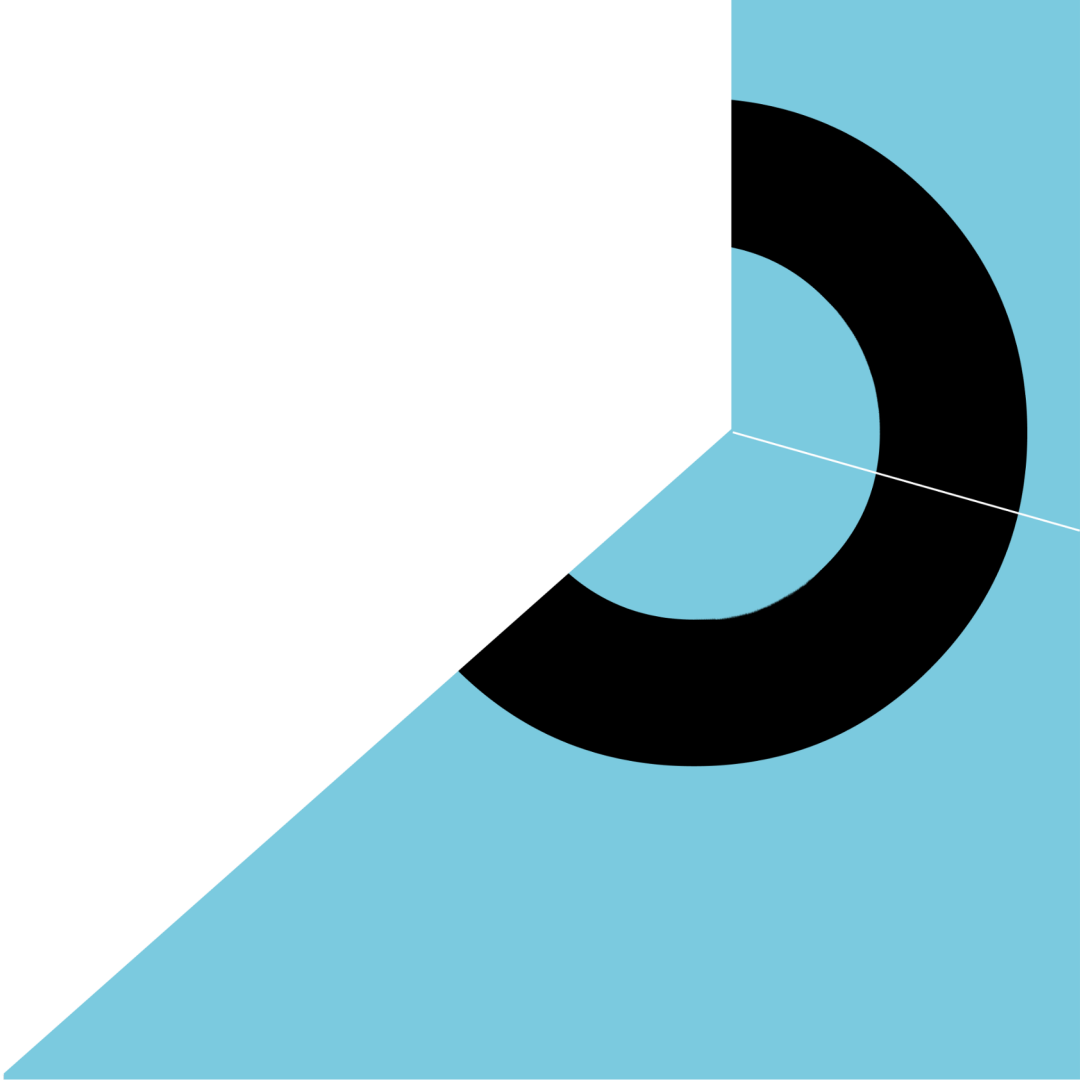


Agenda

- Scorecard Pro Tips
- Visualize relationships between strategy and execution
- Identify opportunities for coaching to improve outcomes
- Join us at Accelerate 2024!

Scorecards - Pro Tips



Showcase period-over-period progress as a Scorecard column

- **Duplicate** your Actual column to quickly create a % Change over Time column
- Choose to **display % change as** Week over Week, Month over Month, or other time period. Hide the "Actual" value for a cleaner view.
- Adjust the **display color** to differentiate from the Actual value

The screenshot shows the WorkBoard interface for an "Innovation Scorecard Q2". The table below represents the data shown in the scorecard:

Objective	Key Result	Actual	WoW Progress	Target	Trend chart	Confidence flag	Confidence narrative	Next steps
INNOVATION drives CORE advantage for our customers	The first implementations of G-AI are deployed in 3 CORE family products and in...	2	+100% WoW	2		High	We are ready to launch G-AI to our remaining CORE products by EO...	
	Cloud Agnosticism strategy agreed upon by all portfolio leaders	82%	+446.67% WoW	100%		Medium	We'll have everyone on board shortly and closed out at our ELT...	
	Cut transaction processing time 4.5 seconds	1.7	+6.25% WoW	4.5		Low	We haven't found a way to get there with quick wins - may take ...	We are rest quarter - n
	Launch 4 Digipay voice assistant Integrations (Google Assistant, Siri, Alexa,...	3			4		High	We've launched 2 Integrations and we expect the Cortana integratio...

