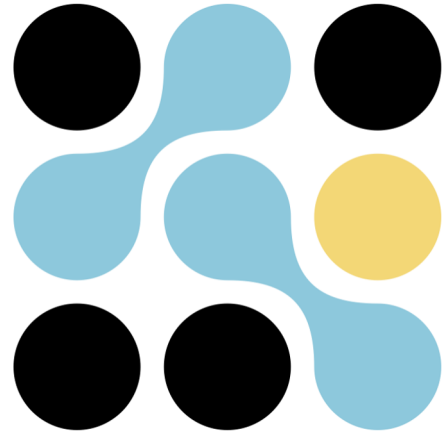


WorkBoard Community Call

April 2023

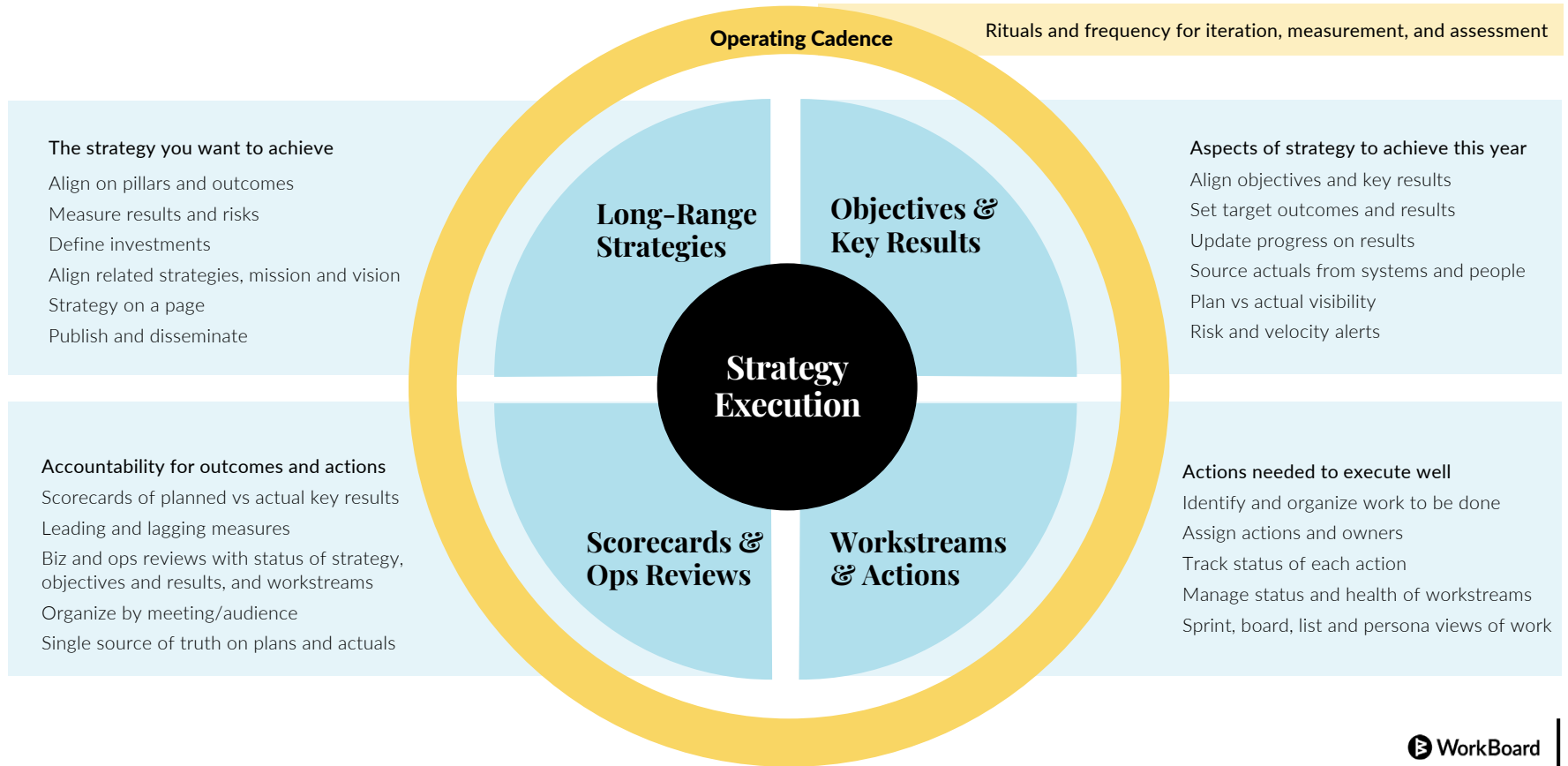


Agenda

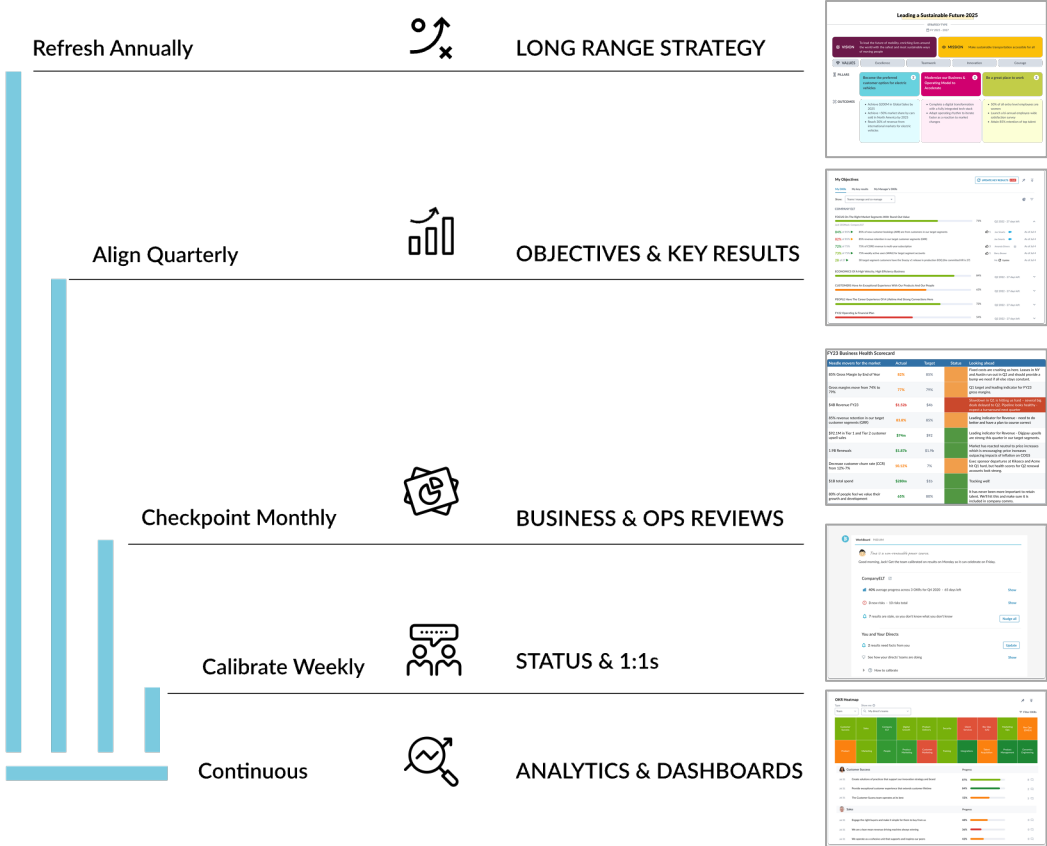
- Establish a fast, focused operating cadence
- Delight updates across the platform
- Deepen your expertise

