



Welcome to the Workboard Community Call!

Starting 3 minutes past the hour ...



News & Capabilities for the Workboard Community

Welcome to the Workboard Community Call

Topics Today

- 1. Microsoft & Workboard**
2. New Experience & Capabilities in April
3. GDPR Readiness
4. On the Horizon



Workboard Showcased at Microsoft Build Event

2 Developer presentations

Booth in Startup Expo

Video feature of our Dev team

Microsoft Build

Sessions

Speakers

FAQ

Become a sponsor ▾

Sign in

Register today >

Microsoft Build

May 7-9, 2018 // Seattle, WA

Microsoft's ultimate developer event is almost here. Join other innovative minds to connect, get inspired, and explore the future of the cloud, AI, mixed reality, and more.

Register today >



Integrated Solution Market Launch Coming May 1

These integrations bring strategic priorities and high value work into daily focus, conversations and decisions



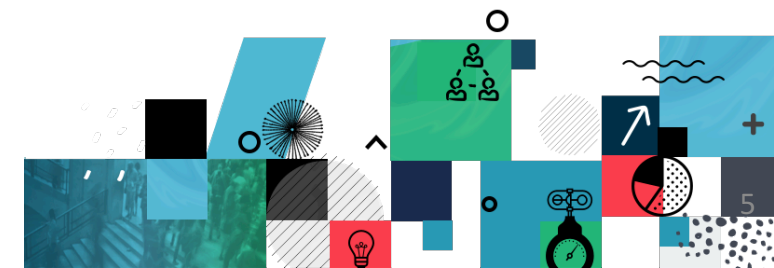
Microsoft producing showcase videos with our

- CEO
- Lead developer
- Customer - Deutsche Telekom-Detecon group

1 of 6 Teams featured partners (of hundreds)

Dedicated Microsoft Teams Solutions Consultant to help you take advantage of Workboard on Teams

Microsoft featuring Workboard on App store, customer newsletter, blog posts and events



Microsoft Outlook Integrations with Workboard

Calendar integrations and Outlook Add on

Build agendas ahead of time and capture decisions and actionable takeaways with Workboard Meetings

Convert emails to action items

< > February 18–24, 2018 ▾

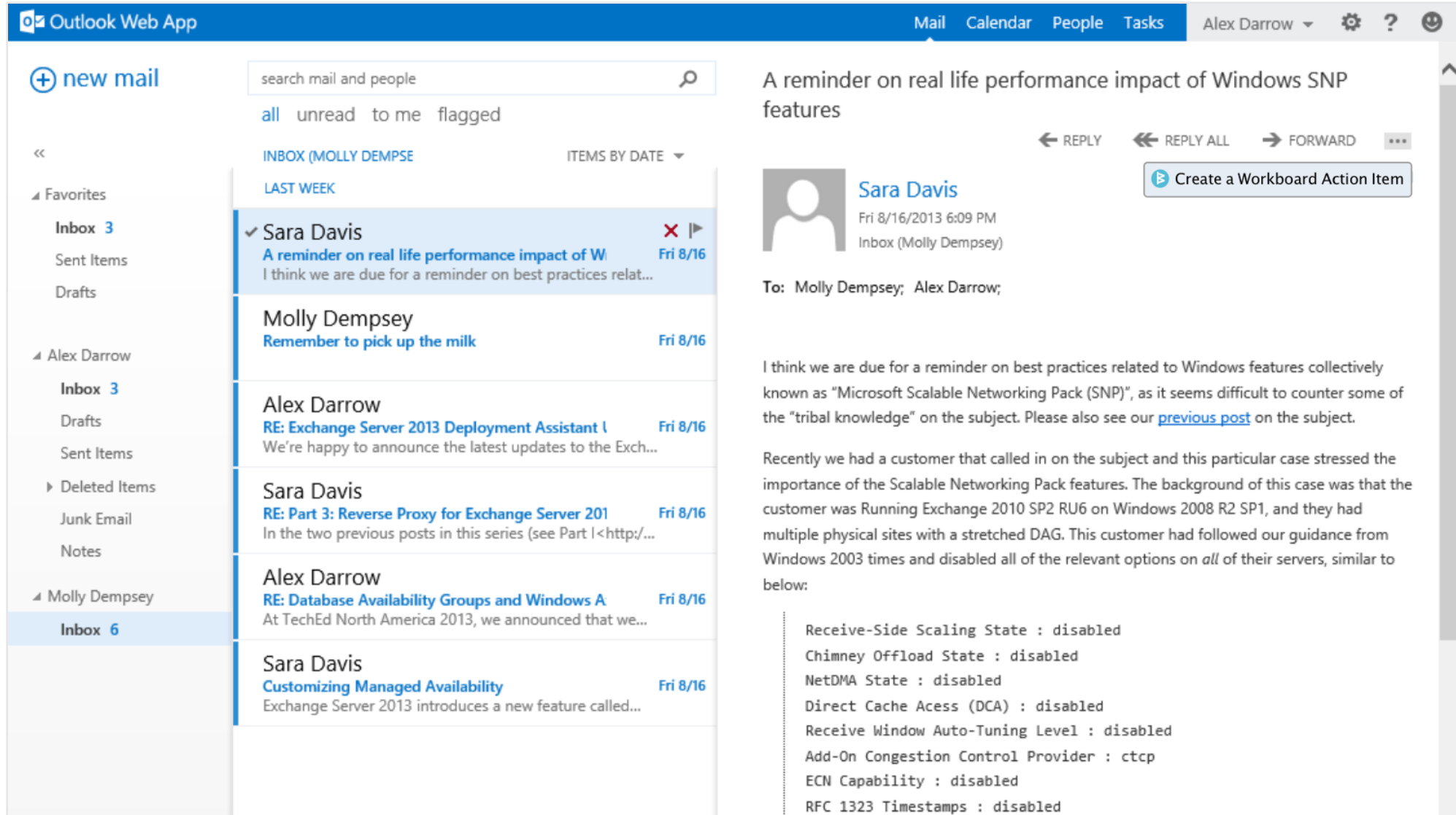
| | 18 Sunday | 19 Monday | 20 Tuesday | 21 Wednesday | 22 Thursday | 23 Friday | 24 Saturday |
|-----|-----------|--------------------------------------|------------|-----------------|-------------------------------------|--|-------------|
| 8a | | | | | | | |
| 9a | | | | | | Invitation to K2 L... | |
| 10a | | | | | | Wed 2/21/2018 1:00p - 2:00p Blue Diamond 3A | |
| 11a | | 1on1 with Maryan Blue Marine Room | | Demand Generat | | BTK Kickoff call | |
| 12p | | | | Weekly progress | | Sam Gartner | |
| 1p | | | | | BTK Kickoff call Blue Diamond 3A | Create a Workboard meeting | |
| 2p | | | | | | | |
| 3p | | | | | | | |

Microsoft Outlook Integrations with Workboard

Calendar integrations and Outlook Add on

Convert emails to action items

Forward your emails to Workboard to easily create action items and track your to do list



The screenshot shows the Outlook Web App interface. The top navigation bar includes 'Mail', 'Calendar', 'People', and 'Tasks'. The user is identified as 'Alex Darrow'. The left sidebar shows a navigation pane with 'new mail' and a list of folders: Favorites (Inbox 3, Sent Items, Drafts), Alex Darrow (Inbox 3, Drafts, Sent Items, Deleted Items, Junk Email, Notes), and Molly Dempsey (Inbox 6). The main area displays a list of emails in the 'INBOX (MOLLY DEMPSEY)' folder, sorted by date. The selected email is from Sara Davis, dated Fri 8/16, with the subject 'A reminder on real life performance impact of W...'. The email body text is visible on the right side of the interface.

Outlook Web App

Mail Calendar People Tasks Alex Darrow

new mail

search mail and people

all unread to me flagged

INBOX (MOLLY DEMPSEY) ITEMS BY DATE

LAST WEEK

✓ Sara Davis ✕ ▶ Fri 8/16
A reminder on real life performance impact of W...
I think we are due for a reminder on best practices relat...