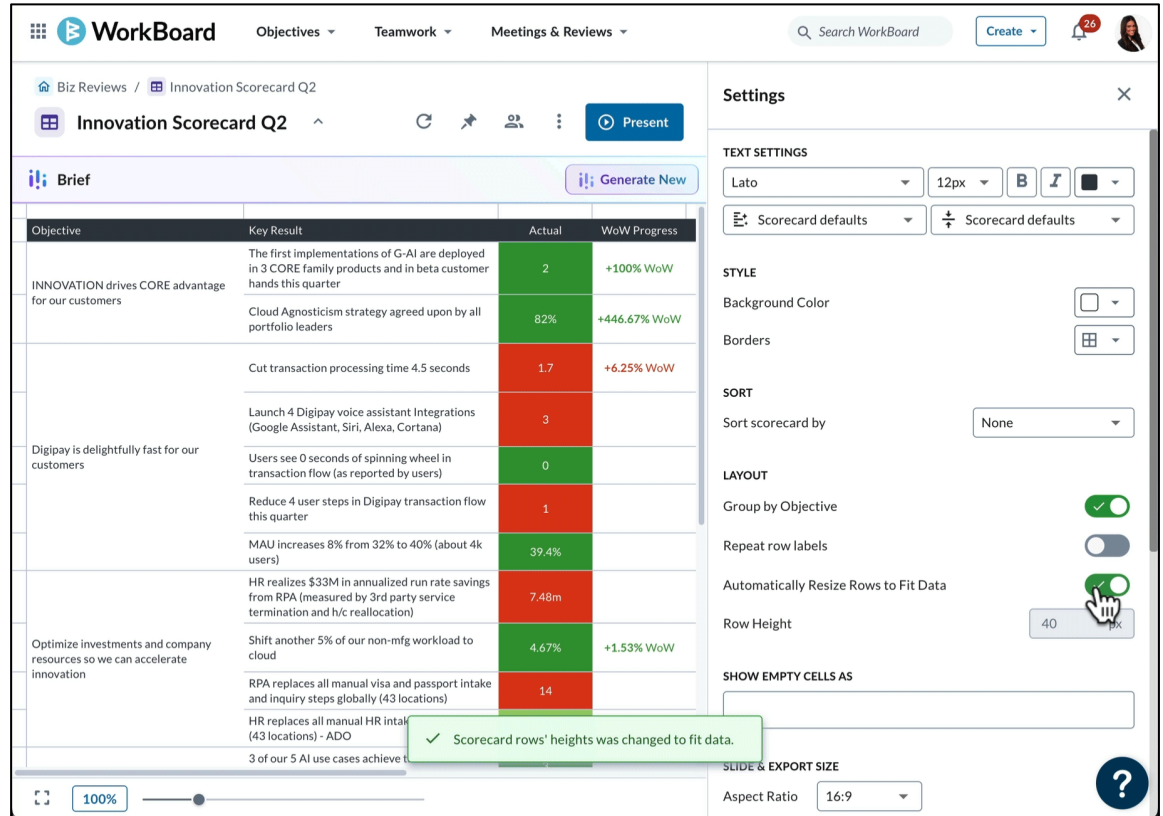
This screenshot shows the configuration menu for the scorecard columns. The 'Actual' column is selected, and the 'Duplicate' option is highlighted. Other options include 'Delete', 'Display color', and 'Show date in header'.

This screenshot shows the configuration menu for the newly created 'WoW Progress' column. The 'Duplicate' option is highlighted. Other options include 'Actual value', '% YoY', '% QoQ', '% MoM', '% WoW', '% DoD', '% Custom', and 'Separator'.

This screenshot shows the configuration menu for the 'WoW Progress' column. The 'Display color' option is highlighted, and the 'RAG cell fill' is set to green. Other options include 'Default text color', 'RAG colored text', and 'Duplicate'.

Make your Scorecard more readable with one click

- If you have long result names or narratives that are cut off by ellipses, click the **Settings** icon, then click the **Automatically Resize Rows to Fit Data** toggle to allow the full text to show.



The screenshot displays the WorkBoard interface for an 'Innovation Scorecard Q2'. The main content is a table with the following data:

Objective	Key Result	Actual	WoW Progress
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	2	+100% WoW
	Cloud Agnosticism strategy agreed upon by all portfolio leaders	82%	+446.67% WoW
Digipay is delightfully fast for our customers	Cut transaction processing time 4.5 seconds	1.7	+6.25% WoW
	Launch 4 Digipay voice assistant Integrations (Google Assistant, Siri, Alexa, Cortana)	3	
	Users see 0 seconds of spinning wheel in transaction flow (as reported by users)	0	
	Reduce 4 user steps in Digipay transaction flow this quarter	1	
Optimize investments and company resources so we can accelerate innovation	MAU increases 8% from 32% to 40% (about 4k users)	39.4%	
	HR realizes \$33M in annualized run rate savings from RPA (measured by 3rd party service termination and h/c reallocation)	7.48m	
	Shift another 5% of our non-mfg workload to cloud	4.67%	+1.53% WoW
	RPA replaces all manual visa and passport intake and inquiry steps globally (43 locations)	14	

The 'Settings' panel on the right is open, showing the 'Automatically Resize Rows to Fit Data' toggle is turned on. A green tooltip at the bottom of the table indicates: 'Scorecard rows' heights was changed to fit data.'

More quick tips!

- **Change the background color** on individual cells or an entire row or column at once
- **Adjust text colors** to highlight important content
- Select a column to **sort your scorecard**
- **Change the width or aspect ratio** to optimize the size of your Scorecard for different presentation needs – **switch to Slide view** for a preview.