Establishing a fast, focused operating cadence

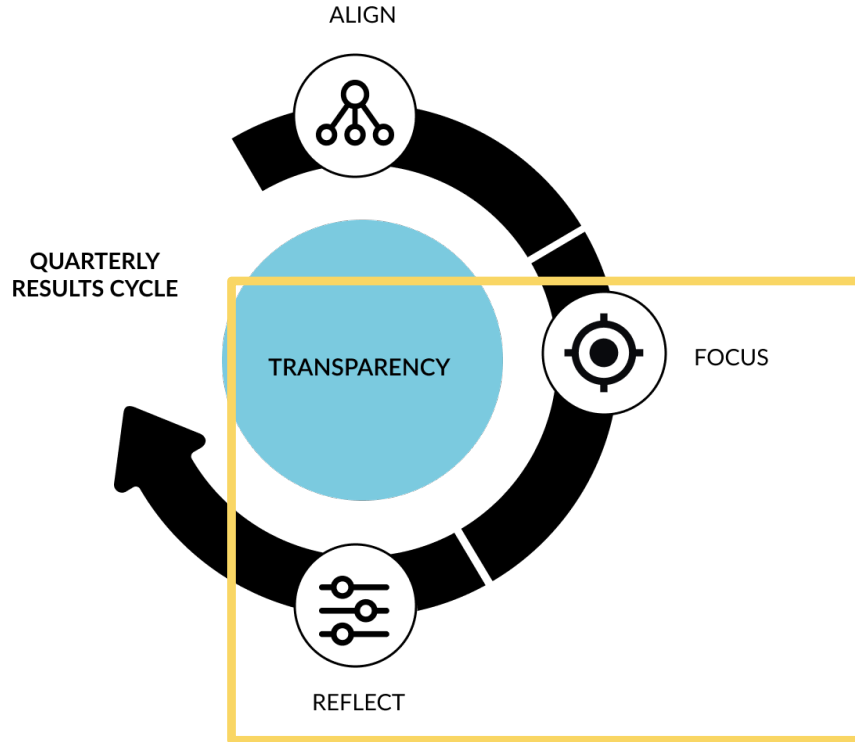
Systematic, data-driven strategy execution that is as smart as the strategy



The operating cadence is the pace setter for strategy achievement



Alignment without accountability and focus are all pain, no gain



**Hiding in plain sight:
This is where real results come from.**

Close the Accountability Gap:

Progress to plan isn't transparent, so it doesn't inform weekly decisions – weeks are lost every quarter at every level.

Fast, good decisions are required for fast, good results.

Every team needs:

- ✓ Clarity on the results they're trying to achieve
- ✓ Contextual data on results to date and risks
- ✓ Fast follow through on result gaps and risks
- ✓ Execution focused on results

Bring key results into focus; reduce meeting and reporting burden

Weekly focus on OKRs improves team results by

19%

Company Business Results Review



Agenda

10-minute round robin on wins and learnings

20 minutes on KR with known risk (hot box items) and plans to address

15 minutes on most critical KR with execution on horizon (ie product launches, quarter end revenue hockey stick)

5 minutes on any past due actions from last meeting



Prep

- ✓ All OKRs and confidence ratings accurate 48 hours prior to meeting
- ✓ Hot Box populated by presenters 24 hours prior (each staffer)
- ✓ Everyone has reviewed prior to meeting
- ✓ Chief of staff populates tray with critical KR with execution on horizon

Company Business Results Review

Owner: Jack CEOmack

COMPANY Q3 OKRS

SHOW KEY RESULTS

- 63%** FOCUS on the right market segments with stand-out value
Company ELT: Jack CEOmack
- 56%** CUSTOMERS have an exceptional experience with our products and our people
Company ELT: Jack CEOmack
- 83%** PEOPLE have the career experience of a lifetime and strong connections here
Company ELT: Jack CEOmack
- 87%** ECONOMICS of a high velocity, high efficiency business
Company ELT: Jack CEOmack

SALES Q3 OKRS

SHOW KEY RESULTS

- 54%** Engage the right buyers and make it simple for them to buy from us
Sales: Joe Smarts
- 45%** We are a lean mean revenue driving machine always winning
Sales: Joe Smarts
- 37%** We operate as a cohesive unit that supports and inspires our peers
Sales: Joe Smarts

CEO WINS AND LEARNING

Over the last few quarters we observed that our overall growth rate and net retention was declining, despite overall bookings going up. We noticed that certain segments were growing quite fast, and retention was high, but we focused and invested the same in all segments. Our focus on segments with high prices and low retention was at the expense of our high growth segments.

Our growth will be fueled by focusing on our highest value market segments -- concentrating our sales, services, and product resources where customers get highest value (ie they will spend more on our products) and where we drive longer value for them (they renew at a higher frequency than other segments).