Molly Dempsey Fri 8/16
Remember to pick up the milk

Alex Darrow Fri 8/16
RE: Exchange Server 2013 Deployment Assistant I...
We're happy to announce the latest updates to the Exch...


Sara Davis Fri 8/16
RE: Part 3: Reverse Proxy for Exchange Server 201...
In the two previous posts in this series (see Part I <http://...

Alex Darrow Fri 8/16
RE: Database Availability Groups and Windows A...
At TechEd North America 2013, we announced that we...

Sara Davis Fri 8/16
Customizing Managed Availability
Exchange Server 2013 introduces a new feature called...

A reminder on real life performance impact of Windows SNP features

← REPLY ←← REPLY ALL → FORWARD ...

 Sara Davis
Fri 8/16/2013 6:09 PM
Inbox (Molly Dempsey)

Create a Workboard Action Item

To: Molly Dempsey; Alex Darrow;

I think we are due for a reminder on best practices related to Windows features collectively known as "Microsoft Scalable Networking Pack (SNP)", as it seems difficult to counter some of the "tribal knowledge" on the subject. Please also see our [previous post](#) on the subject.

Recently we had a customer that called in on the subject and this particular case stressed the importance of the Scalable Networking Pack features. The background of this case was that the customer was Running Exchange 2010 SP2 RU6 on Windows 2008 R2 SP1, and they had multiple physical sites with a stretched DAG. This customer had followed our guidance from Windows 2003 times and disabled all of the relevant options on *all* of their servers, similar to below:

```
Receive-Side Scaling State : disabled
Chimney Offload State : disabled
NetDMA State : disabled
Direct Cache Access (DCA) : disabled
Receive Window Auto-Tuning Level : disabled
Add-On Congestion Control Provider : ctcp
ECN Capability : disabled
RFC 1323 Timestamps : disabled
```

Chat with Workboard in Microsoft Teams

Conversation chat interface to Workboard

Set, create and update objectives, key results, projects, actions and meetings

Invoke and include Workboard data in course of team chats

View Business Reviews, Meetings and project workstreams within Teams (tab)

The screenshot displays a Microsoft Teams chat window with a Workboard tab. The left sidebar shows navigation options: Activity, Chat, Teams, Meetings, Calls, Files, and Feedback. The main chat area shows a conversation with the Workboard bot. The bot's message includes a progress dashboard with three key results:

- 77% - Drive demand and build the sales pipeline** (Dec 31)
- 44% - Make the K2 Launch the most successful in our history** (Dec 31)
- 62% - Build customer relationships and advocacy to support our market strategy** (Dec 31)

Each key result is accompanied by a progress bar. The bot also provides buttons for 'Update result', 'KR History', 'Ping', and 'Follow' for the first key result, and 'Share', 'Edit', and 'Update' for the second. A user message at the bottom right asks, 'How am I doing on my objectives?'.

Grab Workboard Data for Team Conversations

Conversation chat interface to Workboard

Invoke and include Workboard data in course of team chats

Seamless fact-based conversations

View Business Reviews, Meetings and project workstreams within Teams (tab)

The screenshot shows a Microsoft Teams chat window for the 'Northwind Traders > Engineering' team. The left sidebar shows a list of channels including 'General', 'Product', 'Design', 'Engineering' (selected), 'Finance', 'Sales', and '32 more channels'. The main chat area shows a conversation with a message from Daniela Mandera at 9:25 AM. She has shared a Workboard card with the following details:

- Goals:** Launch New Mobile App
- Description:** Android based HRIS mobile app that will empower our employees.
- Progress:** 38% Complete
- Owner:** Chris Hansley
- Category:** Business Objective
- Due Date:** 11/04/2017

Below the card, there is a 'View' button and a follow-up message from Chris: 'Chris, any update on this?'. The chat interface includes a search bar at the top, a message input field at the bottom, and various chat controls like 'Reply' and 'Send a message'.

Run Workboard as a Tab in Microsoft Teams

Conversation chat interface to Workboard

Invoke and include Workboard data in course of team chats

View Business Reviews, Meetings and project workstreams within Teams (tab)

Seamless accessibility

The screenshot displays the Microsoft Teams interface. On the left, the navigation pane shows the 'Teams' section with 'Marketing' selected. The main area shows a meeting titled 'Meeting: K2 Launch' in the 'Marketing' channel. The Workboard tab is active, displaying a grid of business metrics and tasks. The grid includes 'Topics for Discussion' (PR Plan), 'Takeaways' (Update campaign timeline), and 'Key Results' (K2 Launch Readiness at 44%, K2 Launch Press Release Campaign at 45%).

| Topic | Owner | Due Date | Progress |
|----------------------------------|--------------------------------|----------|----------|
| PR Plan | By Emma | Jun 20 | |
| K2 Launch Readiness | By Emma | | 44% |
| K2 Launch Press Release Campaign | Lily Grooves: Customer Success | | 45% |

Run Workboard as a Tab in Microsoft Teams

Conversation chat interface to Workboard

Invoke and include Workboard data in course of team chats

View Business Reviews, Meetings and project workstreams within Teams (tab)

Seamless accessibility

The screenshot displays the Microsoft Teams interface with the Workboard tab active in the 'Engineering' channel of the 'Northwind Traders' team. The left sidebar shows the navigation pane with 'Teams' selected. The main content area is divided into several sections:

- Summary Cards:** A row of seven cards showing key metrics: 'Migrate 20 apps to the cloud' (14 of 20), 'Uptime across all back office' (98.9% of 100), 'Deploy 10 lightweight' (8 of 10), 'Reduce storage costs' (4.57m of 4.5m), 'Improvement UCC' (85% of 100%), 'Mobile enable our 10 top apps' (9 of 10), and 'Mobile enable our 10 top apps' (80% of 100).
- OBJECTIVES:** A list of three objectives with progress bars: 'Enable our LOB teams to be effective anywhere and everywhere with Key apps' (85%), 'Help simplify employee's day-to-day experience' (28%), and 'Attract and retain great people' (50%).
- WORKSTREAMS:** A list of two workstreams with progress bars: 'Cloud Application Candidates' (74%, Sales: Carl Chagoyan) and 'Cloud Services Contract Negotiations' (33%, Development: Jonathan Hu).
- HOT BOX:** A red-bordered box containing four items: 'Help simplify employee day-to-day experience' (28%), 'Cloud Security Protocols', 'Review final candidate pool' (Dec 14), and 'Conduct 3 POCs on mobile front office apps' (1 of 3).
- TODAY MAY 25:** A section for the current day with a 10:30am meeting 'Cloud Security Initiative' and two tasks: 'Execution Efficiency - current blockers' and 'Review contracts for cloud center candidates'.

Run Workboard as a Tab in Microsoft Teams

Conversation chat interface to Workboard

Invoke and include Workboard data in course of team chats

View Business Reviews, Meetings and project workstreams within Teams (tab)

Seamless accessibility

The screenshot displays the Microsoft Teams interface with a Workboard tab open. The sidebar on the left shows the 'Marketing' team selected, with a list of channels including 'General', 'Product', 'Design', 'Finance', 'Sales', and '32 more channels'. The main content area shows the 'Marketing' team's 'Project Board' for 'Strategic Use Cases' from Jan 01, 2018, to Mar 31, 2018. The board is in 'Board View' and shows a progress bar at 37%. The board is divided into four columns: 'Persona Work', 'Use Cases', 'Sales Enablement', and 'Marketing In'. Each column contains a list of tasks with assignees, dates, and status indicators (checkmarks or warning icons). A 'Re-look at the persona for chief of staff -- they are a key decision maker' task is highlighted in a tooltip. The bottom of the screen shows the 'Feedback' and 'Get apps' buttons.