Objective	Key Result	Progress	Target	Trend chart
INNOVATION drives CORE advantage for our customers	The first implementation of AI are deployed in 3 Core family products and in customer hands this quarter	100%	2	
	Cloud Agnosticism strategy agreed upon by all portfolio leaders	82%	+446.67% WoW	100%
Digipay is delightfully fast for our customers	Cut transaction processing time 4.5 seconds	1.7	+6.25%	
	Launch 4 Digipay voice assistant Integrations (Google Assistant, Siri, Alexa, Cortana)	3		
	Users see 0 seconds of spinning wheel in transaction flow (as reported by users)	0		
	Reduce 4 user steps in Digipay transaction flow this quarter	1		
	MAU increases 8% from 32% to 40% (about 4k users)	39.4%		
	HR realizes \$33M in annualized			

Settings

SLIDE & EXPORT SIZE

Aspect Ratio: 16:9

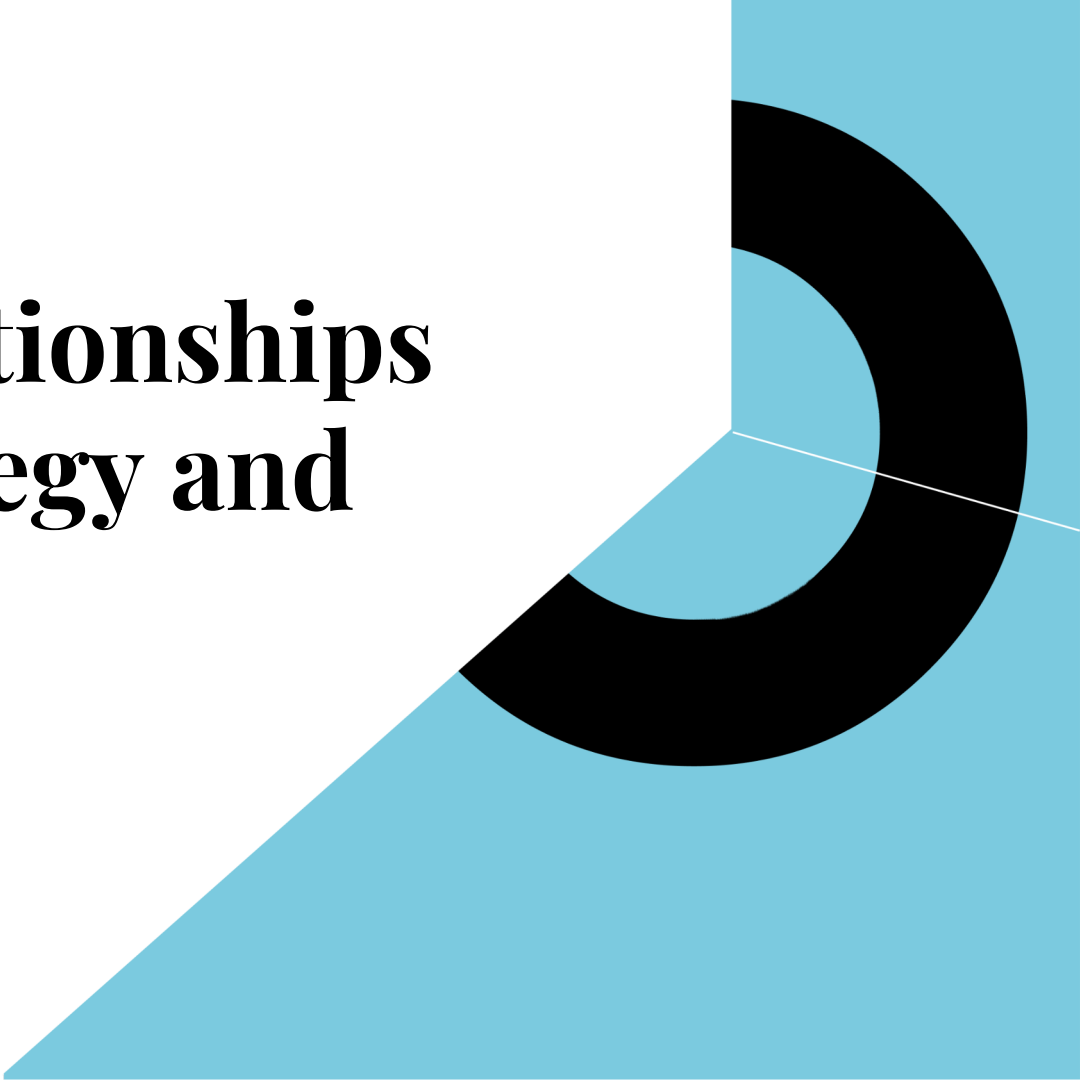
Width: 1650 px

DATA FORMAT

Change to slide view

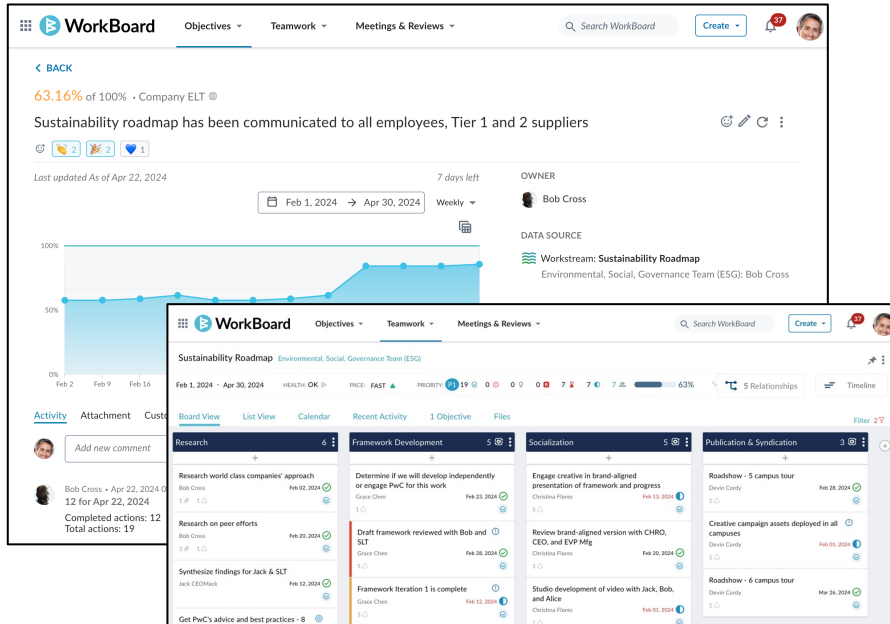
100%

Visualize Relationships Between Strategy and Execution

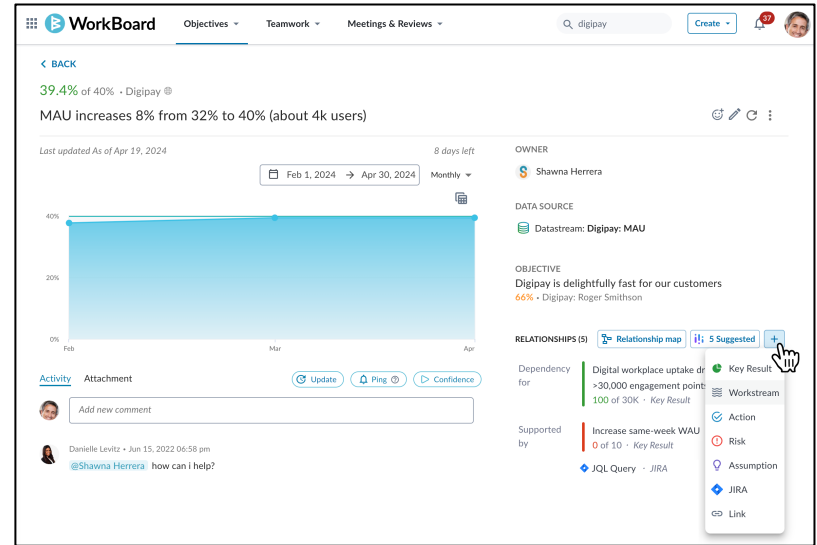


Today you can link progress on the strategy to execution

Source key result updates directly from workstream progress

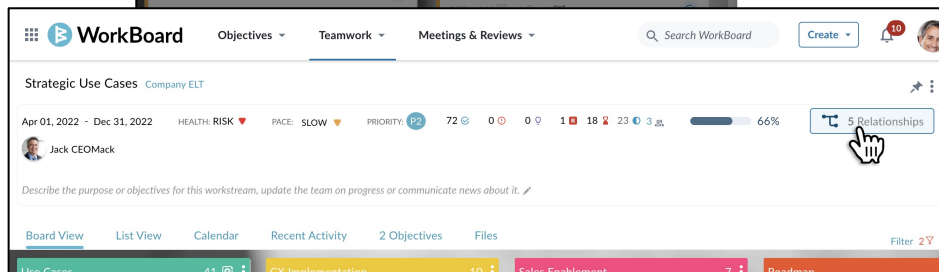
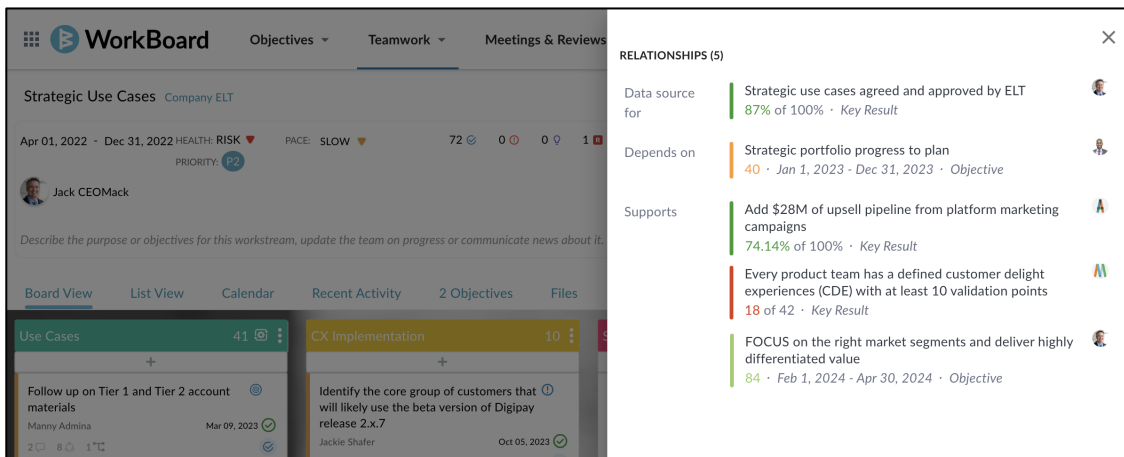


