

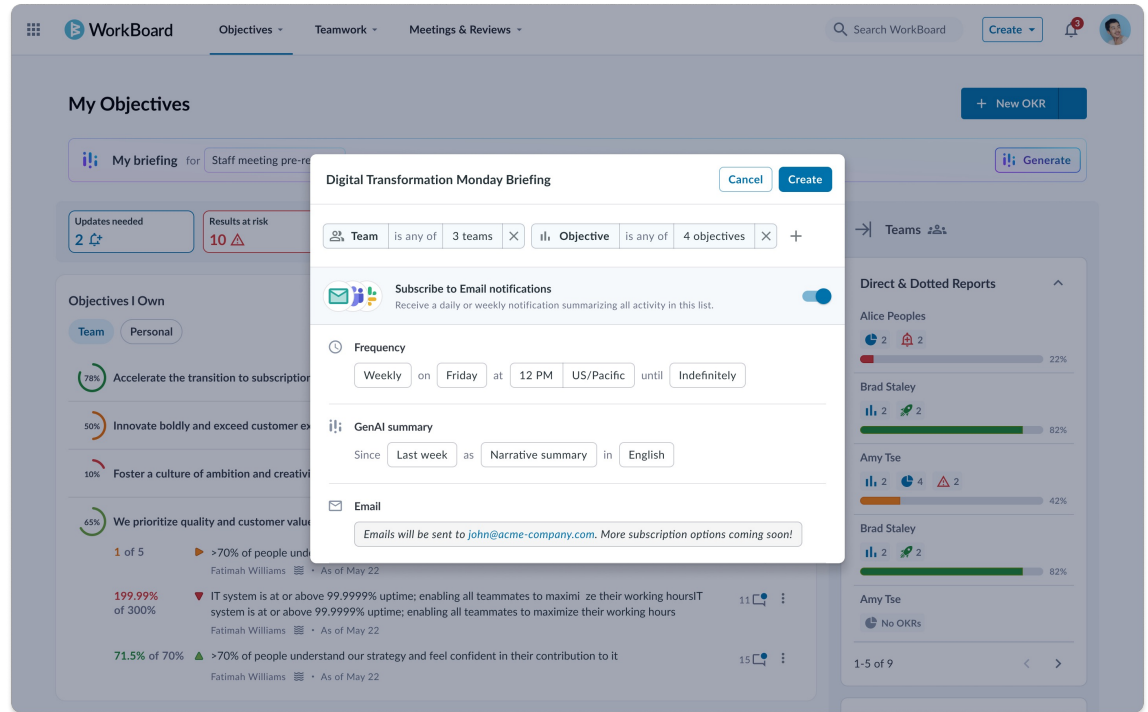
Agenda

- Schedule Executive Briefs
- Scorecard tips to help drive more focus on results
- Instantly spot potential risks to the strategy or its execution on the Relationship Map
- Elevate your team and leadership with the Manager's Lens and Impact Summary
- Join us at Accelerate 2024!

Schedule Executive Briefs

Get to smart decisions **5x faster** with automated briefings!

