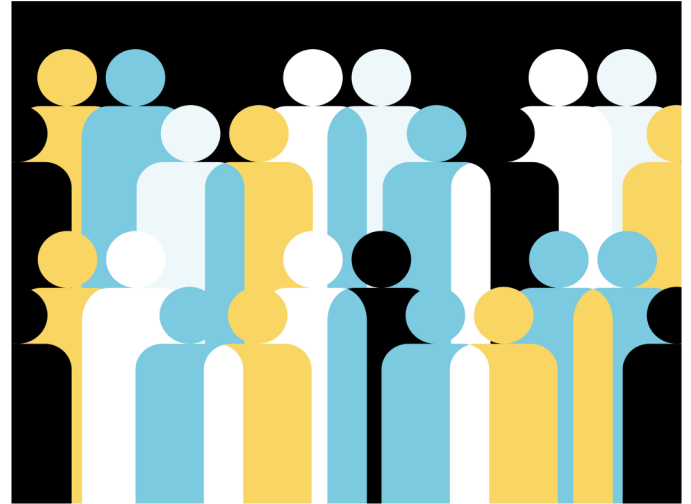


Community Call

August 2023

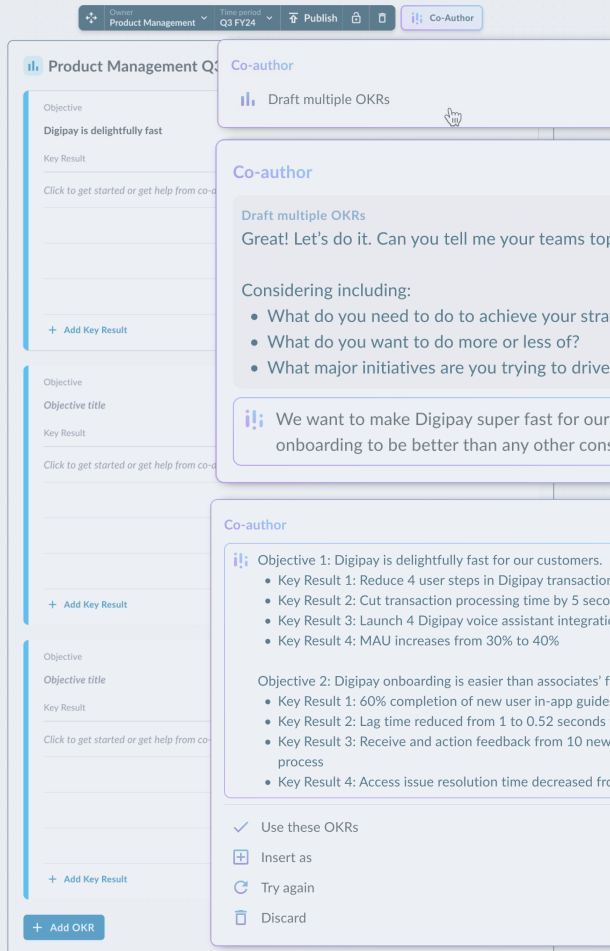


Agenda

- Using Co-Author to set great objectives and key results
- Uncovering organization-wide insights with smart analytics
- My Objectives landing page
- Join the conversation in real life
- Deepening your expertise

Aligning on Outcomes Faster with Co-Author

Draft OKRs



Objectives & Key Results Cycle

CURRENT PROCESS FRICTION & OPPORTUNITIES

Teams face a cold start problem when trying to set OKRs – they can't distinguish actions from results they should create.

It is time consuming and difficult to shift gears to think about outcomes when setting OKRs is 4x a year exercise with only 4 learning opportunities each year.

Debate on priorities is invaluable but can be impeded by the time it takes to articulate priorities as measurable outcomes worthy of debate.



WoBo Co-Author

DIRECTION & CAPABILITIES

Collapse the time to draft OKRs that articulate intent as aspirational and measurable results in OKR syntax.

Aligned and informed drafts incorporate learnings from past results, and upline and leadership priorities.

