

Agenda

- Enabling managers to be more effective coaches
- Sync personal objectives from WorkBoard to Workday
- Automated scorecards
- Managing execution risks and assumptions
- Join us at Accelerate 2024!

Enterprise Performance Management with WorkBoard



Strategy should be the golden thread connecting enterprise, team and individual performance



Execs & Entities

EXECUTIVES set strategy, mobilize people to achieve it with visibility on outcomes



Managers & Teams

MANAGERS translate strategy, drive accountability, and coach team members



Individual Contributors

INDIVIDUALS execute on the most important outcomes, and build skills for the future

Managers are the big lever in performance

Team OKRs are how they translate strategy and define accountability

The gap is obvious to everyone, but how it's described and addressed varies



Strategy execution gap:

OKRs align company outcomes + MBRs + transparency

Manager effectiveness issue:

Classes, cohorts, programs

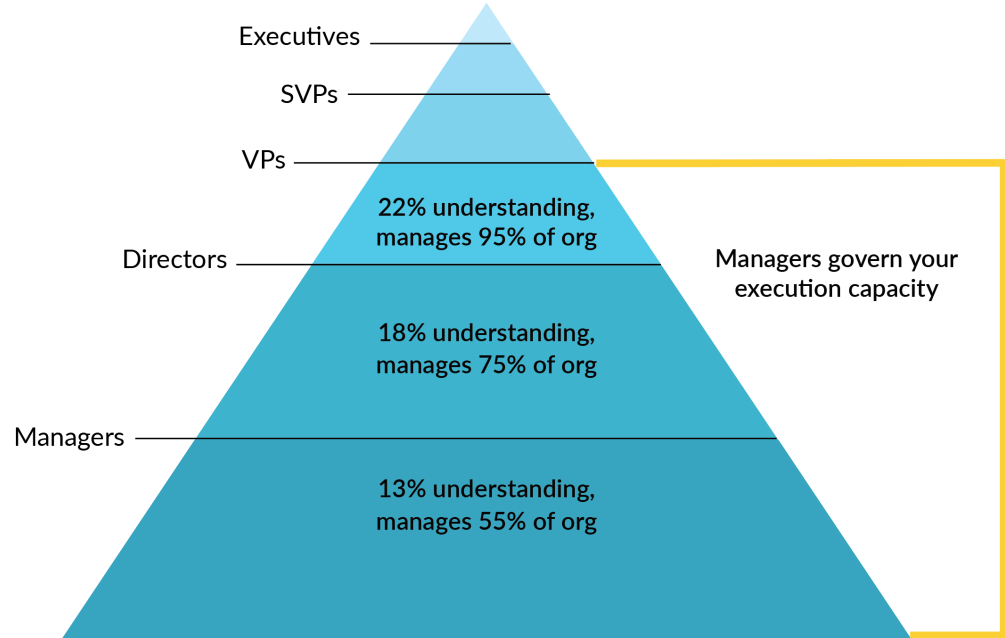
Purpose and meaning gap:

Engagement initiatives

Company performance is highly dependent on managers **translating strategy, driving accountability, and coaching team members**

When managers are ineffective, the impact shows in EBITDA and engagement scores

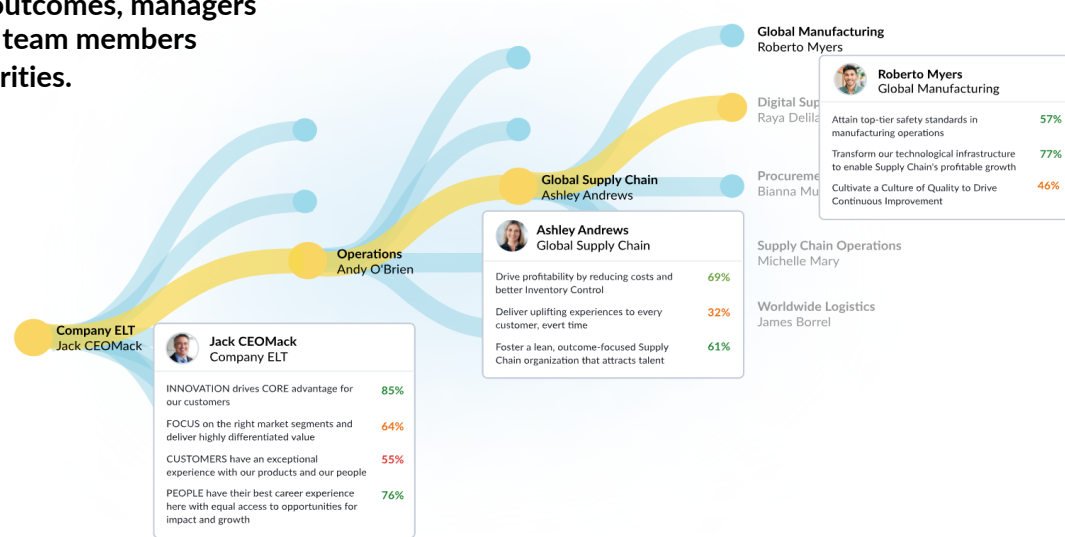
- Upline leaders spend disproportionate time wading in the business rather than working on it
- Surprises percolate up too late
- Have “too many priorities,” and no focus
- Don’t know what I am accountable for
- Don’t know the purpose of this work
- Team has change fatigue
- Team can win alone - apathetic or destructive to cross-org value coordination
- Hide bad news; broadcast good news
- Avoid hard conversations so issues go unaddressed
- Focus our “skunk works” efforts