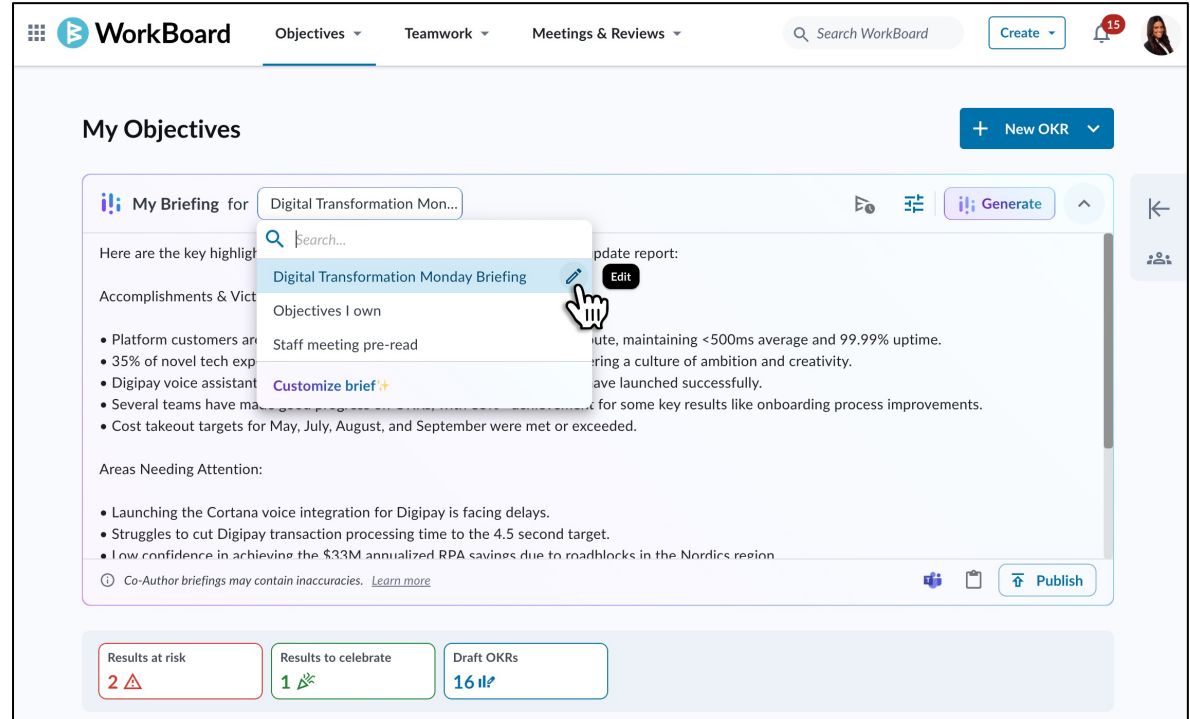
- Get the briefing you need when you need it, without meeting.
- Choose the dimensions you want to include – any combination of Teams, Objectives, Key Results or Workstreams.
- Schedule your draft briefing and optionally get it right in your inbox.
- Pro tip: Create briefs as first drafts of status reports or weekly team meeting pre-reads – refine the message as needed, then share with the team in one click!



Coming soon: include Scorecards, Biz Reviews, Strategy Pillars and more in your draft briefing, and get it delivered to MS Teams or Slack.

Customize individual briefs for all your needs

- Have **multiple briefs** for various reviews, meetings, and rituals, each scheduled to be delivered at the most opportune time.
- Click the pencil from the dropdown to modify what's included in your brief, or when you receive it.



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 Objectives' and features a '+ New OKR' button. A dropdown menu is open, showing a search bar and several options: 'Digital Transformation Monday Briefing' (highlighted with a pencil icon), 'Objectives I own', and 'Customize brief +'. The background content shows a brief for 'Digital Transformation Mon...' with sections for 'Here are the key highlights', 'Accomplishments & Victories', 'Areas Needing Attention', and a 'Publish' button at the bottom right. A summary bar at the bottom indicates 'Results at risk' (2), 'Results to celebrate' (1), and 'Draft OKRs' (16).

Manage your subscriptions

- Click the paper airplane icon to preview all your current briefing subscriptions. Click View All to access the full list.
- Use the kebab menu to edit or delete any briefing subscription.

The image shows two overlapping screenshots of the WorkBoard interface. The top screenshot, titled 'My Objectives', displays a briefing for 'Digital Transformation Monday'. It includes a 'Generate' button and a 'View all' link. A hand cursor points to a paper airplane icon, which opens a dropdown menu showing 'Active subscriptions' with two items: 'Digital Transformation Monday Briefing' and 'Staff meeting pre-read'. The bottom screenshot, titled 'Lists & Subscriptions', shows a table of active subscriptions. A hand cursor points to a kebab menu icon for the 'Staff meeting pre-read' subscription, which opens a dropdown menu with 'Edit' and 'Delete' options.

