Community Call

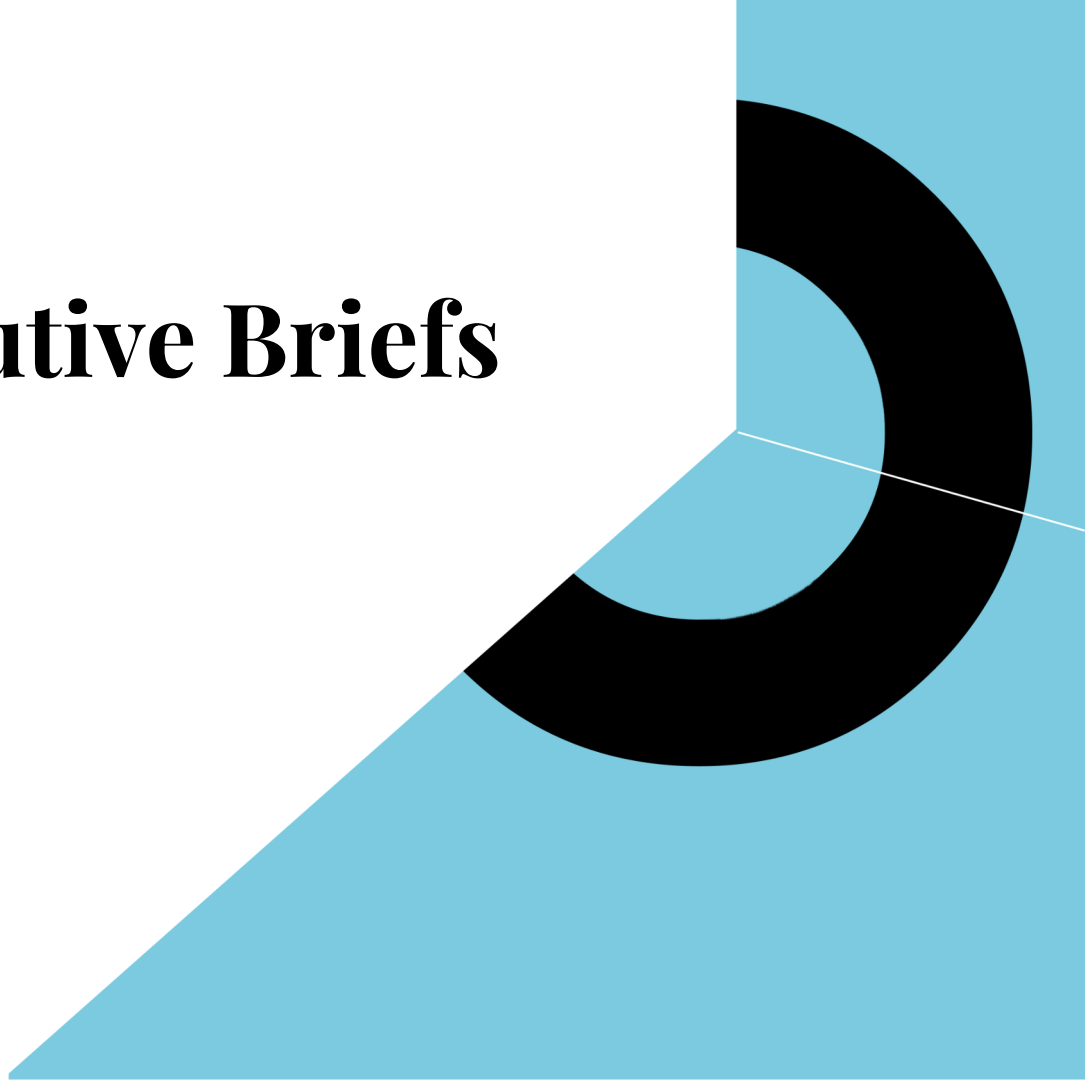
May 2024

WorkBoard

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

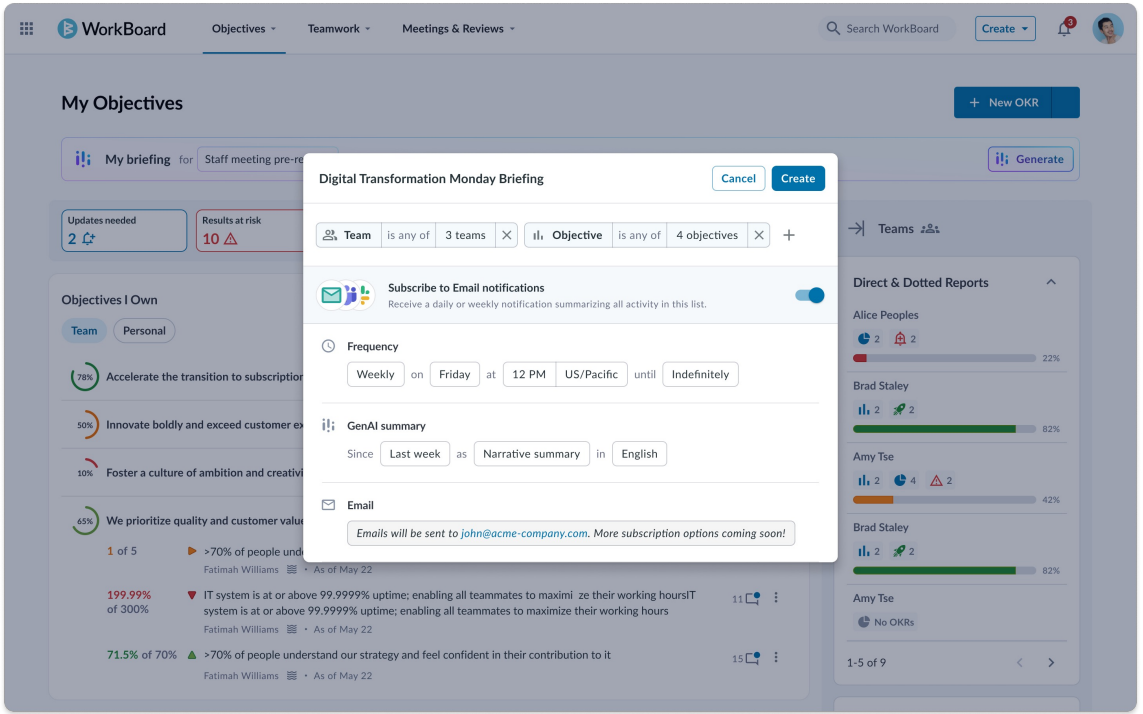


WorkBoard

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!