Improve the quality of user created OKRs with suggestions informed by Outcome Mindset Method™ best practices that give every team the benefit of an OKR coach in the room.

Teams get to execution faster by having more time to debate trade-offs and action plans from co-authored drafts rather than debating and fine-tuning language.

Set Faster, Better OKRs

Co-author OKRs using prior and upline OKRs and the team's retro

- Intelligence from team's past OKRs and retrospective
- Informed by upline OKRs and organization strategy
- Iterative experience helps teams get clarity > 20x faster and leave with measurable outcomes

The screenshot displays the WorkBoard interface, divided into two main sections: 'Review Past OKRs' and 'Draft Next OKRs'.

Review Past OKRs: This section shows a grid of six OKR cards. Each card includes a progress indicator (percentage and a bar), a title, a description, and a completion date. The cards are:

- 100%** A predictable, measurable release productive forces that lives up to enterprise customers' expectations. Release Engineering - As of Jul 26, 2023.
- 89% of 80** Before each weekly release, release success criteria should be >= 80%. Rimpal Hazarka - As of Jul 26, 2023.
- 243** [KPI] incoming bugs from production of 317. Rimpal Hazarka - As of Aug 08, 2023.
- 100% of 100%** By the end of the quarter, every squad must execute 100% of the last 60 days of hotspot test cases before each release by impact areas. Rimpal Hazarka - As of Jul 10, 2023.
- 65%** We own it as a well oiled machine. Product and Engineering (Barrel Surfers) - As of Aug 02, 2024.
- 15% of 100%** Finalize the product long range strategy and present at one of the all-hands meetings. Lella Alappur - As of Aug 02, 2023.
- 100% of 100%** Ensure that every squad publishes well-defined APIs in Swagger for all "new implementations" with a compliance rate of at least 90% for the entire quarter. Gaurav Nilgani - As of Jul 21, 2023.
- 80% of 100%** Loading: 95% of all new projects will go through technical design review. Daryoosh Pakrad - As of Jul 24, 2023.

Discussion & Ideas: Below the OKR cards, there is a section titled 'Discussion & Ideas' with four colored sticky notes (blue, purple, light purple, and yellow) arranged in a cluster. Each note contains the text 'Type something here...' and the name 'Dishra Pakrad'.

Draft Next OKRs: This section shows a form for creating a new OKR. It includes a header with 'Objective & Key Results', a dropdown for 'Innovation', a dropdown for 'Q3 FY24', and a 'Publish OKRs' button. The form has three main sections, each with an 'Objective' field and a 'Key Results' field. The first section is highlighted with a blue border and contains a 'Coauthor' button, a 'Draft an Objective' field, and a 'Suggest Key Results for this Objective' button. Below each section is an 'Add Key Result' button.

Setting OKRs with Co-Author

Before your session

Just Getting Started with OKRs

- Ask the team to add their thoughts on what you should measure to the Canvas

Teams familiar with OKRs

- Run a team retro ahead of your session and have a conversation about shifts to incorporate in the next OKR period

During your Session

Just Getting Started with OKRs

- Ask the Co-Author for suggested results to help get started.

Teams familiar with OKRs

- Ask the Co-Author to help refine the team's brainstorm notes into more inspirational, shorter or more measurable key results

What's next?

We believe embedding Gen AI across the platform, as well as enhancing our existing machine learning capabilities, are incredibly powerful ways to both simplify and accelerate strategy execution. It will fundamentally change how you request and receive information in exciting ways:

- Conversations from your needs and curiosity in the moment.
- Complex data and charts provided in the moment you ask for them
- Information distilled and delivered without navigating or assembling

To help customers that want the full advantages Gen AI brings to Strategy Execution, we have a fast and aggressive roadmap and will offer two platform versions: WorkBoard Strategy Execution, and WorkBoard Intelligent Enterprise (IE). WorkBoard IE customers can expect:

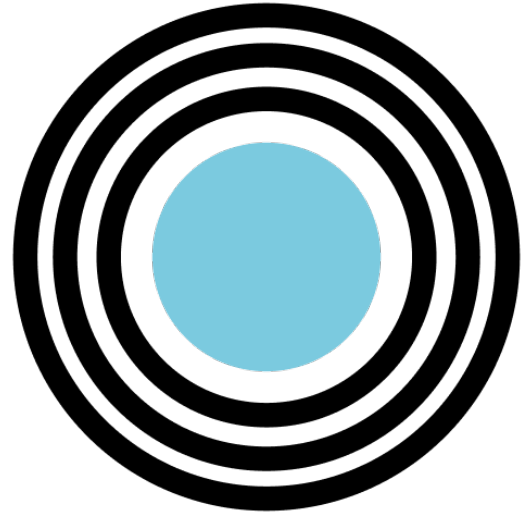
- Prompted and unprompted status summaries, delivered to you with the convenience of chat.
- Ask your own questions about strategy execution and risks, and get instant answers
- Have Co-Author draft plans of action and suggest the next course of action when things are off track
- Summarize the success and challenge themes from team OKR retrospectives to remove the barriers to broader success

What does that mean for you?

- Activated for all customers September 12th
- Will be available for all people in your organization (not a subset)
- First of a whole set of generative AI and machine learning capabilities coming to WorkBoard
- All customers will have free access through the end of the year

Want to learn more?

Contact your customer success manager or reach out to us at beta-coauthor@workboard.com

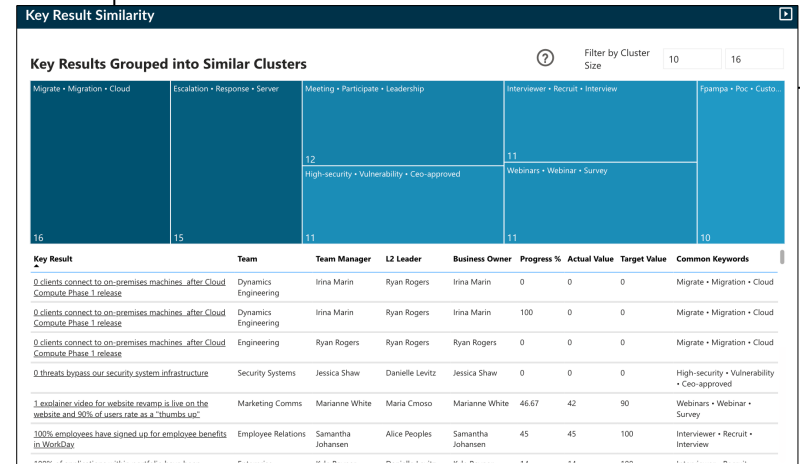
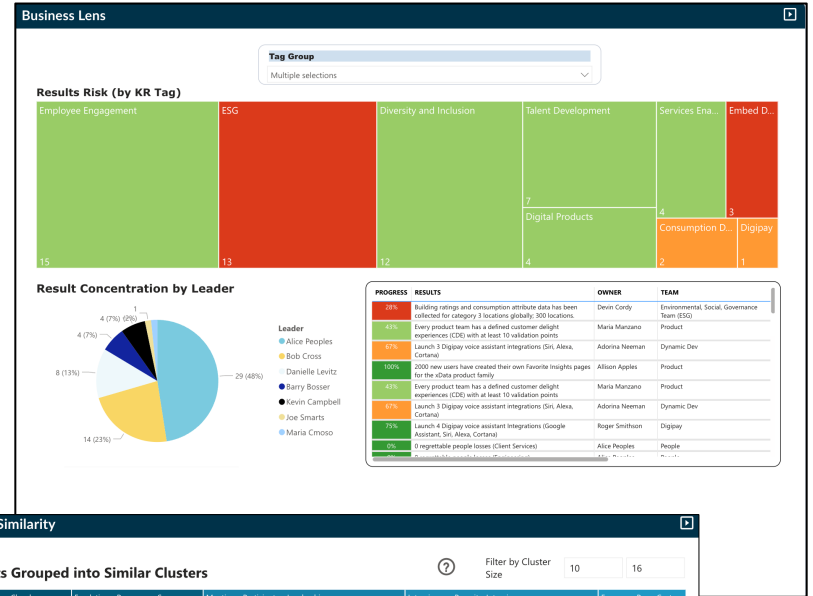