My Objectives

My Briefing for Digital Transformation Mon...

Here are the key highlights and areas needing attention from the executive update report:

Accomplishments & Victories:

- Platform customers are experiencing fast response times with Cloud Compute, maintaining
- 35% of novel tech experiments are being initiated at front line teams, fostering a culture of
- Digipay voice assistant integrations with Google Assistant, Siri, and Alexa have launched suc
- Several teams have made good progress on OKRs, with 85%+ achievement for some key res
- Cost takeout targets for May, July, August, and September were met or exceeded.

Areas Needing Attention:

Active subscriptions:

- Digital Transformation Monday Briefing Weekly on Mon, 7:00 AM
- Staff meeting pre-read Weekly on Tue, 10:00 AM

View all

WorkBoard Objectives Teamwork Meetings & Reviews Search WorkBoard Create 15

Settings Lists & Subscriptions + New list

Name	Owner	Modified	Subscriptions	Actions
Digital Transformation Monday Briefing	You	May 28, 2024	Active Weekly, Monday at 7:00 am PDT	⋮
Staff meeting pre-read	You	May 28, 2024	Active Weekly, Tuesday at 10:00 AM	Edit Delete

Rows per page: 25

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.



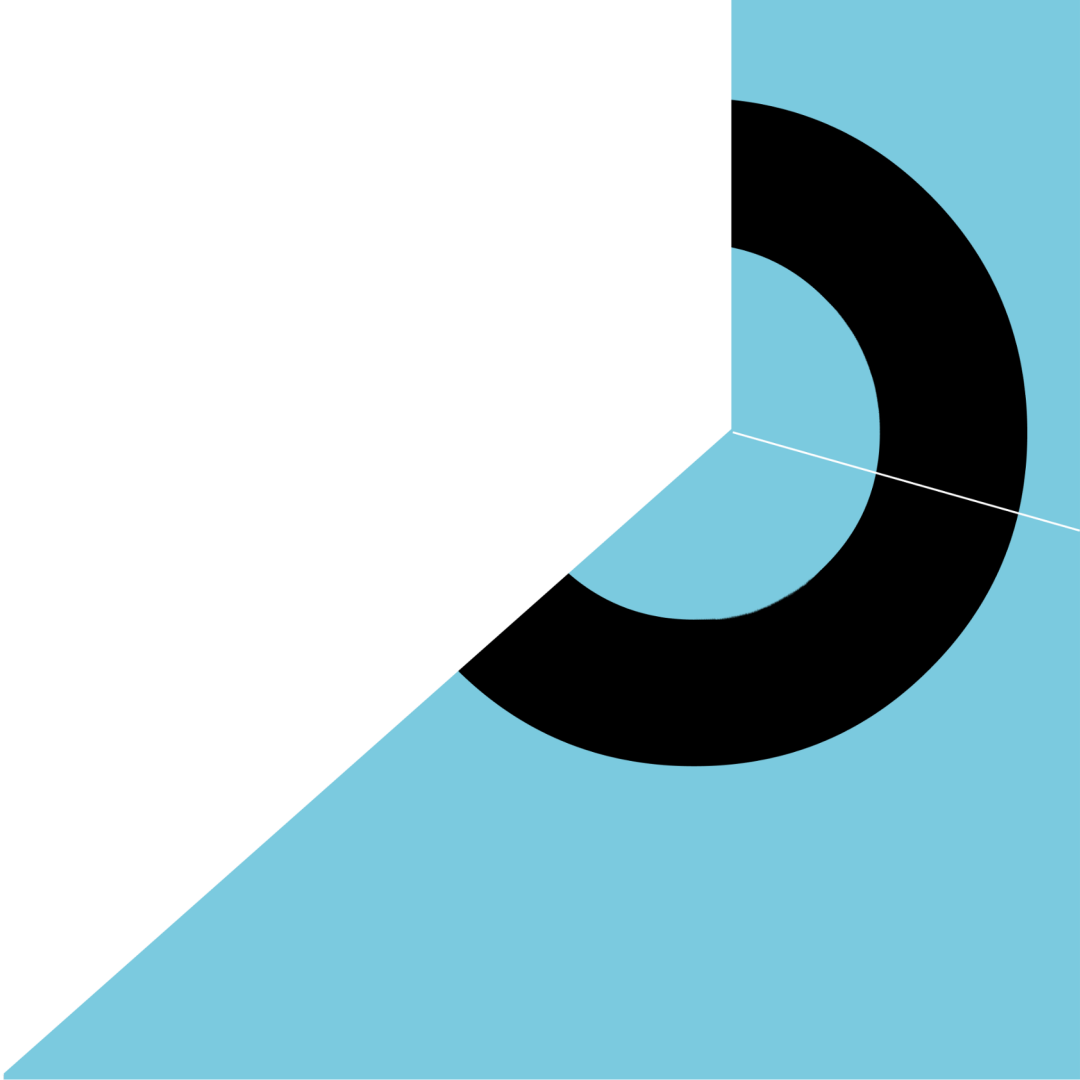
Get Started with WorkBoard GenAI

How to Engage your CEO, CIO, and Colleagues

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

Jen Lacey
Director, Strategy & Change
AstraZeneca

Scorecards - Pro Tips



Easily capture and share a snapshot of your Scorecard

- Copy your scorecard to the clipboard as a png image and paste it directly into a Powerpoint slide or other application.