| Persona Work | Use Cases | Sales Enablement | Marketing In |
|--|--|---|--|
| Program Leader Rachel Palmera Feb 27, 2018 ✓ | Advanced Analytics Rachel Palmera Feb 27, 2018 ✓ | Selling Amplifier to Sponsors and DMs Luke Lancaster Apr 18, 2018 ⌚ | Message framew Mary Cmoso |
| Executive Sponsor and Decision Maker Rachel Palmera Feb 27, 2018 ✓ | Market Predictor Rachel Palmera Mar 02, 2018 ✓ | Selling Advanced Analytics to Program Leads and Report Recipients Luke Lancaster Mar 09, 2018 ✓ | PR boiler plate u Mary Cmoso |
| Primary User Rachel Palmera Mar 16, 2018 ✓ | Amplifier Rachel Palmera Apr 04, 2018 ⌚ | Competing on Market Predictor Luke Lancaster Mar 30, 2018 ⌚ | Product pages o showcase these Mary Cmoso |
| Report Recipient Rachel Palmera Mar 16, 2018 ✓ | | | Solution overview Mary Cmoso |

Link files from OneDrive and SharePoint

File sharing with OneDrive

Seamless file sharing on project workstreams, action items and meetings in Workboard

The screenshot shows the Workboard interface during a meeting titled "Meeting: K2 Launch Strategy Session". The meeting is scheduled for Oct 24 at 3:00pm and has a timer showing 00:01. The interface includes a sidebar with navigation options like "BIZ REVIEW", "MY WORK", "TEAM WORK", "OBJECTIVES", and "MEETINGS". The main content area displays "Topics for Discussion" with several items related to the K2 launch, such as "Set the bar on innovation with K2 and move t...", "Make a decision on the EMEA launch", and "100 validated opportunities for K2 in the pipe...".

A modal dialog is open, titled "Workboard OneDrive name@email.com". It shows a list of files under the path "K2 Launch > Documents". The files are:

| Name | Modified | Modified By | File Size |
|---------------------|-------------|---------------|-----------|
| Marketing | 6 days ago | Alice Peoples | 20 MB |
| Social Media | 6 days ago | Frank Finance | 106 MB |
| Marketing | 3 days ago | Jill Chill | 36 MB |
| K2 Launch Strategy | Just Now | Jack Ceomack | 3 MB |
| PR | 2 days ago | Alice Peoples | 14 MB |
| Sales | 1 month ago | Joe Seller | 7 MB |
| FY18 | 3 weeks ago | Joe Seller | 40 MB |
| Executive Reporting | 4 days ago | Jack Ceomack | 200 MB |

The dialog also shows "Recent" files and "WorkBoard Teams" including "K2 Launch" and "Biz Dev". At the bottom of the dialog, there are "Cancel" and "Open" buttons.

Topics Today

1. Microsoft & Workboard

2. New Experience & Capabilities in April

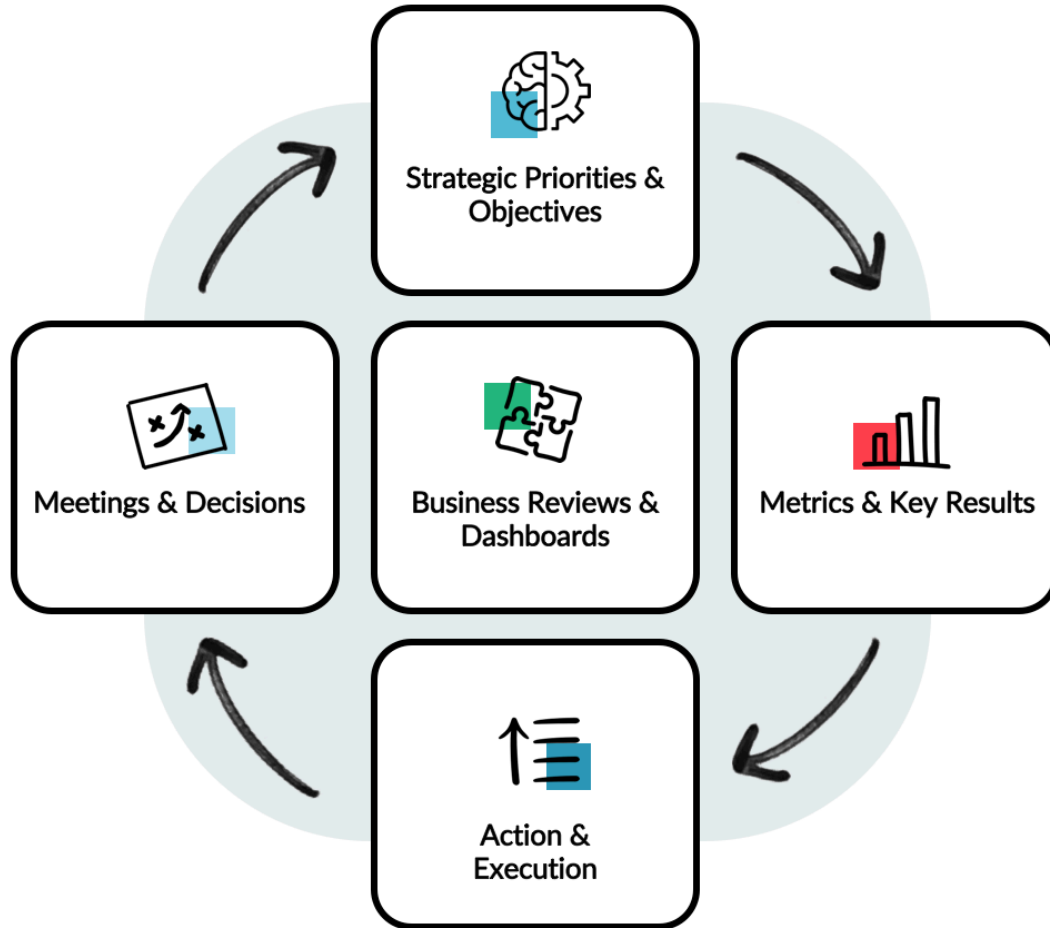
3. GDPR Readiness

4. On the Horizon





Launching April 15: New Experience Touches Every Aspect of WoBo



- ✓ New Navigation
- ✓ Smarter Business Reviews
- ✓ Meetings 3.0

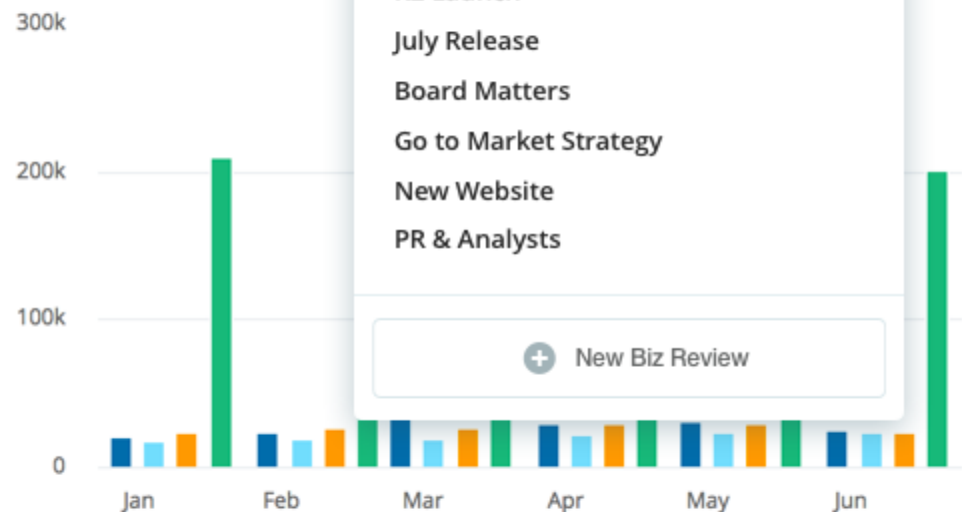
→

Company Operations

Jack Ceomack

Major Account Revenue

Acme (KR1) Mobilio (KR2)