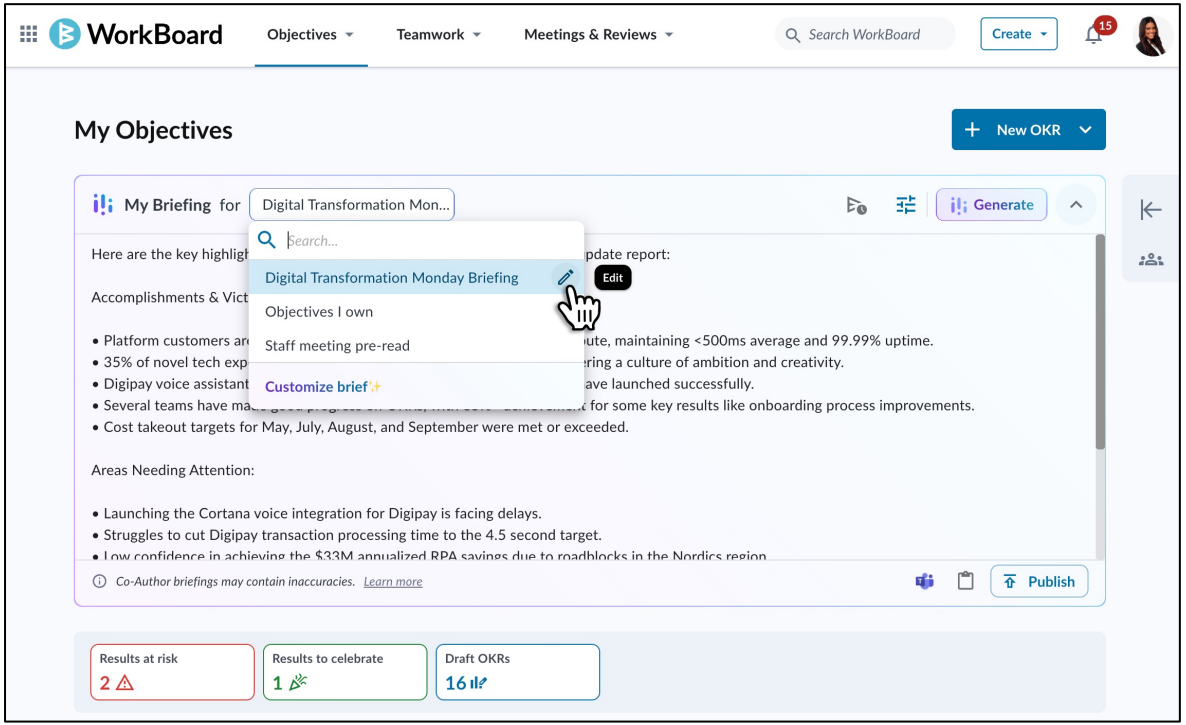
Coming soon: include Scorecards, Biz Reviews, Strategy Pillars and more in your draft briefing, and get it delivered to MS Teams or Slack.



©2024 WorkBoard Inc.

Customize individual briefs for all your needs

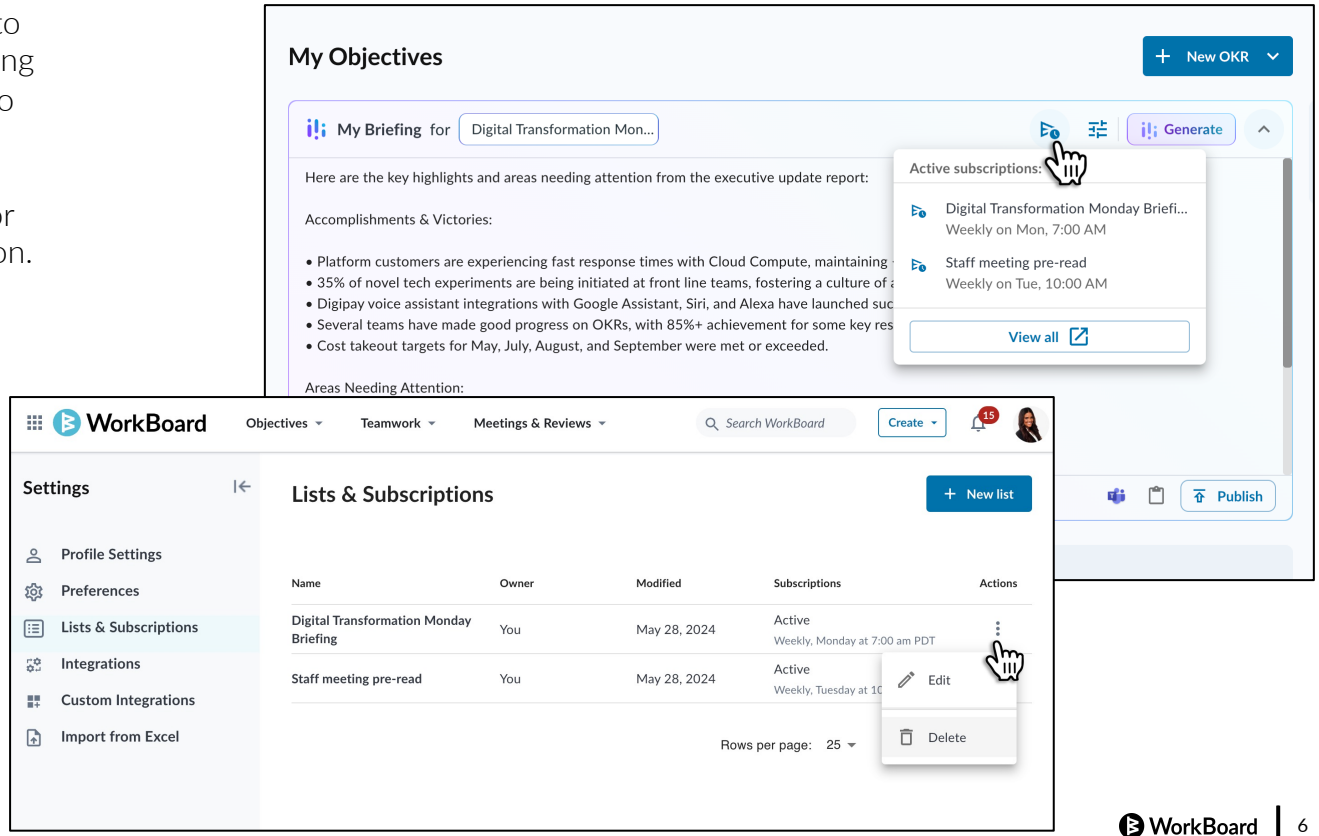
- Have **multiple briefs** for various reviews, meetings, and rituals, each scheduled to be delivered at the most opportune time.
- Click the pencil from the dropdown to modify what's included in your brief, or when you receive it.



©2024 WorkBoard Inc.

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.