Add workstreams and actions as dependencies or blockers on key results



See how progress on an individual workstream is tied to OKR achievement

- 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

Connect OKRs to work tracked in Jira, ADO and other external systems

Source key result updates directly from external systems

The screenshot shows the 'Connect Key Result to Jira Issues' dialog box in the WorkBoard application. The dialog is titled 'Connect Key Result to Jira Issues' and has a close button (X) in the top right corner. It contains several sections for configuring the connection:

- KEY RESULT** (measured as a percentage): 85% of 100%. The key result is 'Deploy all of Buzz App code without assistance'.
- How should this key result be linked with Jira?**
 - Automate key result data from Jira issues
 - Link to related Jira issues (without pulling data)
- How should progress be specified?**
 - Query Builder
 - Advanced JQL
- Select Jira project(s) for all issues ***
 - K2 x Security x K2 Analytics x
 - WorkBoard x
- Select issue type(s) for selected project(s)**
 - [Empty dropdown]
- Select issue status(es) for completed issues ***
 - Resolved x
- Total Issues:** 0
- Automated key result update:** Project = 'KA' AND stat... Enter Update

Buttons for 'Cancel' and 'Save' are at the bottom.

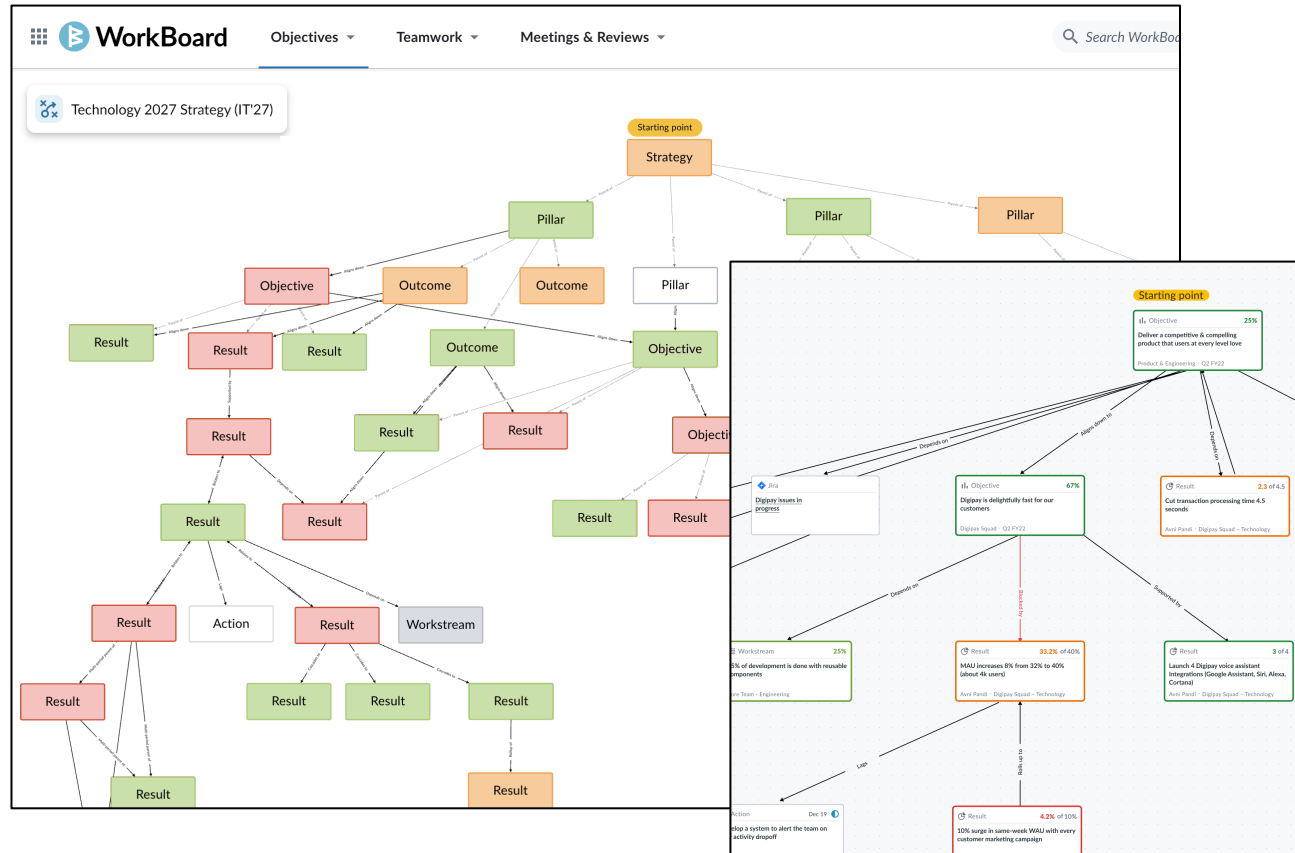
See how related work is advancing team objectives

The screenshot shows a project card in the WorkBoard application. The card is titled 'K2 Analytics / KA-3' and has a subtitle 'I should be able to invite colleagues and form groups of people working on a project'. The card is 1 of 4 in a list. It has several tabs: Edit, Comment, Assign, More, Backlog, Selected for Development, Workflow, and Admin. The card is currently in the 'Backlog' tab. The card displays the following information:

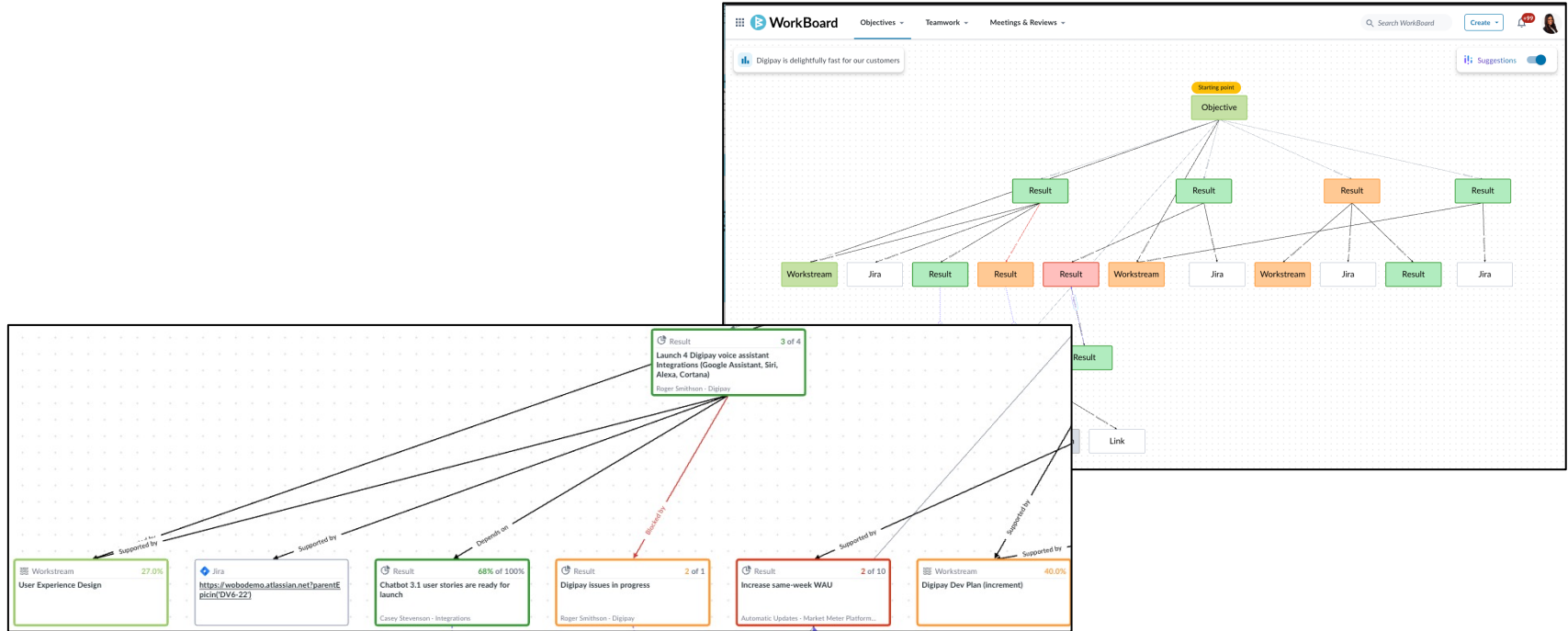
- Details:**
 - Type: Story
 - Priority: Medium
 - Labels: None
 - Story Points: 12
 - Status: BACKLOG (View Workflow)
 - Resolution: Unresolved
- People:**
 - Assignee: Unassigned (Assign to me)
 - Reporter: WorkBoard
 - Votes: 0
 - Watchers: Stop watching this issue
- Description:**
 - Click to add description
- WorkBoard:**
 - Feeding data to key results:
 - Deliver 100% of planned work for Migration to Cloud
 - 28.57% of 100% - Source: Irina Marin
 - Linked as related work to key results:
 - 80% participation of engineering and QA for each new feature
 - 100 of 80 - Source: Ryam B. Rogers
 - Deliver Awesome Feature for Android Beta 2 & 3 to begin measuring usage next quarter
 - 0 of 100 - Source: Android Beta 2 & 3
- Dates:**
 - Created: 28/May/21 4:32 PM
 - Updated: 22/Jul/21 8:34 PM
- Agile:**
 - View on Board
- Hipchat discussions:**
 - Do you want to discuss this issue? Connect to Hipchat.
 - Buttons: Connect, Dismiss

Now you can get the full picture of aligned work

- 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



See how work in external systems like Jira and ADO aligns to results up and down the org



And soon, you can share those relationships on 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 view shows a 'Business Health Scorecard' table with columns for Objective, Key Results, Actual, Target, and Relationships. The 'Relationships' column lists various dependencies and risks, such as 'SUPPORTS', 'BLOCKS', 'DEPENDS ON', 'SUPPORTED BY', 'BLOCKED BY', 'AT RISK FROM', 'BLOCKED BY', 'AT RISK FROM', 'SUPPORTED BY', 'RELATED TO', 'Action: Services comp plan rollout', 'Risk: EMEA Territory Expansion', 'Link: dropbox.com/1230lueolruoeiurw', and 'Workstream: https://www.myworkboard.com/wb/activity/workstreams?id=3309'.

The 'Edit OKRs' sidebar on the right shows a filter menu for relationships. The menu is currently set to 'All' and includes the following options:

- All
- Depends on
- Dependency for
- Blocks
- Blocked by
- Supported by
- Supports
- Leads
- Lags
- Relates to
- Risk from
- Risk to
- Assumes
- Assumed by

Available soon

**Manager Lens &
Employee Impact**



Quickly spot opportunities for coaching

Managers have a single view of progress, workload and issues across their directs to spot issues easily and tee up the right conversations faster

Note: existing direct and dotted page will be deprecated.