- Export your scorecard as an image to save it for use later.

The screenshot displays the WorkBoard interface for a 'Digital TX Scorecard'. The main table shows the following data:

Objective	Key Result	Actual	Target	Relationships
	Cut transaction processing time 4.5 seconds	1.7 +70% MoM	4.5	BLOCKS Launch 3 Inr
	Launch 4 Digipay voice assistant		4	SUPPORTS Apple Pay la

The context menu is open, showing the following options:

- Set as start page
- Add to Collection
- Duplicate Scorecard
- Copy embed link
- Copy to Clipboard as...
- Publish
- Export as...
- Switch to Multi-period
- Archive Scorecard
- Delete Scorecard

The 'Copy as Image (PNG)' option is highlighted, and a hand cursor is pointing at it. Another menu is visible in the foreground, showing 'Export as Image (PNG)' and 'Export as CSV' options, also with a hand cursor pointing at 'Export as Image (PNG)'.

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
- **Pro tip:** If you've customized the scorecard columns to meet your needs, duplicate the scorecard and edit the team list to use it for other teams – your column customizations will be kept on the new scorecard.

The screenshot displays the WorkBoard interface for creating a scorecard. The main view is titled 'Single-period Scorecard' and includes a 'Generate New' button. Below this, there are two options for scorecard types: 'Single-period Scorecard' (marked with a checkmark) and 'Multi-period Scorecard' (marked as 'New'). A search bar for 'Add Key Results' is also present. An inset window titled 'Edit List' shows a list of teams, with 'Product & Engineering' selected and checked.