Uncovering insights with smart analytics



See Where Team Resources are Being Allocated and How Well They Are Delivering Strategy Results

- Gain instant visibility into resource allocation and risks across tagged key result groups.
- Concentrate resources on what matters most and eliminate wasted efforts.



Surface Clusters of Results

- Easily find and tag similar key results to report against organization-wide strategy execution themes.

Key Result Tags & Clusters

Manage tags Tag key results

Search for and select any available key results and apply one or multiple tags to them.

Tag	Tag Groups	Tag Status	Keywords	KRs Tagged	Suggested KRs
Apple	Customers	Active	0 keywords	0 KRs	4
Consumption Drivers	CX Game Change	Active	2 keywords	2 KRs	2
Digipay	Deliver on Digital	Active	3 keywords	1 KR	1
Digital Products	Deliver on Digital	Active	2 keywords	4 KRs	2
Diversity and Inclusion	Employee Experience & NPS	Active	0 keywords	21 KRs	3
Embed Data and AI	Deliver on Digital	Active	0 keywords	8 KRs	10
Employee Engagement	Employee Experience & NPS	Active	0 keywords	35 KRs	19
Enablement	Employee Experience & NPS	Active	0 keywords	0 KRs	1
ESG	Environmental, Social and Governance	Active	9 keywords	20 KRs	4
Google	Customers	Active	0 keywords	0 KRs	5

Page 1 of 2 pages

Key Result Tags & Clusters

Manage tags Tag key results

Search for and select any available key results and apply one or multiple tags to them.

Embed Data and AI

Select all | 2 of 30 Key Results | Hide suggested key results

Make it easy for suppliers to on-board onto our apps
Owner: Ashley Andrews Team: Global Supply Chain Operations 1 of 1 Selected

User database encryption increases from 2 to 4 levels for supplier data access
Owner: Ashley Andrews Tags: Embed Data and AI

Our Supply Chain Org is a lean, outcome-focused business where people want to work
Owner: Ashley Andrews Team: Global Supply Chain 1 of 1 Selected

Hire 12 best-in-class Data Analysts to accelerate data-driven decision-making for our business
Owner: Kathy Queen Tags: Embed Data and AI

Our people are excited about their work and have purpose
Owner: Michelle Mary Team: Supply Chain Operations 0 of 1 Selected

Develop 2 Career Paths for the tech organization for both Individual Contributor and People Leader
Owner: Michelle Mary Tags: Diversity and Inclusion Employee Engagement
Talent Development Embed Data and AI

Create an organization where our talent finds purpose and empowerment in their work
Owner: Robert Myers Team: Digital Supply Chain 0 of 1 Selected