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 also visible. The main content area is titled 'My Direct & Dotted' and has three sub-tabs: 'Members', 'OKRs', and 'Key Results'. Below these tabs is a table with the following columns: 'Team Member', 'Title', 'Responsibilities', 'Status', 'Focus', and 'Next 1on1'. The table lists seven team members with their respective metrics. A pop-up window for 'Rakesh Wardekar' is shown in the bottom right corner, displaying his next 1on1 meeting details.

Team Member	Title	Responsibilities	Status	Focus	Next 1on1
Joe Smart (you)	Chief Revenue Officer	45, 4, 2	38%	2/10	
Carlo Marco	Chief Technology Officer	5, 13, 2	26%	2/10	Wed, Nov 8 · 3 ☰
Sameera Spellman	Customer Success	8, 9, 3, 2	42%	10/10	Wed, Nov 8 · 1 ☰
Kelly Clark	Global Sales	9, 5, 1	18%	4/10	Thu, Nov 9 · 1 ☰
Roger Murphy	Sales Enablement	6, 12, 3	28%	8/10	Thu, Nov 9 · 0 ☰
Rakesh Wardekar	Sales Partnerships	8, 9, 2, 2	34%	5/10	Fri, Nov 10 · 2 ☰
Jill Chill	Sales Strategy & Operations	2, 10, 2	48%		

Rakesh Wardekar
Next: Nov 10 · 10:00 - 10:30am · 2 ☰
Last: Oct 13
[View last 1on1](#) [See upcoming agenda](#)

Understand a team member's impact

- Leverage WorkBoard's AI to summarize employee progress and challenges since the last 1on1, based on their OKRs, actions and comments
- Impact summary prepares managers to provide coaching that improves outcomes
- Quick view of your last PACE conversation to easily spot gaps in perception

The screenshot displays the WorkBoard interface for a manager's lens on Sameera Spellman, a Customer Success team member. The interface is divided into several sections:

- Profile Card:** Shows Sameera Spellman's profile, her role as Customer Success, and her reporting line to Joe Smart. A quote from her states: "Get to spend my days helping the world's innovative and impactful companies achieve their strategies!"
- Team Engagement:** A bubble chart showing engagement levels across different teams: Revenue Team, Revenue Leaders, Customer Support, Internal Account Squad, and Customer Success.
- Momentum:** A feed of recent conversations, including a "Goal Achiever" message from Joe Smart and an "Excellent!" message from Emma S.
- Objectives:** A section showing progress on three key objectives: Maximize Customer Value (55%), Master value delivery and consumption (76%), and Communication, Community, and Connection (32%).
- Total Impact:** A summary of key metrics: 1434 Key results, 55% Results achieved, 4734 Actions completed, 373 Badges received, and 14,030 Comments and badges.
- Manager's Lens:** A detailed view of the last 1on1 conversation, including an AI-generated impact summary, key objectives, key wins, challenges, and next steps. The PACE analysis shows performance, alignment, competence, and engagement levels on a scale of 1 to 5.

Coming Soon



Get to smart decisions 5x faster with automated briefings!

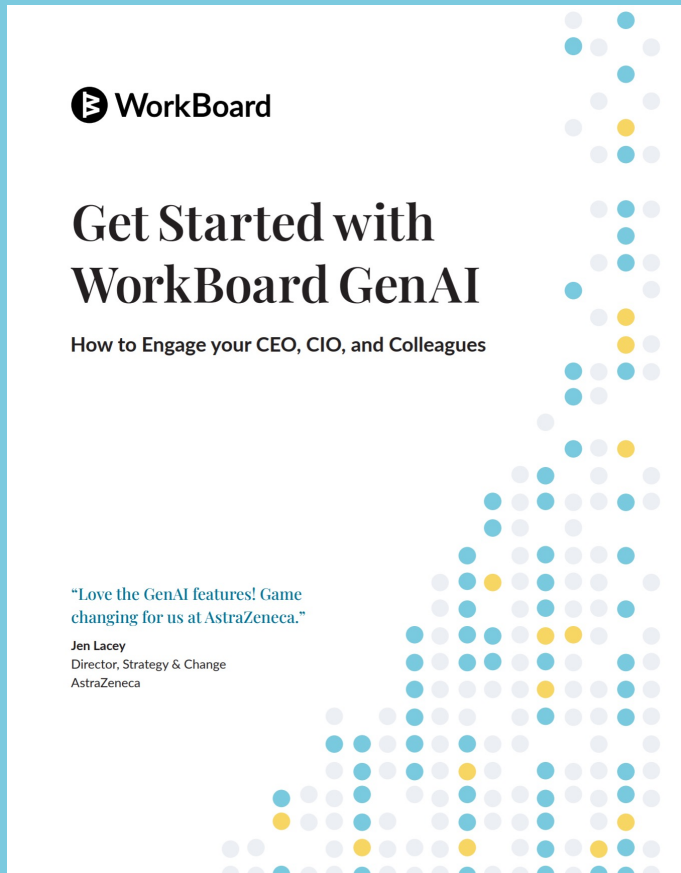
- No more waiting for the meeting or chasing progress updates – get the briefing you need when and where you need it.
- Choose the dimensions you want to include – any combination of Strategies, Teams, OKRs, Workstreams, Scorecards, Biz Reviews and more!
- Schedule when and where you want your briefing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


The image displays two overlapping screenshots of the WorkBoard application. The background screenshot shows the 'My Objectives' page for a 'Digital Transformation Monday Briefing'. It features a 'Generate' button and a summary of key performance indicators and project updates. The foreground screenshot is a modal window for configuring the briefing. It includes a 'Create' button, a 'Subscribe to notifications' section with a toggle switch, and a 'Frequency' section where the user has selected 'Weekly' on 'Monday' at '12 PM' in the 'US/Pacific' time zone. Below this, there are sections for 'GenAI summary', 'Email' (with 'john@acme-company.com' added), and 'Microsoft Teams' (with 'product-and-engineering' added). A 'Slack' section is also visible at the bottom.

