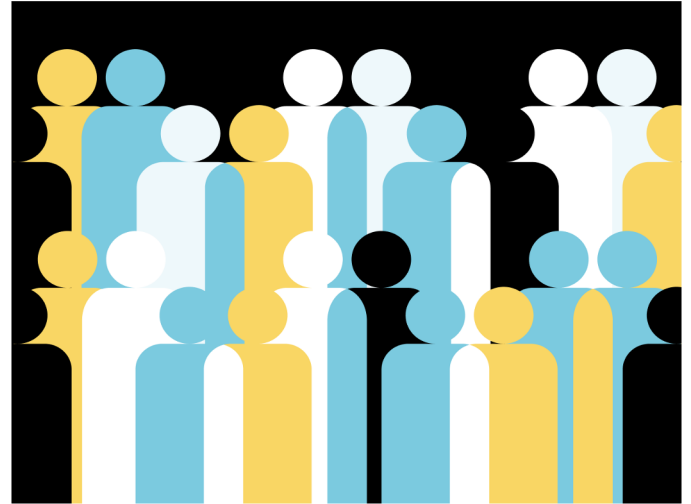


Community Call

March 2024



Agenda

- Scorecard & Biz Review updates
- Find and share Strategies more easily
- Offset updates for key results
- Reduce distractions on Canvas during brainstorming sessions
- Key Result relationships and RAID framework

Scorecards & Biz Reviews



Automatically generate team scorecards

- Select a list of one or more teams to instantly create a scorecard with all team OKRs
- Edit the team list anytime
- At the beginning of a new OKR cycle, refresh the scorecard with the current OKRs for the selected teams with one click

The screenshot displays the 'Edit Scorecard' interface in WorkBoard. At the top, there are navigation tabs for 'Objectives', 'Teamwork', and 'Meetings & Reviews'. The main header includes 'Biz Reviews / Untitled', a 'Present' button, and a search bar. Below the header, there's a 'Summary' section with a 'Generate New' button. The main content area is titled 'Select Scorecard type' and provides instructions: 'Begin by selecting a Scorecard type to suit your needs. Not sure which type to choose? Learn more about [Scorecard Types](#).' Two options are presented: 'Single-period Scorecard' (marked with a blue checkmark) and 'Multi-period Scorecard' (marked with a yellow 'New' tag). The 'Single-period Scorecard' is described as 'Best for viewing KR progress in a single quarter, or for linked annual and quarterly KRs.' The 'Multi-period Scorecard' is described as 'Ideal for tracking progress over multiple timeframes by displaying sets of results for each period.' On the right side, there's a sidebar with 'Edit Scorecard' controls, including 'Rows (10)', 'Columns (6)', and a 'Create List' button. Below this is an 'Add Key Results' section with a search bar.

Highlight period-over-period progress on Scorecards

- Add % Change over Time to any Actual column
 - Daily (%DoD) for fast changing metrics
 - Weekly (%WoW) or Monthly (%MoM) for monitoring progress to plan in the quarter
 - Quarterly (%QoQ) for yearlong initiatives
 - Yearly (%YoY) for multiyear reviews
 - Or choose a custom period
- Customize font color and size to differentiate from the Actual value

The screenshot shows the WorkBoard interface for a 'Single-period Scorecard'. The table displays key results with columns for Priority, Key Results, Last update, Actual, Target, and Current Progress. A context menu is open over the 'Actual' column, showing options to toggle various comparison metrics:

- Actual value:
- % YoY:
- % QoQ:
- % MoM:
- % WoW:
- % DoD:
- % Custom Period over period:

The table data includes:

Priority	Key Results	Last update...	Actual	Target	Current Progress
RESPONSIBILITY for Trust, Sustainability and Equity at the...	Reduce Scope 1 and 2 emissions from 35M metric tons to 32M metric tons	Mar 11, 2024	34.29m +42% WoW	32m	
FOCUS on the right market segments and deliver highly differentiated value	Consumption of CORE and PRIME platforms reaches 75% weekly active users (WAU) for all customers in the target segment	Mar 18, 2024	63%	75%	
INNOVATION drives CORE advantage for our customers	Cloud Agnosticism strategy agreed upon by all portfolio leaders	Mar 11, 2024	82% +446.67%...	100%	
FOCUS on the right market segments and deliver highly differentiated value	75% of CORE revenue is multi-year subscription commitment from customers to advance the transition to CORE-First	Feb 20, 2024	69% +40% WoW	75%	
INNOVATION drives CORE advantage for our customers	The first implementations of G-AI are deployed in 3 CORE family products and in beta customer hands this quarter	Mar 1, 2024	2 +100% WoW	2	
INNOVATION drives CORE advantage for our customers	Energy efficiency strategy in place PowerPro & CORE product families for how we will drive a 20% cost advantage for customers ...	Mar 1, 2024	25 +56.25% WoW	90	
INNOVATION drives CORE advantage for our customers	LaCa has full PowerPro feature equivalency with US and we have closed the \$41m deal backlog pending in the region	Mar 1, 2024	\$8.5m +174.2% WoW	\$41m	
RESPONSIBILITY for Trust, Sustainability and Equity at the...	We are ready to start carbon neutral certification by EQO and auditors are...	Mar 11, 2024	53% +140.91%...	100%	

Publish Biz Reviews with Full Length Scorecards

- Scorecards are published as full length, regardless of the size of the scorecard tray.
- If the published scorecard is more than 1 page long, column headers are automatically repeated on each page for greater ease of reading.

WorkBoard

Biz Reviews / Product and Technology

Owner: Barry Bosser

Summary

Product and Technology Priorities

Objective

RESPONSIBILITY for Trust, Sustainability and Equity at the center of our actions and value creation

Business Excellence & Integrity framework completed and the BE&I office is fully...

Cloud Agnosticism strategy agreed upon by all portfolio leaders

LaCa has full PowerPro feature equivalency with US and we have closed the \$41m deal...

INNOVATION drives CORE advantage for our customers

Energy efficiency strategy in place PowerPro...

Objective	Key Metric	Actual	Target	Confidence	Location	Last comment
Business Excellence & Integrity	Framework completed and the BE&I office is fully...	22%	100%	High	NA	Good win team!
Cloud Agnosticism	Strategy agreed upon by all portfolio leaders	82%	100%	High	NA	We'll have everyone on board shortly and closed out at our ELT...
LaCa	Full PowerPro feature equivalency with US and we have closed the \$41m deal...	\$8.5m	\$41m	High	NA	We are tracking lower than we did at the same time last quarter with...
Energy Efficiency	Strategy in place PowerPro...	25	90	High	NA	We are currently delayed due to the migration to cloud...