Showcase period-over-period progress as a Scorecard column

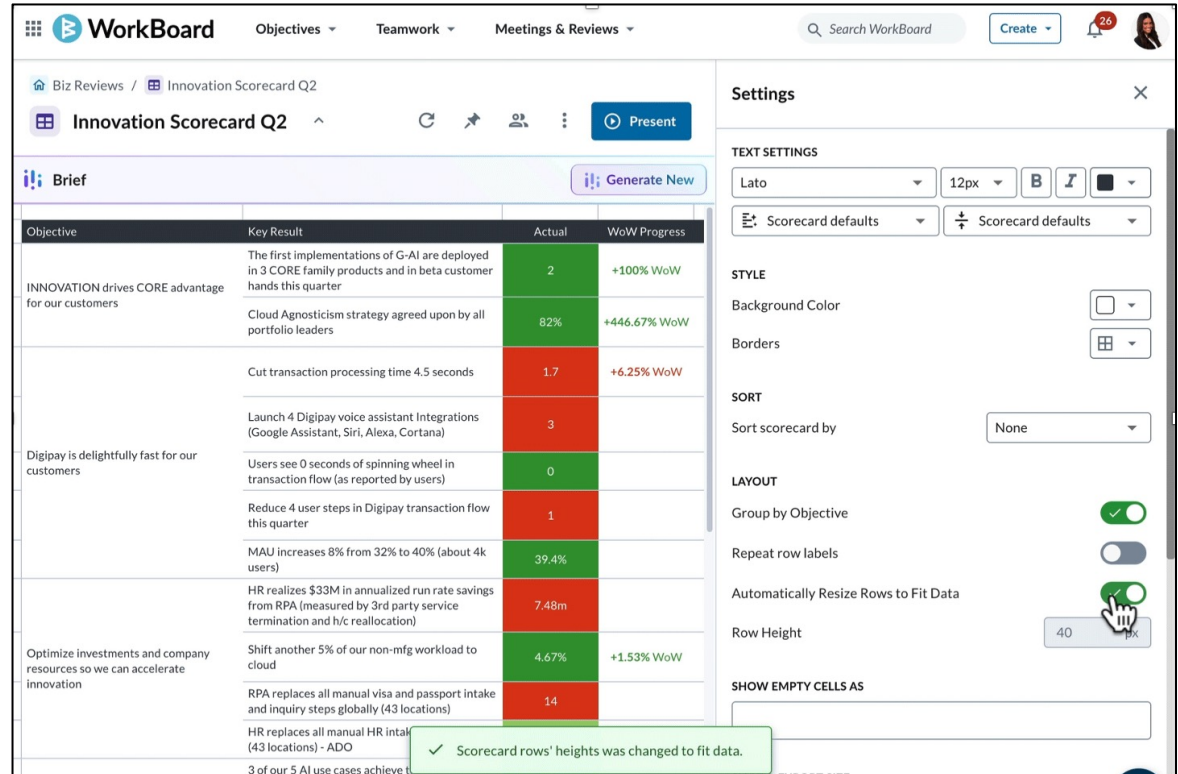
- Duplicate your Actual column to quickly create a % Change over Time column
- Choose to display % change as Week over Week, Month over Month, or other time period. Hide the "Actual" value for a cleaner view.
- Adjust the display style to differentiate from the Actual value

The screenshot displays the WorkBoard interface for an 'Innovation Scorecard Q2'. The main table shows objectives and key results with columns for Actual, Target, and Trend charts. The right-hand panel is configured for a 'Single-period Scorecard' with 8 columns and 23 rows. The configuration includes columns for Objective, Key Result, Actual (Current), Target, Trend chart, Confidence flag (Current), Confidence narrative (Current), and Next steps. The 'Actual' column is currently set to 'Current'.

Objective	Key Result	Actual	Target	Trend chart
INNOVATION drives CORE advantage for our customers	The first implementations of G-AI are deployed in 3 CORE family products and in...	2	2	
	Cloud Agnosticism strategy agreed upon by all portfolio leaders	82%	100%	
Digipay is delightfully fast for our customers	Cut transaction processing time 4.5 seconds	1.7	4.5	
	Launch 4 Digipay voice assistant integrations (Google Assistant, Siri, Alexa,...)	3	4	
	Users see 0 seconds of spinning wheel in transaction flow (as reported by users)	0	0	
	Reduce 4 user steps in Digipay transaction flow this quarter	1	4	
Optimize investments and company resources so we can accelerate innovation	MAU increases 8% from 32% to 40% (about 4k users)	39.4%	40%	
	HR realizes \$33M in annualized run rate savings from RPA (measured by 3rd party...)	7.48m	33m	
	Shift another 5% of our non-mfg workload to cloud	4.67%	5%	
	RPA replaces all manual visa and passport intake and inquiry steps globally (43...)	14	43	
3 of our 5 AI use cases achieve their value outcomes, including 1 in cyber security	HR replaces all manual HR intake steps globally (43 locations) - ADO	29	43	
	3 of our 5 AI use cases achieve their value outcomes, including 1 in cyber security	3	3	