Every team has aligned on the results they drive in our Tier 1 and 2 segments this quarter. **Let's be focused and disciplined about driving results!**

CRO WINS AND LEARNINGS

General trend toward higher bookings number across North America and EMEA for Monthly New Booking compared to our current forecast, especially from Dec - Feb. We didn't anticipate the expansion potential in several accounts, which has resulted in 121% GRR over the last 6 months.

Sept - July Cumulative Target: \$325M
Sept - July Cumulative Bookings: \$462M

HOTBOX

- 50%** Deliver Insights v2.2 MVP with 100% UAT pass rate
Sophie Barrett
- 24%** All the right Platform X buyers in our pipeline
Market Meter Platform Launch Team: Laurie Luna

KRS WITH EXECUTION ON HORIZON

83 of 88 Meet our hiring plan in every function Jack CEOmack	72% of 75% 75% weekly active users (WAU) for target segment accounts Barry Bosser	83% of 85% 85% Gross Margin by End of Year Jack CEOmack	25.4k of 35k ACV goes from \$18k to \$35k Automatic Updates
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ACTION ITEMS

Stakeholder approval for product strategy for BKT product line
Barry's To Do List: Jack CEOmack

Sep 02, 2021

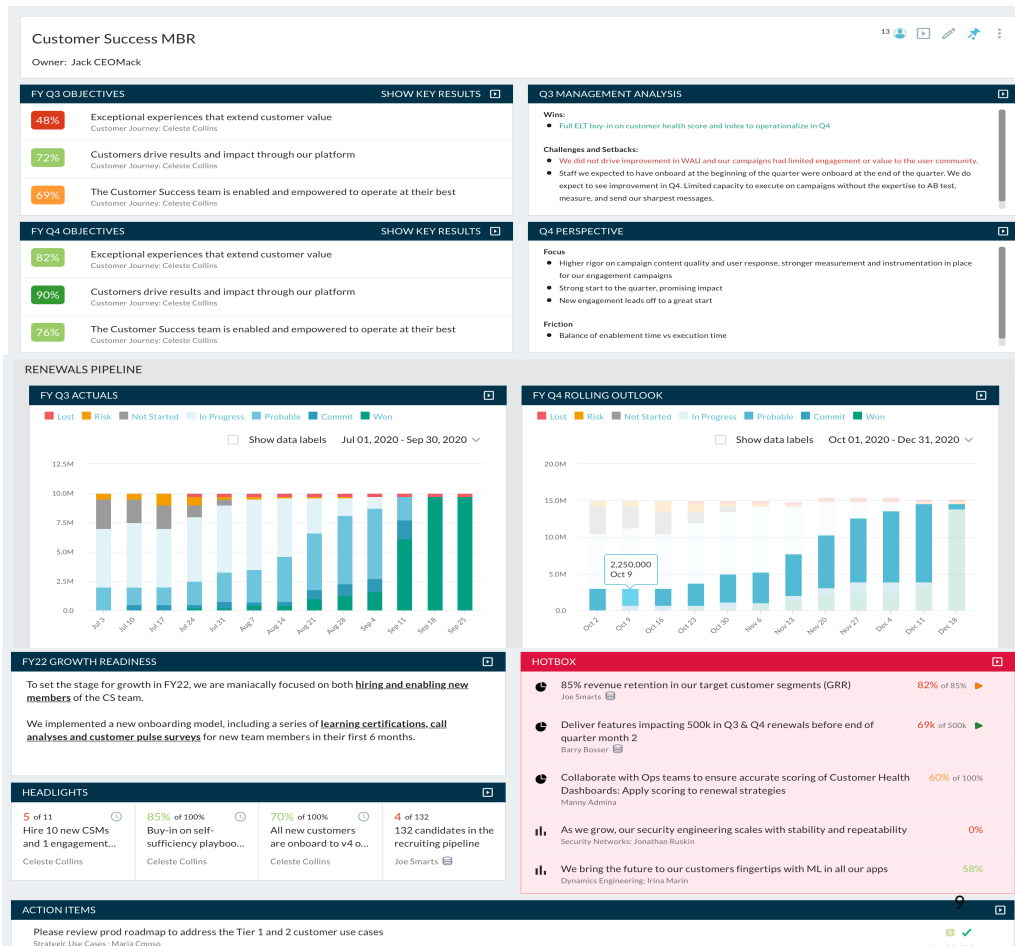
Business Unit & Functional Results Review

Agenda

- 10-minute round robin on wins and learnings
- 20 minutes on KR's with known risk (hot box items) and plans to address
- 15 minutes on most critical KR's with execution on horizon (ie product launches, quarter end revenue hockey stick)
- 5 minutes on any past due actions from last meeting

Prep

- ✓ All OKRs and confidence ratings accurate 48 hours prior to meeting
- ✓ Hot Box populated by presenters 24 hours prior (each staffer)
- ✓ Everyone has reviewed prior to meeting
- ✓ Chief of staff populates tray with critical KR's with execution on horizon



Senior Staff Meetings



Agenda

- 10-minute round robin on wins or insights
- 20 min on KRs with low confidence (red) and low progress (red) and owner's plans to address
- 10 min on execution toward lagging KRs (or use confidence signal)
- 10 min on issues and controversies surfaced during 1:1s with directs that need to be addressed as a team
- 5 min on any past due actions from last meeting



Prep

- ✓ KRs are accurate Friday prior to meeting and confidence rating set on all yellow and red KRs as well as green KRs that are at risk so the team can concentrate it's time on what truly needs group attention
- ✓ 2-level alignment view generated by WorkBoard shows leader objective and all aligned team OKRs in one view
- ✓ Everyone has reviewed prior to meeting
- ✓ People are prepared to discuss the at-risk results and their plans
- ✓ Senior leader creates the agenda 24 hours in advance