5 Year IT Strategy

Q1 FY25 Perspective

Technology 2027 Strategy (IT'27)

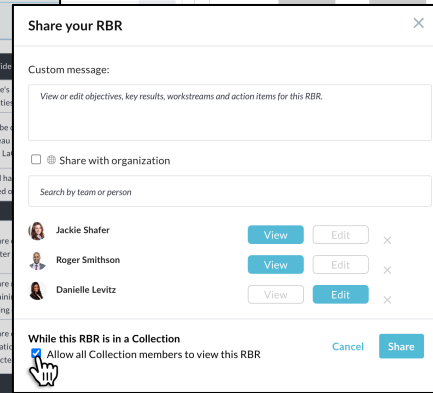
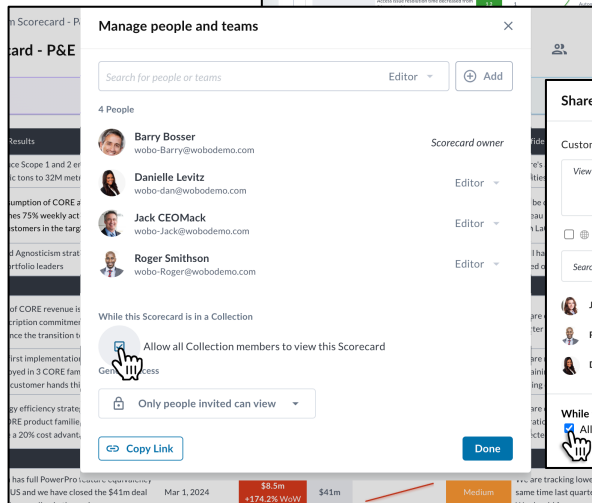
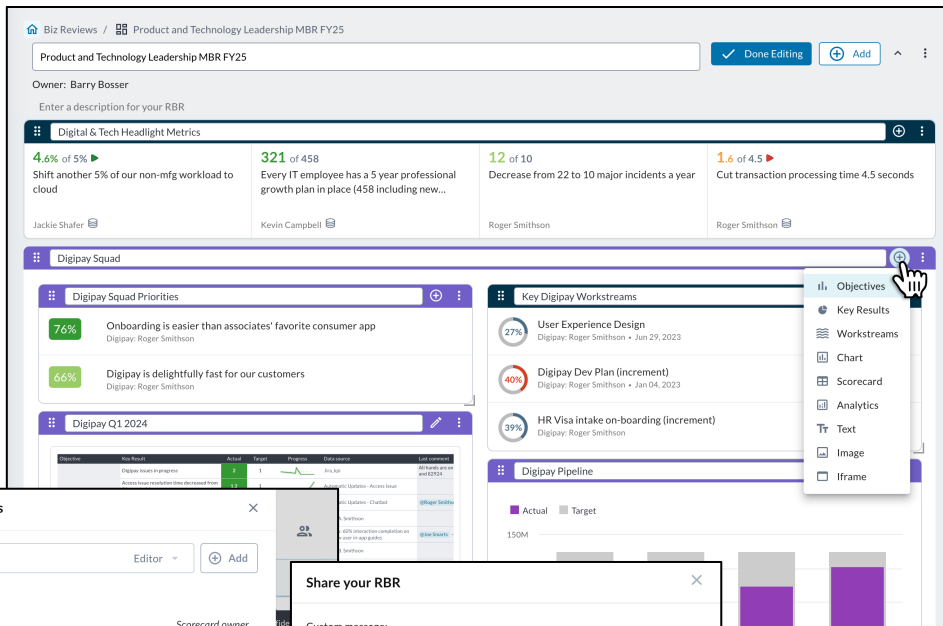
Information Technology (IT) | FY 2022 - 2027

Focus

- Condition Monitoring: Only live in 1 NA location but anticipating strong momentum in the coming 2-3 weeks that should allow us to hit our target. *Danielle, ask from you to reach out to region leaders to drive urgency.*

And more...

- New option for organizing your Biz Review – Add objective, key result, or workflow trays into Biz Review sections
- Easily manage Biz Review or Scorecard view access across multiple Collections



Strategy



Embed individual Strategy pillars in a Biz Review

- Copy the iFrame code from any strategy pillar to add to a Biz Review.

The screenshot displays the WorkBoard interface. The top section shows a Biz Review titled "Product & Technology Leadership MBR Q1 2024" with a "Summary" tab selected. Below this, a "2026 Strategy Pillar" is embedded, titled "Accelerate innovation and value" with a "52% Outcome Progress" indicator. The pillar displays four outcomes with progress bars and targets:

Outcome	Current Progress	Target	Description
75% of deployment work relies on reusable components	16%	75%	75% of deployment work relies on reusable components
55% of development is done with reusable components	36%	55%	55% of development is done with reusable components
Every application has a path to public cloud neutrality and a rational migration cost profile	68%	100%	Every application has a path to public cloud neutrality and a rational migration cost profile
We've completed the move to product squads that are value-focused with active OKRs for visible across IT and our business partners	55%	100%	We've completed the move to product squads that are value-focused with active OKRs for visible across IT and our business partners

Below the pillar, "Digital & Tech Headlight Metrics" are shown in a grid:

Metric	Value	Target	Owner
Every IT employee has a 5 year professional growth plan in place...	321 of 458	-	Kevin Campbell
Cut transaction processing time 4.5 seconds	1.6 of 4.5	-	Roger Smithson
Shift another 5% of our non-mfg workload to cloud	4.6% of 5%	-	Jackie Shafer
Decrease from 22 to 10 major incidents a year	12 of 10	-	Roger Smithson