Foundation for Performance

Solid foundations, where strategy is the golden thread connecting executives, managers, and individuals, enable organizations to achieve great enterprise performance. Executives have visibility over outcomes, managers offer feedback that is fair, frequent, and fact-based, and team members align with and execute the most important strategic priorities.

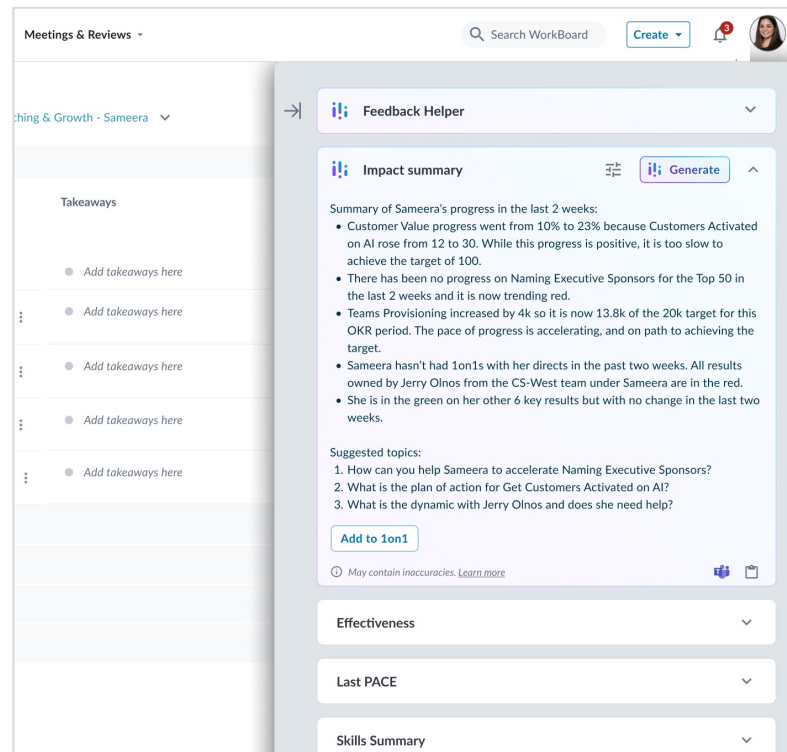
- ✓ **Company strategic priorities:** Align long range strategies and OKRs. Get transparency across disparate efforts. Drive operating cadence with scorecards, MBRs.
- ✓ **Team OKRS and Goals:** Align OKRs within and across teams. Simplify team meetings and status reporting. Identify and manage dependencies between teams
- ✓ **Personal Goals and IDPs:** Harmonize personal goals with team OKRs. Get coaching that reflects true efforts. Simplify feedback between peers and manager



Elevate Performance

This foundation supports a set of unique capabilities in WorkBoard that improve enterprise performance. It does this by enabling and facilitating more frequent conversations between managers and team members, where individuals receive consistent, fact-based feedback that aids their development.

- ✓ **AI 'Coach on call' for Managers:** Provides managers with on-call guidance and constructive feedback framing, along with impact summaries that prepare them for effective conversations backed by facts.
- ✓ **Give and get feedback:** Ad hoc or prompted feedback on results, work or specific impacts that they have.
- ✓ **Routine 1:1s:** Provide regular coaching on how to do your best work, remove roadblocks and stay focused on the right priorities.
- ✓ **Scheduled check in's:** Focused on career and performance growth, guided by HR-prepared agendas, ensure managers are skilled and employees engage in meaningful dialogues with their managers.



