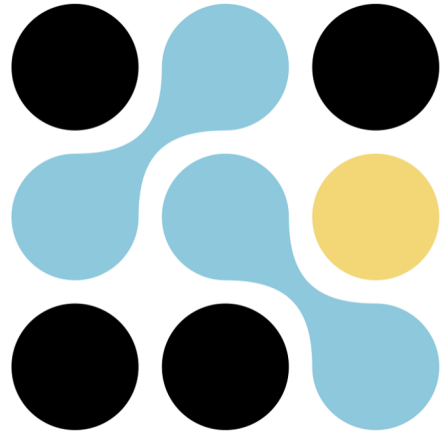


WorkBoard Community Call

March 2023



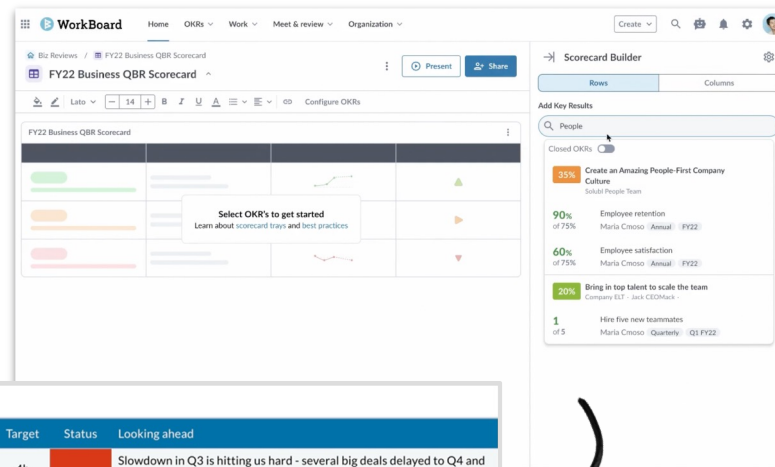
Agenda

- 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.



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

Build a Scorecard in 5 Minutes

Biz Reviews / FY22 Business QBR Scorecard

FY22 Business QBR Scorecard 1

Present

Scorecard

Select OKR's to get started
Learn about [WorkBoard Scorecards](#) and [best practices](#)

Edit Scorecards 2

Rows Columns (5)

Add Key Results Closed OKRs

3

ARR

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

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

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	-

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

Edit Scorecards

Rows (5) **4** Columns (4)

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

5 + Add column

Search for key result attributes

- 123 Initial Value
- Owner
- G RAG Rating

Format, Share, and Present

Biz Reviews / FY23 Q4 Revenue Scorecard

FY23 Q4 Revenue Scorecard 1 9 Present

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	Green	-
\$366M Bookings (ARR)	1.3b	366m	Workboard Worker	Green	-
Affiliate marketing drives \$10m ARR	5m	10m	TJ Thompson	Green	-
2% ARR derived from self-sign up	0.75%	2%	Manny Admina	Green	-
85% revenue retention in our target customer segments (GRR)	83.47%	85%	Jack CEOMack	Orange	Mitigating risk for Globel renewal w/ exec onsite. Have tapped Tom L to help the negotiations.
\$4B Revenue FY21	1.52b	4b	Jack CEOMack	Red	-

Edit Scorecards 8

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

Scorecard Roadmap

Recently added (Jan- Feb 2023)	Coming Soon (March - April 2023)	Later (May 2023+)
<ul style="list-style-type: none">✓ 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 KR_s✓ 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 <p>Usability</p> <ul style="list-style-type: none">✓ Improved side-panel editor discoverability✓ Removed the empty state dash as default✓ Improved daggers to adjust column width and height	<ul style="list-style-type: none">✓ Sort By any Column (auto sort)✓ Add a Free Text Rows● Email notifications when SCs are shared● Improved sharing:<ul style="list-style-type: none">○ 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 <p>Usability Focus</p> <ul style="list-style-type: none">● 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	<ul style="list-style-type: none">● Multi-period Sets:<ul style="list-style-type: none">● create side-by-side comparisons in a SC Row● QoQ views for KR_s 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)