Train all knowledge workers on the 5 new tech tools
Owner: Robert Myers

Apply KR Tags

2 Selected Key Results

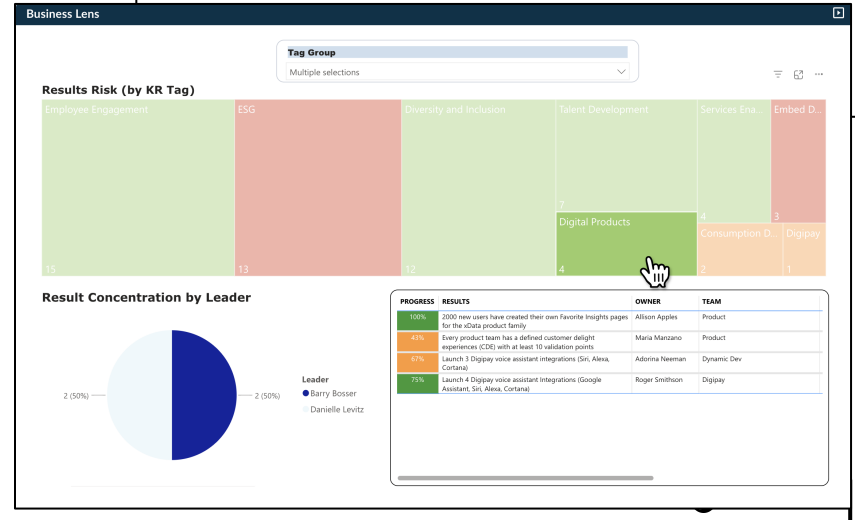
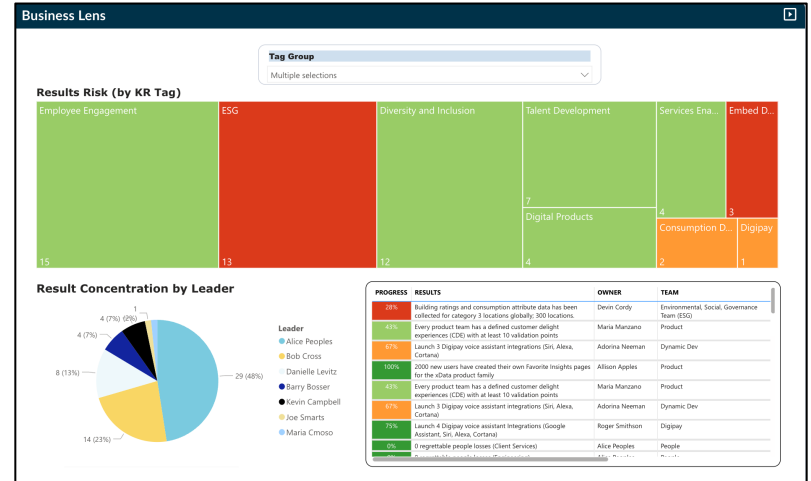
Added KR Tags (1)
Embed Data and AI

Search for KR Tags

Undo Apply Apply Kr Tags

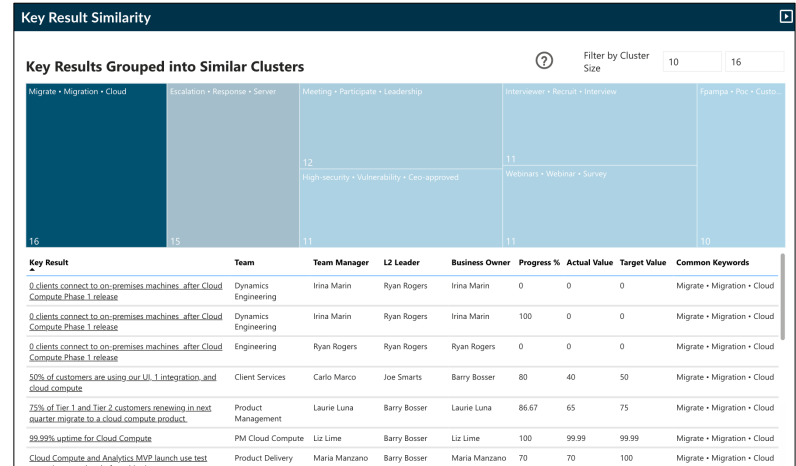
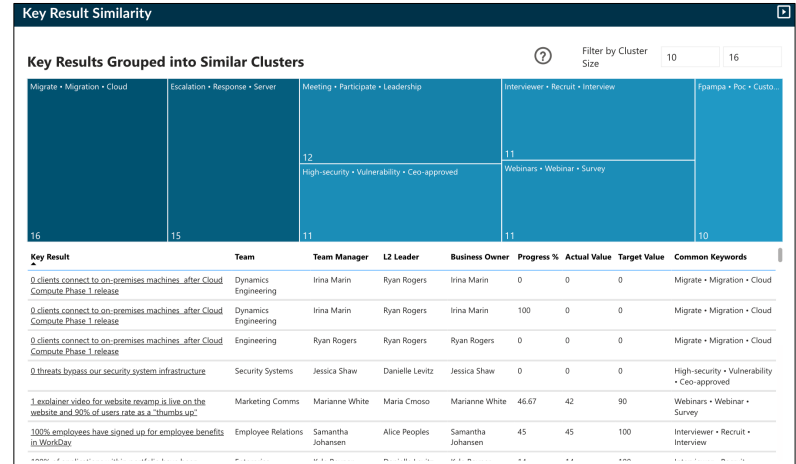
Analyze organization-wide results by cluster