The screenshot displays the WorkBoard interface for a 'Meetings & Reviews' session. The main panel shows a 'Feedback Helper' section with an 'Impact summary' for 'Sameera'. The summary provides a detailed overview of her performance over the last two weeks, highlighting key metrics and areas for improvement. Below the summary, there are 'Suggested topics' for discussion, such as accelerating Naming Executive Sponsors and action plans for AI. A 'Generate' button is visible next to the summary, and a 'Add to 1on1' button is located below the suggested topics. The interface also includes a search bar, a 'Create' button, and a user profile picture in the top right corner.

Feedback Helper

Impact summary [Generate](#)

Summary of Sameera's progress in the last 2 weeks:

- Customer Value progress went from 10% to 23% because Customers Activated on AI rose from 12 to 30. While this progress is positive, it is too slow to achieve the target of 100.
- There has been no progress on Naming Executive Sponsors for the Top 50 in the last 2 weeks and it is now trending red.
- Teams Provisioning increased by 4k so it is now 13.8k of the 20k target for this OKR period. The pace of progress is accelerating, and on path to achieving the target.
- Sameera hasn't had 1on1s with her directs in the past two weeks. All results owned by Jerry Olmos from the CS-West team under Sameera are in the red.
- She is in the green on her other 6 key results but with no change in the last two weeks.

Suggested topics:

1. How can you help Sameera to accelerate Naming Executive Sponsors?
2. What is the plan of action for Get Customers Activated on AI?
3. What is the dynamic with Jerry Olmos and does she need help?

[Add to 1on1](#)

May contain inaccuracies. [Learn more](#)

Effectiveness [▼](#)

Last PACE [▼](#)

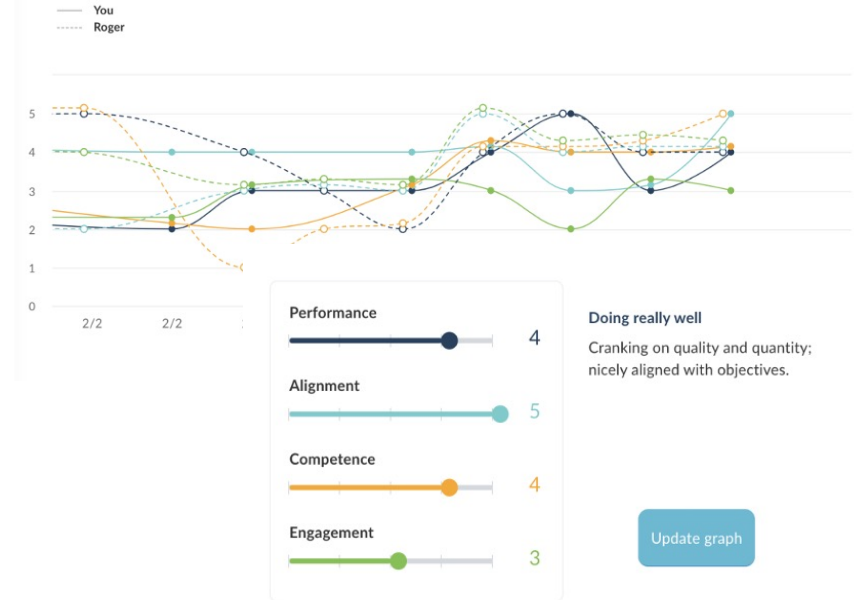
Skills Summary [▼](#)

Assess Performance

The final key part of the performance cycle is conducting structured reviews involving goals, key results, and a mutual rating system like PACE, where both team members and managers assess performance. These elements integrate to modernize performance management, enhancing the performance of individuals and managers alike.

- ✓ **Rate performance:** Enhanced annual or bi-annual performance reviews with a mutual rating system, yours or ours (PACE) that fosters accountability and transparency.
- ✓ **Reviews and performance conversations:** Structured reviews and performance conversations focus on personal achievements and strategic developmental goals.
- ✓ **Assess goal achievement :** Facilitates collaborative evaluations, aligning individual successes with broader organizational objectives for enhanced performance.

PACE (performance, alignment, competence, engagement) ⓘ



Coaching for Managers

Elevate Performance with a “Coach-on-call” for Managers

Make hard conversations easier and help managers carve out the time they need to coach the team to great outcomes.

- Impact summary helps managers quickly identify recent challenges and progress, so they can plan effective 1on1s that address roadblocks and celebrate great results.
- Feedback helper guides managers on how to deliver constructive or positive feedback that drives desired outcomes.