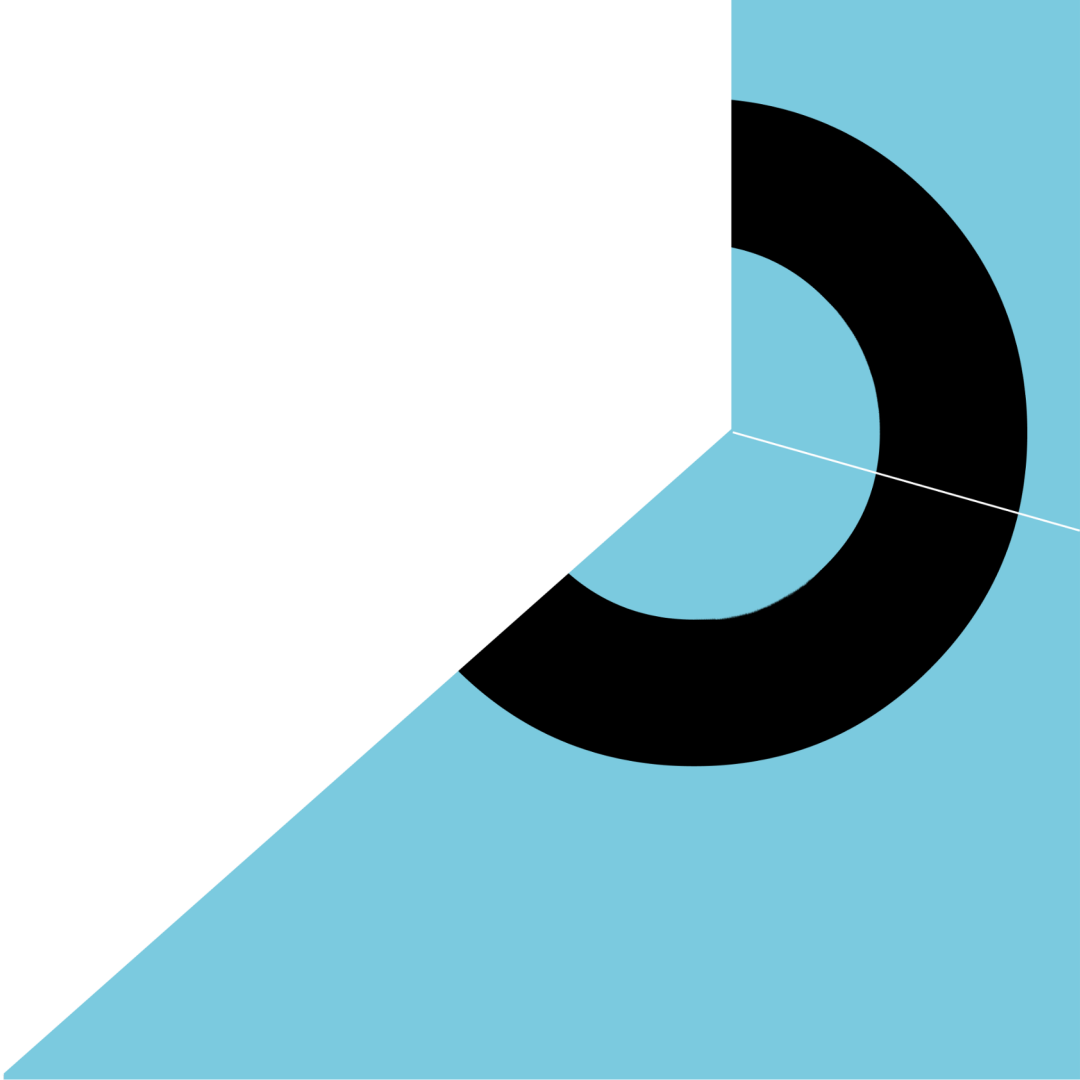
An inset window shows the "Copy embed link" button on the strategy pillar, indicating the process of copying the iFrame code.

Find Strategies more easily

- Search for strategies – or use tabs to see those shared directly with you or with the entire organization.
- Change the owner of a long-range strategy from the “Share and manage permissions” modal

The screenshot displays the WorkBoard interface. At the top, there are tabs for 'Strategies' and 'Strategy Map'. Below the 'Strategies' tab, there is a 'Set new strategy' button and a search bar labeled 'Search for strategy'. There are three filter tabs: 'All', 'Directly shared with me' (which is highlighted with a hand cursor), and 'Globally shared'. Below the filters, there is a 'Company Strategy' section with a card for 'Acme 5 year strategy'. In the foreground, a 'Share and manage permissions' modal is open. It features a search bar 'Search by person or team name' and a list of users: Jack CEOMack (You) as Owner, Danielle Levitz as Collaborator, Roger Smithson as Admin, and Barry Bosser as Collaborator. A hand cursor is pointing at the 'Admin' role for Roger Smithson. At the bottom of the modal is a 'Done' button. The background shows a strategy card for 'Technology 2026 Strategy (IT'26)' with details like dates, category, and frequency.

Key Results




Offset Updates for Integration Key Results

- Capture late updates in external business systems that occur after the end of the key result measurement period
- Define the delay period on a case-by-case basis

Edit Key Result

How will you measure your key result? *

 **Salesforce** [Change measurement type](#)

Selected Data Source

FY24 Bookings [Change data source](#)

Sum of Amount | Stage
Last Value: 21932000

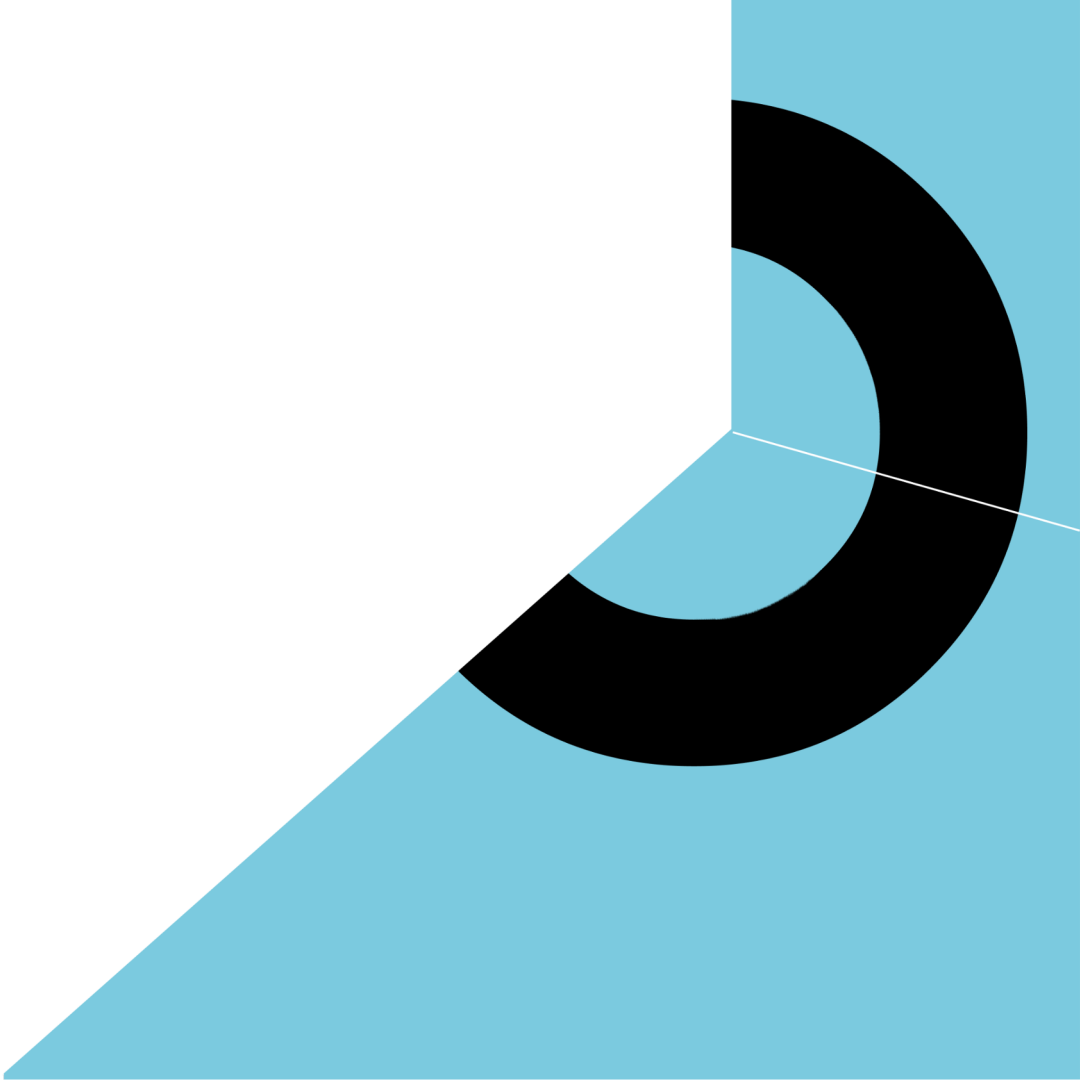
Start value * Result Value Target value * Committed Result [?](#)