- **Interactive heat map** gives instant visibility into the average RAG rating of key results in each tag group, so you can quickly identify and address risks.
- Effortlessly recognize resource allocation, trends and patterns with the **Result concentration by leader** chart.
- Drill down by tag group to see **individual key result progress**, identify potential bottlenecks and address issues before they escalate, and focus where it matters most.



Uncover new patterns of key result similarity

The ML-driven "Key Result Similarity" report automatically clusters related key results into thematic groups and provides big-picture visibility into the progress and efforts the organization is making against each cluster.



My Objectives 2.0

My Objectives 2.0

On September 15, the new My Objectives page will become the default experience.

- Take immediate action on results that require attention or celebration.
- Keep daily focus on the results you own or contribute to.
- Easily follow and contribute to results conversations.
- Align your work to leadership priorities.
- Check in on your direct reports and teams.
- Keep tabs on all your favorite OKRs.

The screenshot displays the WorkBoard interface for 'My Objectives'. At the top, there are navigation tabs for 'Objectives', 'Teamwork', and 'Meetings & Reviews'. A search bar and a 'Create' button are also visible. The main content area is titled 'My Objectives' and features a summary of key metrics: 'Updates needed' (1), 'Results at risk' (9), 'Results worth celebrating' (8), and 'Draft OKRs to finalize' (6). Below this, there are filters for 'All (18)', 'High Risk (5)', 'Moderate Risk (1)', 'On plan (3)', and 'Above plan (9)'. The 'Key Results I Own' section lists several key results with their current status and progress. For example, 'Consumption of CORE and PRIME platforms reaches 75% weekly active users (WAU) for all customers in the target segment' is at 64% of 75%. The 'Objectives I Own' section shows progress bars for various objectives, such as 'Our products are differentiated by competitive & compelling Analytics that customers rely on for decision making' at 87%. On the right side, there is a 'Teams' sidebar showing 'Direct & Dotted Reports' for Alice Peoples (56%), Amanda Dinero (95%), Andrea Williams (13%), Andy O'Brien (0%), and Jamie Johnson (62%). At the bottom right, there is a 'Functional Teams' section showing 'Product' with a 74% overall status.

Join the Conversation



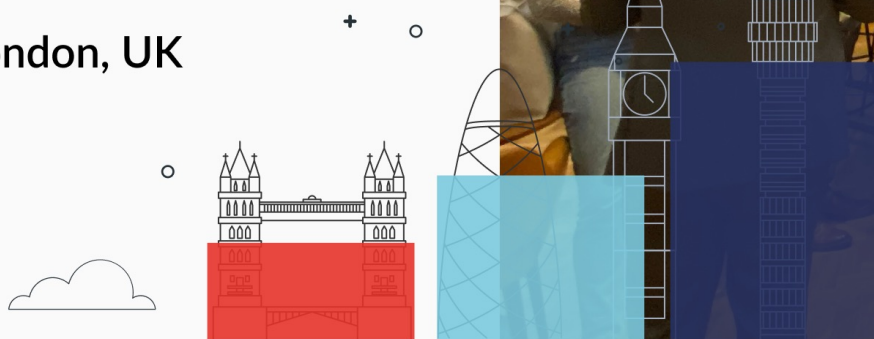
Limited Seats
Still Available

WorkBoard
Accelerate 
Conference #7

Strategy Execution LEADER'S SUMMIT

28 September 2023 | London, UK

[REGISTER NOW](#)