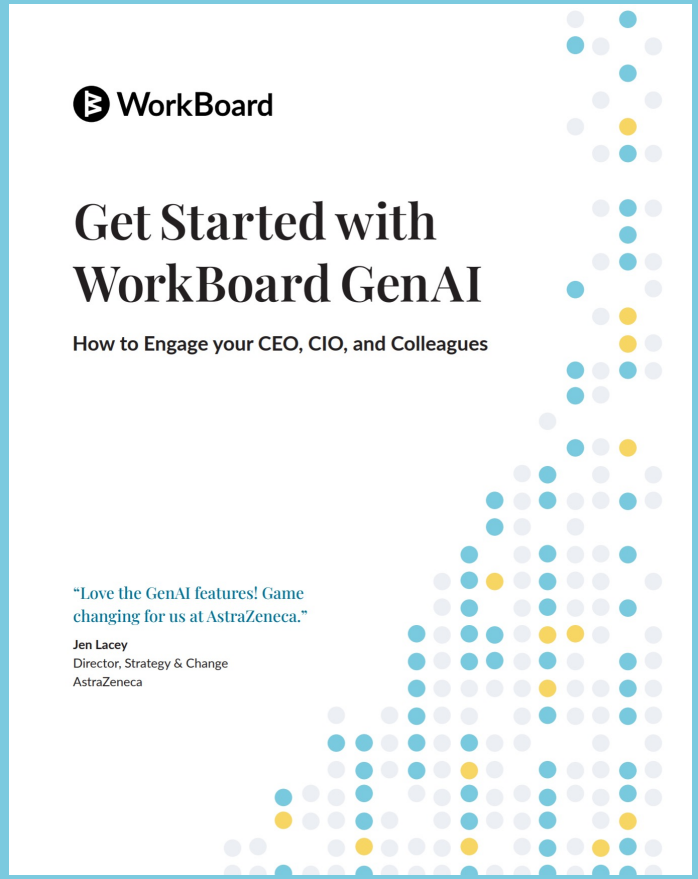


©2024 WorkBoard Inc.

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.



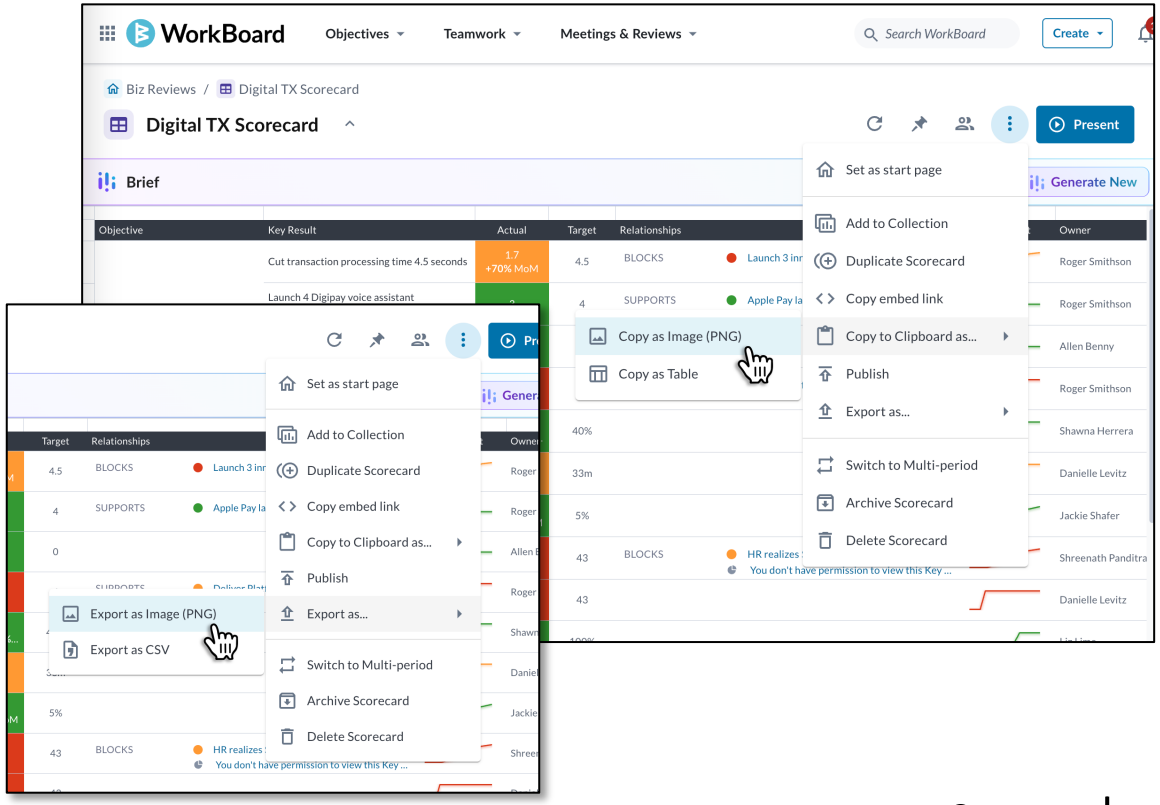
©2024 WorkBoard Inc.

Scorecards - Pro Tips

WorkBoard

Easily capture and share a snapshot of your Scorecard

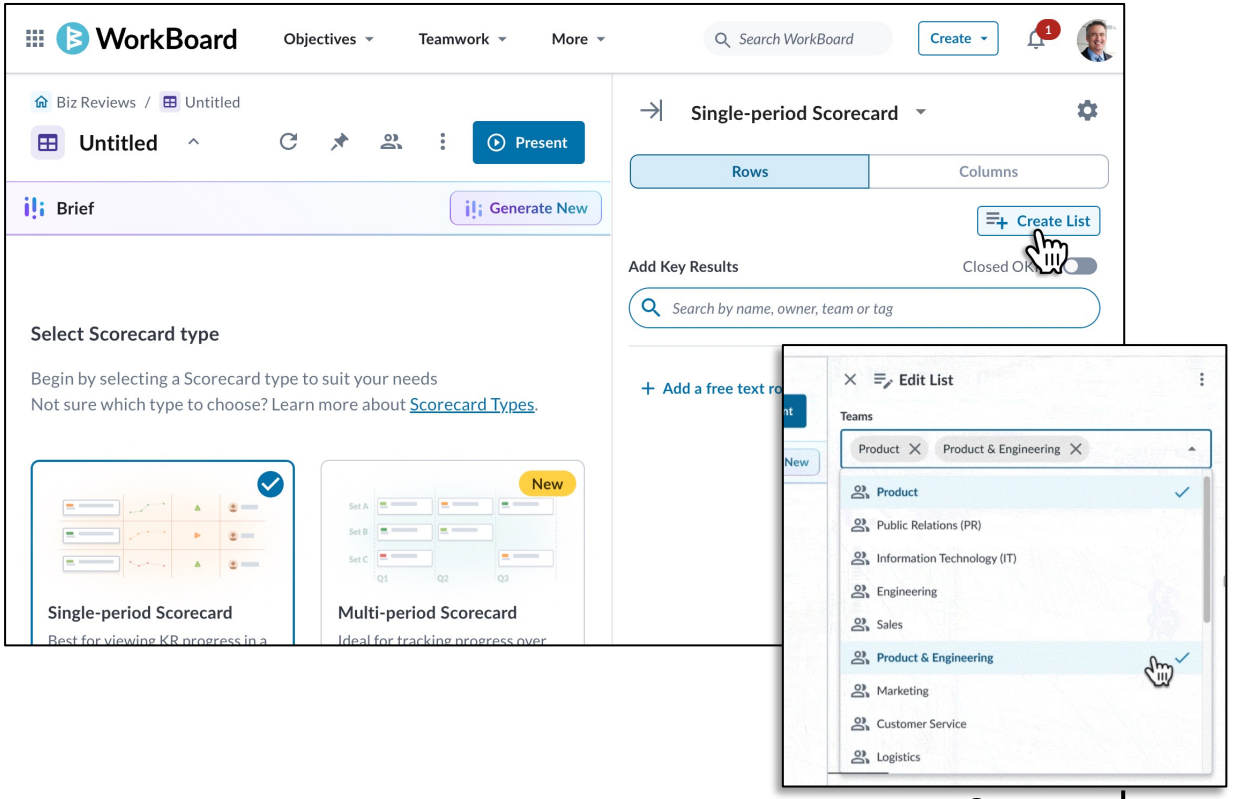
- Copy your scorecard to the clipboard as a png image and paste it directly into a Powerpoint slide or other application.
- Export your scorecard as an image to save it for use later.



