Welcome!
June WoBo Community Call

workboard

Topics Today

1. **Attributes of Awesome Teams & Results**

2. **June Releases**

3. **On the Horizon**

Their leaders are leading ...
somewhere specific with creativity and courage

They share a #growthmindset

Mastery is a process fueled by:

- ✓ Aspiring to greatness
- ✓ Embracing challenges
- ✓ Seeking and using feedback
- ✓ Welcoming what's learned from failures

Unique Accountability Dynamic

1. OKRs topic in weekly huddle → #1 predictor of outcomes
2. Authentic key results and retros
3. Embrace transparency as a team virtue
4. Hold each other accountable and cheer each other on
5. Appreciate the difference between activity and results, and the autonomy and empowerment that creates
6. Build bridges across organization, often with shared OKRs

The Impact on Key Results
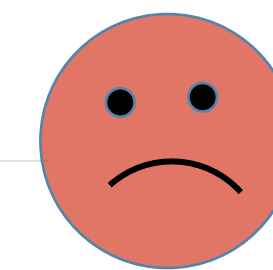
% Result Achievement
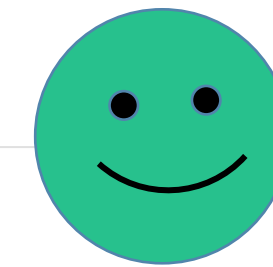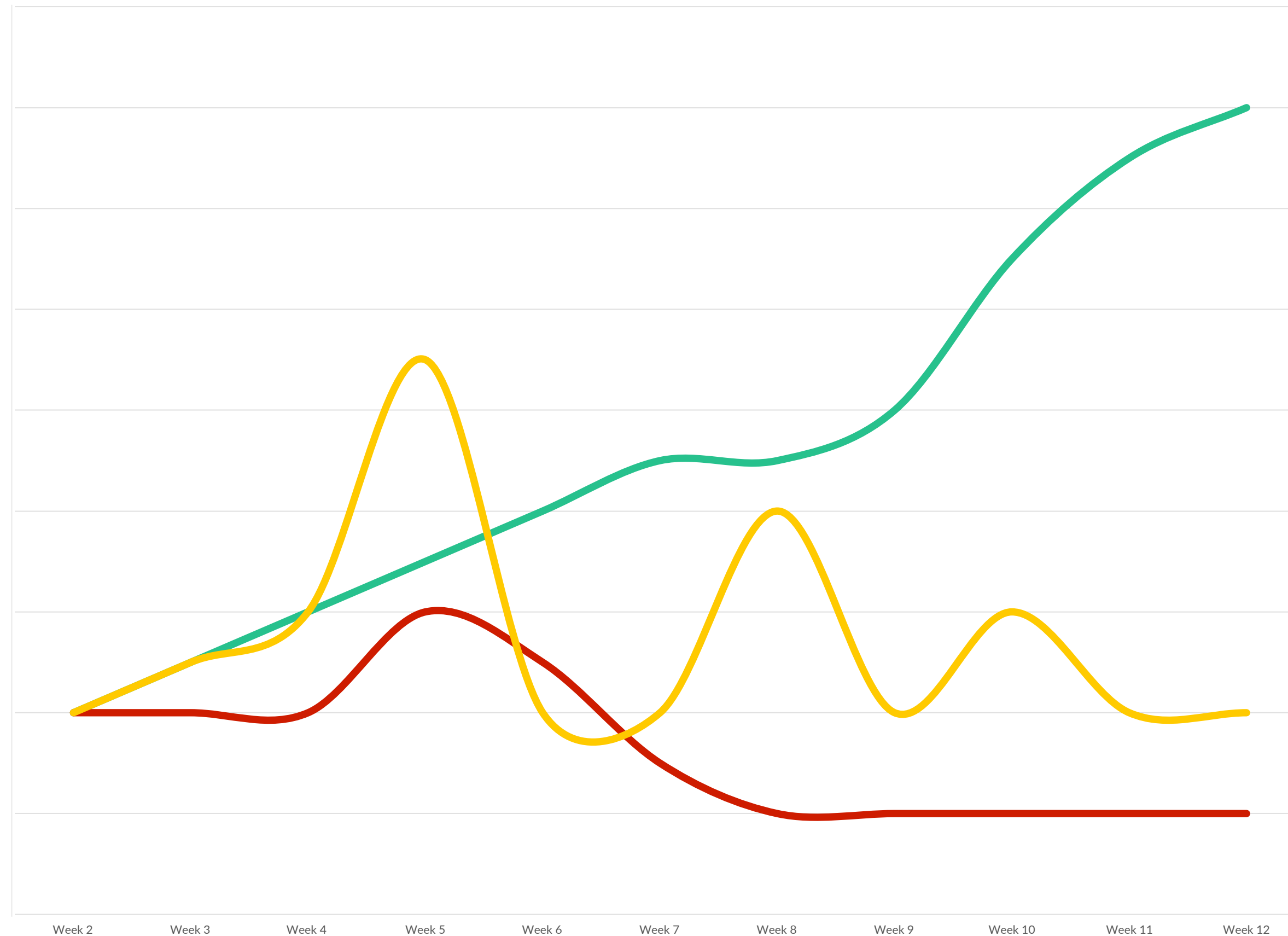
Sustained weekly results focus
- Part of manager's leadership habit
- Weekly updates keep results top of mind
- High transparency, early risk detection so not lost time