Available now

to all people managers with Intelligent Enterprise

The screenshot displays the WorkBoard interface for a 1:1 meeting titled "Danielle & Roger 1:1" on Thursday, August 22, from 1:30pm to 2:00pm. The interface is divided into several sections:

- Meeting Details:** Shows the meeting title, date, and time, along with a "View Series" link.
- PACE (performance, alignment, competence, engagement):** A summary section for the meeting.
- Objectives:** A section for adding objectives, with icons for various actions.
- Topics for Discussion:** A list of discussion topics, including "Explore the challenges and potential solutions for achieving the transaction processing time reduction goal, as it appears to be a significant undertaking." and "Discuss strategies to address the stalled progress on cutting transaction processing time and explore potential solutions or alternative approaches."
- Takeaways:** A section for adding takeaways from the meeting.
- Manager's Lens:** A sidebar on the right showing the profile of Roger Smithson and a "Feedback helper" section. The feedback helper text reads: "I can help you give feedback using the SBI framework - situation, behavior, impact. This ensures constructive feedback is easy to say and use, and positive feedback has a greater impact." Below this text are two buttons: "Tell me more about SBI" and "Help me frame feedback".

Accessing manager's coaching across the platform

WorkBoard Objectives More Search WorkBoard Create 80

< Danielle & Roger 1:1 Send Summary Manager's lens

Thu, Aug 29 · 1:30pm - 2:00pm View Series

72% of employees think their performance would improve with more feedback. Learn more

WorkBoard Objectives Teamwork Meetings & Reviews Search WorkBoard Create

My Direct & Dotted

Members OKRs Key Results

Team Member	Title	Responsibilities	Status	Focus	Next 1on1
Ashley Andrews	Head of Global Sup...	3 6 5 2	75%	8 of 10	Mon, Sep 2 3
Christine Skye	Head of IT, Strategy...	2 10 5 2	70%	7 of 10	Fri, Aug 30 3
Dana Chamin	Head of IT & Workp...	1 4	68%	3 of 10	Thu, Aug 29 1
Jackie Shafer	Chief of Staff - Offi...	3 9 2	82%	4 of 10	Fri, Aug 30 3
Kevin Campbell	SVP, Information Sy...	3 13 1 1	49%	6 of 10	Mon, Sep 2 4
Roger Smithson	Head of Customer ...	4 17 5 8	47%	2 of 10	Thu, ...
Shreenath Pand...	Head of Business Sy...	2 5 2 2	79%	4 of 10	None

Give Feedback Manager's Lens

WorkBoard Objectives Teamwork More Search WorkBoard Create 27

← Manager's Lens

Roger Smithson
Head of Customer Access Solutions and IT
Reports directly to Danielle Levitz

TEAM ENGAGEMENT MOMENTUM RESULTS THIS PERIOD

Give a shoutout

Jul 29 from Danielle Levitz
Awesome!

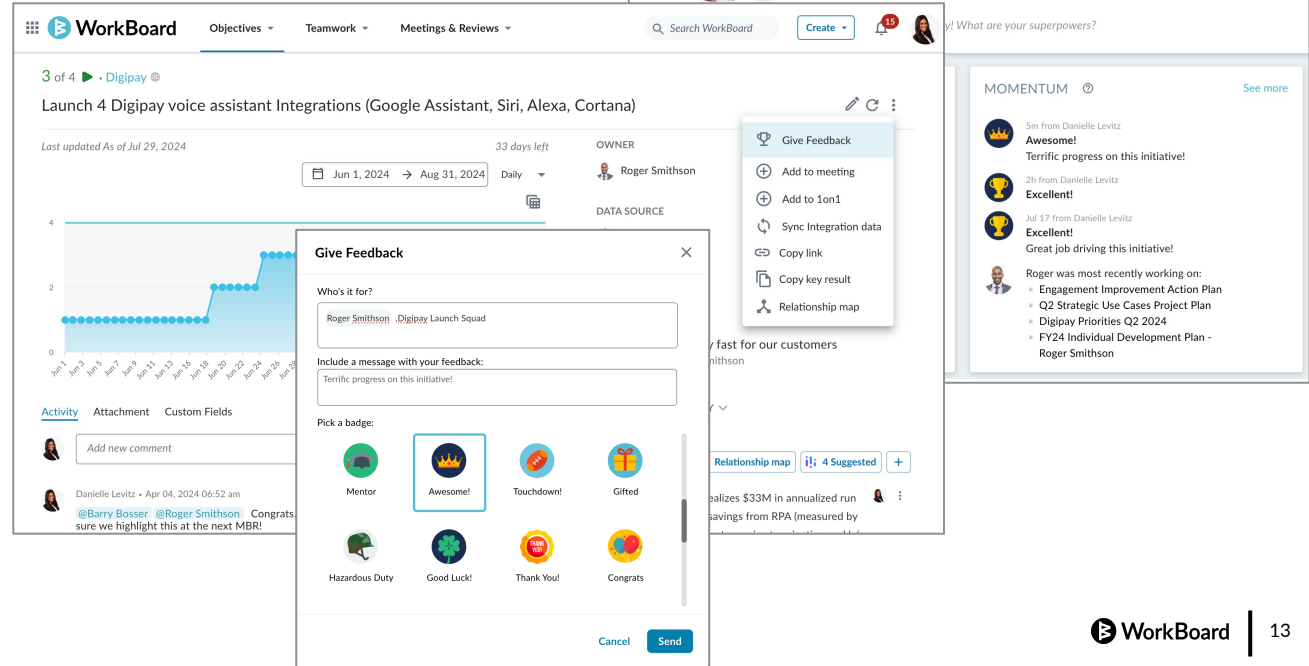
Lag time reduced from 1s to .54s for customer access sites 0.7 of 0.54