Unit of Measurement Calculate overall progress as

Update cadence Offset Update [?](#) day(s)

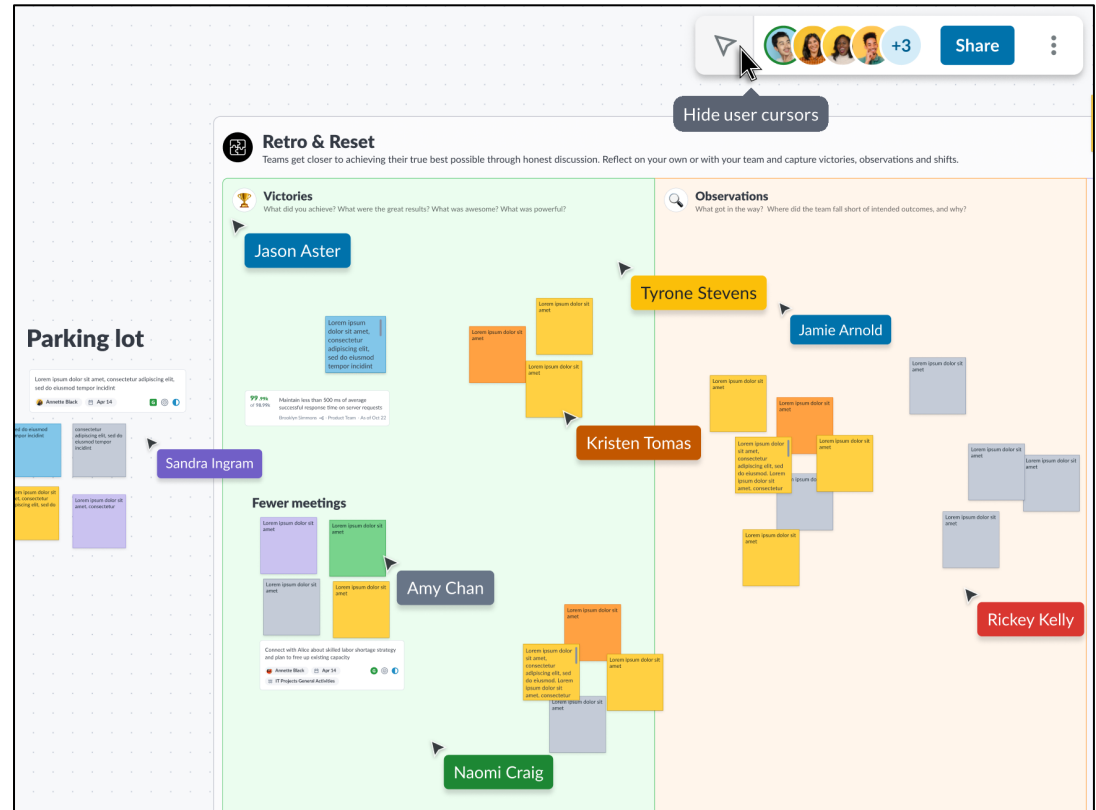
Canvas

 WorkBoard



Hide participant cursors during brainstorming sessions

- Reduce clutter and distractions during active brainstorming
- Toggle to show cursors again anytime



Key Result Relationships

Identify Key Result Risks, Assumptions, and Dependencies

- Add actions, risks and assumptions as Key Result Relationships
- Assign an owner and add to any workstream

WorkBoard Objectives Teamwork Meetings & Reviews

68% of 75% - Company ELT

Consumption of CORE and PRIME platforms reaches 75% weekly active users (WAU) for all customers in the t segment

Last updated As of Mar 18, 2024

38 days left

Feb 1, 2024 → Apr 30, 2024 Weekly

Date	WAU (%)
Feb 2	45
Feb 9	45
Feb 16	45
Feb 23	48
Mar 1	65
Mar 8	65
Mar 15	65

OWNER: Barry Bosser

DATA SOURCE: Datastream: Automatic Updates - WAW

OBJECTIVE: FOCUS on the right market segments differentiated value

55% - Company ELT: Jack CEO/Mack

*Key result weighting: 33%

Activity Attachment Custom Fields Update Confidence

Add new comment

Barry Bosser • Oct 16, 2023 11:47 am
@Manny Adminia committed to dedicating extra capacity to consumption campaign this quarter

Jack CEO/Mack • Sep 18, 2023 11:24 am
Changed result confidence flag to medium
We are tracking higher than we did at the same time last quarter with 2 weeks left, but we are stalled and need to push harder to achieve this outcome

Barry Bosser • Sep 08, 2023 08:09 pm
Narrative for the confidence rating
We are tracking higher than we did at the same time last quarter with 3 weeks left, so we are highly confident in hitting our target.

RELATIONSHIPS (13) Relationship map 5 Suggested +

Add a Risk

Has risk

We don't allocate enough resources to this goal

WAW Engagement RAID Tracker Barry Bosser

Cancel Save

RELATIONSHIPS (13) Relationship map 5 Suggested +

Depends on

- WAW Engagement RAID Tracker - Workstream
- 75% of CORE revenue is multi-subscription commitment from customers to advance the trans - Key Result
- CORE-First 69% of 75% - Key Result

Blocked by

- Increase same-week WAW 1.86 of 10 - Key Result

Supported by

- Investigate core user usage patterns - Action

Has risk

- CORE and PRIME's AI model has to be re-written - Risk
- Core team member left team - Risk
- WAW drops due to seasonality during the Spring holiday season - Risk

Assumes

- Users Like the product enough to use weekly - Assumption
- Users adopt the product at WAW cadence vs MAU - Assumption

Key Result Workstream Action Risk Assumption JIRA Link

Ask your account team about enabling this optional feature for your organization.