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 shows the WorkBoard interface with a scorecard titled "Innovation Scorecard Q2". The scorecard table is as follows:

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 shows the "Automatically Resize Rows to Fit Data" toggle is turned on. A tooltip at the bottom of the scorecard 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.

The screenshot displays the WorkBoard interface for an "Innovation Scorecard Q2". The main table lists objectives and key results with associated metrics and trends. A "Sort by" dropdown menu is open, showing options for "A → Z" and "Z → A". A "Settings" panel is also visible, showing options for "Aspect Ratio" (16:9) and "Width" (1650 px). A "Slide view" overlay is shown at the bottom, indicating a zoom level of 100%.

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	82%	+446.67% WoW	100%
	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

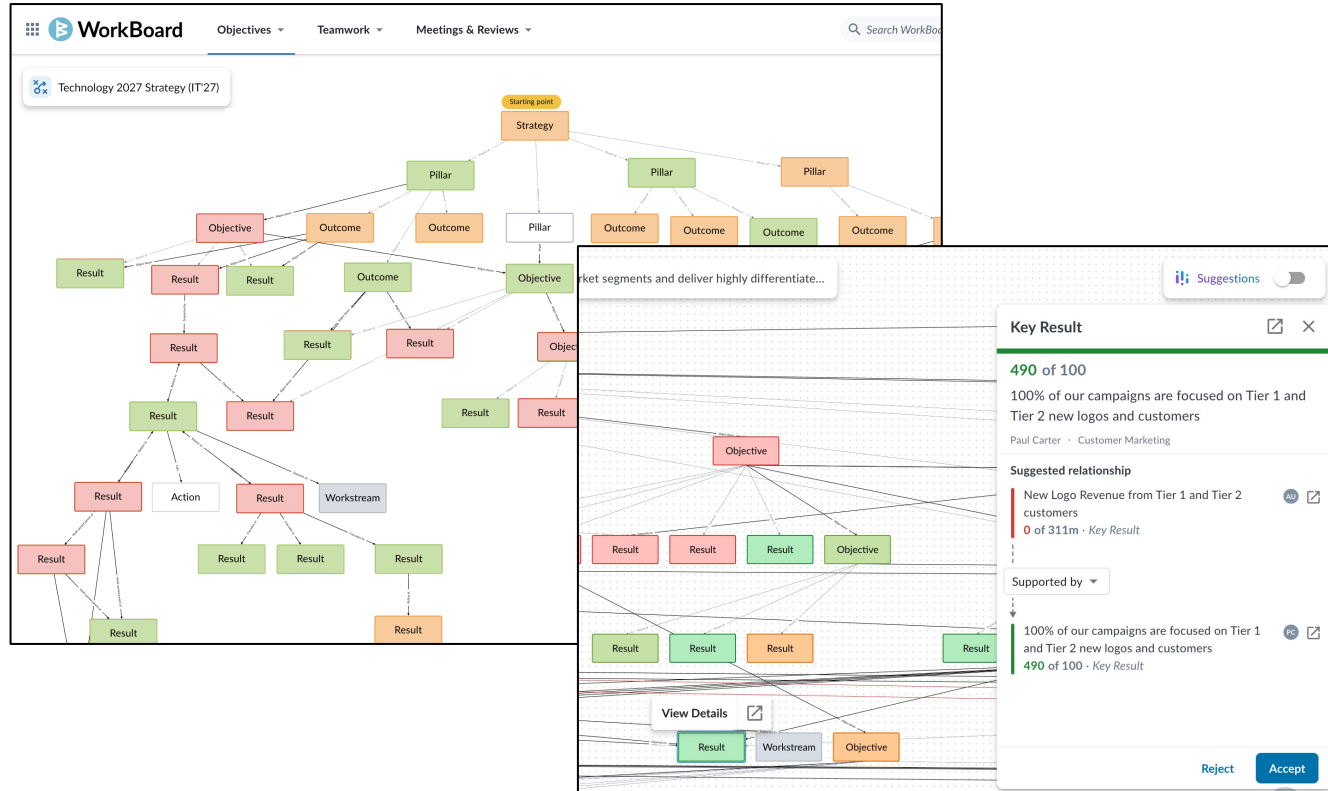
Change to slide view

100%

Visualize Dependencies Across the Org

Get the full picture of work aligned 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
- Leverage embedded AI to discover and align on new dependencies and risks



Share 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 for a 'Digital TX Scorecard'. The main table lists Key Results (KR) with their actual values, targets, and relationships. A dropdown menu is open on the right side of the table, showing options for relationship types.

Objective name	KR name	Actual	Target	Relationships
Digipay is delightfully fast for our customers	Cut transaction processing time 4.5 seconds	1.7 +70% MoM	4.5	BLOCKS BLOCKED BY ● Launch 3 innovative product 🔗 Action: Reassign dev resources
	Launch 4 Digipay voice assistant Integrations (Google Assistant, Siri, Alexa, Cortana)	3	4	BLOCKED BY ● Digipay Issues in Progress Bar
Digipay is delightfully fast for our customers	Users see 0 seconds of spinning wheel in transaction flow (as reported by users)	0	0	
	Reduce 4 user steps in Digipay transaction flow this quarter	3 +200% MoM	4	BLOCKS BLOCKED BY ● 35% of novel tech experime 📊 Q2 Strategic Use Cases W
Digipay is delightfully fast for our customers	MAU increases 8% from 32% to 40% (about 4k users)	39.4% +111.43% MoM	40%	BLOCKED BY ● Increase same week WAU Jac
	Receive and action feedback from 10 sign ups to improve account creation process	20 +1900% MoM	10	