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

The screenshot displays the WorkBoard interface. At the top, there are navigation tabs for 'Objectives', 'Teamwork', and 'Meetings & Reviews', along with a search bar and a 'Create' button. The main content area shows a 'Q2 Product Scorecard' with a table of metrics. The table has columns for 'Actual', 'Target', 'Risk', and 'Looking ahead'. The 'Risk' column is highlighted in red for the top two rows, orange for the next three, and green for the bottom two. A 'Settings' panel is open on the right, showing options for 'TEXT SETTINGS' (font, size, weight), 'BACKGROUND COLOR' (White), 'SORT' (Sort scorecard by: Risk, Sort order: At risk → Above pl...), 'LAYOUT' (Group by Objective: on, Repeat row labels for Group By Column: off), and 'SHOW EMPTY CELLS AS'. The 'Row Height' is set to 55 px.

Scorecard	Actual	Target	Risk	Looking ahead
Needle Movers				
2000 new user signups from newly launched referral portal	279	2k	At Risk	We need to partner with customer facing teams to help identify sticky points in the signup process.
Deliver Analytics MVP to production	22%	100%	At Risk	Looking to reallocate dev resources to Analytics MVP following the bkt launch.
Validate Q3 roadmap features with 10 Tier 1 and Tier 2 customers	5	10	At Risk	3 more customer meetings lined up in the next 2 weeks.
60% interaction completion on our new user in-app guides	31%	60%	At Risk	We're about one week from having statistically significant results for our A/B test... will redeploy th...
4 FullStory sessions per PM per week	21	48	At Risk	Working through scheduling conflicts to get back on track.
7 quality of life features released to production	3	7	At Risk	Drilldown and Analytics Insights both delayed due to the resource shift to BKT... hoping to get back on...
Deliver features impacting 750k in Q3 & Q4 renewals	450k	750k	On Track	New Insights dashboard has been a game changer.
RPA automation across 43 countries	75%	100%	On Track	We're right on track!
99.9% uptime	99.9%	99.9%	On Track	Great work by the QA and dev teams

Tailor the View of Your Content

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

The image displays two overlapping screenshots of the WorkBoard interface. The top screenshot shows the 'Edit Scorecards' panel on the right, where a 'Rows (12)' and 'Columns (5)' configuration is visible. Below this, a search bar for 'Add Key Results' is present, followed by a list of key results with their respective values and owners. A red box highlights the '+ Add a free text row' button at the bottom of this panel.

The bottom screenshot shows the main scorecard view. It features a table with columns for 'Needle movers for the market', 'Actual', 'Target', 'RAG Rating', and 'Looking ahead'. The table includes rows for '\$4B Revenue FY23', '\$1.9B Renewals', 'Operating Margin', and '85% Gross Margin by End of Year'. Below this table, a section titled 'Leading indicators' contains rows for 'Q1: Q1 GM of 78', 'Q2: Q2 GM of 79', '85% revenue retention in our target customer segments (GRR)', 'Decrease customer churn rate (CCR) from 12%-7%', and 'Gross margins move from 74% to 79%'. A red box highlights the '+ Add a free text row' button at the bottom right of the scorecard area.

Needle movers for the market	Actual	Target	RAG Rating	Looking ahead
\$4B Revenue FY23	1.52b	4b	Red	Slowdown in Q1 is hitting us hard - several big deals delayed to Q2 and pipeline looks healthy - expect a...
\$1.9B Renewals	1.21b	1.9b	Orange	Pipeline looks healthy - expect a strong quarter close
Operating Margin	8%	10%	Green	
85% Gross Margin by End of Year	81%	85%	Red	Fixed costs are crushing us here. Leases in our NY and Austin offices run out in Q2.