FAVORITES

- Marketing
- Funnel Optimization
- Company Operations
- Q1 Sales Pipeline

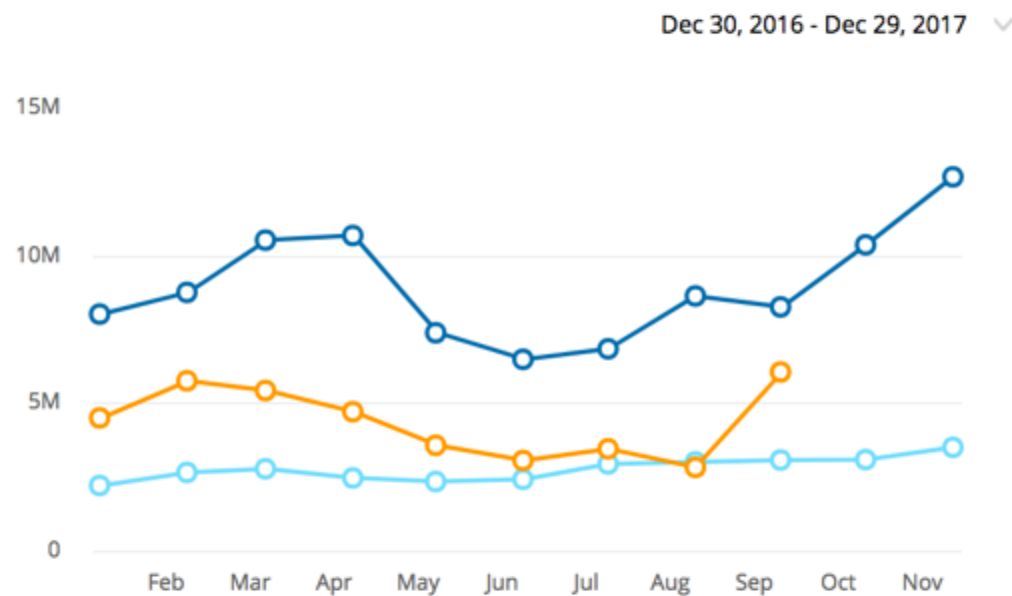
RECENTS

- K2 Launch
- July Release
- Board Matters
- Go to Market Strategy
- New Website
- PR & Analysts

+ New Biz Review

NA & EMEA Revenue

NoAm (KR1) EMEA (KR2) Global (KR3)



68.2% ▲ of 69.7%

Retention forecast - February

70.5% ▲ of 70.1%

Retention forecast - March

3.67 ▼ of 3.7

Improve LTV to CAC to 3.7

9.4 ▲ of 8

CAC Payback Period for new business deals improves from 10 months to un-

9 ▼ of 10

10 Evangelist interviews published in tier 1 media

75.6% ▲ of 79%

Gross margins move from 74% to 79%

147 ▼ of 200

200 validated opportunities for K2 in the pipeline

4 ▲ of 10

10 T1 customers actively using K2 with an average NPS of 30

79 ▲ of 125

K2 Demos

12 ▼ of 24

24 Beta Customers on K2

Biz Review



🔍 Jump to...

⬆️ COLLAPSE ALL

⬆️ FAVORITES

Marketing

Emma Thompson

Funnel Optimization

Guy Sales

Company Operations

Emma Thompson

Q1 Sales Pipeline

Guy Sales

⬆️ MY RUNNING BIZ REVIEWS

⬆️ BIZ REVIEWS SHARED WITH ME

K2 Launch

Emma Thompson

Customer Advocate Program

Guy Sales

DemandGen

Emma Thompson

+ New Biz Review

BKT Product Line Performance

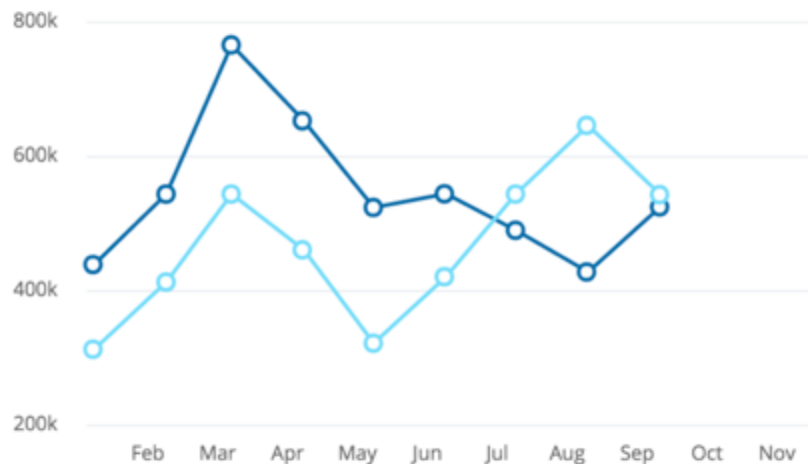
Jack Ceomack



BKT77

NorthAmer... (KR1) EMEA (KR2)

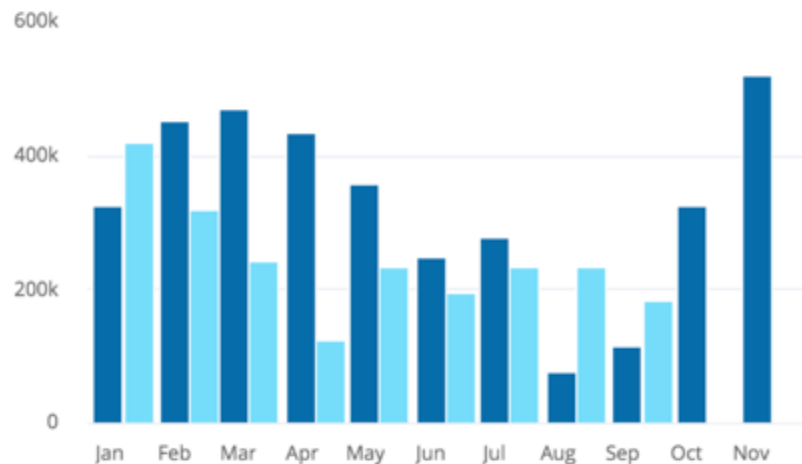
Dec 30, 2016 - Dec 29, 2017



P60X2 & X2 -- North America

76-X2 NoAm (KR1) 75-X1 NoAM (KR2)

Jun 29, 2016 - Dec 27, 2017



EMEA -- all products

BKT 76 (KR1) BKT 75 (KR2) BKT 77 (KR3) BKT 78 (KR4) BKT 79 (KR5)

Dec 29, 2016 - Dec 28, 2017



North America -- all products

BKT 75 (KR1) BKT 76 (KR2) BKT 77 (KR3)

Dec 30, 2016 - Dec 25, 2017





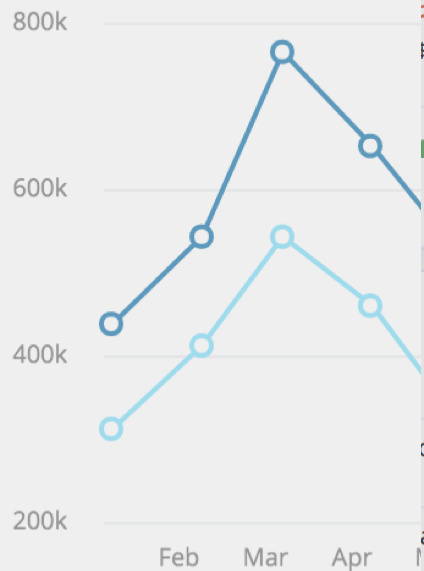
BKT Product Line Performance

Jack Ceomack



BKT77

NorthAmer... (KR1) EMEA (KR2)



Business Results Chart



- Source from metric
- Upload Image
- Embed Iframe

Name your chart:

Enter your chart display name

Choose the primary result or metric on the chart:

Search for a result

Next

EMEA -- all products

BKT 76 (KR1) BKT 75 (KR2) BKT 77 (KR3) BKT 78 (KR4) BKT 79 (KR5)

Dec 29, 2016 - Dec 28, 2017

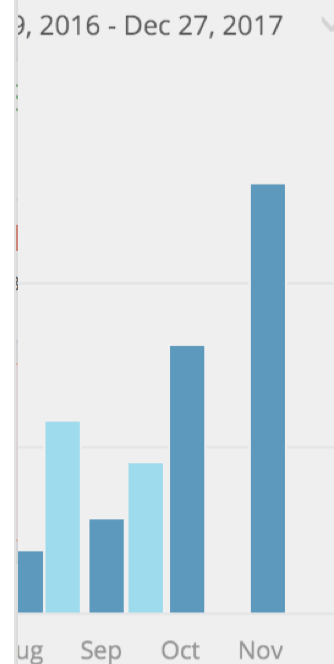
800k

North America -- all products

BKT 75 (KR1) BKT 76 (KR2) BKT 77 (KR3)