COMPANY ELT FOCUS on the right market segments with stand-out value			
80% of 85%	85% revenue retention in our target customer segments (GRR)	79.3103444827586%	Re-vamped strategic use cases and mgmt
82% of 85%	85% of new customer bookings (ARR) are from customers in our target segments	1.52b of 2b	\$2B in new ARR (Board Commit)
73% of 75%	75% weekly active users (WAU) across all accounts in target segments	49.83k of 100k	Incremental 100k units of Snazzy
26 of 28	30 target segment customers have the Snazzy v1 release in production EOQ		
PRODUCT Deliver competitive & compelling products that users at every level love and depend on		SALES Engage the right buyers and make it simple for them	
1.72k of 2k	2000 new user signups from newly launched referral portal	82% of 85%	85% of new customer bookings (ARR)
4 of 5	5 publicly referenceable Tier 1 and Tier 2 customers included in Analytics MVP Launch	2 of 0.7	Account to close ratio goes from 0.7 to 1.0
8 of 10	Validate Q3 roadmap features with 10 Tier 1 and Tier 2 customers	58 of 95	95% of deals are above the discount threshold
16 of 18	Convert 18% of Analytics module users to use new One-Click Reporting at least twice a week	45 of 70	Average cubist demo score goes from 4.5 to 5.0
99.43% of 99.99%	Maintain 99.99% uptime	0 of 4 - 5	Handoff scores average of 4 or better
0 of 0	0 critical bugs on initial deploy of production code	1.02b of 366m	Global Sales Revenue
9 of 2	7 quality of life features released to production	232m of 311m	New Logo Revenue from Tier 1 and 2
MARKETING Drive demand to build the sales pipeline		MARKETING Bring in the right customers	
1.9k of 3k	MQLs	9.5m of 13m	Deliver new leads with \$13m in pipeline
880 of 1.5k	SQLs	48 of 50	Increase cubist score of inbound leads
18% of 50%	MQL to SQL conversion rate	39 of 30	30 low usage account conversations
3.1k of 4.5k	Email campaigns reach 4.5k contacts at target accounts	100 of 500	500 demos set up from inbound leads
4.11k of 5k	Events webinar qualified targets reached		
45.53k of 75k	Qualified targets reached through advertising		
OPERATIONS Focus only on what delivers extraordinary value to fuel our growth		MARKET METER PLATFORM LAUNCH TEAM All the right Platform X buyers in our pipeline	
77.59 of 79	Gross margins move from 74% to 79%	9.3m of 28m	Add \$28M of upsell pipeline from Platform X
1 of 0 - 2	Retention forecast accuracy within 2% of actual	0.7 of 10	10% surge in same-week WAU w/ Platform X
0 of 1	Improve our TAT by 1 day on the 5 most requested doc types	30% of 100%	100% of our campaigns are focused on Platform X
135.5m of 135m	Reduce order backlog from \$150M to \$135M	8% of 100%	Sign-off of Platform X customer acquisition

Team Weeklies



Agenda

Monday Calibration

- Short huddle or digital chat/nudge
- Identify and zoom in on KRs where higher focus is needed or at risk
- Cross-team coordination of execution to outcomes

Friday Celebration

- Celebrate the week's achievement in short huddle or via chat



Prep

- ✓ KRs and confidence ratings are accurate end of each week - everyone can rely on the system without the need to meet/discuss
- ✓ Everyone has checked in on team OKRs prior to meeting (or received via chat)
- ✓ KRs that need attention Monday and victories to celebrate are suggested by WorkBoard
- ✓ Cross-team topics added by team members to shared agenda

The screenshot displays the Workboard interface. At the top, there's a navigation bar with 'Workboard', 'Chat', 'This Week', 'Running Business Revi...', and 'About'. A chat window is open, showing a message from 'Workboard' at 11/4 4:46 PM. The message says: 'Time is a non-renewable power source. Good morning, Jack! Get the team calibrated on results on Monday so it can celebrate on Friday.' Below the message, there's a section for the 'Product & Development Team' with a progress bar showing '40% average progress across 3 OKRs for Q4 2020 - 65 days left' and '3 new risks · 10 risks total'. Below the chat, a meeting agenda for 'Platform X Team Meeting' is shown, scheduled for 'Mar 02 at 10:00am'. The agenda lists several topics for discussion, each with a progress indicator and a 'Takeaways' column. The topics are: 'We've nailed our cutting edge platform road map' (30% progress), 'Interview 3 customers on dynamics can't live without features', 'Getting more resources for customer interviews.', and 'All the right Platform X buyers in our pipeline' (26% progress).

Topics for Discussion	Takeaways
<p>We've nailed our cutting edge platform road map 30%</p> <p>Platform X Launch Team: Laurie Luna by Sophie B</p>	<p>○ Add takeaways here</p>
<p>Interview 3 customers on dynamics can't live without features Mar 02</p> <p>Team Workstream: Sophie Barrett by Sophie B</p>	<p>●</p>
<p>Getting more resources for customer interviews.</p> <p>Sophie Barrett 07:33 pm Mar 05</p>	<p>●</p>
<p>All the right Platform X buyers in our pipeline 26%</p> <p>Platform X Launch Team: Laurie Luna by Sophie B</p>	<p>●</p>

Block & Tackle 1on1 Meeting



Agenda

5 minute on direct's wins and learnings

10 minutes on major topics and surfacing information in either direction

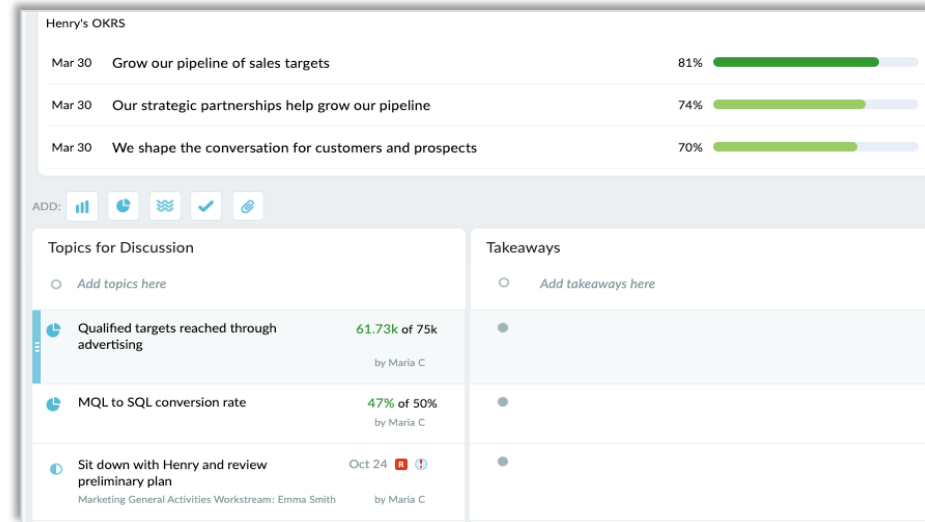
20 minutes on KR's at risk (red KR's, low confidence; green KR's, low confidence) and execution toward lagging-indicator KR's (where the surprises will be)