©2024 WorkBoard Inc.

Automatically generate team scorecards

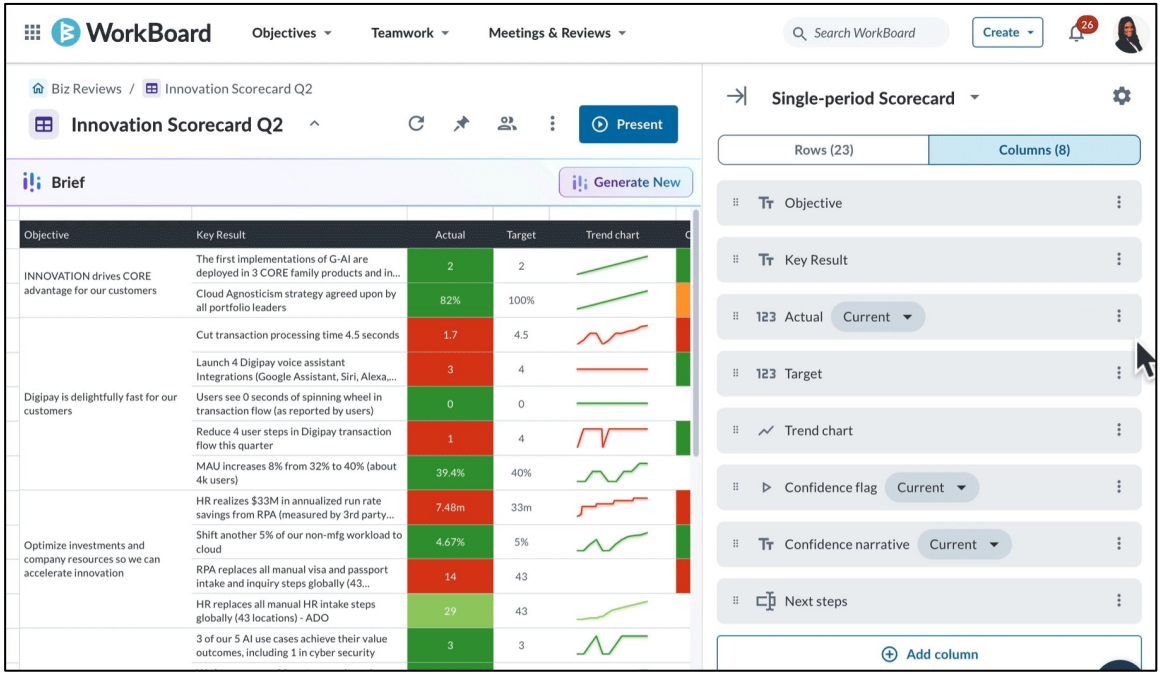
- Select a list of one or more teams to instantly create a scorecard with all team OKRs
- Edit the team list anytime
- At the beginning of a new OKR cycle, refresh the scorecard with the current OKRs for the selected teams with one click
- **Pro tip:** If you've customized the scorecard columns to meet 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.



©2024 WorkBoard Inc.

Showcase period-over-period progress as a Scorecard column

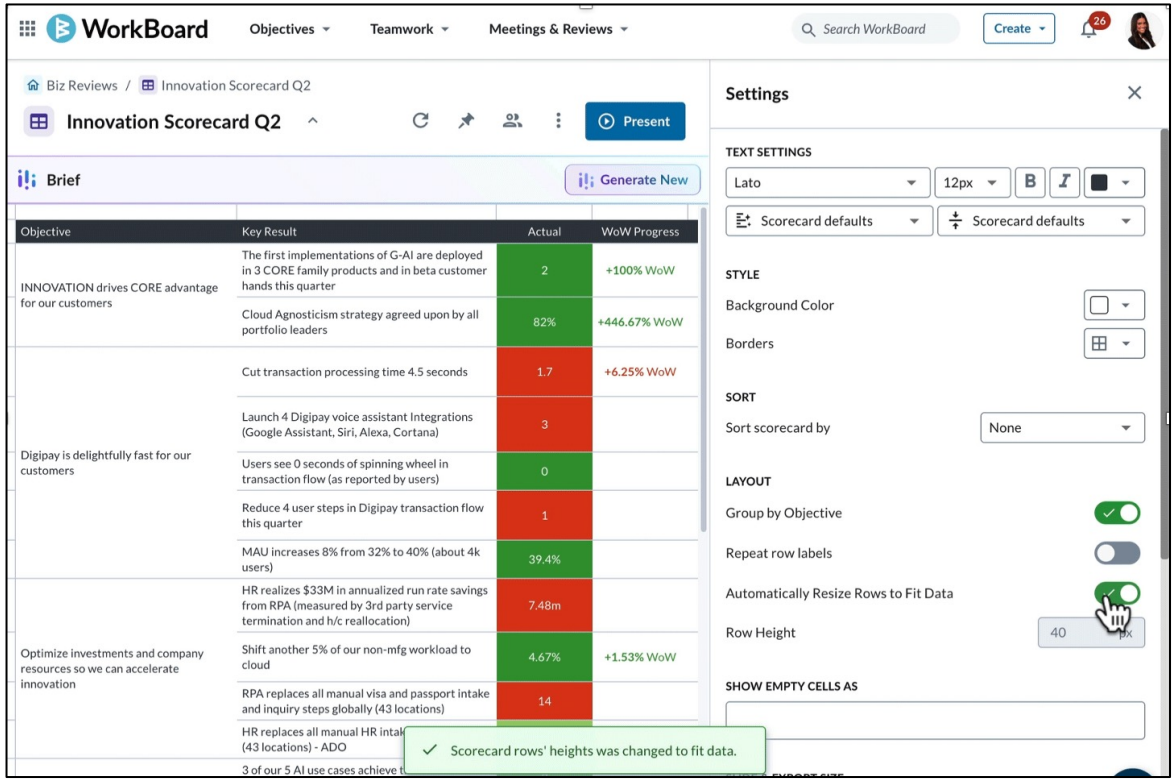
- Duplicate your Actual column to quickly create a % Change over Time column
- Choose to display % change as Week over Week, Month over Month, or other time period. Hide the "Actual" value for a cleaner view.
- Adjust the display style to differentiate from the Actual value



©2024 WorkBoard Inc.