Dec 30, 2016 - Dec 25, 2017

1 000k

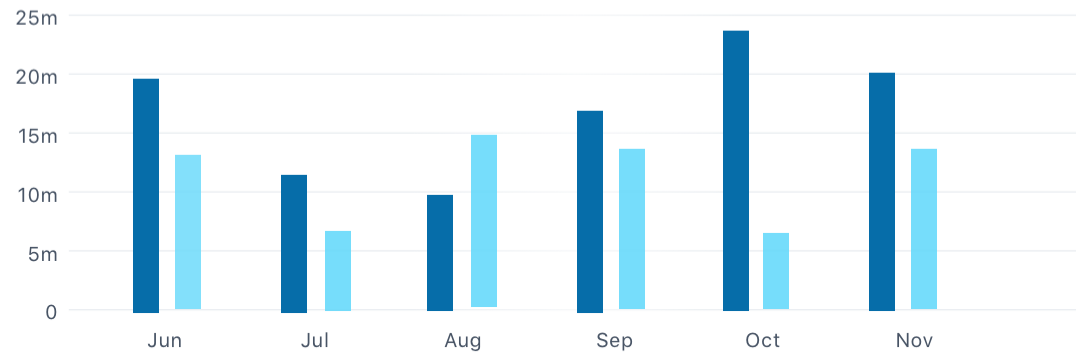


Marketing

Mary Cmoso

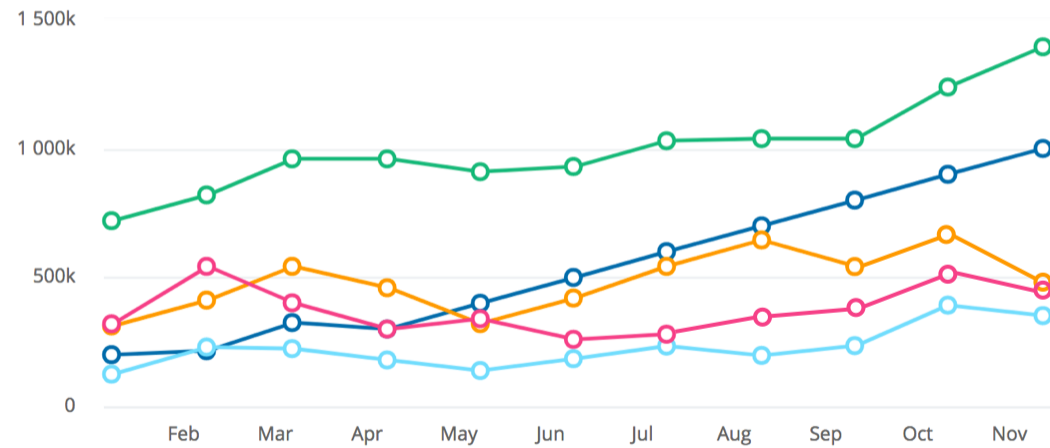
MQLs and SQLs

■ MQLs (KR1) ■ SQLs (KR2)

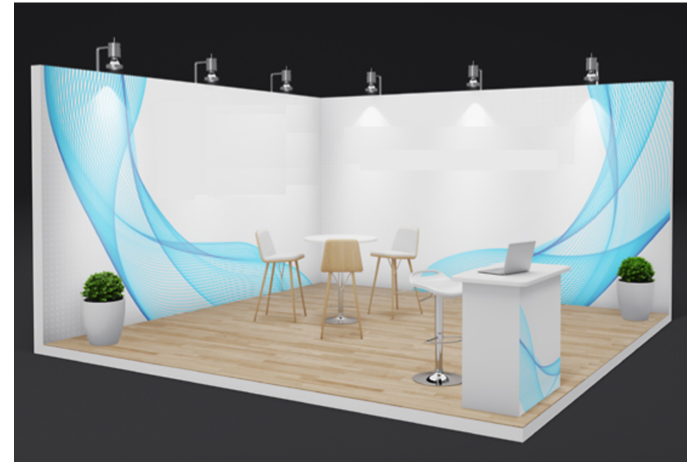


Channels

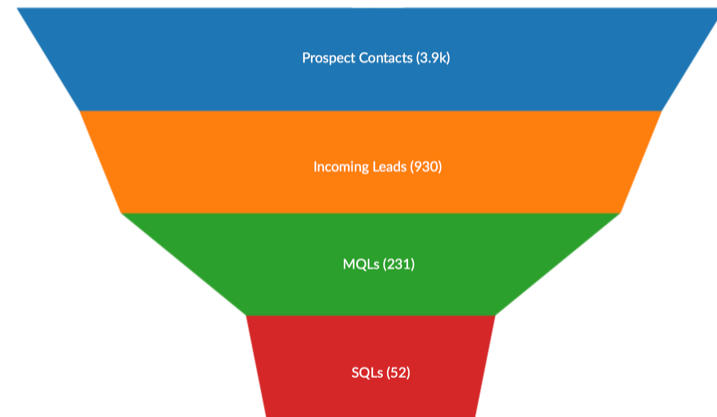
■ Referral ■ Direct ■ Organic ■ Paid ■ Display



Microsoft Insights Tradeshow Booth



Top of Funnel



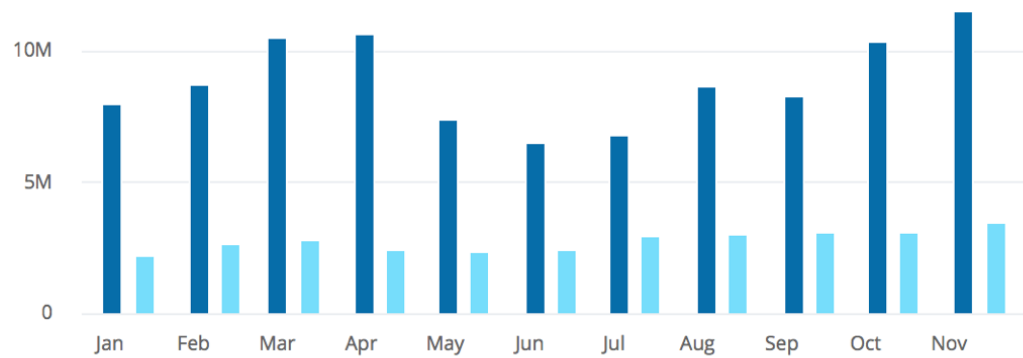
Growth: Target Industries

Jack Ceomack



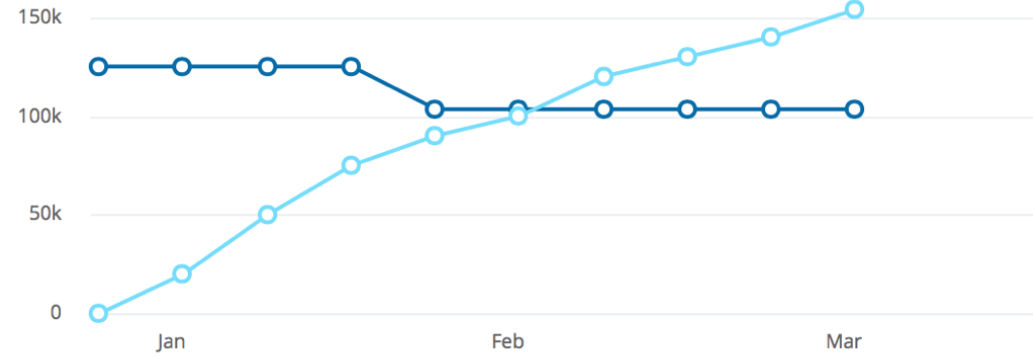
NA & EMEA Revenue

NoAm (KR1) EMEA (KR2)