Track status on related Actions, Risks and Assumptions

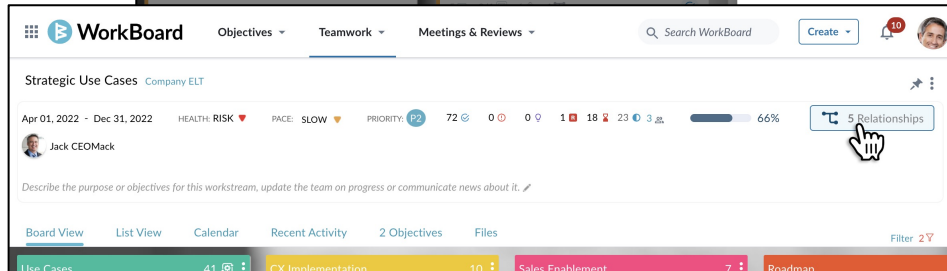
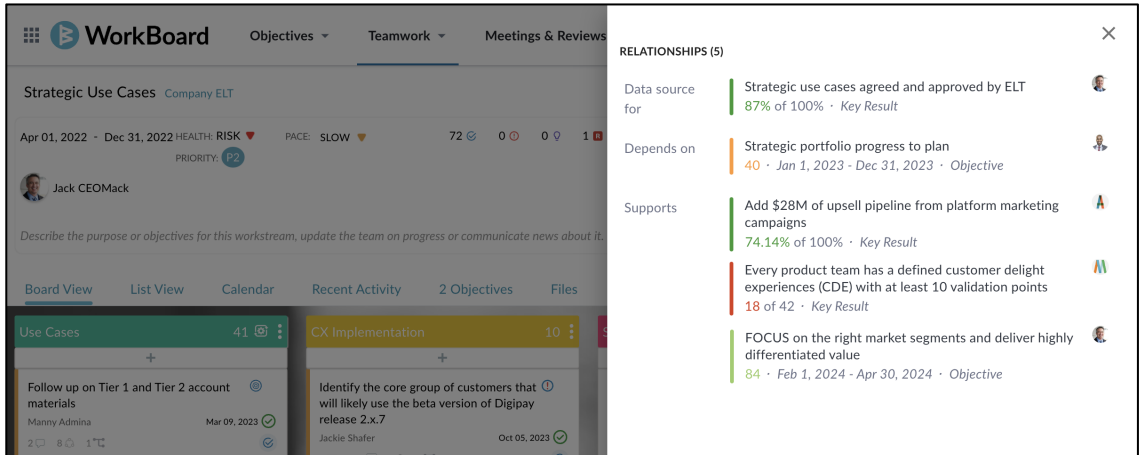
- Optionally create a workstream to track actions, risks and assumptions for a specific key result.
- Assign owners, due dates, attach files and track conversations around risks, actions and assumptions
- Actions, risks and assumptions are color coded with distinct icons for easy identification
- Use risk and assumption statuses to indicate severity, probability and confidence

Ask your account team about enabling this optional feature for your organization.

The screenshot displays the WorkBoard interface. At the top, a 'RAID Tracker' for 'WAW Engagement RAID Tracker' is shown with a progress bar at 33%. Below this, four columns are visible: Risks (4 items), Assumptions (2 items), Issues (1 item), and Dependencies (1 item). Each item includes a title, owner, and due date. A detailed view of a Risk titled 'CORE and PRIME's AI model has to be re-written' is shown, featuring a 'Status' dropdown menu with options: Next, Open, Closed, and Paused. Another detailed view of an Assumption titled 'Users adopt the product at WAW cadence vs MAU' is shown, with a 'Status' dropdown menu with options: Open, High, Low, and Amber. The interface also includes a search bar, a 'Create' button, and a 'Timeline' view.

View OKR relationships on Workstreams

- Show key result sourcing data from the workstream, as well as dependencies and OKRs supported by the workstream
- Click directly into the details of any related item



Available now

Share Key Result Relationships in Scorecards

- Show key result risks, dependencies, blockers, and more
- Click directly into the details of any related item
- Include all related items, or select specific relationship types to display

The screenshot displays the WorkBoard interface. The main content area shows a 'Business Health Scorecard' table with columns for Objective, Key Results, Actual, Target, and Relationships. The table contains three rows of data. The first row is for 'FOCUS on the right market segments' with a key result of '85% of new business (ARR) comes from within our target market segments', an actual value of 76.5%, and a target of 85%. The Relationships column for this row lists various dependencies and risks. The second row is for 'We are a lean mean revenue driving machine always winning' with a key result of '\$135M in services revenue', an actual value of \$62.7M, and a target of \$135M. The Relationships column lists actions and risks. The third row is for 'New Logo Revenue from Tier 1 customers' with a key result of '\$92M in Tier 1 and Tier 2 upsell sales', an actual value of \$83M, and a target of \$92M. The Relationships column lists actions and risks.

The right sidebar is titled 'Edit OKRs' and contains a 'Relationships' filter dropdown menu. The dropdown menu is open, showing a list of relationship types with checkboxes. The 'Supports' relationship type is currently selected, and a mouse cursor is hovering over it. Other relationship types include 'All', 'Depends on', 'Dependency for', 'Blocks', 'Blocked by', 'Supported by', 'Lags', 'Relates to', 'Risk from', 'Risk to', 'Assumes', and 'Assumed by'.