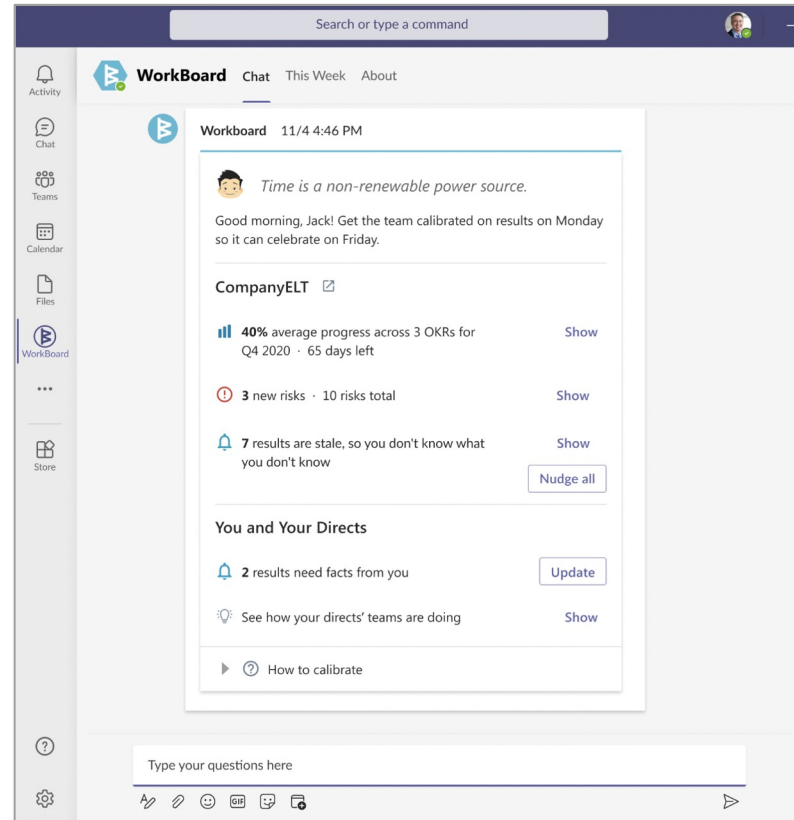
Leading indicators	Actual	Target	RAG Rating	Looking ahead
Q1: Q1 GM of 78	60%	78%	Red	
Q2: Q2 GM of 79	75%	79%	Green	
85% revenue retention in our target customer segments (GRR)	83.71%	85%	Orange	Leading indicator for Revenue - need to do better and have a plan to course correct
Decrease customer churn rate (CCR) from 12%-7%	10.12%	7%	Green	Leading indicator for Renewals - we lost executive sponsors at Kikasco and Acme but if Q2 accounts contin...
Gross margins move from 74% to 79%	77	79	Green	Q1 target and leading indicator for FY23 gross margins.