Make your Scorecard more readable with one click

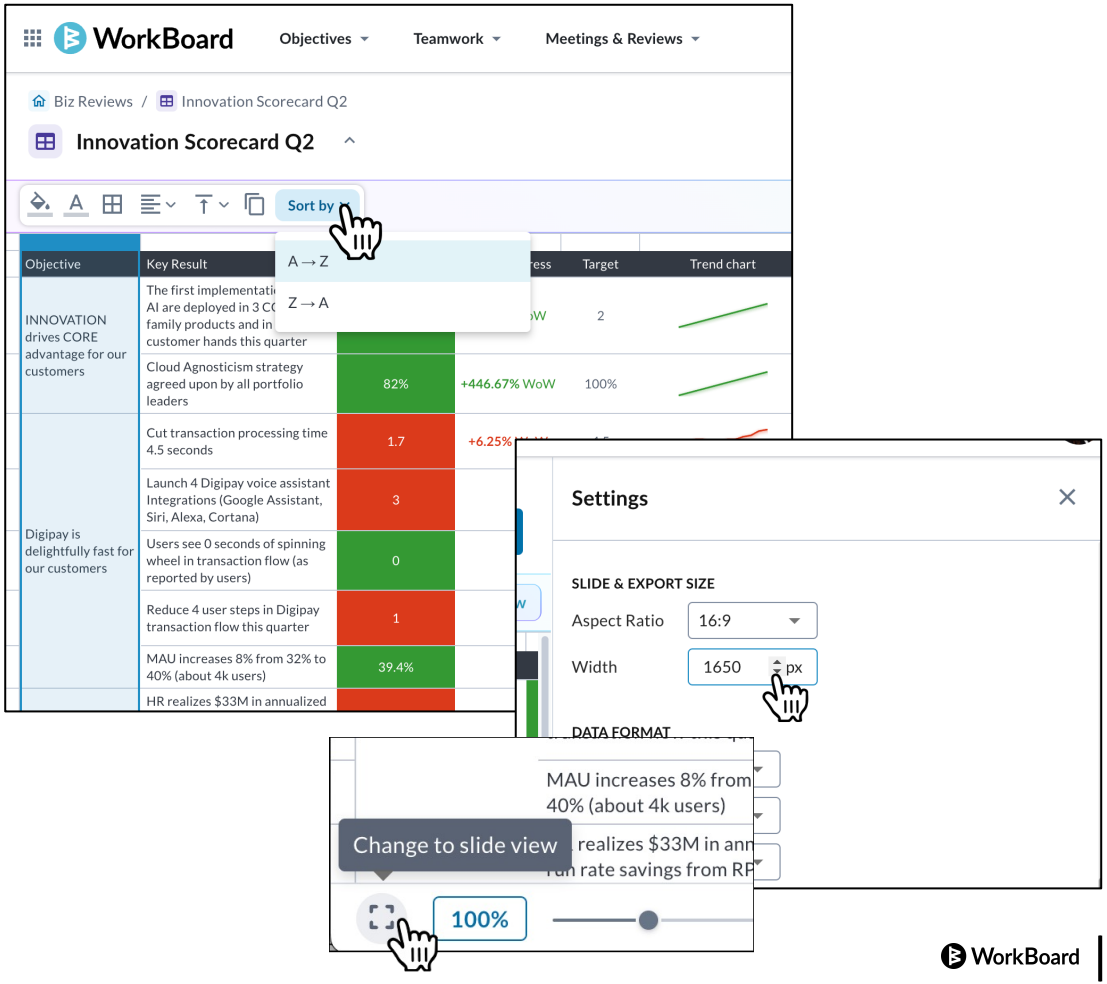
- If you have long result names or narratives that are cut off by ellipses, click the **Settings** icon, then click the **Automatically Resize Rows to Fit Data** toggle to allow the full text to show.



©2024 WorkBoard Inc.

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.



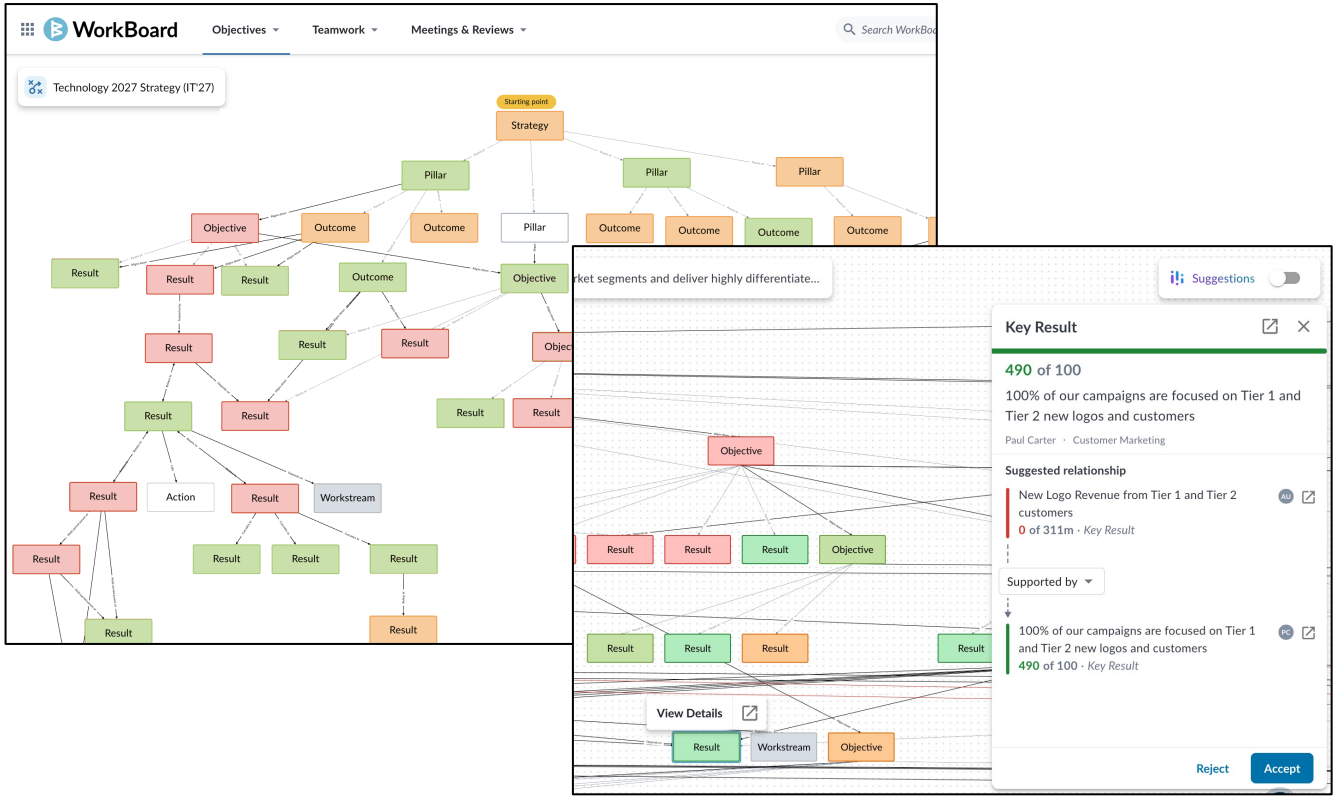
©2024 WorkBoard Inc.