The 6th Edition of the Accelerate Conference EU TM

 **WorkBoard**



Deidre Paknad
CEO & Co-Founder
WorkBoard

 **infobip**



Mihael Matošević
Head of Strategy Development
Infobip

 **infobip**



Marin Bezić
VP Planning and Strategy
Implementation
Infobip



Chris Rome
Head of Delivery Operations
Virgin Media O2



Eoghan O'Dwyer
Director, Digital Value Creation &
Commercial Growth
Virgin Media O2



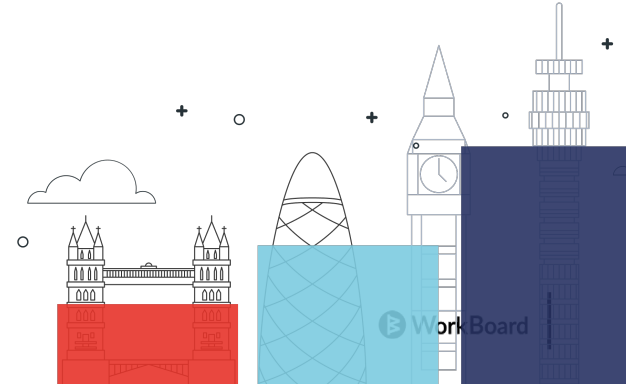
Jeff Gothelf
Co-author of *Lean UX*, OKR Expert

28 September 2023 | The Andaz London Liverpool Street

Meet your strategy execution peers, learn from industry experts, and participate in main stage and breakout sessions to advance your organization's achievements and your own.

Save your seat now at workboard.com/accelerate-eu2023/

...More speakers to be announced!



Special hotel
rates available
until Oct 2

WorkBoard
Accelerate
Conference #7

Strategy Execution

DESERT RETREAT

October 23-25, 2023 | Scottsdale AZ

REGISTER NOW



At the Andaz Scottsdale Resort...



Speakers: 7th Edition of the Accelerate Conference TM

 WorkBoard



Deidre Paknad
CEO & Co-Founder
WorkBoard

BAIN & COMPANY



Darren Johnson
Expert Partner
Bain & Company





Patrick Thompson
Chief Information & Digital
Transformation Officer
Albemarle





Athena Murphy
VP of Business Execution &
Transformation, Chief of Staff
to CEO
Juniper Networks





Joel Neeb
VP of Execution and
Transformation in the Office of
the CEO
VMware





Summers Hutchings
Director, Product Delivery &
Portfolio Strategy
CarMax

Strategy Execution in the AI Era

Deidre Paknad, CEO and Co-Founder, WorkBoard

OKRs and the Next-Gen Management System

Darren Johnson, Expert Partner, Bain & Company

Accelerating Innovation and Transformation with OKRs

Joel Neeb, VP Execution and Transformation - Office of the CEO,
VMware

Building a Strategy Execution Program at Scale and Speed

Summers Hutchings, Director, Product Delivery & Portfolio Strategy,
CarMax

Executing Transformation Strategies in the Face of Unpredictability

Patrick Thompson, Chief Information & Digital Transformation
Officer, Albemarle Corporation

Driving with Headlights – Using Leading & Lagging Measures to Improve Business Outcomes

Athena Murphy, VP of Business Execution & Transformation-Chief of
Staff to CEO, Juniper Networks

Breakout Sessions and Facilitated Networking

Meet your strategy execution peers, learn from industry experts, and participate in main stage and breakout sessions to advance your organization's achievements and your own.

Save your seat now at
workboard.com/accelerate2023

...More speakers to be announced!



The 7th Edition of the Accelerate Conference TM

Andaz Scottsdale Resort - Very limited capacity

23-25 October 2023

Pricing July 1st onward – Based on availability

\$299 Individuals

\$449 Bring a peer (2 tickets)

Save your seat now at workboard.com/accelerate2023/

Small group conversations, on specific topics to improve KR integrity, creating user group and Chief of Staff role in the operating cadence.