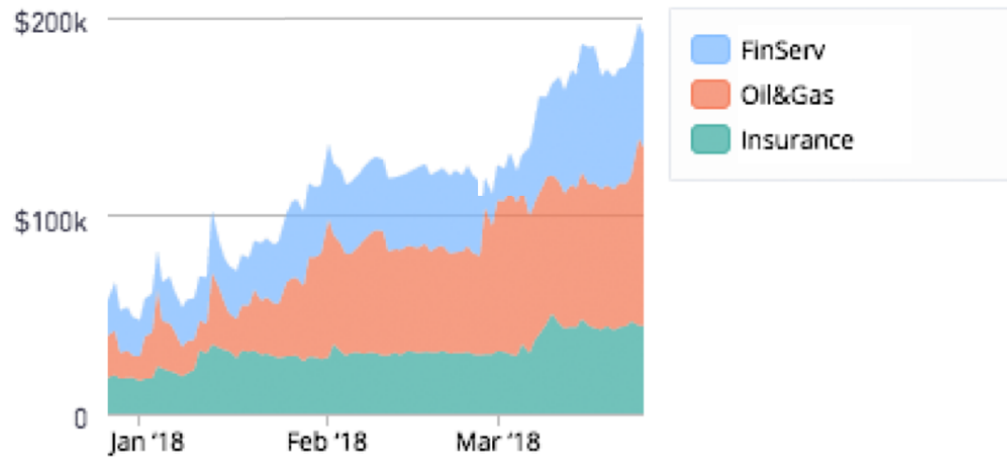


MRR

Renewals ... (KR1) New Biz M... (KR2)



Daily Revenue in Target Industries



Powered by Periscope Data

NA Revenue by Product in Target Industries

| Industry | Product | October 2017 | November 2017 | December 2017 |
|-----------|---------|--------------|---------------|---------------|
| FinServ | ABN5 | \$788 | \$1,560 | \$870 |
| | BKT61 | \$16,210 | \$762 | \$1,263 |
| | K2 | \$104 | \$6,234 | \$1,459 |
| Insurance | ABN5 | \$1,411 | \$8,345 | \$1,552 |
| | BKT61 | \$5,793 | \$7,647 | \$905 |
| | K2 | \$2,349 | \$1,734 | \$1,345 |
| Oil&Gas | ABN5 | \$1,378 | \$2,262 | \$5,810 |
| | BKT61 | \$936 | \$14,175 | \$2,729 |
| | K2 | \$3,336 | \$2,915 | \$4,151 |

My Work



Jump to...

Today 12

This week 22

Requests for me 234

Overdue 23

All my work 567

Work I delegated 45

In the loop 526

MY REPORTS

Weekly Check-Ins
Manager First Last

Reports sent via email

Email report

Add action item

This Week



You are getting it done Victor!



Happy New ye...

From Workboard,

Cheers to your 2018 success from your friends and fans at Workboard!

134 Total Done

Show me: Action Items and Subactions

| Mon Feb 19 | Tue Feb 20 | Wed Feb 21 | Thu Feb 22 | Fri Feb 23 | Sat Feb 24 |
|---|--|---|--|---|--|
| + | + | + | + | + | + |
| <p>Follow up on pricing plan with agency <small>PERSONAL STREAM</small></p> | <p>Connect Barry with Tom from conference on machine learning opportunity <small>PERSONAL STREAM</small></p> | <p>Review product roadmap with dev team <small>PERSONAL STREAM</small></p> | <p>Approve New Proposal <small>RENEGOTIATE CONTRACT ...</small></p> | <p>K2 Launch Strategy Session 15:02 pm</p> | <p>Review curriculum with Joaquin <small>PERSONAL STREAM</small></p> |
| <p>K2 sales team training is completed by August 4th <small>PERSONAL STREAM</small></p> | <p>Reach out to Barry for an update on Innovation Strategy Workshop <small>PERSONAL STREAM</small></p> | <p>Follow up with Stephanie on the launch plan <small>PERSONAL STREAM</small></p> | <p>Baxter RFP -- what is our high level pitch? <small>MAJOR ACCOUNTS</small></p> | <p>Budget for the TV campaign in the northeast <small>PRODUCT ROADMAP</small></p> | <p>Review and Sign Off on the Runbooks <small>OPERATIONS</small></p> |
| <p>Provide team with an updated budget <small>PERSONAL STREAM</small></p> | <p>Set up the initial meeting with our partners <small>K2 LAUNCH CAMPAIGNS</small></p> | <p>PR plan for K2 Launch <small>PERSONAL STREAM</small></p> | <p>Discuss hiring with Mary <small>PERSONAL STREAM</small></p> | <p>Put together a round table on product centric org model <small>PERSONAL STREAM</small></p> | |
| | | <p>Review Finances for Upcoming Board Meeting <small>BOARD MATTERS</small></p> | <p>Follow up with Bob <small>PERSONAL STREAM</small></p> | <p>Send George and Phil the final Q2 competitive analysis <small>PERSONAL STREAM</small></p> | Sun Feb 25 |
| | | <p>Sync with Lisa <small>PERSONAL STREAM</small></p> | <p>Follow up with Jane <small>PERSONAL STREAM</small></p> | <p>Website review <small>PERSONAL STREAM</small></p> | + |
| | | <p>Update metrics: Hire 10 <small>PERSONAL STREAM</small></p> | <p>Make flight reservations for next week's meeting <small>PERSONAL STREAM</small></p> | | |

Boards

🔍 Jump to...

View All Boards

⬆️ COLLAPSE ALL

⬆️ FAVORITES

K2 Launch

Funnel Optimization

Gartner MQ Submission

Q1 Sales Pipeline

Google Ad Campaign

⬆️ NON-TEAM BOARDS

K2 Launch

Customer Advocate Program

DemandGen

▼ SALES

▼ MARKETING

+ Add workstream

+ Add board

Favorites

Q1 Sales Pipeline
North America sales
John Morales

Strategy
Marketing
Emma Smith

Deep Thinking
Marketing
Emma Smith

K2 Launch
Dev Team
Kamilla Brzenski

Google Ad Campaign
Marketing
Emma Smith

Website
Marketing
Emma Smith

Non-Team Boards

Other Fish in the Sea 🚀
Sales
John Morales

Customer Success
Marketing
Emma Smith

Budget Allocation
Sales
John Morales

Marketing

Social Media Marketing
Marketing

Marketing Emails
Marketing
Emma Smith

Crazy Ideas
Marketing
Emma Smith

Chat

Strategic Use Cases Executive Team

Jan 01, 2018 - Mar 31, 2018

HEALTH: GOOD ▲

Board View

15 List View

Recent Activity

1 C

0 📅 0 ⏸ 15 🗨 18 👤

17%

Timeline

1 Filter

Use Cases

Advanced Analytics

Rachel Palmera

Feb 27, 2018



Market Predictor

Rachel Palmera

Feb 27, 2018



Amplifier

Rachel Palmera

Feb 27, 2018



Sales E

Selling Am

Luke Lancaste

Selling Adv

Leads and

Competing

Luke Lancaste

FAVORITES

- Marketing
- Funnel Optimization
- Gartner MQ Submission
- Q1 Sales Pipeline
- Google Ad Campaign

RECENTS

- K2 Launch
- July Release
- Board Matters
- Funnel Optimization
- Go to Market Strategy
- New Website
- PR & Analysts