Visualize Dependencies Across the Org

WorkBoard

Get the full picture of work aligned to the strategy

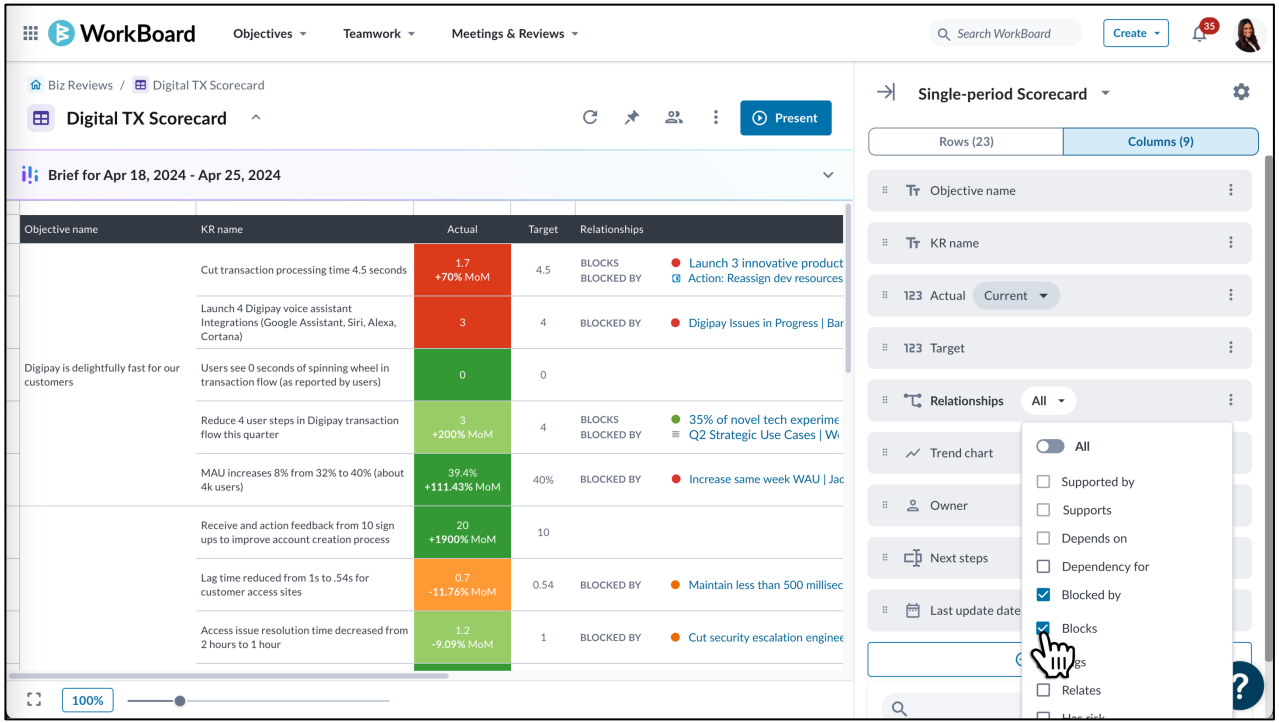
- See a full relationship map identifying dependencies, risks and connections across all layers of the organization
- Instantly spot potential risks to the strategy or its execution
- Click directly into the details of any item you have access to view
- Leverage embedded AI to discover and align on new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



©2024 WorkBoard Inc.

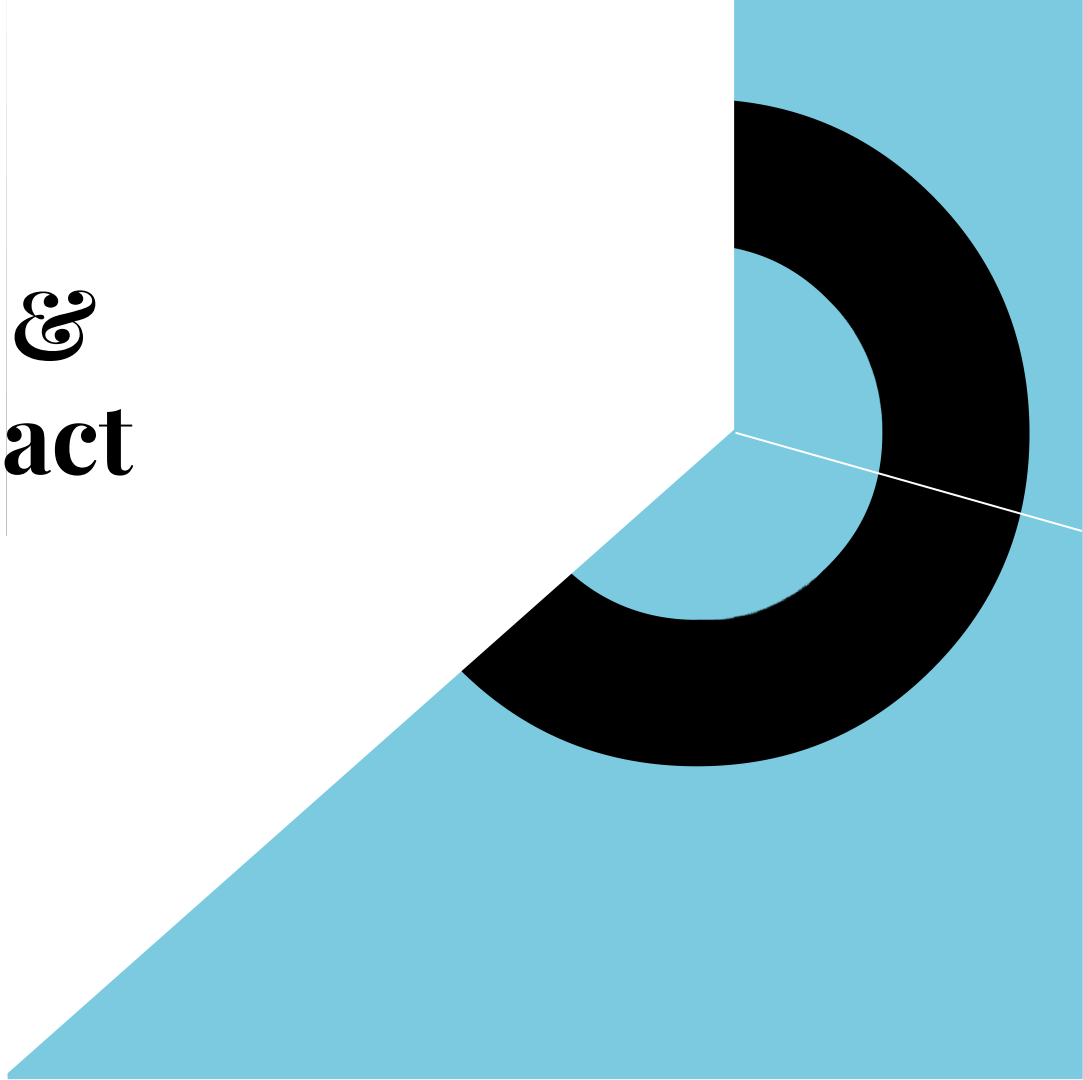
Share relationships on Scorecards

- 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



©2024 WorkBoard Inc.