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 'Get Started with WorkBoard GenAI' guide. The cover is white with a blue and yellow dot pattern on the right side. At the top left is the WorkBoard logo. The title 'Get Started with WorkBoard GenAI' is in a large, bold, black serif font. Below the title is the subtitle 'How to Engage your CEO, CIO, and Colleagues' in a smaller, black sans-serif font. At the bottom left, there is a quote: 'Love the GenAI features! Game changing for us at AstraZeneca.' followed by the name 'Jen Lacey', her title 'Director, Strategy & Change', and the company 'AstraZeneca'.

 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



Join Us

Accelerate is the world's largest strategy execution & OKR conference. Accelerate 2024 will be the most exciting yet, featuring tailor-made programming aimed at uniting a vibrant community of OKR and strategy execution leaders.

Early-bird pricing through June 30th

\$499 Individuals

\$799 Bring a peer (2 tickets)

Agenda at a glance

Monday, September 30

2:00 PM - 4:00 PM

Pre-conference WorkBoard Labs

4:30 PM - 7:00 PM

Check In & Welcome reception

Meet, mingle and enjoy a meal with peers and the WorkBoard leadership team! Check in and receive your conference materials.

Tuesday, October 1

8:00 AM - 9:00 PM

Full day agenda

Including optional morning activity, all meals & evening reception

Wednesday, October 2

9:00 AM - 2:00 PM

Half-day agenda

Including breakfast and lunch

2:00 PM - 4:00 PM

Post event networking



Intimate Conversations

Join very small group conversations on specific topics like tactics to improve KR integrity, creating a user group, chiefs of staff role in operating cadence, using OKR coaches, building a new-hire onramp to OKRs and WorkBoard.



Ideal for Executives & Strategy Execution Leaders

Whether you lead a business, drive the strategy or spearhead strategy operations, this is a one-of-a-kind opportunity to learn and benchmark with peers. As you face a trifecta of imperatives — transformation, growth, and efficiency — the wisdom of this crowd can help you break through.

Typical Attendee Titles

CEO
President
Chief Digital Officer
Chief Operations Officer
Chief Strategy Officer
Chief Transformation Officer
SVP Strategy
SVP, Product
VP, Efficiency
VP, Execution & Transformation
VP, Strategy
Chief of Staff
Sr, Director, Innovation & Agile
Sr. Director, Strategic Operations
Director, Strategy Execution
Director, Corporate Strategy
Director, Results Management Office
Director, Strategy & Planning
Innovation Portfolio Director

2024 Confirmed Speakers

More speakers will be announced soon.

 WorkBoard



Deidre Paknad
Founder and CEO





Erik Huddleston
Chief Executive Officer





Beth Dawson
Director, Strategy Deployment
Strategic Initiatives

2023 Speakers



Darren Johnson
Expert Partner



Patrick Thompson
Chief Information & Transformation Officer



Summers Hutchings
Director, Product Delivery & Portfolio Strategy



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



John Glander
Senior Vice President



Duncan Hawksbee
Director of Strategic Execution

Don't miss this coastal retreat!
It's the perfect place to reflect,
learn and make real
connections with your peers.

Immerse yourself in the warm glow of
Southern California sunshine at the
newly reimagined Estancia La Jolla Hotel
& Spa, a AAA Four Diamond Hotel
Centrally located in the heart of La Jolla,
San Diego's premier seaside village.

We've arranged a special rate of \$289/
night for Accelerate attendees from
September 29 - October 2.



You truly know how to take care of
your guests. Thank you so much!

— Mike Limanni, IBM



Great event, great content, great venue, great food! Awesome conversations with other attendees

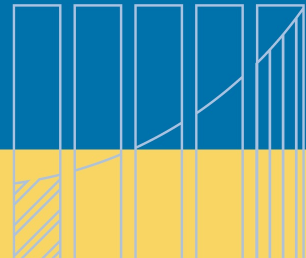
— Duncan Hawksbee, Trimble



Great balance between speakers, breakouts and networking. Wouldn't change a thing!

— Bridget Guerrero, ViaSat

REGISTER NOW AT www.workboard.com/accelerate2024



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">● May 20/22 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">● May 1 at 1pm PT● May 8 at 8am PT	learn.workboard.com
OKR Fast Pass Course	Build your OKR expertise in 3 hours	<ul style="list-style-type: none">● May 1 at 8am PT	learn.workboard.com
OKR Coach Certification	Become a certified OKR coach	<ul style="list-style-type: none">● Apr 30/May 2 at 8am PT● May 7/9 at 1pm PT● May 14/16 at 1pm PT● May 21/23 at 8am PT● May 21/23 at 1pm CET● May 28/30 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">● May 14/15 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

**What are You
Curious About?**



Thank you

See you next time!