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

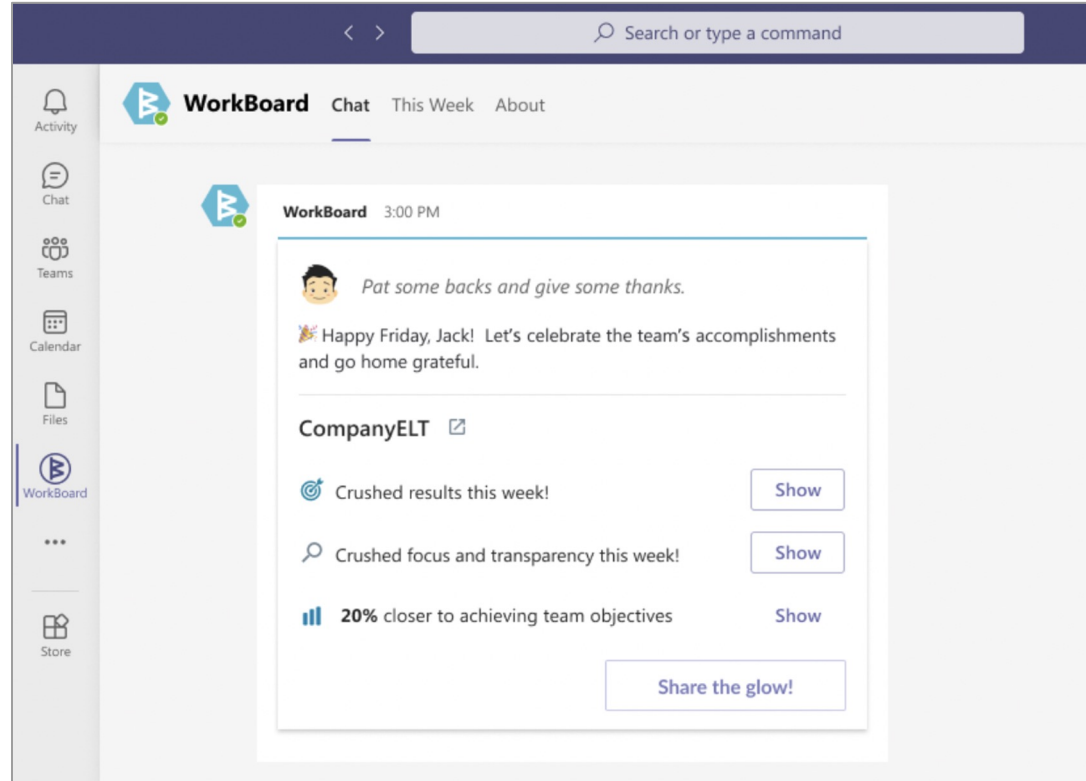


Fridays: Celebrate Your Wins in Microsoft Teams

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:

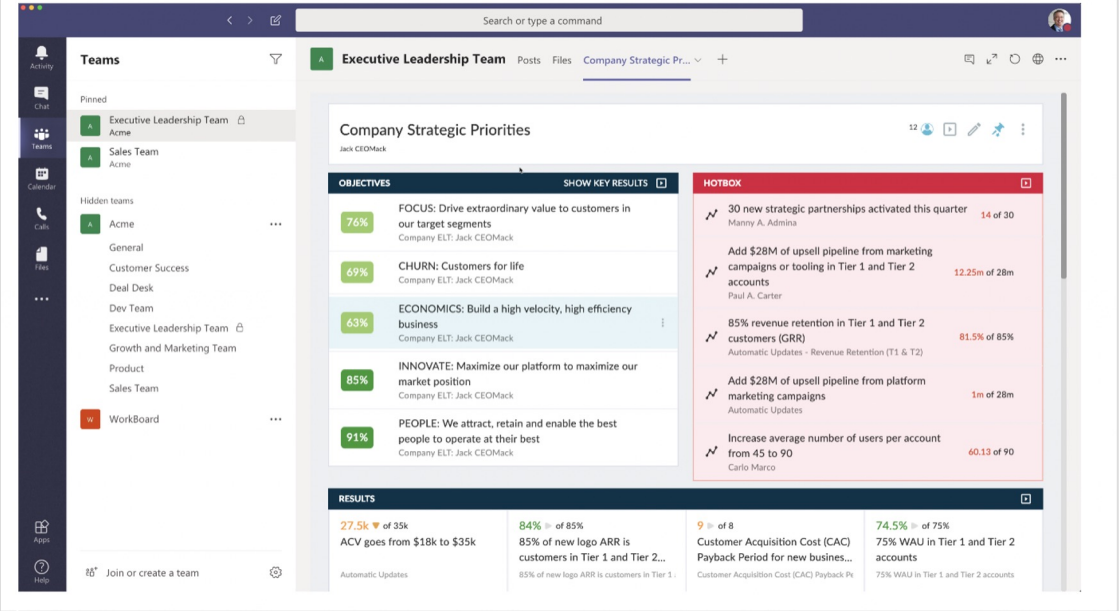
- Your team's victories this week
- How they progressed toward their results and how engaged
- How focused they were this week.



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.