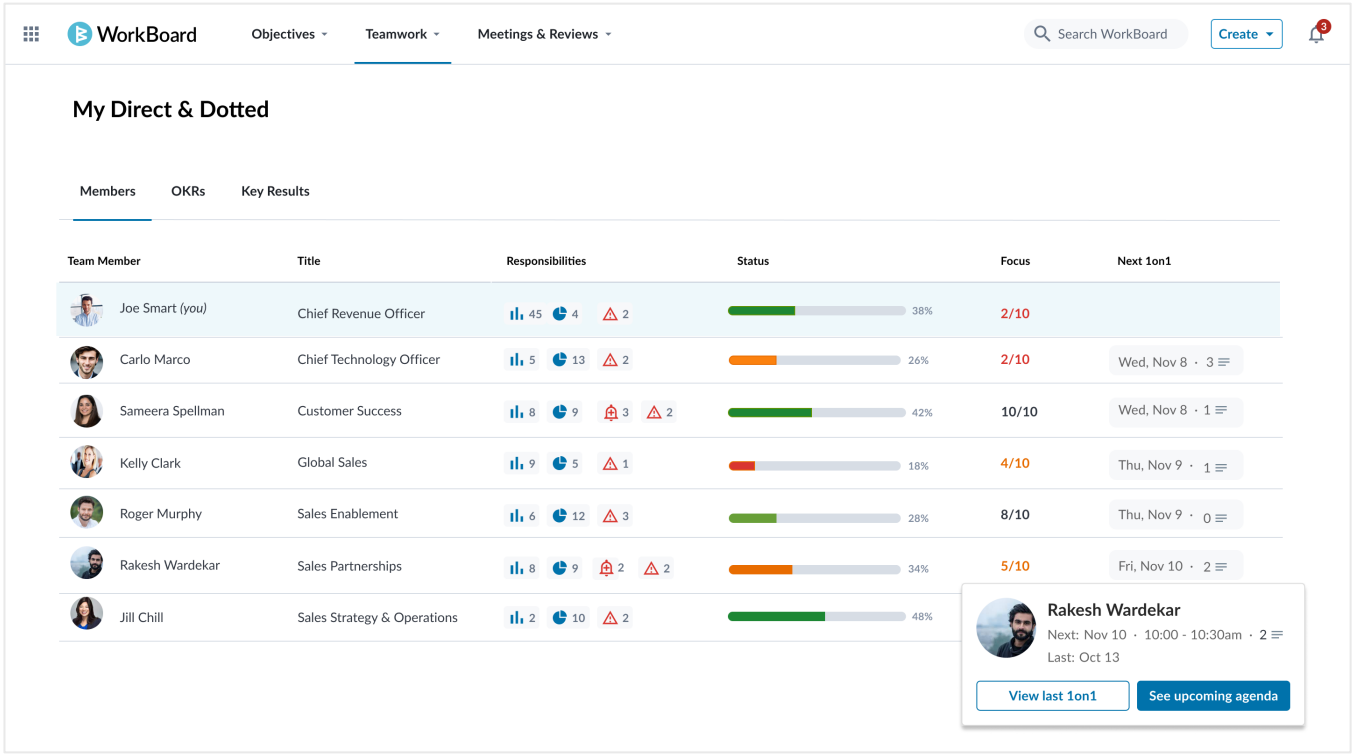
Manager Lens & Employee Impact



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

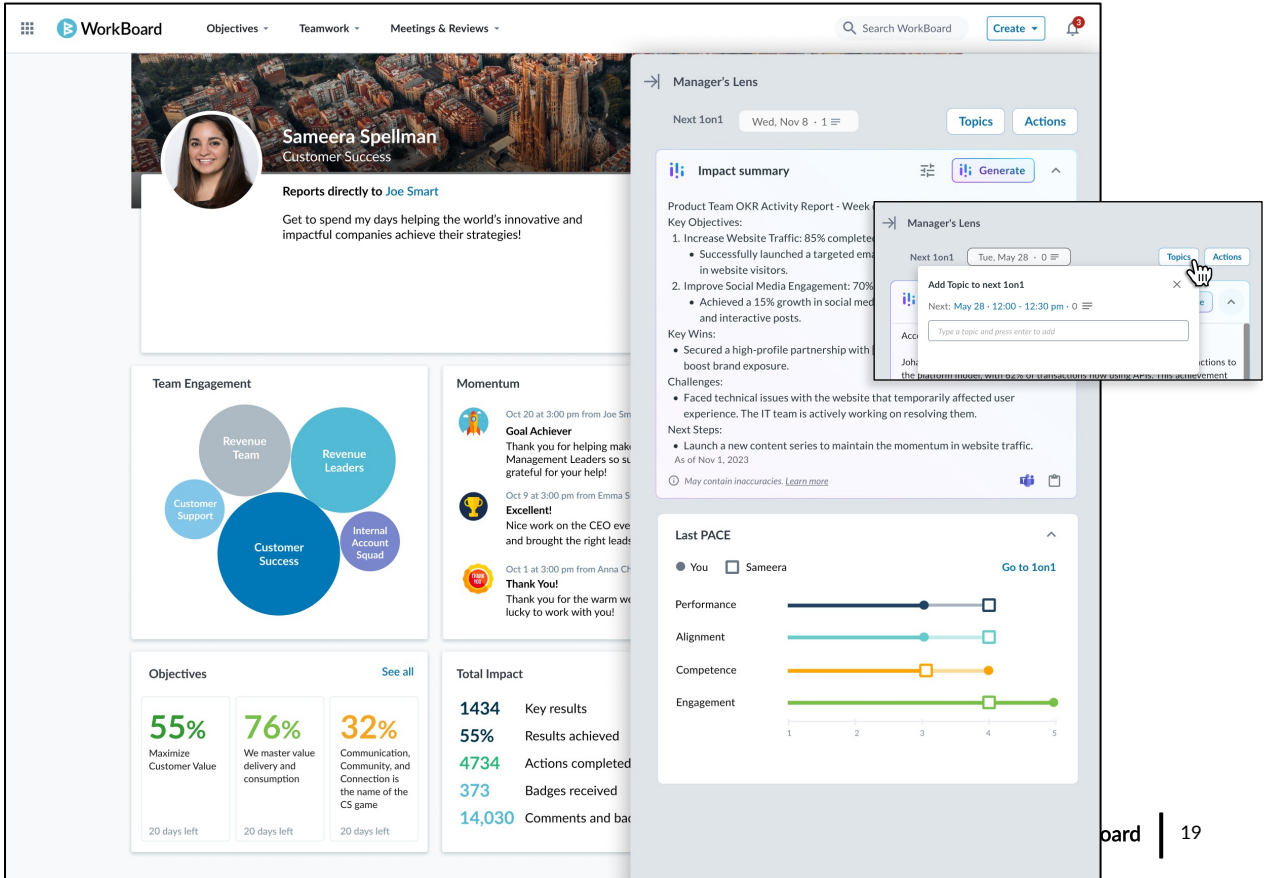
Note: existing direct and dotted page will be deprecated.