Haphazard focus
- Distraction for 1-3 weeks at a time
- Sudden realization off course, not enough time to recover
- Not part of team or management habits

Set and forget
- No focus once set
- Lost opportunity for success, set up for failure
- Lost confidence in management and overall objectives

Week 2 Week 3 Week 4 Week 5 Week 6 Week 7 Week 8 Week 9 Week 10 Week 11 Week 12

So what do you want
to accomplish in Q3?

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GANTT CHARTS

- Team work dashboard improvement
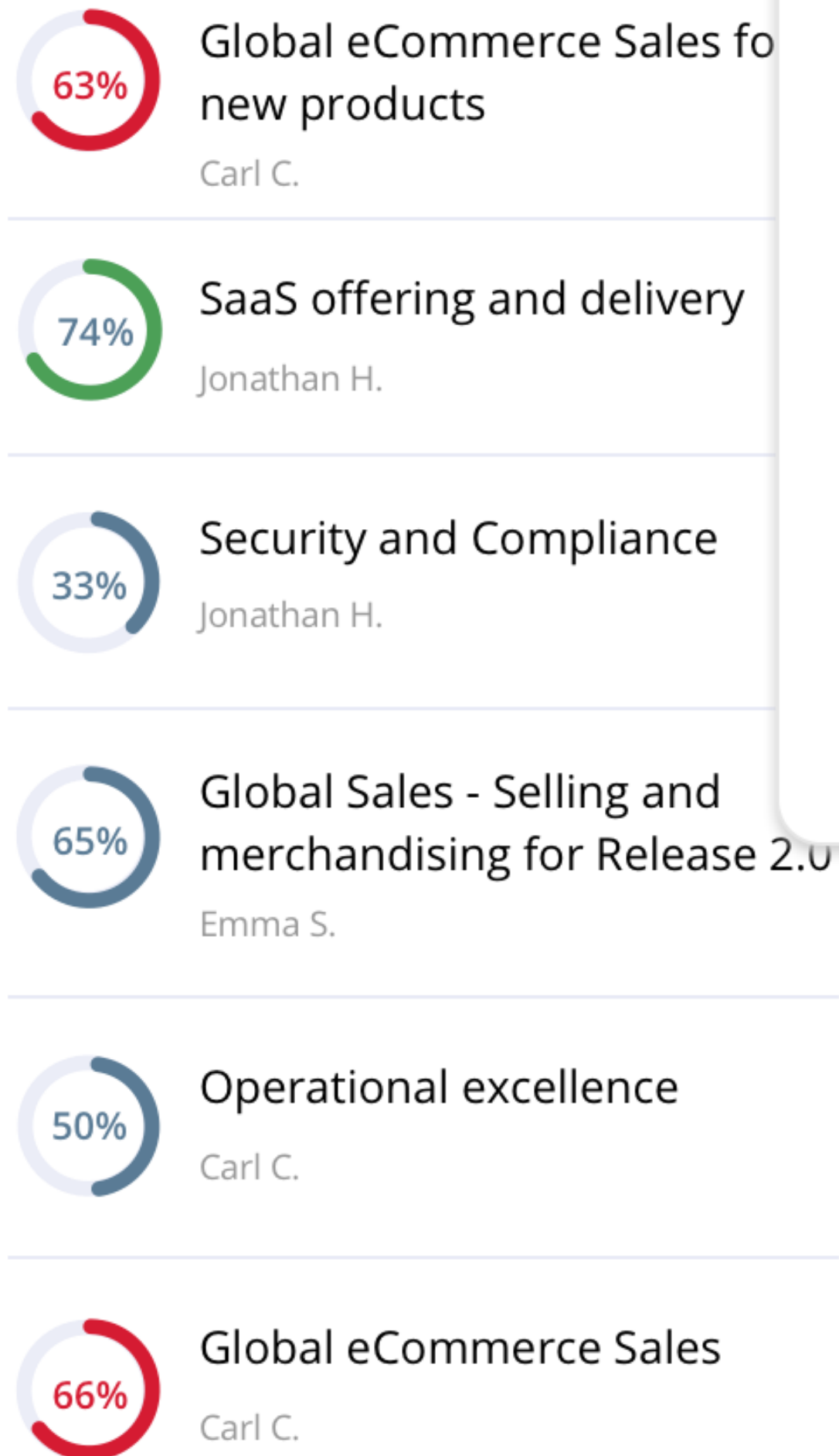- See and adjust workstream start/end dates
- Plan more easily
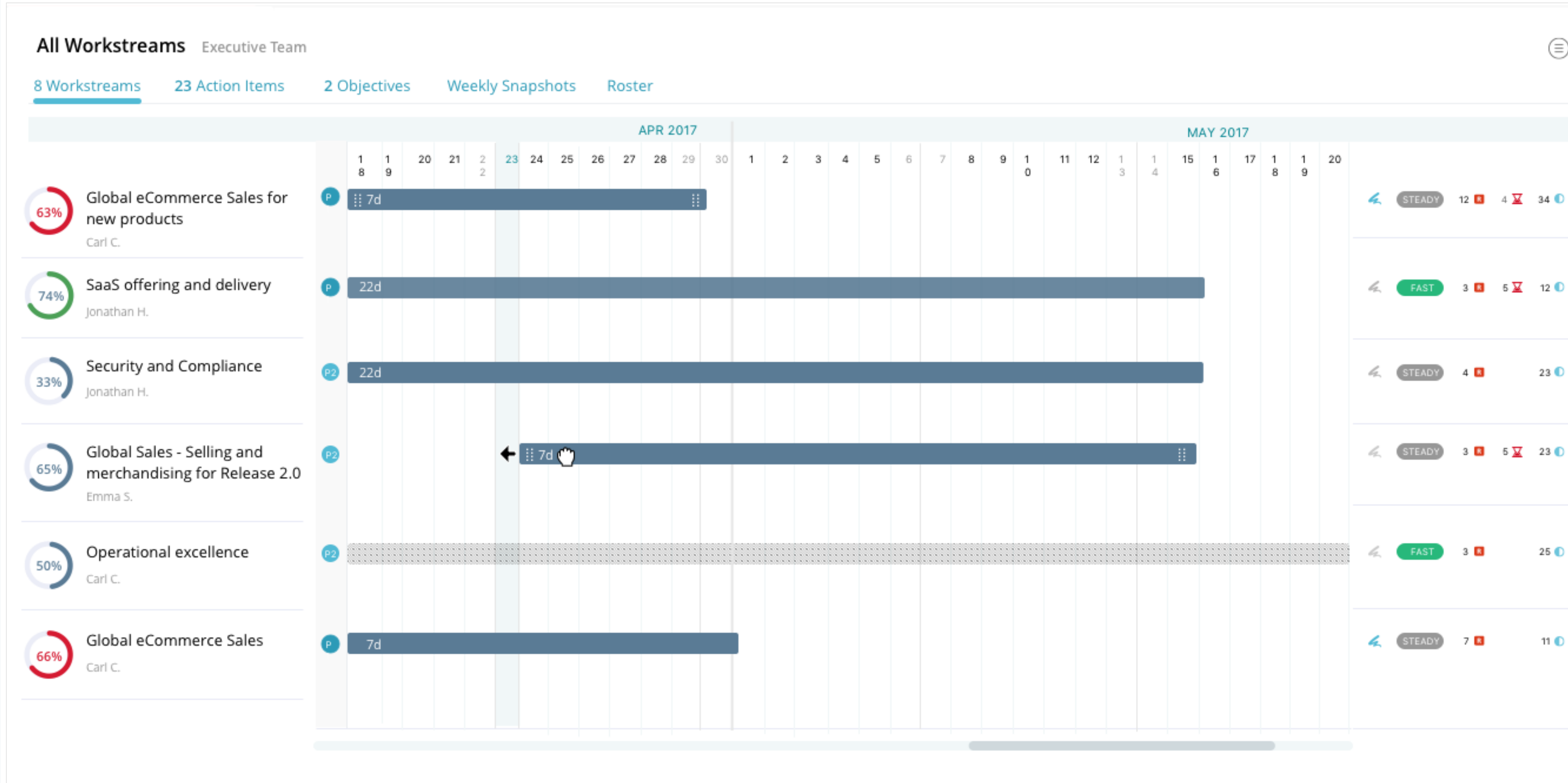
GANTT CHARTS