Digipay is delightfully fast for our customers	Lag time reduced from 1s to .54s for customer access sites	0.7 -11.76% MoM	0.54	BLOCKED BY ● Maintain less than 500 millisec
	Access issue resolution time decreased from 2 hours to 1 hour	1.2 -9.09% MoM	1	BLOCKED BY ● Cut security escalation engine

The dropdown menu on the right side of the table shows the following options:

- All
- Supported by
- Supports
- Depends on
- Dependency for
- Blocked by
- Blocks
- Relates
- Has risk

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 titles, responsibilities (represented by bar charts and icons), status (represented by progress bars and percentages), focus (represented by numbers), and next 1on1 (represented by dates and counts). A modal window is open over the 'Rakesh Wardekar' row, showing a profile picture, name, and details for the next 1on1 meeting: 'Next: Nov 10 · 10:00 - 10:30am · 2' and 'Last: Oct 13'. There are two buttons in the modal: 'View last 1on1' and 'See upcoming agenda'.

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%		

Understand a team member's impact

- The Impact Summary is a new human-in-the-loop AI-generated summary of progress and impact to help managers give more specific feedback and be better prepared for 1on1s.
- Instantly understand employee progress and challenges since the last 1on1, based on their OKRs, actions and comments.
- Quickly add action items and topics to the next 1on1 agenda.
- Quick view of your last PACE conversation to easily spot gaps in perception.

The screenshot displays the WorkBoard interface for a manager's lens. At the top, the navigation bar includes 'Objectives', 'Teamwork', and 'Meetings & Reviews'. The main content area is titled 'Manager's Lens' and features a profile card for Sameera Spellman, a Customer Success manager. Below this, an 'Impact summary' section provides a detailed overview of her performance, including key objectives, wins, and challenges. A 'Team Engagement' section uses a bubble chart to show her involvement across various teams. The 'Momentum' section highlights recent achievements and feedback. 'Objectives' are tracked with progress bars, and 'Total Impact' is summarized with key metrics. Finally, the 'Last PACE' section shows a conversation history with performance, alignment, competence, and engagement scores.