Chatbot system 47.42

Give quick kudos for great progress right on the spot

Send any individual or team quick feedback on any objective, key result, or action item to which you have access. They'll get a fun badge that will show on their Profile and My Work Today pages.

Available now!



WorkBoard Objectives Teamwork Meetings & Reviews

3 of 4 Digipay

Launch 4 Digipay voice assistant Integrations (Google Assistant, Siri, Alexa, Cortana)

Last updated As of Jul 29, 2024

33 days left

OWNER: Roger Smithson

DATA SOURCE:

Give Feedback

Who's it for?
Roger Smithson | Digipay Launch Squad

Include a message with your feedback:
Terrific progress on this initiative!

Pick a badge:

- Mentor
- Awesome!**
- Touchdown!
- Gifted
- Hazardous Duty
- Good Luck!
- Thank You!
- Congrats

Relationship map | 4 Suggested

MOMENTUM

- 5m from Danielle Levitz **Awesome!**
Terrific progress on this initiative!
- 2h from Danielle Levitz **Excellent!**
- Jul 17 from Danielle Levitz **Excellent!**
Great job driving this initiative!

Roger was most recently working on:

- Engagement Improvement Action Plan
- Q2 Strategic Use Cases Project Plan
- Digipay Priorities Q2 2024
- FY24 Individual Development Plan - Roger Smithson