- Quickly see or adjust the details and description of workstreams

All Workstreams   Executive Te

8 Workstreams   23 Action Items

63% Global eCommerce Sales fo new products
Carl C.

74% SaaS offering and delivery
Jonathan H.

33% Security and Compliance
Jonathan H.

65% Global Sales - Selling and merchandising for Release 2.0
Emma S.

50% Operational excellence
Carl C.

66% Global eCommerce Sales
Carl C.

Security and Compliance

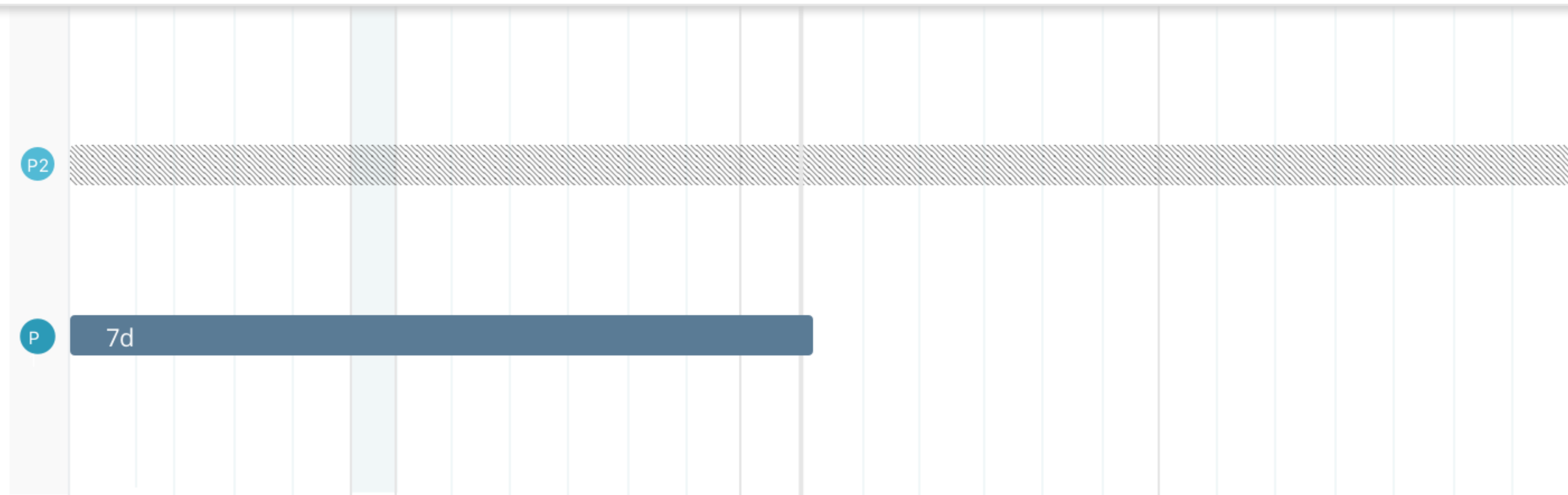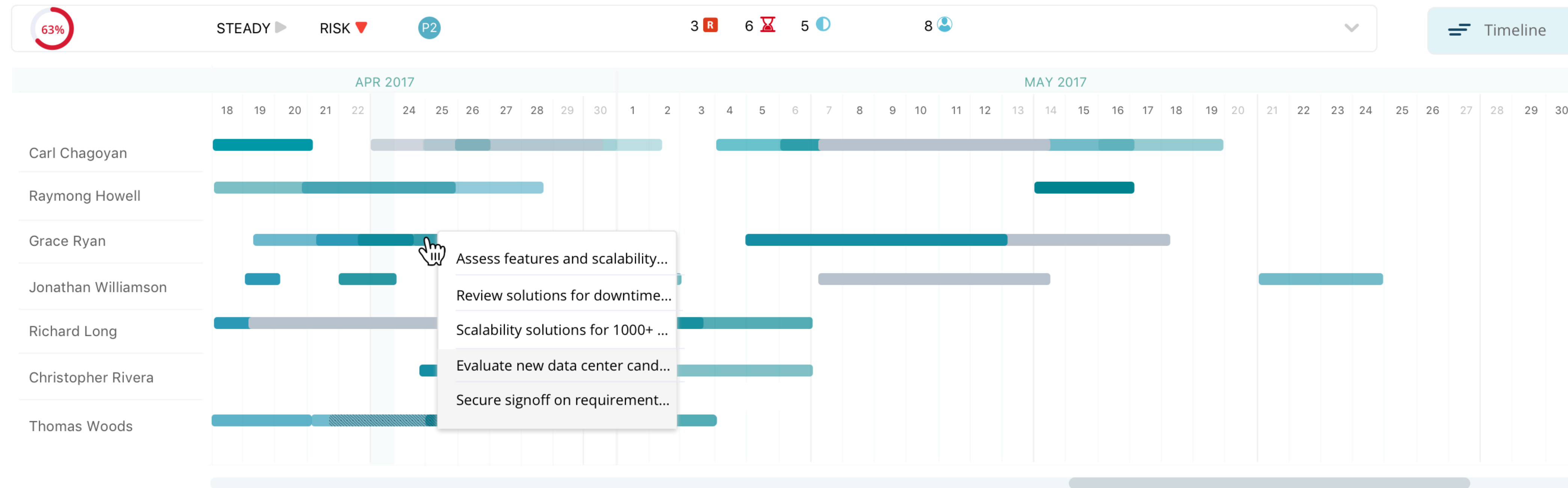| LEAD	START DATE	END DATE	HEALTH	PRIORITY	PACE
Jonathan H	01/01/2017	DD/MM/YYYY	GOOD ▲	P1	STEADY

Description:

Leverage agile frameworks to provide a robust synopsis for high level overviews. Iterative approaches to corporate strategy foster collaborative thinking to further the overall value proposition. Organically grow the holistic world view of disruptive innovation via workplace diversity and empowerment.

- Bring to the table win-win survival strategies to ensure proactive domination.
- At the end of the day, going forward, a new normal that has evolved from generation X is on the runway heading towards a streamlined cloudsolution.
- User generated content in real-time will have multiple touchpoints for offshoring.