5 minutes on any past-due actions from last meeting



Prep

- ✓ Agenda topics added at least 4 hours before
- ✓ Both parties have reviewed the agenda before the meeting
- ✓ KR's and confidence ratings are reliable at time of meeting



Scorecards



Scorecard (SC) Product Roadmap | April 2023

Legend:

- ✓: Development complete
- : Planned development

	Shipped recently Jan- Mar 2023	Coming Soon Apr - May 2023	Next Jun 2023+
Enterprise Engagement	<ul style="list-style-type: none"> ✓ Duplicate SCs ✓ Collection play all includes SCs ✓ Embed URL: IFrame into a Biz Review ✓ Hover to access underlying OKRs ✓ Create a SC in a Collection ✓ Display currency as £, €, ₹ 	<ul style="list-style-type: none"> ✓ Share with entire Org ● Email notifications when SCs are shared ● Print-friendly view: Print to PDF ✓ Export to CSV ● Export to PDF, PNG ● Record Free Text Field Entry as KR Comment 	<ul style="list-style-type: none"> ● Embed SCs into a Biz Review ● More RBR-style hover states: <ul style="list-style-type: none"> ● KR Comment popover ● KR Calculation modal
Customize & Configure	<ul style="list-style-type: none"> ✓ Sort By any Column (auto sort) ✓ Add a Free Text Row ✓ Hide RAG colors from Actual field option ✓ Column names can be empty ✓ As Of option for many fields: display the progress as of a specific date ✓ Formatting for % and \$ data ✓ Set a SC as your WB Start Page ✓ Set row height for all rows 	<ul style="list-style-type: none"> ● New Fields (Columns): <ul style="list-style-type: none"> ✓ Team, OKR owner, OKR % Progress, Committed status & more <ul style="list-style-type: none"> ● Progress Chart ● Context Menu: right click to access key actions <ul style="list-style-type: none"> ● Key configuration controls ● Hover state menus from any cell 	<ul style="list-style-type: none"> ● Multiperiod Mode + Result Sets <ul style="list-style-type: none"> ● Group KRs from different Os together into reusable Sets ● Create multi-quarter & multiyear views in a singleSC Row ● Display Actuals as %MoM, %QoQ, %YoY ● Calculations: SUM, AVG, etc. ● Augment Text: e.g. shorten
User Experience/ Interaction	<ul style="list-style-type: none"> ✓ Text narrative truncation, hover states and better editor experience ✓ Side-panel editor discoverability ✓ Removed empty state dash as default ✓ Daggers to adjust column width and height ✓ Reload button to refresh data on-demand 	<ul style="list-style-type: none"> ✓ Improved Zoom and resizing interactions ● Contrast between slide & non-slide areas ✓ Present mode sizing improvements ✓ Scroll interaction improvements ● Timeframe chip visible on all KRs 	<ul style="list-style-type: none"> ● Keyboard copy and paste on cells ● Improve zoom interactions

Control Granular Key Result Data in Scorecards

Format Key Result numbers exactly to your needs to reflect percentage, currency, and numeric data – or convert all items to percentages for easy comparison across results.

Default Formats	<ul style="list-style-type: none"> Percentage data shows as % (45%) Currency data shows as \$ (\$12.2K) Numeric data shows as # (55.2)
Separate preference for each data type	<ul style="list-style-type: none"> Preferences affect Initial, Actual, and Target fields Foreign currency options: Pound (£), Euro (€), Rupee (₹)

Business Health Scorecard - Q1

Needle Movers for the Market	RAG Rating	Actual	Target	Narrative
HR realizes \$33M in annualized run rate savings from RPA (measured by 3rd party service...)	Red	\$6.82m	\$33m	Leading indicator for Operating Margin--need to do better and have a plan to course correct
RPA replaces all manual visa and passport intake and inquiry steps globally (43 locations)	Red	9	43	Behind in the Nordics and planning to unblock in Norway & Sweden
RPA replaces all manual HR intake steps globally (43 locations)	Green	24	43	Using these learnings to triage RPA in the Nordics
Desktop and security costs rationalized - \$32M run rate cost reduction	Green	\$2	\$32	
Decrease from 22 to 10 major incidents a year	Green	12	10	
0 breaches or losses with adverse brand impact	Green	0	0	

Settings

DATA FORMAT

- Currency: \$
- Percentage: %
- Numeric: #

Highlight Progress with RAG Cell Fill for the Scorecard Actual Field

Lean into the red by highlighting actuals based on RAG color, so you know right where to focus efforts based on a quick visual.

Options:

RAG Cell Fill	White text, colored box Matches Confidence Flag aesthetic
RAG Colored Text	White fill, colored text Matches previous default scheme
Default Text Color	Select the color and cell fill you want

The screenshot shows a 'Business Health Scorecard - Q1' with a table of metrics. The 'Actual' column is highlighted with a red background (RAG cell fill) for the first two rows and a green background for the last three rows. The 'RAG Rating' column shows 'Red' for the first two rows and 'Green' for the last three rows. The 'Narrative' column contains descriptive text for each row.

Needle Movers for the Market	RAG Rating	Actual	Target	Narrative
HR realizes \$33M in annualized run rate savings from RPA (measured by 3rd party service...)	Red	\$6.82m	\$33m	Leading indicator for Operating Margin--need to do better and have a plan to course correct
RPA replaces all manual visa and passport intake and inquiry steps globally (43 locations)	Red	9	43	Behind in the Nordics and planning to unblock in Norway & Sweden
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0 breaches or losses with adverse brand impact	Green	0	0	