Workday Integration

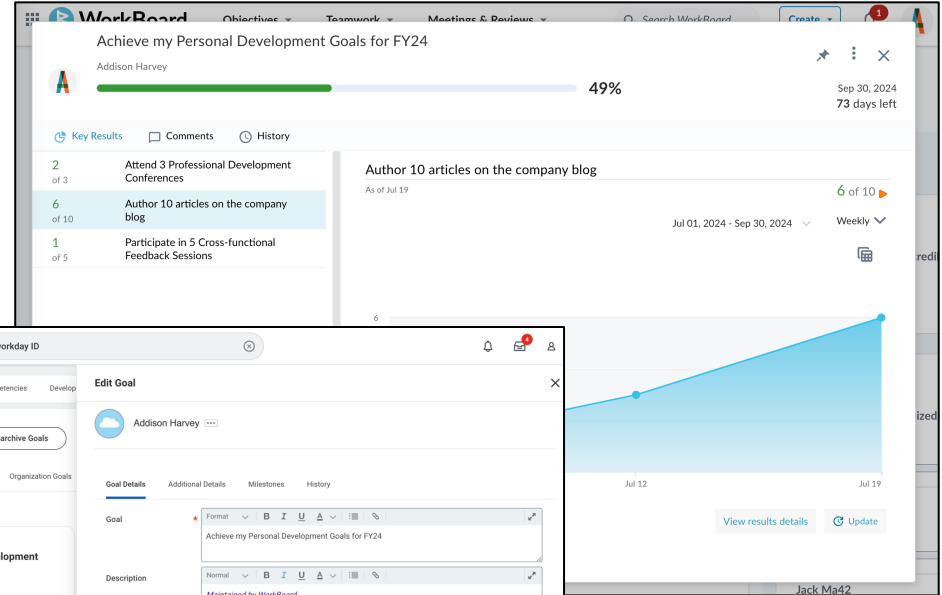


Automatically sync Personal Objectives to Workday Goals and Milestones

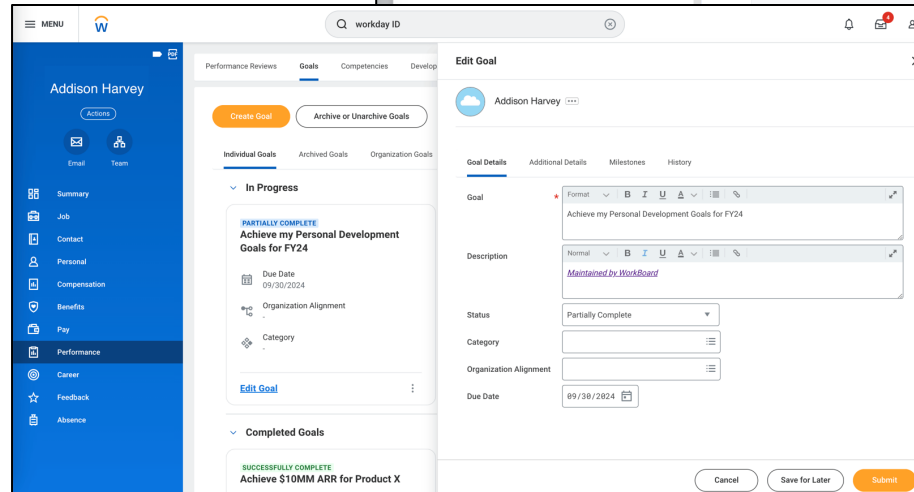
- Sync your personal objectives from WorkBoard into Workday Goals, and your personal key results as Workday Milestones.
- Save time by updating your team OKRs and Workday Goals in one place!

Available now!

Talk to your customer success team about turning it on for your organization.