P2

P   7d

WORKLOAD TIMELINE

- Open a timeline view of work on the board

- See team capacity within a workstream

- Select person on timeline to light up their items on the board

- Quick look at what's on each persons plate in a given time window

- Work start and due dates for action items

Board View   20 List View   2 Objectives   12 Feed   Files   2 Filters

63%   STEADY ▶   RISK ▼   P2   3 R   6 ⧖   5 ◑   8 👤   ≡ Timeline

APR 2017   MAY 2017

18 19 20 21 22 | 24 25 26 27 28 29 30 | 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30

Carl Chagoyan

Raymong Howell

Grace Ryan

| Assess features and scalability... |
| Review solutions for downtime... |
| Scalability solutions for 1000+ ... |
| Evaluate new data center cand... |
| Secure signoff on requirement... |

Jonathan Williamson

Richard Long

Christopher Rivera

Thomas Woods

HealthTips app
Carl Chagoyan   Jun 13 '17

Help Desk solutions — feature/function survey
Grace Ryan   Jun 14 '17

Identify areas of improvement we are seeking
Christopher Rivera   Jun 17 '17

Inventory and profiles for all Finance apps
Thomas Woods   Jun 23 '17

Follow up on eCMS migration
Joseph Douglas   Jun 14 '17

NEXT ⇨

Inventory and profiles for all Legal apps
Carl Chagoyan   Jun 13 '17

Runbook for data and app migration
Grace Ryan   Jun 14 '17

Review the candidate contract
Christopher Rivera   Jun 17 '17

Review final candidate pool
Raymond Howell   Jun 13 '17

Reach out to vendor on the specs
James Ward   Jun 14 '17

Assess features and scalability of analytics apps
Grace Ryan   Jun 14 '17

Catalog the best-of-breed apps
Raymond Howell   Jun 16 '17

Identify commercial cloud options
Raymond Howell   Jun 17 '17

Deploy GCV at `
Carl Chagoyan   Jun 1 '17

Deploy PatientPredictor at AWS
Carl Chagoyan   Jun 23 '17

Double check the last candidate contract terms
Grace Ryan   Jun 1 '17

Draft contract by June 23
Jonathan Williamson   Jun 23 '17

Draft list of cloud transition candidate apps
Richard Long   Jun 13 '17

Cloud Application Candidates
Information Technology & Services

BACKLOG ⏸
➕

Get proposal from Vinny ⚠
Carl Chagoyan   Jun 13 '17

Product owners identified
Grace Ryan   Jun 14 '17

Define the org model
Christopher Rivera   Jun 17 '17

Follow up on eCMS migration
Thomas Woods   Jun 23 '17

NEXT ⇨
➕

Inventory all Finance apps ⚠
Carl Chagoyan   Jun 13 '17

Deploy PatientPredictor at AWS ⚠
Grace Ryan   Jun 14 '17

Check candidate contract terms
Christopher Rivera   Jun 17 '17

IN PROGRESS ◑
➕

Review Last Candidate List ⚠
Carl Chagoyan   Jun 13 '17

Marketing cloud apps ⚠
James Ward   Jun 14 '17

Inventory all Talent apps
Janice Larson   Jun 14 '17

Assess ER analytics apps
Raymond Howell   Jun 16 '17

Product owners identified for the B2B products ⚠
Raymond Howell   Jun 17 '17

HealthTips app
Raymond Howell   Jun 18 '17

Catalog apps for patient services
James Ward   Jun 23 '17

DONE ✓
➕

Distribute SAFE training knowledge ⚠
Grace Ryan   Jun 1 '17

identify commercial cloud options ⚠
Thomas Woods   Jun 23 '17

Runbook for data and app migration to cloud
Karen Hamilton   Jun 1 '17

eCMS
Jonathan Williamson   Jun 23 '17

Draft candidate list
Richard Long   Jun 13 '17

Help Desk solutions -- feature/function survey
Joseph Douglas   Jun 14 '17

Review Last Candidate List

Carl Chagoyan

☑ Hide Subactions

☐ Highlight my items

Done items for `90` days

Due **Jun 13**   ◑ Doing   ⚠ Priority

💬   ✎   2/5 ☑   1 📎   3 💬   3 🏷   🕐

Add a comment

Post

EASIER RESULTS CASCADE

- Flow the same key results through several levels of the organization more easily

- Get consistent measurement of results and tally upward

- Reverse order so few touches

Identify and implement 20 transformative innovations across the organization

📈 **Key Results** ⊕

What is your result or metric?