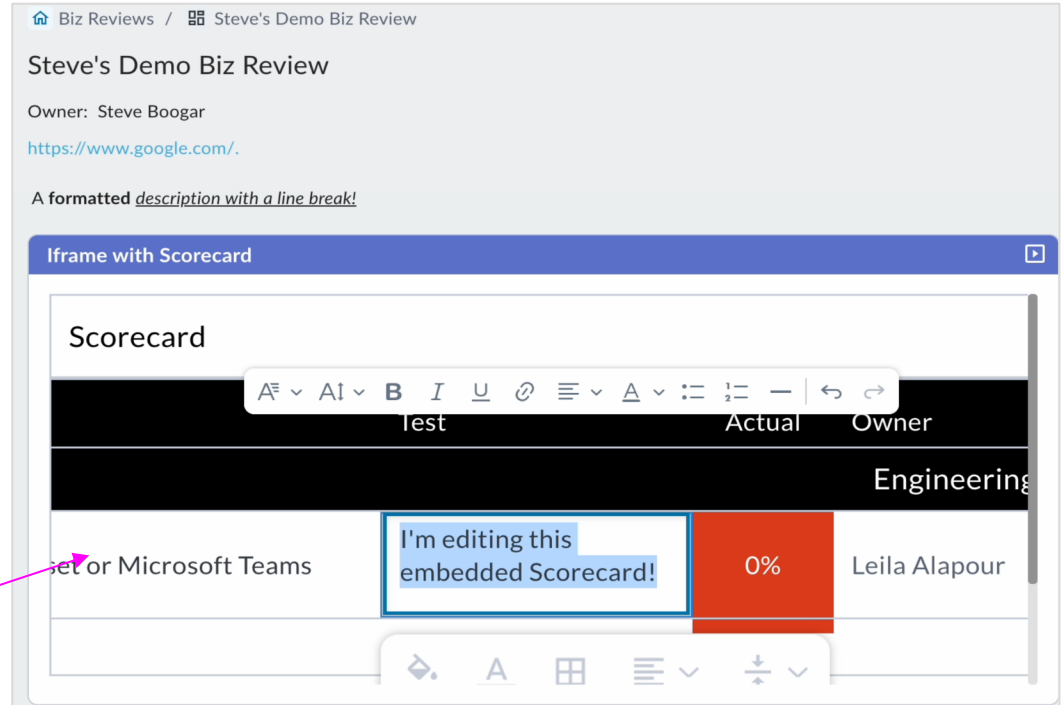
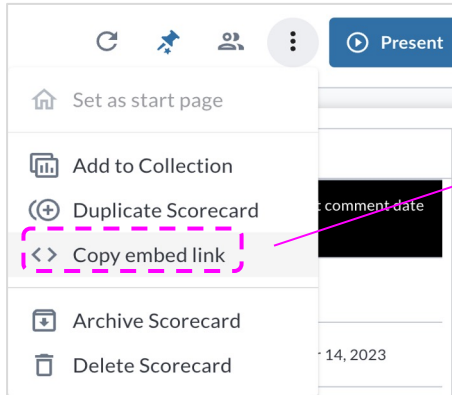
The right-hand side of the image shows the 'Edit Scorecards' configuration panel. A dropdown menu is open for the 'Actual' field, showing options for 'Default text color' (71%), 'RAG cell fill' (71%), and 'RAG colored text' (71%). The 'RAG cell fill' option is highlighted with a red dashed box.

Add Free Text Field Notes & Format Cell in Embedded Scorecards

Add notes to the free text field of Scorecards embedded in a Biz Review to quickly capture topics or ideas on the spot during presentations and discussions.

How to use:

1. Embed a Scorecard in a Biz Review
IFrame Tray
2. Add RichText to Free Text Field Cells
3. Format any Cell using the Format
Toolbar

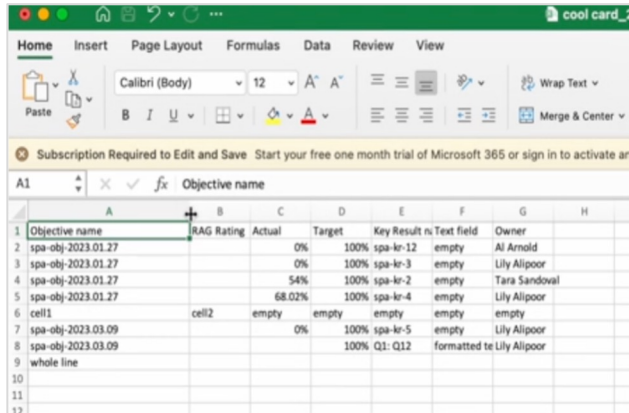


Export any Scorecard in CSV Format for Data Analysis in Excel, etc.

Now you can export any Scorecard to CSV format into Excel, Sheets, and PowerBI to have Scorecard data where you need it most.

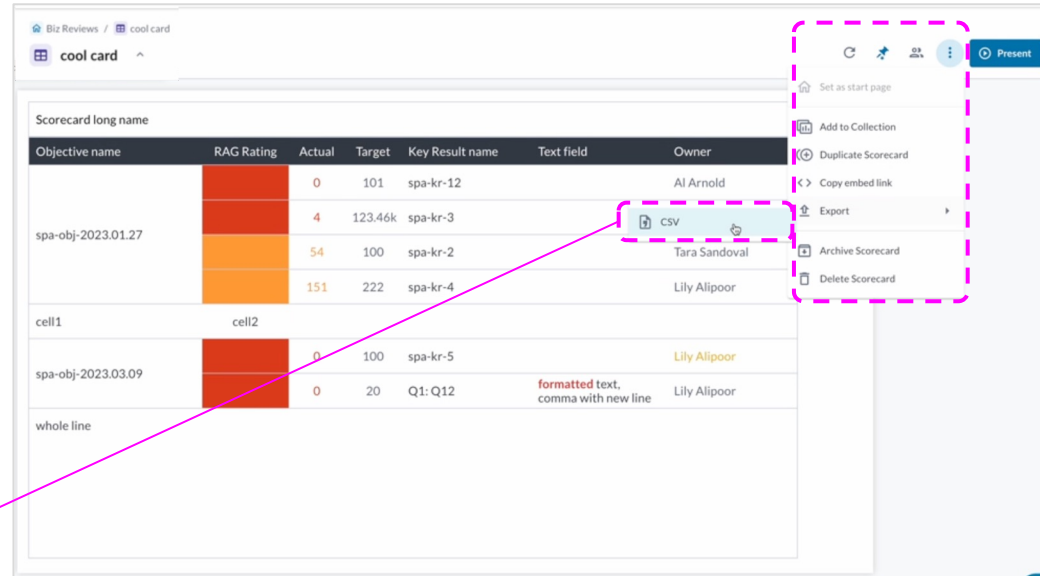
Note: More Export formats coming soon!