WorkBoard Objectives Teamwork Meetings & Reviews Search WorkBoard Create

Manager's Lens

Next 1on1 Wed, Nov 8 · 1 ☰ Topics Actions

Impact summary

Product Team OKR Activity Report - Week

Key Objectives:

- Increase Website Traffic: 85% completed
 - Successfully launched a targeted email campaign in website visitors.
- Improve Social Media Engagement: 70% completed
 - Achieved a 15% growth in social media followers and interactive posts.

Key Wins:

- Secured a high-profile partnership with a leading brand to boost brand exposure.

Challenges:

- Faced technical issues with the website that temporarily affected user experience. The IT team is actively working on resolving them.

Next Steps:

- Launch a new content series to maintain the momentum in website traffic.

As of Nov 1, 2023

ⓘ May contain inaccuracies. [Learn more](#)

Team Engagement

Revenue Team Revenue Leaders Customer Support Internal Account Squad Customer Success

Momentum

Oct 20 at 3:00 pm from Joe Smith
Goal Achiever
Thank you for helping make Management Leaders so grateful for your help!

Oct 9 at 3:00 pm from Emma S.
Excellent!
Nice work on the CEO eve and brought the right lead!

Oct 1 at 3:00 pm from Anna C.
Thank You!
Thank you for the warm welcome, lucky to work with you!

Objectives

55% Maximize Customer Value (20 days left)

76% We master value delivery and consumption (20 days left)

32% Communication, Community and Connection is the name of the CS game (20 days left)

Total Impact

1434 Key results
55% Results achieved
4734 Actions completed
373 Badges received
14,030 Comments and badges

Last PACE

● You ☐ Sameera Go to 1on1

Performance: [Progress bar]

Alignment: [Progress bar]

Competence: [Progress bar]

Engagement: [Progress bar]

1 2 3 4 5

Manager's Lens Next 1on1 Tue, May 28 · 0 ☰ Topics Actions

Add Topic to next 1on1

Next: May 28 - 12:00 - 12:30 pm · 0 ☰

Acco [Input field]

Johi [Input field]

Actions to [Input field]

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

 WorkBoard



Deidre Paknad
Founder and CEO,
WorkBoard

 BOEING



Brad Surak
Vice President, Digital
Aviation Solutions, Boeing

MARS



Beth Dawson
Director, Strategy Deployment
Strategic Initiative, Mars

 twilio



Ivy Grant
SVP, Corporate Strategy
& Operations, Twilio

 aprimo



Erik Huddleston
Chief Executive Officer,
Aprimo

2023 Speakers

BAIN & COMPANY

Darren Johnson
Expert Partner

 vmware

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

 JPMORGAN
CHASE & CO.

John Glander
Senior Vice President

 ALBEMARLE

Patrick Thompson
Chief Information &
Transformation Officer

 JUNIPER

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

 Trimble

Duncan Hawksbee
Director of Strategic Execution

 CARMAX

Summers Hutchings
Director, Product Delivery &
Portfolio Strategy



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">● June 24/26 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">● June 5 at 1pm PT● June 6 at 8am PT	learn.workboard.com
OKR Fast Pass Course	Build your OKR expertise in 3 hours	<ul style="list-style-type: none">● June 5 at 8am PT	learn.workboard.com
OKR Coach Certification	Become a certified OKR coach	<ul style="list-style-type: none">● June 4/6 at 1pm PT● June 18/20 at 1pm PT● June 19/20 at 1pm CET● June 25/27 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">● June 25/26 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">● Summer cohort begins July 9!	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 June 26.

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



**What are You
Curious About?**



Thank you

See you next time!