Get hands on with the newest WorkBoard capabilities and learn how to take fullest advantage for the platform from other customers and WorkBoard product team.



Upcoming Courses



Class	Description	Dates	How to Sign Up
Level 2 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">● Sep 25-26 at 8am PT	learn.workboard.com
Outcome Method Mindset	Learn about OKRs and the Outcome Mindset in 1 hour	<ul style="list-style-type: none">● Sep 6 at 1pm PT● Sep 13 at 6am PT	learn.workboard.com
OKR Fast Pass Course	Build your OKR expertise in 3 hours	<ul style="list-style-type: none">● Sep 6 at 8am PT	learn.workboard.com
OKR Coach Certification	Become a certified OKR coach	<ul style="list-style-type: none">● Sep 5/7 at 1pm PT● Sep 12/14 at 8am PT● Sep 19/21 at 1pm PT / 9am CET	learn.workboard.com
WorkBoard Pro	Learn the full power of the WorkBoard application and how to apply it in your organization.	<ul style="list-style-type: none">● Sep 13/14 at 8am 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">● Fall cohort begins October 17	workboard.com/rme-certification

New Courses Available on WorkBoard Learn



- **[My Objectives](#)**: Check out a quick intro course on the new My Objectives 2.0 page to get familiar with the freshly updated interface.
- **[WoBo Strategy](#)**: Learn how you can connect the Long Range Strategy to the nearer term OKRs teams are driving, including assessing risk, managing assumptions, and documenting investment plans.
- **[Advanced Key Results](#)**: Dive deeper into the advanced features like using roll ups, cascades, mirrors, surveys, workstream key results, and connecting data from external apps, so you can automate progress across teams.

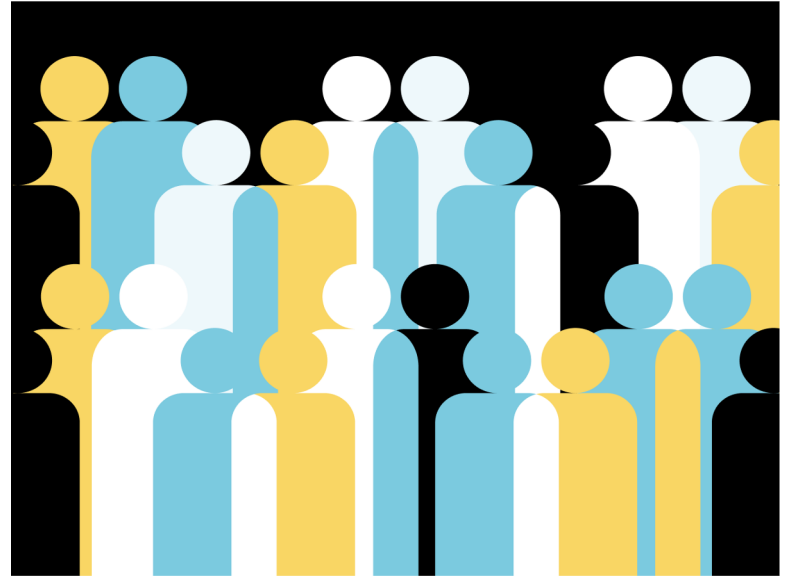
[Workboard Learn \(US\)](#)
[Workboard Learn \(EU\)](#)

Community Calls: Save the Date(s)!

Our next Community Call is September 27.

Make sure to [sign up](#) for all our monthly 2023 calls so you don't miss a single one!

- Sep. 27
- Oct. 25
- Nov. 29
- Dec. 20



What are You Curious About?



WorkBoard
Accelerate
Conference #7

Strategy Execution
DESERT RETREAT

October 23-25, 2023 | Scottsdale, AZ

[workboard.com/
accelerate2023](https://workboard.com/accelerate2023)

The banner features a photograph of a group of people in a modern, outdoor lounge setting with blue and orange seating. The text is overlaid on a dark blue background with an orange arrow pointing right.



Thank you

See you next time!