- PDF
- PNG



The screenshot shows an Excel spreadsheet with the following data:

Objective name	RAG Rating	Actual	Target	Key Result name	Text field	Owner
spa-obj-2023.01.27		0	101	spa-kr-12		Al Arnold
spa-obj-2023.01.27		4	123.46k	spa-kr-3		Lily Alipoor
spa-obj-2023.01.27		54	100	spa-kr-2		Tara Sandoval
spa-obj-2023.01.27		151	222	spa-kr-4		Lily Alipoor
cell1	cell2					
spa-obj-2023.03.09		0	100	spa-kr-5		Lily Alipoor
spa-obj-2023.03.09		0	20	Q1: Q12	formatted text, comma with new line	Lily Alipoor
whole line						



The screenshot shows the WorkBoard interface for a scorecard named 'cool card'. The scorecard data is displayed in a table with columns: Objective name, RAG Rating, Actual, Target, Key Result name, Text field, and Owner. The 'RAG Rating' column uses color coding: red for 0, orange for 4, and yellow for 54. The 'Actual' column shows values like 0, 151, and 0. The 'Target' column shows values like 101, 100, and 20. The 'Key Result name' column shows values like 'spa-kr-12', 'spa-kr-3', 'spa-kr-2', 'spa-kr-4', and 'Q1: Q12'. The 'Text field' column shows 'formatted text, comma with new line'. The 'Owner' column shows 'Al Arnold', 'Lily Alipoor', 'Tara Sandoval', and 'Lily Alipoor'. A menu is open on the right side of the interface, with the 'Export' option highlighted. The 'Export' option has a sub-menu with 'CSV' selected. A pink arrow points from the 'CSV' option in the menu to the Excel spreadsheet in the previous image.

News in Biz Reviews

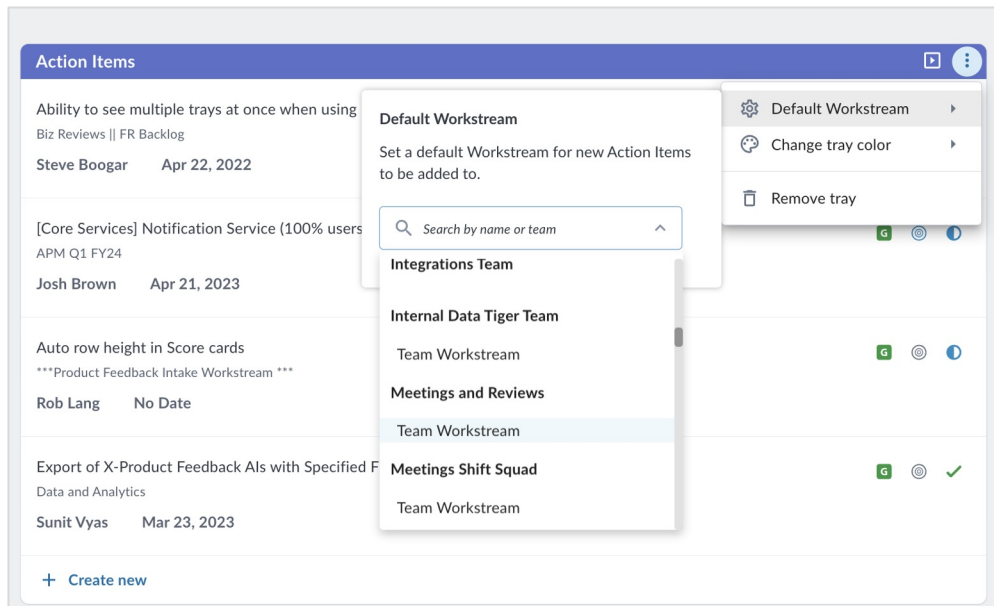
Action Item Tray: Set Default Workstream for New AIs

Set a default Workstream for new AIs in your Action Item Trays so you don't have to select the assigned Workstream every single time. Once set, all new AIs will default to that Workstream.

How to use:

1. Click the Kebab
2. Select Default Workstream
3. Choose Workstream

Note: Preference is per user, per tray.



Meetings

Meetings: Custom PACE Meter with: 1-5 Attribute Support

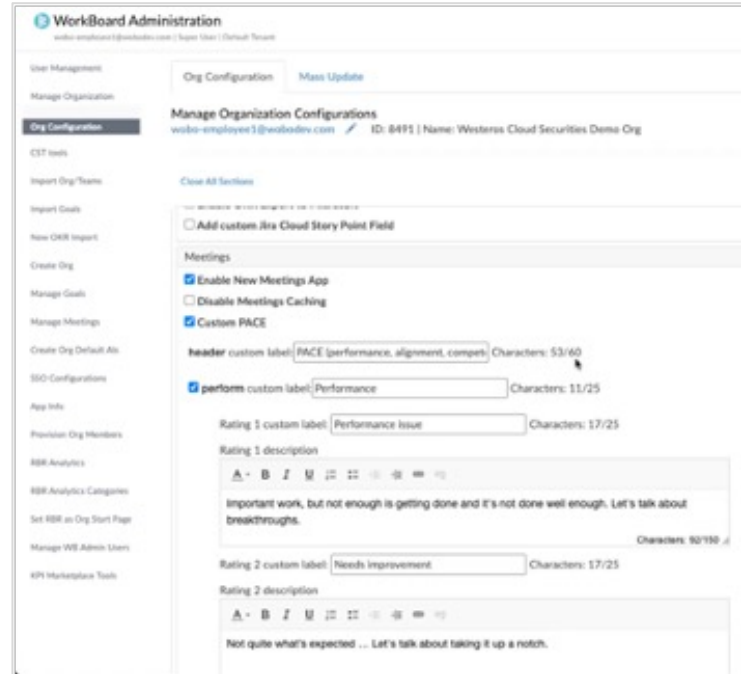
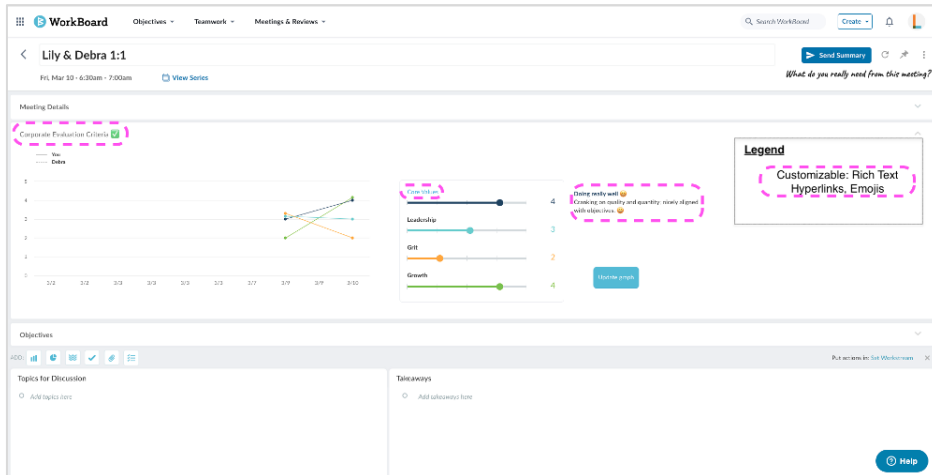
Reflect your organization's 1:1 development goals with customization in the PACE Meter from WB Admin.