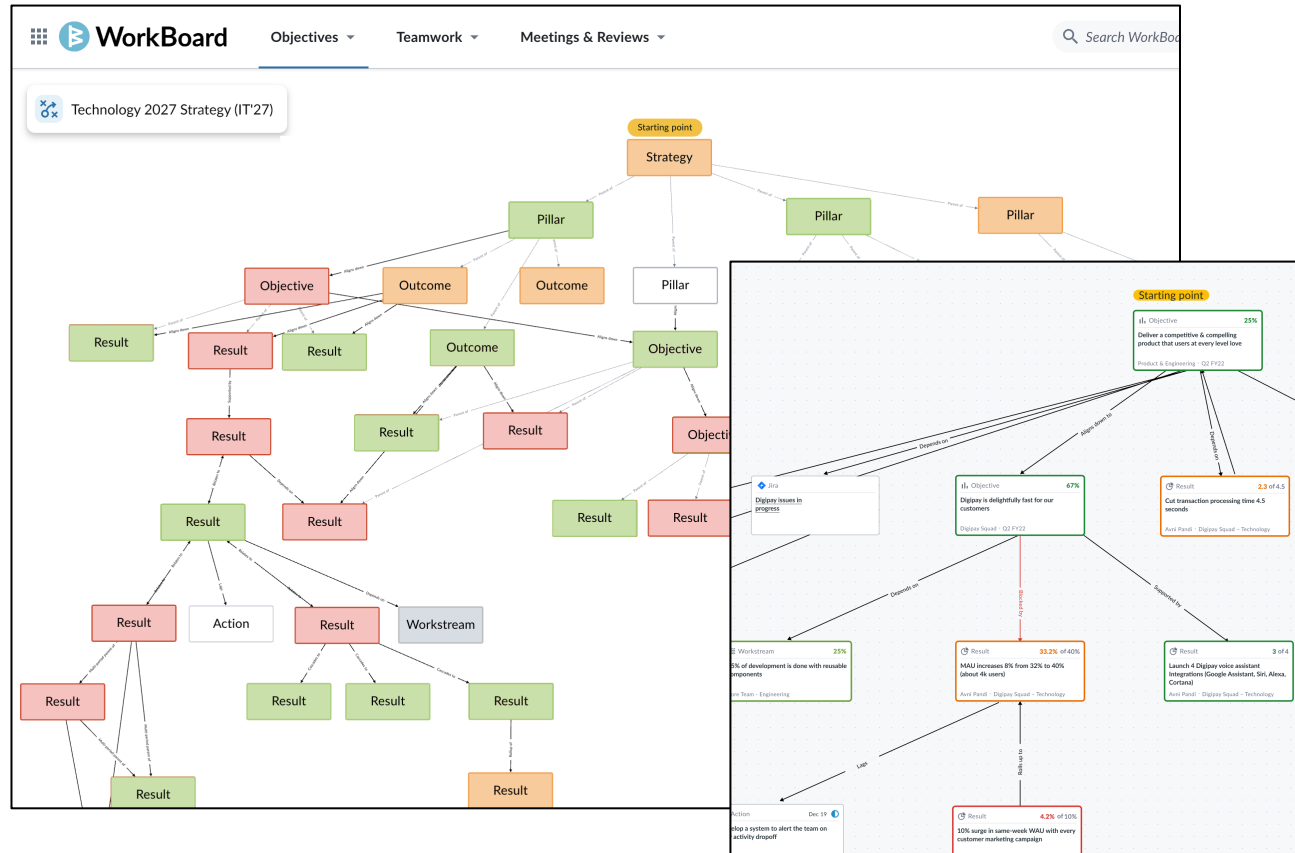
Available soon

Coming Soon



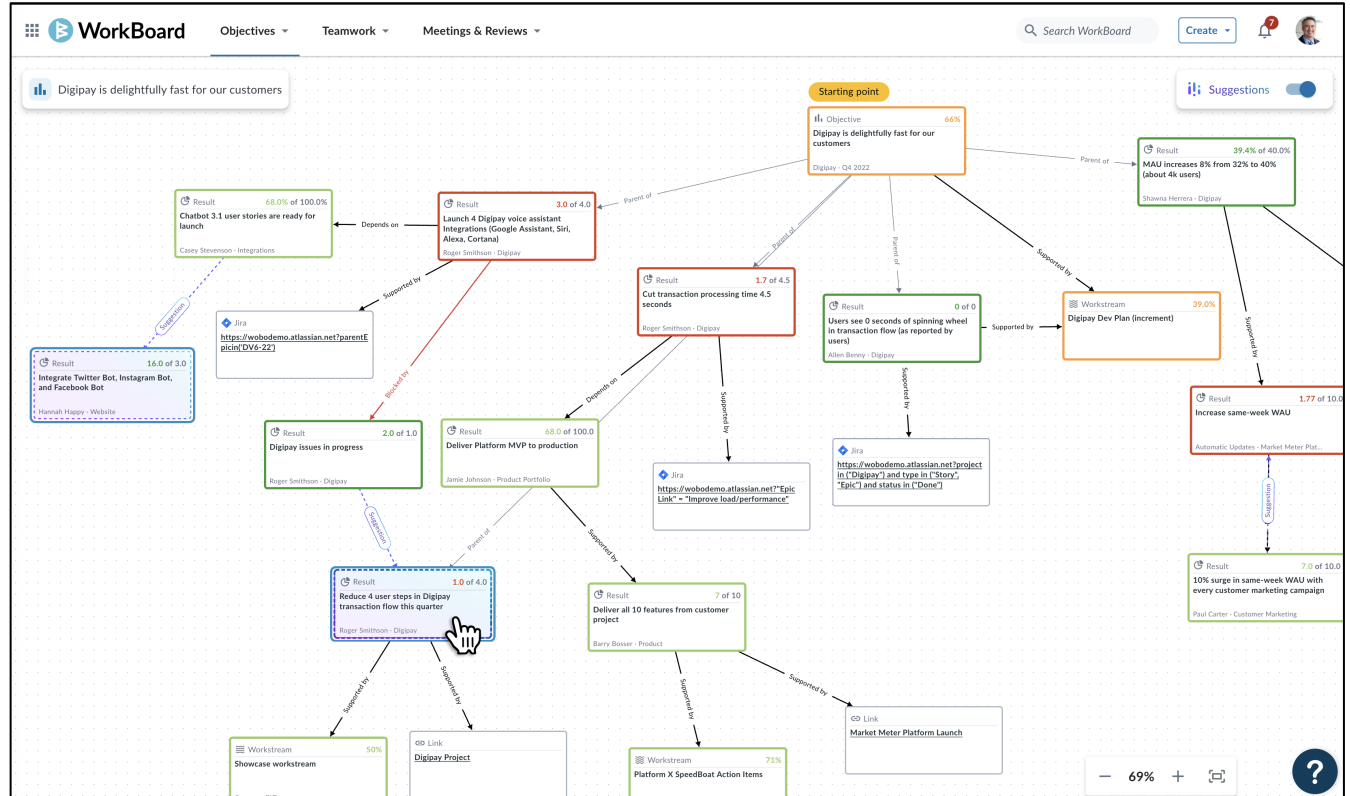
Easily visualize dependencies and risks to the strategy

- See a full relationship map identifying dependencies, risks and connections across all layers of the organization
- Instantly spot potential risks to the strategy or its execution
- Click directly into the details of any item you have access to view



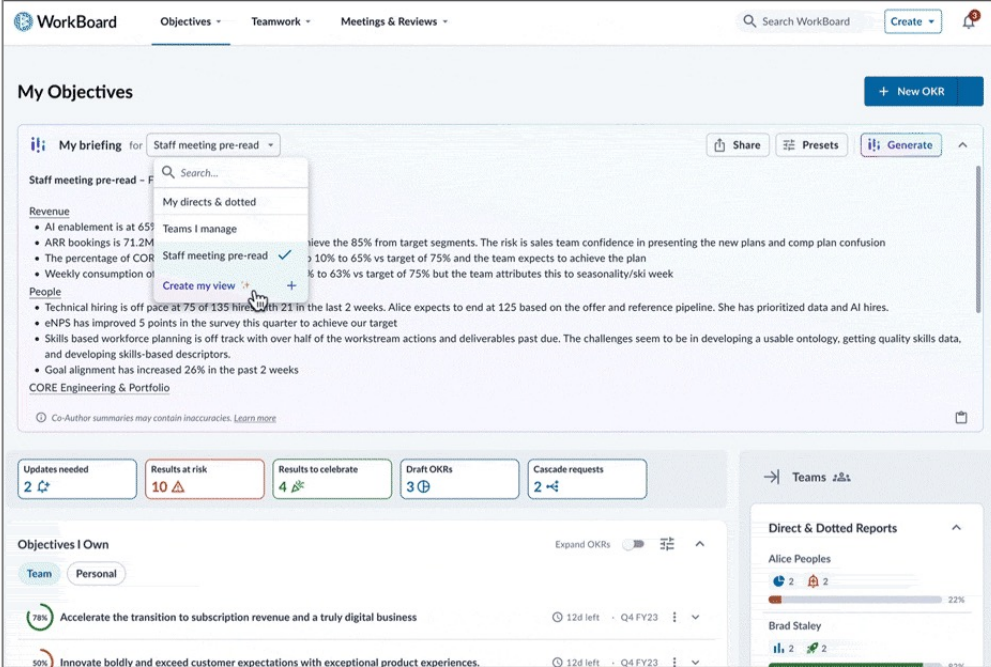
Align 10x faster with smart suggestions

- Leverage WorkBoard's embedded AI to uncover hidden dependencies and risks



Get to smart decisions 5x faster with automated briefings!