Innovation opportunities identified by org leaders

Cascade to: ❓

Search

✕ Adam Johnson
✕ Benjamin Skye
✕ Carol Winter
✕ Andrea Spring
✕ George Smith
✕ jackie sophie
✕ Nicole Talento
✕ Sophie Moore

Starting value: | **Your target:**

0 | ↑ Up to ⌄ | 20

Update every:

Quarterly ⌄

Calculate and graph progress as ❓

◯ Quarterly average
◉ Total

Message to team members

I'd like you to also track this key result in your aligned objectives. To simplify that, I've cascaded it from mine and you should be able to pick up and include it when you create your objectives automatically.

☐ Exclude from OKR progress

Discard | Save Result

EASIER RESULTS CASCADE

When an item is cascaded to someone, they are alerted and simply incorporate it in their own objectives

Innovate for greater performance

For the objective(s) you have aligned to, **Jack Anderson** has cascaded **1 key results** to you. **Start with those** or choose one of the following options to add key results and success metrics for this objective.

 # Basic Count or Percentage
Measure a basic count or percentage of something

Cascade a Result
Push this key result into other people's objectives

y/n Group Result
Get and display data or answers from many people

Roll Up Results
Roll up or total other results

Measure Work
Measure work in one or more workstreams

Roll Up Objectives
Roll up and display other goals in this objective

Source from JIRA
Roll up and display data from JIRA

Source from Asana
Roll up and display data from Asana

A few more details for Monday ...

• More obvious when there are notes and files on action items in board view

• Customize columns for each board the team shares

• Close meetings before their set start time (yay!)

• Closed objectives on now appear on Team Work Details

• Manager and member see both sets of OKRs in 1on1 meeting agendas

And a little more end of month ...

• An additional Competence meter in 1on1s for radical candor

• Performance and quality improvements

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Coming in July

Shared Business Reviews
Multiple Business Reviews
All-new meetings look
Emoji

LET'S MEET MORE OFTEN

- Neater side-by-side layout is easier to project

- Add any WoBo element to the agenda including workstreams and individual KRs

- One-click "meet now"

- Faster interaction

- Copy an agenda item to takeaway and add comments and narratives to it

- Flow comments to the objective or action item

Meeting: K2 Launch Planning

May 23 at 5:00pm · Blue Marina Room · Close Meeting

Add an Action Item, Workstream, OKR or KR.

Add an Action Item, Workstream, OKR or KR.

00 : 00

Agenda

○ *Type to add a topic to the agenda*

K2 Launch   **70%**
Mary Cmoso: Marketing

● 5 differentiated features for K2

⊘ Draft Budget Outline   R ! ◐
K2 Launch: Alice Dmiri

≋ Product Launch   **65%**
Software Development: Carl Chagoyan

⤳ K2 Launch Readiness   **45%**
Software Development: Carl Chagoyan

⧉ product_launch_plan.pdf

Takeaways

○ *Type to add to the takaways*

⅄ Cut Marketing K2 launch budget by 10%

⊘ Schedule training workshops for Sales in August
K2 Launch: Alice Dmiri

Meeting: K2 Launch Planning

Close Meeting

Add an Action Item, Workstream, OKR or KR.

Agenda

○ Type to add a topic to the agenda

K2 Launch **70%**
Mary Cmoso: Marketing

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📎 product_launch_plan.pdf

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K2 Launch: Alice Dmiri *Addec by Mary*
💬 1 📎 0

[comment input] **Post**

Mary ● 02:08 pm Feb 01, 2016
How about this? Adding some new columns and corrected some data. Hopefully this is good enough to go forward. Reply

Emma ● 11:48 am Aug 01, 2016
Great work! This looks almost done. Let's put together a PowerPoint too and set up a meeting in Workboard.

00 : 00 ▶

"
The best preparation for tomorrow is doing your best today.

- H. Jackson Brown, Jr.