Add 1 to 5 Attributes to the Meter.

Customize everything including:

- Attribute Names
- Rating descriptions
- Meter Title

Note: Changes affect the entire Org



Deepen Your Expertise

Upcoming Courses

Class	Description	Dates	How to Sign Up
NEW! Certified Level 2 OKR Coach	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"> June 12/13 at 8am 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
NEW! Long Range Strategy and Outcomes	Explore the intersection of long-range strategy and near-term OKRs, and the importance of connecting the two to drive fast and focused execution.	<ul style="list-style-type: none"> May 17 at 8:30am PT 	learn.workboard.com
Outcome Method Mindset	Learn about OKRs and the Outcome Mindset in 1 hour	<ul style="list-style-type: none"> May 3 at 6am PT May 10 at 1pm PT 	learn.workboard.com
OKR Fast Pass Course	Build your OKR expertise in 3 hours	<ul style="list-style-type: none"> May 8 at 8am PT June 8 at 8am PT 	learn.workboard.com
OKR Coach Certification	Become a certified OKR coach	<ul style="list-style-type: none"> May 1/2 at 8am PT May 9/11 at 1pm PT May 16/18 at 1pm PT May 23/25 at 9am CET and 8am PT 	learn.workboard.com

WorkBoard Learn

What's New?

- **Welcome to WorkBoard Course** – The addition of a new lesson for all things Functional & Dynamic Teams, relevant to all WorkBoard users.
- **WorkBoard Administrator Course** – A new & improved comprehensive course for those in the WorkBoard Administrator roles – an excellent refresher for existing Admins or essential for new Admins.

ICYMI: Digital Operating Rhythm Courses

Our free Launch Your Digital Operating Rhythm courses are built to guide Managers and Individuals on a path to achieving their outcomes with a best-in-class operating rhythm in WorkBoard.

- **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>

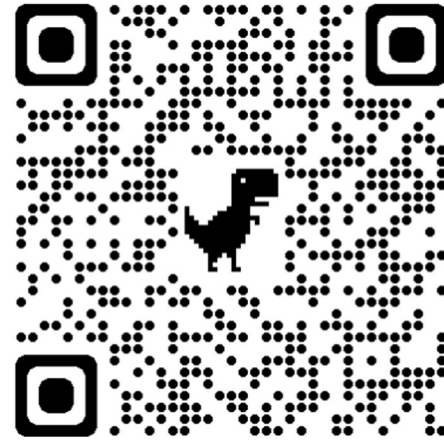
The image displays three screenshots of the WorkBoard interface. The top-left screenshot shows the 'Teams' section with a list of team management options. The top-right screenshot shows a 'Weekly Snapshots' view for 'Company ELT' with various performance metrics and charts. The bottom-left screenshot shows the 'Managers: Launch Your Digital Operating Rhythm in WorkBoard' course list. The bottom-right screenshot shows a cartoon illustration of a man and a woman discussing a 'shave our heads' strategy, with a 'WorkBoard' logo in the corner.

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.”

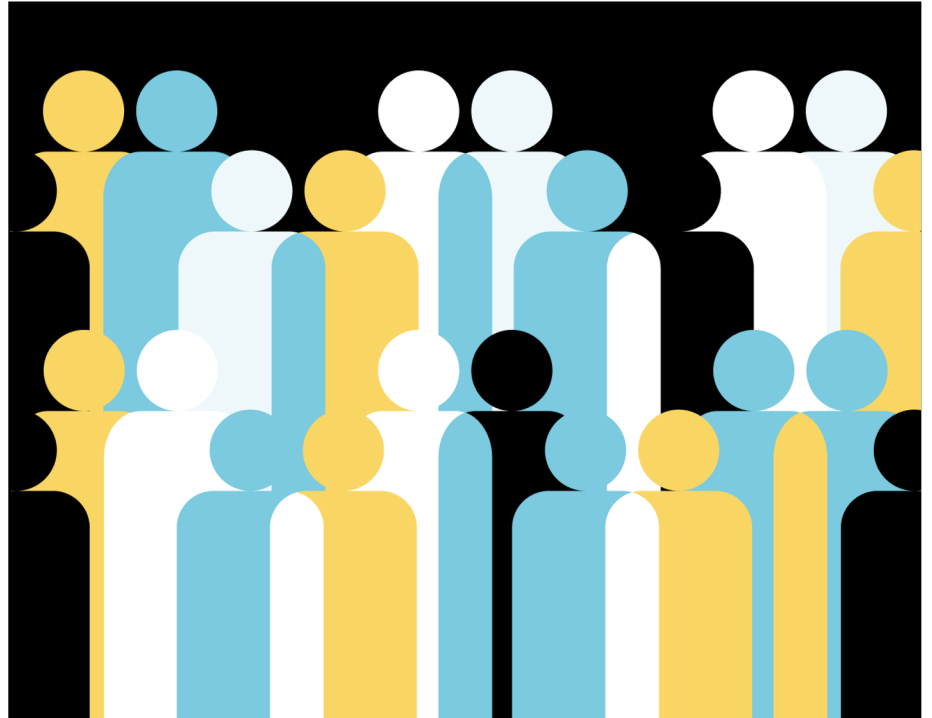
– Chief of Staff, Nike

Community Calls: Save the Date(s)!

Our next Community Call is May 31.

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

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



What are you curious about?

Thank you