- No more waiting for the meeting or chasing progress updates – get the briefing you need when and where you need it.
- Choose the dimensions you want to include – any combination of Strategies, Teams, OKRs, Workstreams, Scorecards, Biz Reviews and more!
- Schedule when and where you want your briefing delivered – MS Teams, Slack, email, or right in WorkBoard.

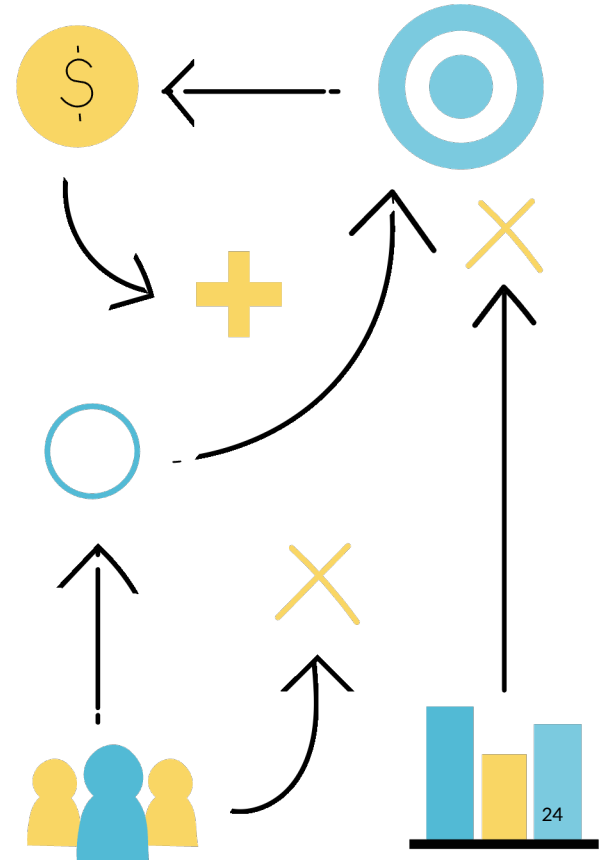


The screenshot displays the WorkBoard interface. At the top, there are navigation tabs for 'Objectives', 'Teamwork', and 'Meetings & Reviews'. A search bar and a 'Create' button are visible in the top right. The main section is titled 'My Objectives' and includes a '+ New OKR' button. Below this, there is a search bar and a dropdown menu for 'My briefing for Staff meeting pre-read'. The dropdown menu is open, showing a search bar and several options: 'My directs & dotted', 'Teams I manage', 'Staff meeting pre-read' (which is selected with a checkmark), and 'Create my view'. Below the dropdown, there is a list of 'Revenue' items and a 'People' section. The 'Revenue' section includes items like 'AI enablement is at 65%', 'ARR bookings is 71.2M', 'The percentage of COR', and 'Weekly consumption of'. The 'People' section includes items like 'Technical hiring is off pace at 75% of 135 hires with 21 in the last 2 weeks', 'eNPS has improved 5 points in the survey this quarter to achieve our target', 'Skills based workforce planning is off track with over half of the workstream actions and deliverables past due', and 'Goal alignment has increased 26% in the past 2 weeks'. Below the main content, there are several status boxes: 'Updates needed 2', 'Results at risk 10', 'Results to celebrate 4', 'Draft OKRs 3', and 'Cascade requests 2'. At the bottom, there is a section for 'Objectives I Own' with tabs for 'Team' and 'Personal'. The 'Team' tab is selected, showing an objective 'Accelerate the transition to subscription revenue and a truly digital business' with a progress indicator of 78% and a due date of '12d left - Q4 FY23'. Another objective is partially visible: 'Innovate boldly and exceed customer expectations with exceptional product experiences' with a progress indicator of 50% and a due date of '12d left - Q4 FY23'. On the right side, there is a 'Teams' section with a 'Direct & Dotted Reports' dropdown menu. Below this, there are reports for 'Alice Peoples' (22%) and 'Brad Staley' (2).

Interested in early access?

Respond in the chat, or reach out to anyone at WorkBoard if you'd like to be part of the beta programs for:

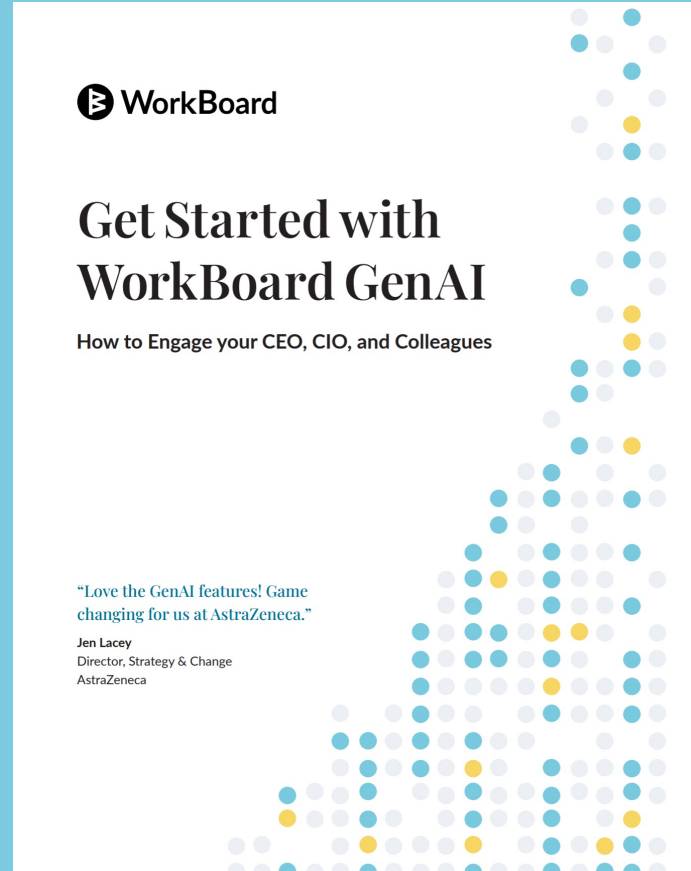
1. Strategy Execution Map
2. Executive Briefs




Executive Briefings are an Intelligent Enterprise feature

Learn more about Intelligent Enterprise!