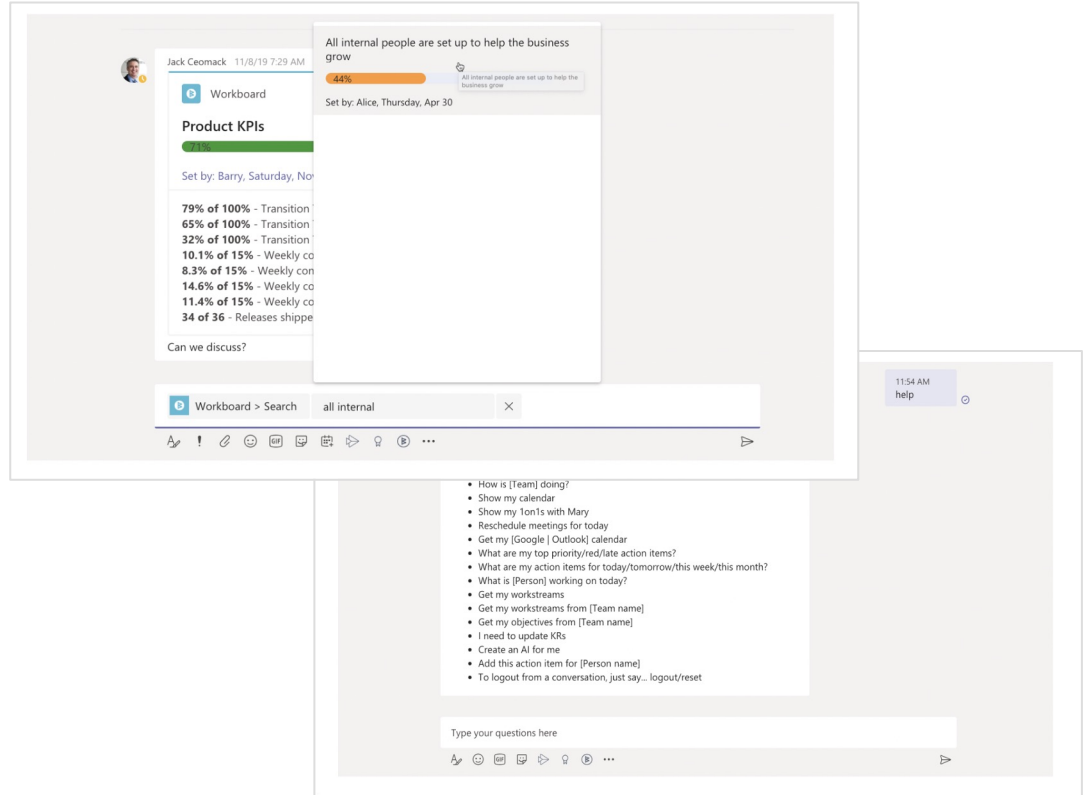


The screenshot displays the Microsoft Teams interface. On the left, the 'Teams' sidebar shows a list of teams: 'Executive Leadership Team', 'Sales Team', and 'WorkBoard'. The 'WorkBoard' team is selected. The main content area shows a channel named 'Company Strategic Pr...' with a 'WorkBoard' tab. The tab displays a dashboard with the following sections:

- OBJECTIVES:** A list of five strategic objectives with progress bars and descriptions.
 - 76%** FOCUS: Drive extraordinary value to customers in our target segments. Company ELT: Jack CEO/Mack
 - 69%** CHURN: Customers for life. Company ELT: Jack CEO/Mack
 - 63%** ECONOMICS: Build a high velocity, high efficiency business. Company ELT: Jack CEO/Mack
 - 85%** INNOVATE: Maximize our platform to maximize our market position. Company ELT: Jack CEO/Mack
 - 91%** PEOPLE: We attract, retain and enable the best people to operate at their best. Company ELT: Jack CEO/Mack
- HOTBOX:** A red-bordered section with three items:
 - 30 new strategic partnerships activated this quarter (14 of 30) by Manny A. Admira
 - Add \$28M of upsell pipeline from marketing campaigns or tooling in Tier 1 and Tier 2 accounts (12.25m of 28m) by Paul A. Carter
 - 85% revenue retention in Tier 1 and Tier 2 customers (GRR) (81.5% of 85%) - Revenue Retention (T1 & T2) by Automatic Updates
 - Add \$28M of upsell pipeline from platform marketing campaigns (1m of 28m) by Automatic Updates
 - Increase average number of users per account from 45 to 90 (60.13 of 90) by Carlo Marco
- RESULTS:** A grid of four performance metrics:
 - 27.5k ▼ of 35k: ACV goes from \$18k to \$35k
 - 84% ▬ of 85%: 85% of new logo ARR is customers in Tier 1 and Tier 2... (85% of new logo ARR is customers in Tier 1...)
 - 9 ▬ of 8: Customer Acquisition Cost (CAC) Payback Period for new business... (Customer Acquisition Cost (CAC) Payback Pe...)
 - 74.5% ▬ of 75%: 75% WAU in Tier 1 and Tier 2 accounts (75% WAU in Tier 1 and Tier 2 accounts)

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.

The screenshot displays the WorkBoard Admin interface. The top navigation bar includes the WorkBoard logo, 'Objectives', 'Teamwork', and 'Meetings & Reviews' menus, along with a search bar and a 'Create' button. The left sidebar lists various administrative categories: Admin Tools, User Management (User Directory, External Users, Reporting Structures, Administrators), Org Management (Org Structure, Functional Teams, Dynamic Teams, Business Groups, Biz Review Analytics, Team Member Requests), IT Policies (Security, Email Policy, SSO Configuration, Integrations Security, MS Teams Org Enable), and Datastreams (Data Streams). The main content area is titled 'Enable MS Teams for your Organization'. It contains instructions on how to enable Microsoft Teams org-wide, a list of consequences for named users and future users, and a note about required permissions. A blue 'Enable Microsoft Teams' button is visible. A modal dialog is open in the foreground, titled 'Enable Microsoft Teams?', with the text 'This action would enable Microsoft Teams for every user in your WorkBoard Organization.' and two buttons: 'Cancel' and 'Continue'.

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!

The screenshot displays the 'My Objectives' interface. At the top, there are five summary cards: 'Updates needed' (1), 'Results worth celebrating' (4), 'Results at risk' (4), 'Unaligned Objectives' (1), and 'Unowned pins' (1). Below these are sections for 'Key Results I Own' and 'Objectives I Own', each showing progress bars and risk indicators. The 'Results Feed' section contains several entries with user avatars, comments, and progress indicators. A 'Favorites' section at the bottom shows a grid of objective cards. The right sidebar includes 'Teams', 'Functional Teams', 'Dynamic Teams', and 'Leadership' sections. The bottom of the page features a search bar and a 'New Custom View' button.