+ Add workstream

Marketing Implementation

Page framework updated

Emoso

Feb 27, 2018



Boiler plate updated

Emoso

Feb 27, 2018



Product pages on website updated to reflect use cases

Emoso

Feb 27, 2018



Content overviews for each use case

Emoso

Feb 27, 2018



CX Implementation

Onboarding checklists for Advanced Analytics

Carlo Marco

Feb 27, 2018



CX team training on the new use cases

Carlo Marco

Feb 27, 2018



Panda updated to reflect use cases

Carlo Marco

Feb 27, 2018



Onboarding checklists for Amplifier

Carlo Marco

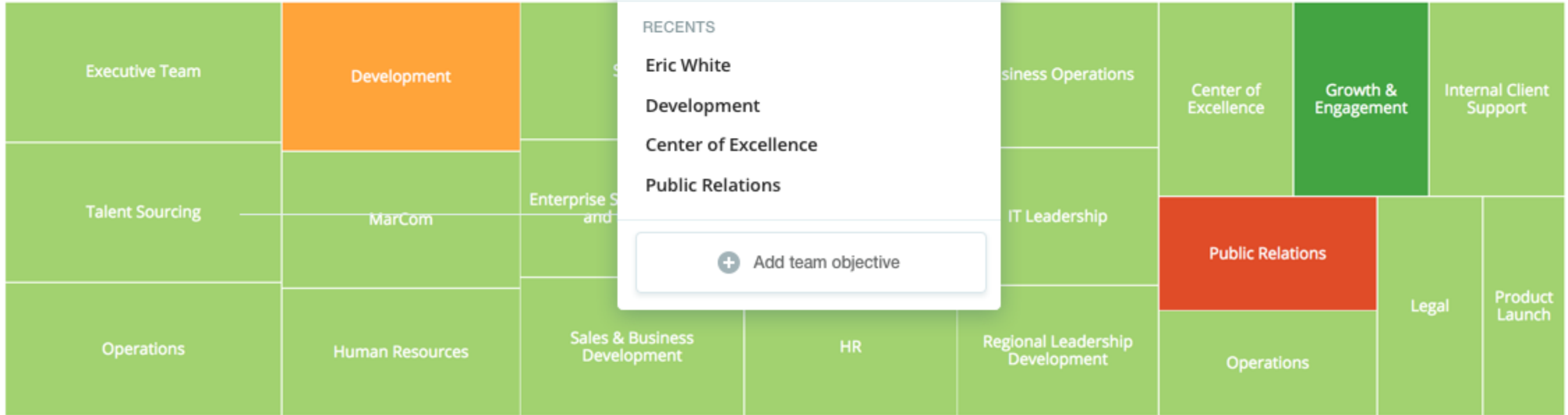
Feb 27, 2018



OKR Progress in your organization

Show me: Include: State: Achievement Date:

Show



Legend

| Business Operations | | Progress |
|---------------------|-------------------------------------|-------------------------------------|
| Dec 31 | 17' Company Objectives | 75% <div style="width: 75%;"></div> |
| Dec 31 | Enable our team to grow and succeed | 67% <div style="width: 67%;"></div> |
| Dec 31 | Killer K2 Launch | 73% <div style="width: 73%;"></div> |

Objectives & KR←

Jump to...

My OKrs

Heatmap

Alignment

Timeline

Engagement

Due for update now 4

COLLAPSE ALL

FAVORITES

OKR Progress in your organization

[← Back to Org Objectives](#)



Development

Barry Bosser

| | | | | | |
|---|--|--------------|---|--|---|
| 83% | Fill product gaps to drive referencability | 0 days left | 2 ↓↑ | 1 💬 | ⋮ |
| 100% | Code complete on current gap fixes | Barry Bosser | As of Nov 15, 2016 | | |
| 83% | Complete QA resourcing plan | Barry Bosser | As of Mar 08, 2016 | | |
| 11 | Hire developers | Barry Bosser | As of Nov 15, 2016 | | |
| 73% | Identify and define architecture and product strategy for K2 release | 0 days left | 2 ↓↑ | 0 💬 | ⋮ |
| 26% | Maximize resources on architecture and strategy | Barry Bosser | As of Nov 15, 2016 | | |
| 78% | Improve measurement accuracy on resource consumption | Barry Bosser | As of Mar 08, 2016 | | |
| 85% | Complete draft architecture for unified, scalable backend | Jordy Moe | As of Nov 15, 2016 | | |
| 65% | Review design options and constraints for next release | Jordy Moe | As of Nov 15, 2016 | | |
| 77% | Scale dev team to increase bandwidth | 0 days left | 1 ↓↑ | | |

+ Add personal objective

+ Add team objective

Meetings & 1:1s



🔍 Jump to...

Meetings

One on Ones

Past Meetings

^ FAVORITES

▶ Meet now

+ New meeting

+ New 1:1

Meeting: K2 Product Launch

😊 MEETING RATING

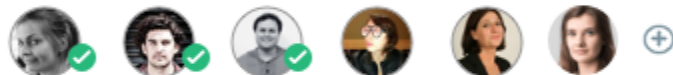


00:12 ⏸

Close



May 23 at 5:00pm ▾



Description ▾

ADD

📊 Objective

📈 Key Result

🌊 Workstream

☑️ Action Item

📎 Attachment

Topics for Discussion

○ Add topic

☑️ Draft customer announcement Aug 13 ⓘ
K2 Launch Readiness: Mary C.

📊 Killer K2 Launch
Marketing: Kim L.

Takeaways

○ Add a takeaway

Mary Cmoso *Just now*
We have to draft the customer announcement to send Jun 1

☑️ PR Plan Aug 13 ⓘ
K2 Launch Readiness: Emma S. *Added by Emma S.*

Kim Lou *1m ago*
We need to realign our messaging to the sales vision. The messaging needs to focus on digital transformation and the fast pace of change in the current market environment .

There is a real opportunity to use recent market developments and disruptions to our advantage. There are a lot of marketing campaigns from our competitors that focus on predictive technologies and solving problems of the future.

Mary Cmoso *Just now*
Jennifer on vacation March 15-23, campaign delayed

Meeting: K2 Product Launch

MEETING RATING

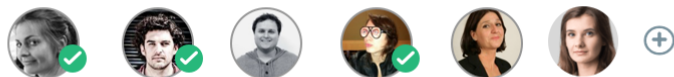


00:12

Close



May 23 at 5:00pm



Description

ADD

Objective

Key Result

Workstream

Action Item

Topics for Discussion

Add topic

Draft customer announcement
K2 Launch Readiness: Mary C.

Aug 13



Takeaways

Add a takeaway

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PR Plan
K2 Launch Readiness: Emma S.

Aug 13
Added by Emma S.

Kim Lou 1m ago
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Mary Cmoso Just now
Jennifer on vacation March 15-23, campaign delayed

Meeting: K2 Launch Planning

Blue Marina Room

May 23 at 5:00pm



00:12

Send Minutes



DESCRIPTION

- ADD Objective
- Key Result
- Workstream
- Action Item
- Attachment

Topics for Discussion

Add topic

PR Plan Aug 13
 K2 Launch Readiness: Emma S. By Emma

Takeaways

Add a takeaway

Update campaign timeline to launch 2 weeks before Christmas
 Mary Cmoso Just now

We need to realign our messaging to the sales vision. The messaging needs to focus on digital transformation and the fast pace of change in the current market environment

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K2 Launch Readiness 44
 By Emma of 100%

Invite 25 additional customers to participate in pre-launch beta. Aug 13
 K2 Launch Readiness: Emma S. By Mary

K2 Launch Press Release Campaign 45%
 Lily Grooves: Customer Success



Meeting: K2 Launch Planning Blue Marina Room

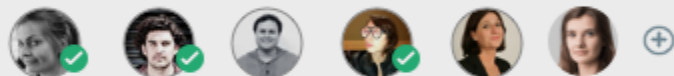
MEETING RATING



00:12



May 23 at 5:00pm



Description

ADD Objective Key Result Workstream

Rate Meeting

How productive was the meeting?



VERY



SOMEWHAT



NOT VERY

Send

Topics for Discussion

Add topic

PR Plan
K2 Launch Readiness: Emma S.

Aug 1

weeks before Christmas

Create a variety of social assets that have design and message match with the landing page and schedule promotional messages in advance with Hootsuite to coincide to avoid last-minute scrambles. Research better ways to collect feedback.

Add Takeaways

K2 Launch Readiness **44%**
K2 Launch Readiness: Emma S. of 100%

K2 Launch Press Release Campaign **45%**
Lily Grooves: Customer Success

Meeting: K2 Product Launch

MEETING RATING

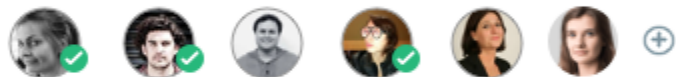


00:12

Close



May 23 at 5:00pm



Ratings received: 3 of 10



Haven't submitted a rating? [Rate Now](#)

Description

- ADD Objective
- Key Result
- Workstream
- Action Item
- Att

Topics for Discussion

Add topic

Draft customer announcement
K2 Launch Readiness: Mary C.

Aug 13

Killer K2 Launch
Marketing: Kim L.