- ✓ Get the engagement guide for tips on starting the discussion with stakeholders in your organization.
- ✓ Discuss next steps with your account team.

The image shows the cover of a guide titled "Get Started with WorkBoard GenAI". The cover features the WorkBoard logo at the top left. The title "Get Started with WorkBoard GenAI" is prominently displayed in a large, bold, black serif font. Below the title, the subtitle "How to Engage your CEO, CIO, and Colleagues" is written in a smaller, black sans-serif font. A quote from Jen Lacey, Director of Strategy & Change at AstraZeneca, is featured in a blue serif font: "Love the GenAI features! Game changing for us at AstraZeneca." Below the quote, her name and title are listed in a small, black sans-serif font. The right side of the cover is decorated with a pattern of blue, yellow, and grey dots of varying sizes, arranged in a way that suggests a staircase or a grid. The background of the cover is white, and the entire graphic is set against a light blue background.

 WorkBoard

Get Started with WorkBoard GenAI

How to Engage your CEO, CIO, and Colleagues

"Love the GenAI features! Game changing for us at AstraZeneca."

Jen Lacey
Director, Strategy & Change
AstraZeneca

Join the Conversation



WorkBoard
Accelerate

Strategy Execution

COASTAL RETREAT

Sep 30-Oct 2, 2024 | La Jolla - San Diego, CA

Register Now!

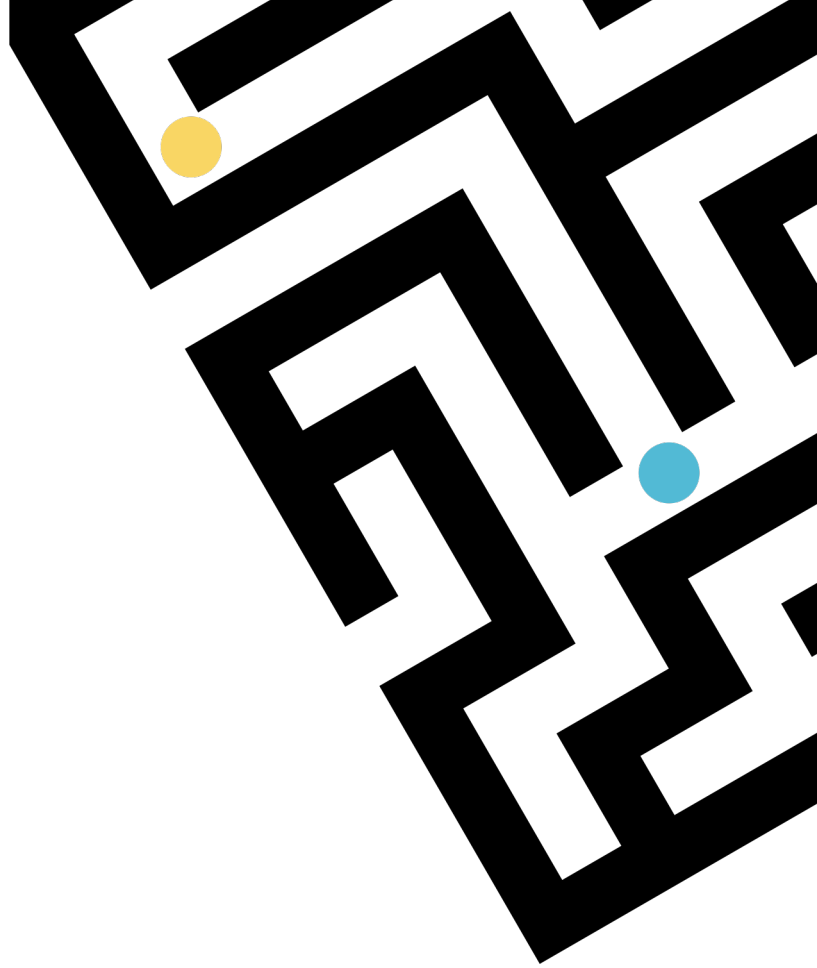
workboard.com/accelerate2024

Early bird pricing available through June 30



Interested in sharing your journey at Accelerate?

Send me an email at sameera@workboard.com



Upcoming Courses



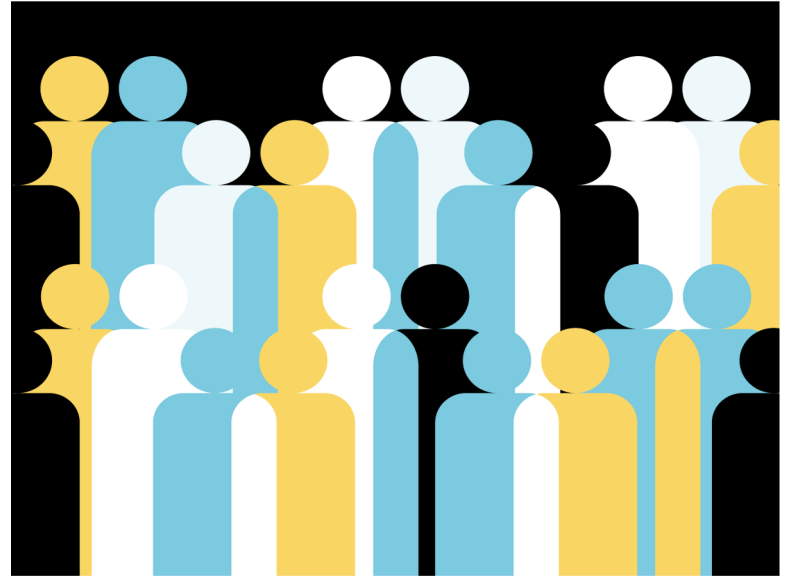
Class	Description	Dates	How to Sign Up
Level 2 OKR Coach Certification	For experienced OKR Coaches: Take the next step on your journey as a key influencer helping to mature your organization's OKR program.	<ul style="list-style-type: none">● Apr 15/17 at 8am PT	learn.workboard.com
Outcome Method Mindset	Learn about OKRs and the Outcome Mindset in 1 hour	<ul style="list-style-type: none">● Apr 3 at 1pm PT● Apr 10 at 8am PT	learn.workboard.com
OKR Fast Pass Course	Build your OKR expertise in 3 hours	<ul style="list-style-type: none">● Apr 3 at 8am PT	learn.workboard.com
OKR Coach Certification	Become a certified OKR coach	<ul style="list-style-type: none">● Apr 2/4 at 8am PT● Apr 9/11 at 1pm PT● Apr 16/18 at 1pm PT● Apr 16/18 at 1pm CET● Apr 23/25 at 8am PT	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">● Apr 4-5 at 2pm IST● Apr 16-17 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">● Spring cohort will begin soon	workboard.com/rme-certification

Community Call: Save the Date(s)!

Our Community Calls are on the last Wednesday of each month.

Our next Community Call is April 24.

Make sure to [sign up](#) so you don't miss it!



**What are You
Curious About?**



Thank you

See you next time!