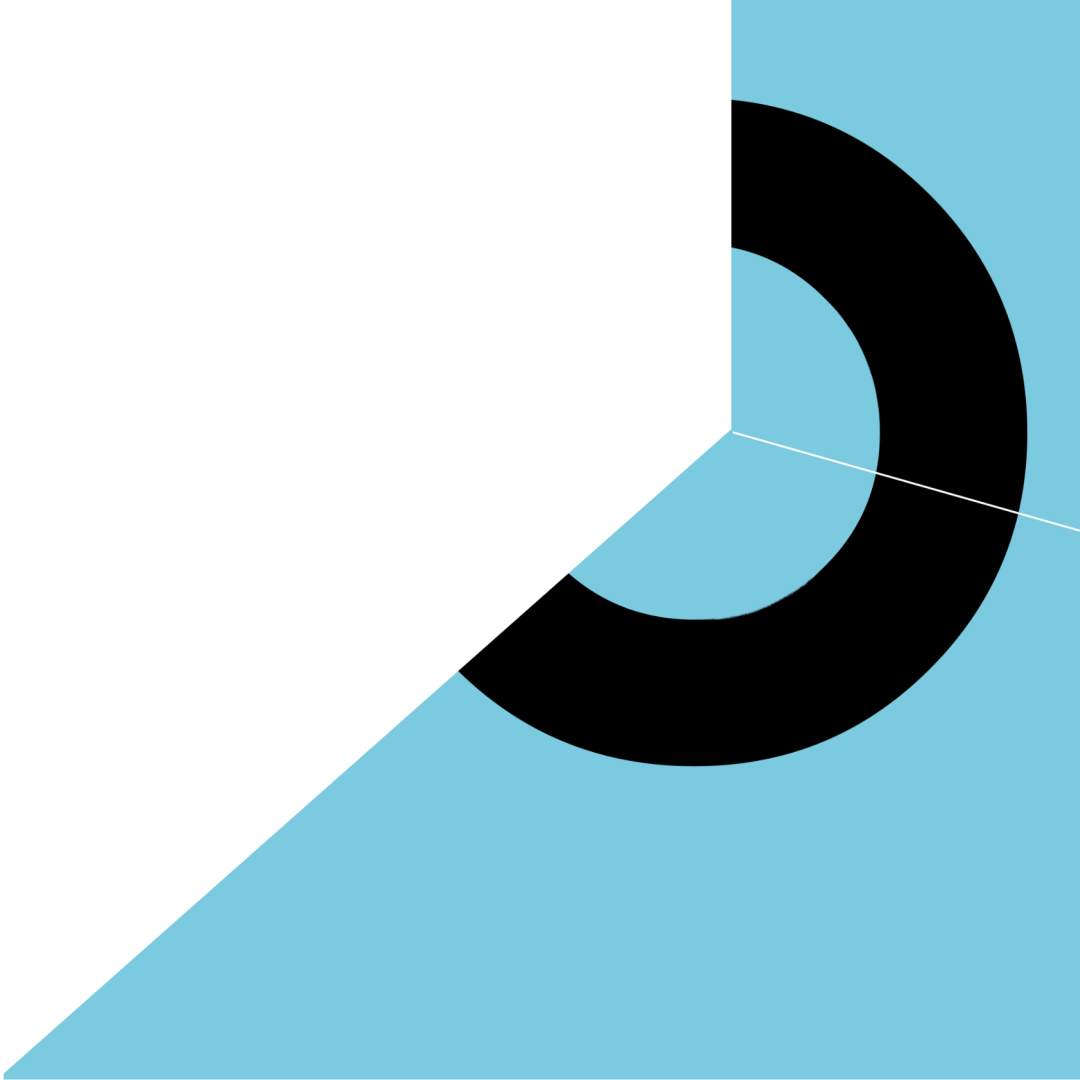


The screenshot shows the WorkBoard interface for a user named Addison Harvey. The main goal is "Achieve my Personal Development Goals for FY24" with a progress bar at 49%. Below the goal, there are three key results: "Attend 3 Professional Development Conferences" (2 of 3), "Author 10 articles on the company blog" (6 of 10), and "Participate in 5 Cross-functional Feedback Sessions" (1 of 5). A detailed view of the "Author 10 articles on the company blog" key result is shown on the right, indicating it is 6 of 10 articles completed, with a due date of Sep 30, 2024 and 73 days left. The interface includes navigation tabs for "Key Results", "Comments", and "History".



The screenshot shows the Workday Goals interface for a user named Addison Harvey. The main goal is "Achieve my Personal Development Goals for FY24" with a status of "PARTIALLY COMPLETE". The goal details include a due date of 09/30/2024, organization alignment, and category. A list of completed goals is shown below, including "Achieve \$10MM ARR for Product X" with a status of "SUCCESSFULLY COMPLETE". The interface includes navigation tabs for "Performance Reviews", "Goals", "Competencies", and "Develop".

Scorecards



Create a scorecard once, use it all year

Spend less time creating and maintaining your results scorecard!

- Select a list of teams, result owners, or tagged results to include in your scorecard, and set it to automatically add and remove items with each OKR reset.
- Instantly include any new key results that match your criteria as they are created, and remove them when they are closed.

WorkBoard Objectives Teamwork Meetings & Reviews Search WorkBoard Create

Biz Reviews / Digital Transformation Scorecard

Digital Transformation Scorecard Present

Scorecard Brief Generate

Objective name	KR name	Actual	Target	Comments	Tr
Digipay is delightfully fast for our customers	Cut transaction processing time by 4.5 seconds	1.6	4.5	@Roger Smithson Let's discuss a way forward	📈
	Launch 4 Digipay voice assistant Integrations (Google Assistant, Siri, Alexa, Cortana)	3	4	@Barry Bosser @Roger Smithson Congrats, you are doing really impressive work here. Let's make sure we highlight this at the next MBR!	📈
	MAU increases 8% from 32% to 40% (about 4k users)	39.4%	40%	@Shawna Herrera how can i help?	📈
	Reduce 4 user steps in Digipay transaction flow this quarter	1	4	@Roger Smithson Please let me know how we plan an achieving this in one day	📈
Onboarding is easier than associates' favorite consumer app	Users see 0 seconds of spinning wheel in transaction flow (as reported by users - from 2 seconds)	0	0		📈
	60% interaction completion on our new user in-app guides	43%	60%	Nice job Roger!	📈
	Access issue resolution time decreased from 2 hours to 1 hour	1.2	1		📈
	Chatbot system addresses 50% of customer inquiries without the need of a support rep	46.94	50	@Roger Smithson Hey Roger, great progress!	📈
Digipay issues in progress	Digipay issues in progress	2	1	All hands are on deck to address tickets 82922 and 82924	📈
	Lag time reduced from 1s to .54s for customer access sites	0.7	0.54		📈
	Receive and action feedback from 10 sign ups to improve account creation process	15	10		📈
User database encryption increases from 2 to 4 levels for customer data access	3	4		📈	