©2024 WorkBoard Inc.

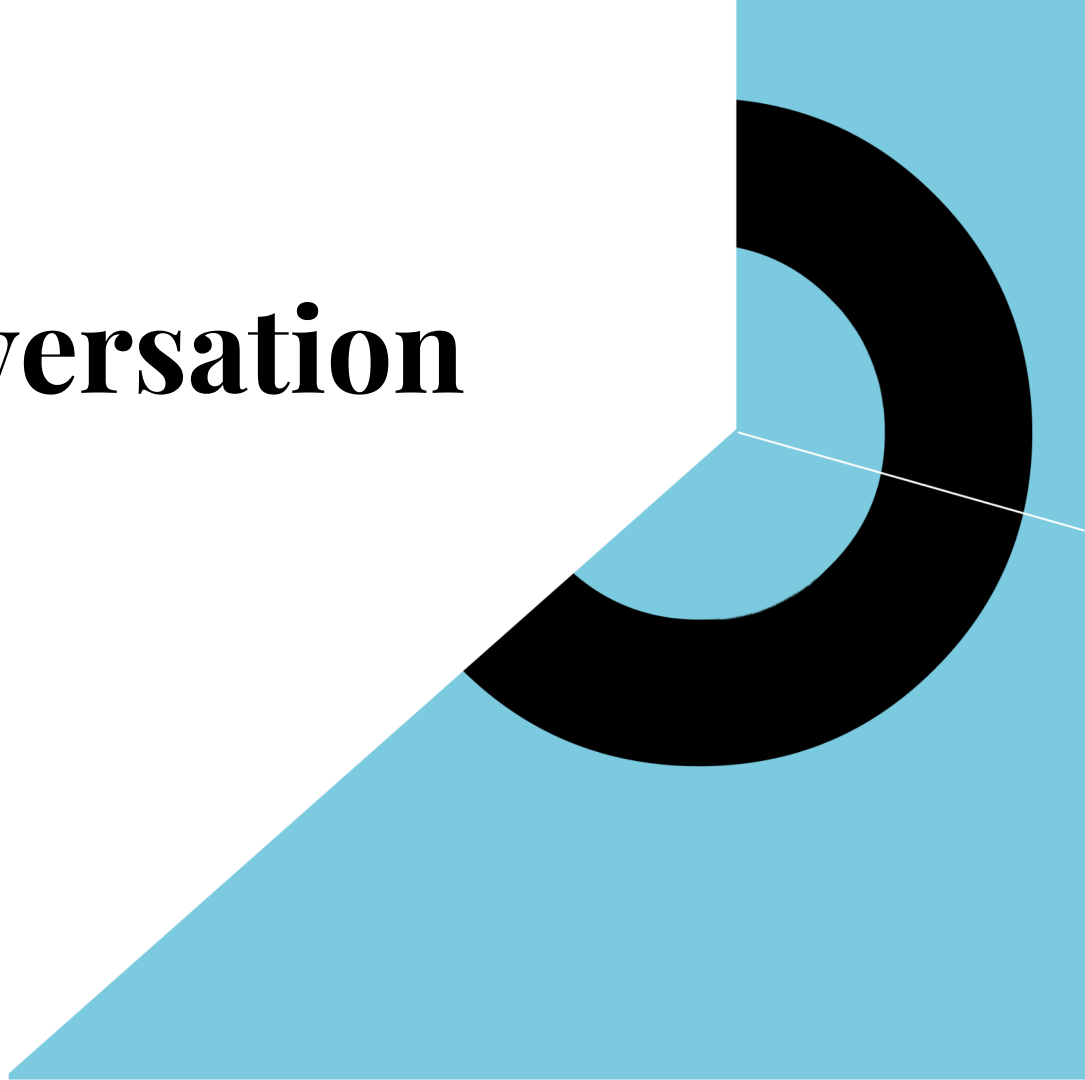
Understand a team member's impact

- 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.



©2024 WorkBoard Inc.

Join the Conversation



WorkBoard

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

Deidre Paknad
Founder and CEO,
WorkBoard

Brad Surak
Vice President, Digital
Aviation Solutions, Boeing

Beth Dawson
Director, Strategy Deployment
Strategic Initiative, Mars

Ivy Grant
SVP, Corporate Strategy
& Operations, Twilio

Erik Huddleston
Chief Executive Officer,
Aprimo

2023 Speakers

Darren Johnson
Expert Partner

Patrick Thompson
Chief Information &
Transformation Officer

Summers Hutchings
Director, Product Delivery &
Portfolio Strategy

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

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

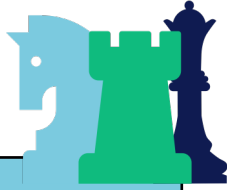
— Bridget Guerrero, ViaSat

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.	• June 24/26 at 8am PT	learn.workboard.com
Outcome Method Mindset	Learn about OKRs and the Outcome Mindset in 1 hour	• June 5 at 1pm PT • June 6 at 8am PT	learn.workboard.com
OKR Fast Pass Course	Build your OKR expertise in 3 hours	• June 5 at 8am PT	learn.workboard.com
OKR Coach Certification	Become a certified OKR coach	• 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.	• 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.	• Summer cohort begins July 9!	workboard.com/rme-certification

©2024 WorkBoard Inc.

Community Call: Save the Date(s)!

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

Our next Community Call is June 26.

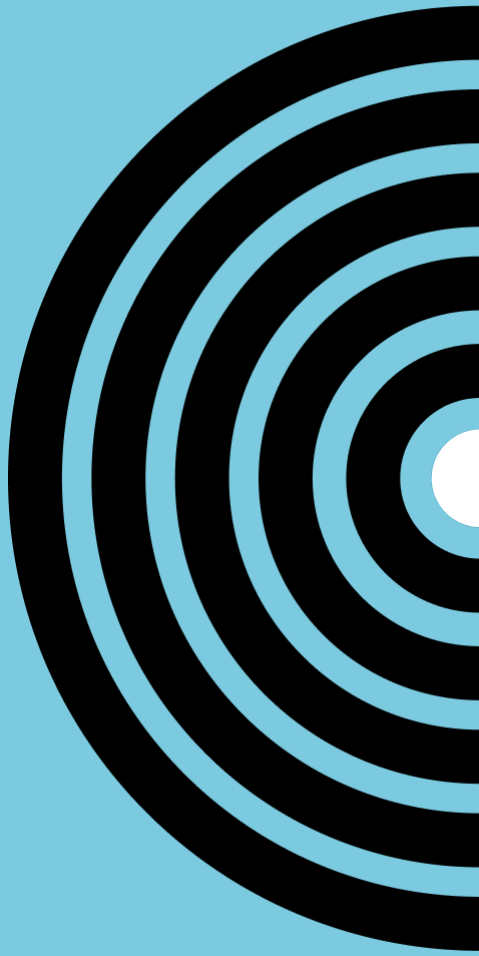
Make sure to sign up so you don't miss it!

©2024 WorkBoard Inc.

What are You Curious About?

Thank you

See you next time!



WorkBoard