Live Demo of My OKRs Page

OKR Setting Canvases

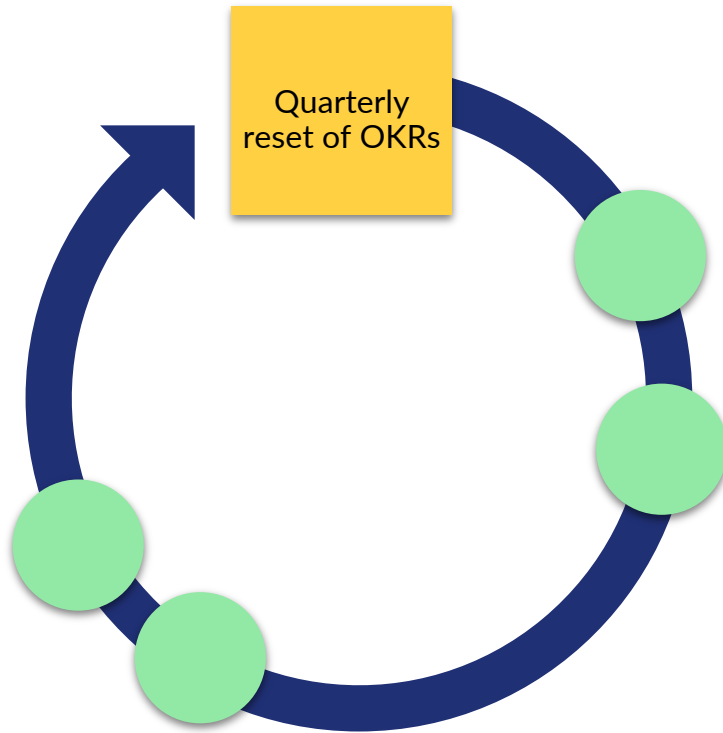
Available since Feb 2022

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

The screenshot displays the 'Sales Team Q1 2022' OKR Canvas. At the top, a navigation bar shows a back arrow and the team name. The main workspace is a grid of sticky notes and interactive elements. A central box titled 'First objective' asks 'What is your team trying to achieve?' and contains a focus note: 'FOCUS on the right product segments with lead-out value'. Below this, a 'Key result candidates' section lists several potential results, such as '85% of new customer bookings (ABR) are from customers in our target segments' and '30 target segment customers have the SaaS v1 release in production EQQ'. The canvas is populated with various sticky notes, including one from 'Emily Weiss' and another from 'Julie Williams'. A sidebar on the left contains navigation icons for home, search, and other functions. At the bottom, a yellow banner reads 'Too many KR? What doesn't matter as much as the rest?'. The name 'Nolan Hernandez' is visible at the bottom of the canvas.

Planning and Mapping OKR Execution



Brainstorm on how to team & achieve OKRs

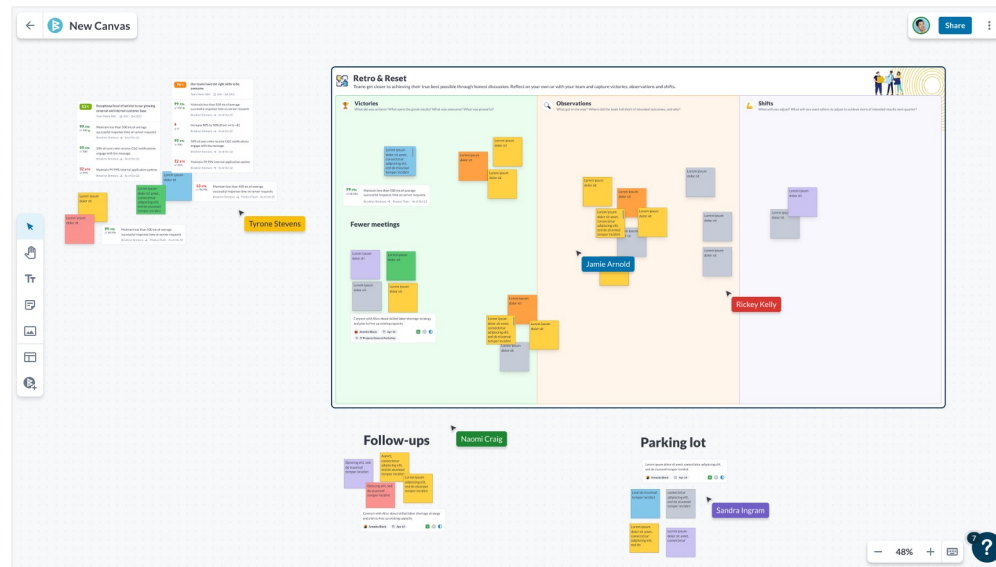
- Open-ended ideation
- Mid-quarter team retro/check-in
- Brainstorm around Blockers & prioritization