Teams: Digipay Information Technology PM Cloud Compute Search teams by name

Status: Open Closed Open & Closed

Result Owners: Roger Smithson Danielle Levitz Barry Bosser Search owners by name

Tags: Search tags by description

LIST AUTOMATION

Add new items in List to Scorecard

Remove items no longer in List from Scorecard

16 Key Results

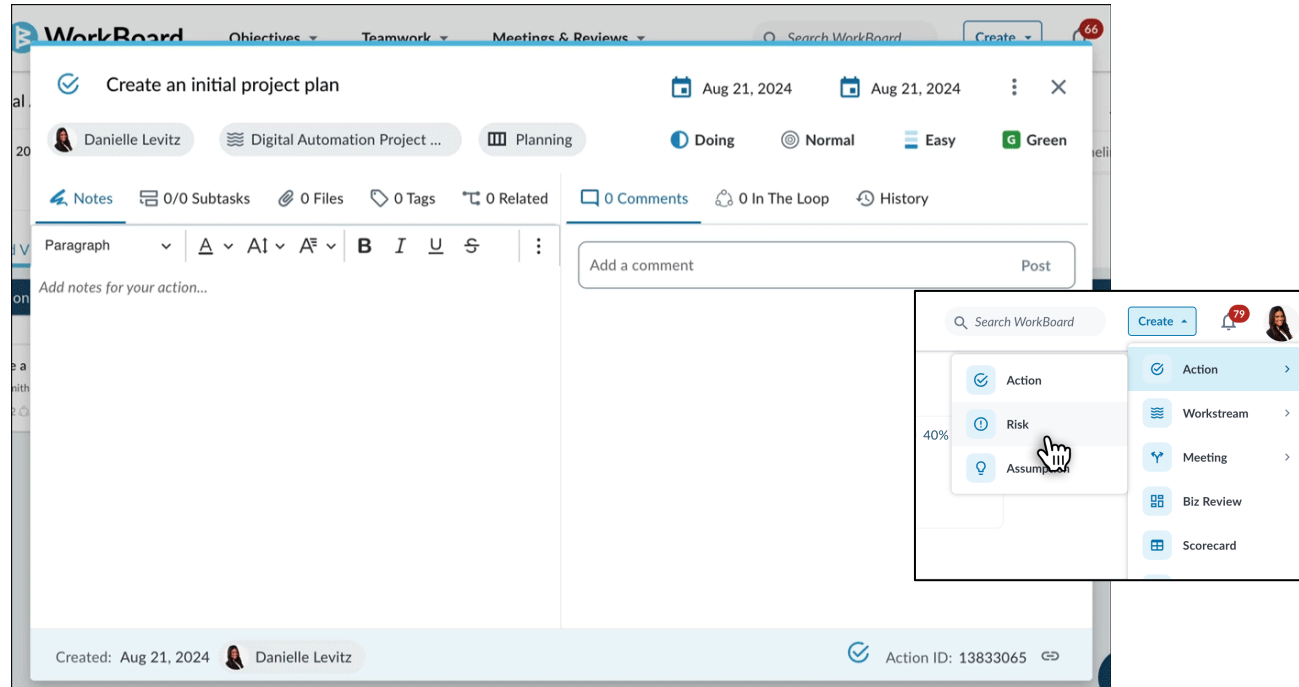
Save and apply list

Available now!

Manage Execution Risks

Easily track project risks and assumptions

- Create and track execution risks and assumptions in your team workstreams.
- Select **Risk** or **Assumption** from the global **Create > Action** menu, or change types on any existing action by clicking the checkmark icon.



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.

Conference pricing

\$699 Individuals

\$999 Bring a peer (2 tickets)

Conference fee includes a light meal at reception Sep. 30, all meals Oct. 1, breakfast and lunch Oct. 2, and conference materials.

[REGISTER NOW](#)

Agenda at a glance

Monday, September 30

2:00 PM - 4:00 PM

Pre-conference WorkBoard Labs

4:30 PM - 7:30 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

Speaker Lineup



Deidre Paknad

Founder and CEO,
WorkBoard



Erik Huddleston

Chief Executive Officer,
Aprimo



Ivy Grant

SVP, Corporate Strategy &
Operations, Twilio



Brad Surak

Vice President, Digital
Aviation Solutions, Boeing



Charles Jeffries

Sr. Manager, Supply Chain
Operations, Lam Research



Duncan Hawksbee

Director of Strategic
Execution, Trimble



Christopher Kiffe

Sr. Director, Information
Technology, CrowdStrike



Philipp Schett

CEO, Wave Nine



Rory Thompson

Operations Manager, Pax8



Mary Wheelwright

Senior Director of Business
Operations, Trellix



Jamie Temple

Co-founder, Insight Age



Joel Neeb

Co-founder, Insight Age

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 \$351/night
(including taxes and resort fees) for
Accelerate attendees from Sep. 29 - Oct. 2.

**Discounted hotel rates available
through this Friday, Aug 30!**



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

— Mike Limanni, IBM



Upcoming Courses



Class	Description	Dates	How to Sign Up
OKR Coach Certification	Become a certified OKR coach	<ul style="list-style-type: none">• Sep 10/12 at 1pm CET• Sep. 17/19 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">• Sep. 10-11 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">• Winter cohort begins January 14, 2025!	workboard.com/rme-certification

**What are You
Curious About?**



Thank you

See you next time!

