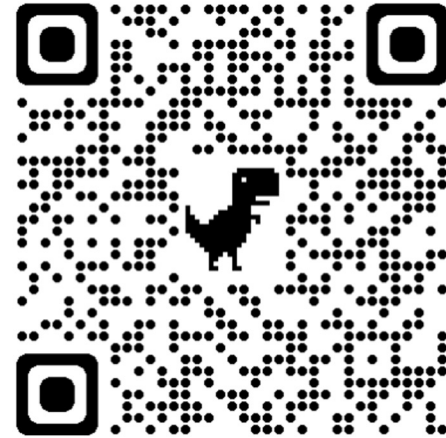


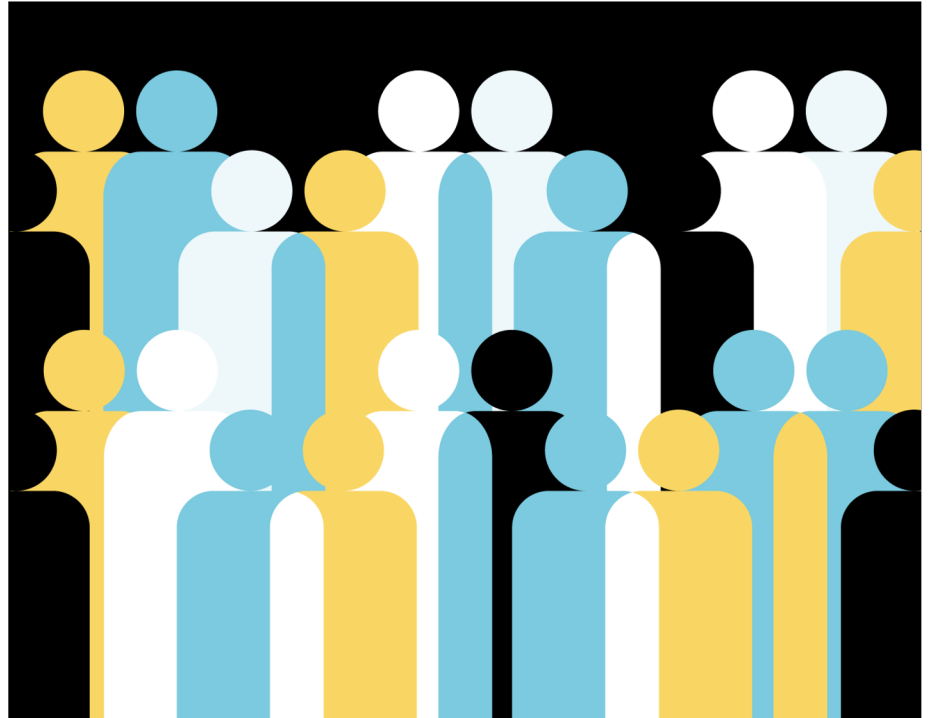"This is the most helpful discussion I've been a part of this year."

— Chief of Staff, Nike

# Community Calls: Save the Date(s)!

**Our next Community Call is April 26.**

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

- Apr. 26
- May 31
- Jun. 28
- Jul. 26
- Aug. 30
- Sep. 27
- Oct. 25
- Nov. 29
- Dec. 20

# What are you curious about?

# Thank you

WorkBoard