Brainstorm and Retros

Beta starting in early March

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.	<ul style="list-style-type: none"> ● 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.	<ul style="list-style-type: none"> ● May 17 at 10am PT 	learn.workboard.com
Outcome Method Mindset	Learn about OKRs and the Outcome Mindset in 1 hour	<ul style="list-style-type: none"> ● April 5 at 1pm PT ● April 12 at 6am PT 	learn.workboard.com
OKR Fast Pass Course	Build your OKR expertise in 3 hours	<ul style="list-style-type: none"> ● April 5 at 8am PT 	learn.workboard.com
OKR Coach Certification	Become a certified OKR coach	<ul style="list-style-type: none"> ● April 4/6 at 1pm PT ● April 11/13 at 1pm PT ● April 18/20 at 8am PT & 9am CET ● 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.	<ul style="list-style-type: none"> ● Spring Cohort launches April 18 	workboard.com/rme-certification

WorkBoard Learn

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

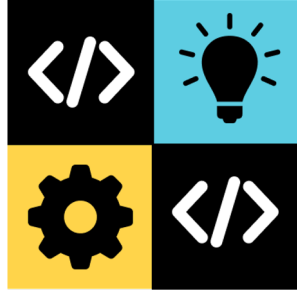
- Includes a new lesson dedicated to Scorecards and a comprehensive Knowledge Check Quiz.
- Recommended for all new WorkBoard users!

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>

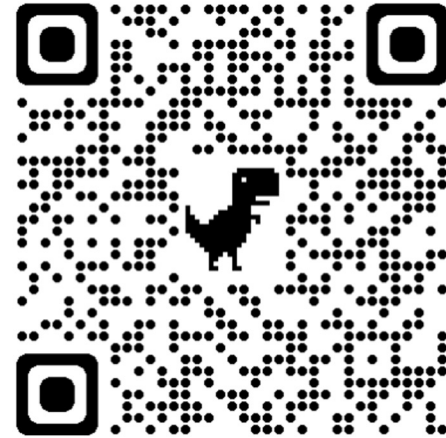


Our 2023 In-Person Event Lineup

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.”

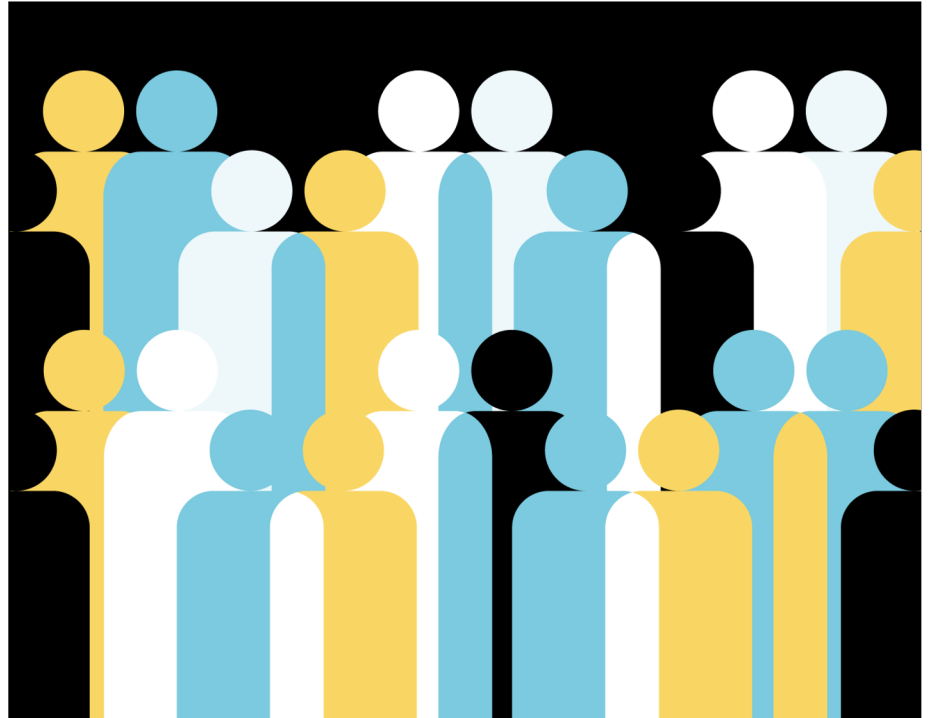
— Chief of Staff, Nike

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