Takeaways

Add a takeaway

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PR Plan
K2 Launch Readiness: Emma S.

Aug 13
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Kim Lou 1m ago
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Jennifer on vacation March 15-23, campaign delayed

Teams



Jump to...

Workload & Bandwidth

Priorities & Risks

My Directs

Reports

COLLAPSE ALL

FAVORITES

Marketing

MarCom

Funnel Optimization

Executive Team

Product Marketing

TEAMS

+ Add team

Marketing



7 Workstreams

25 Action Items

Objectives

Weekly Snapshots

Roster

Sort: A to Z

Timeline

Narrative

| | | | | | | | | | | |
|-----|---|------------------|------------------|------------------|--------|---------------------|----|-----------------------------|--|--|
| 46% | Customer Advocate Program Mary Cmoso | 1 R | 5 X | 2 D | SLOW | GOOD ▲ | P1 | Oct 15, 2017 - Nov 11, 2017 | | |
| 56% | DemandGen Mary Cmoso | 1 R | 5 X | 4 D | FAST | GOOD ▲ | P5 | Oct 08, 2017 - Dec 27, 2017 | | |
| 14% | Gartner MQ Submission Mary Cmoso | 1 R | 6 X | 4 D | FAST | OK ▶ | P5 | Oct 31, 2017 - Nov 29, 2017 | | |
| 63% | K2 Launch Mary Cmoso | 1 R | 5 X | 6 D | FAST | GOOD ▲ | P1 | Dec 31, 2017 - Mar 30, 2018 | | |
| 75% | Marketing Strategy Mary Cmoso | | 2 X | 2 D | STEADY | GOOD ▲ | P1 | Nov 30, 2017 - Dec 28, 2017 | | |
| 98% | Media Mary Cmoso | 1 R | 2 X | 2 D | STEADY | GOOD ▲ | P3 | Nov 09, 2017 - Dec 07, 2017 | | |
| 33% | Tier 1 Press Coverage Mary Cmoso | | 2 X | 2 D | SLOW | RISK ▼ | P1 | Oct 31, 2017 - Nov 29, 2017 | | |

Summary



Business Reviews & Dashboards

- Add images
- Display data from other apps (iFrames)



Strategic Priorities & Objectives

- Pin any OKR report view as favorite for fast access
- Jump to any OKR



Metrics & Key Results

- Pin results graph as favorite for fast access
- First ServiceNow integration at BAL



Action & Execution

- Direct navigation to boards
- Visual of all boards
- Jump to a board
- Sticky board images
- Teams menu goes to dashboard
- Easier to add members
- OneNote



Meetings & Decisions

- Smart assignment w/ @ # !
- Takeaways go with actions
- Add images
- Track-along feature
- Rate the meeting
- Stop/start recurring actions
- Note improvements



Topics Today

1. Microsoft & Workboard
2. New Experience & Capabilities in April
- 3. GDPR Readiness**
4. On the Horizon



GDPR Readiness

- Already adhere to EU Model Contract Clauses for our global customers
- Will meet new GDPR requirements by May deadline
- GDPR Readiness program includes:
 - ✓ A full review of our data supply chain, procedures and protocols
 - ✓ Ensuring the right to be forgotten
 - ✓ Refreshing policies and incident response protocols
 - ✓ Updating privacy and security training content and programs

Topics Today

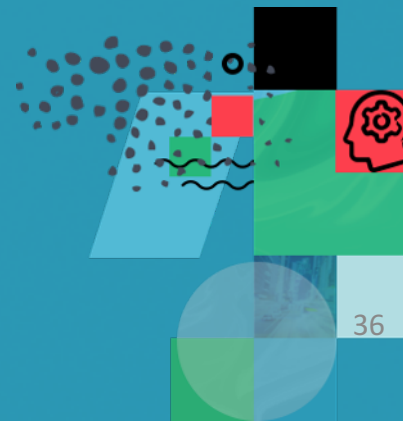
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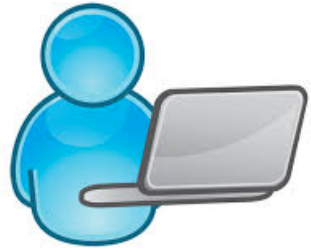


On the Horizon

- Datastreams
- Notifications and other improvements
- Improved list experience on My Work and Workstreams
- Custom action item and object attributes



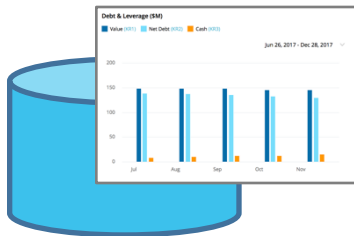
Creating & Updating KPIs (and key results)



Establish objectives and metric

End user KPI creation

1. User creates metric as they establish objectives
2. Determines what and how to measure and how often
3. Chooses data source for updates:
 - Self
 - Project in Workboard
 - Other Workboard metrics
 - Excel or app
 - Data stream



Update metric data

Period data push

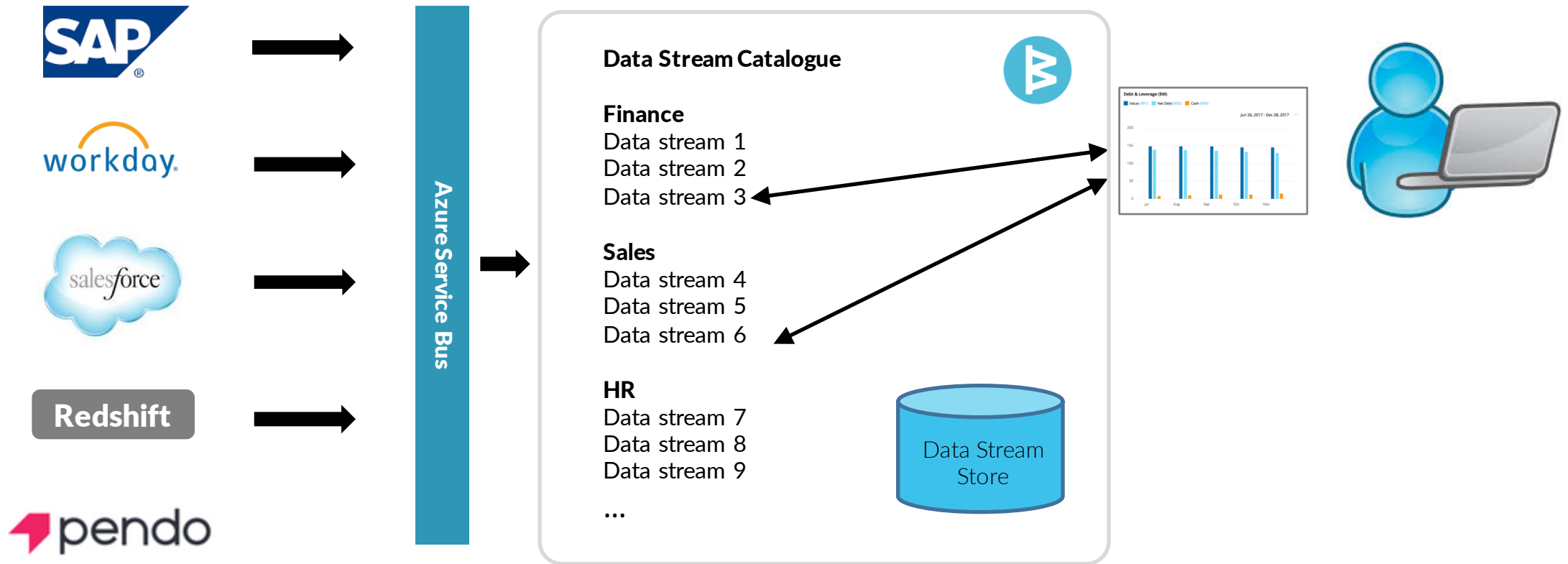
1. If "self", user enters data through Web, mobile, or chat interface
2. If any other source, period data is updated automatically



Data Stream Service Bus Architecture

Connectors publish to streams

Key Results (KPIs) subscribe to data streams





What do you think?





*Thank you for the opportunity to
support your success!*

