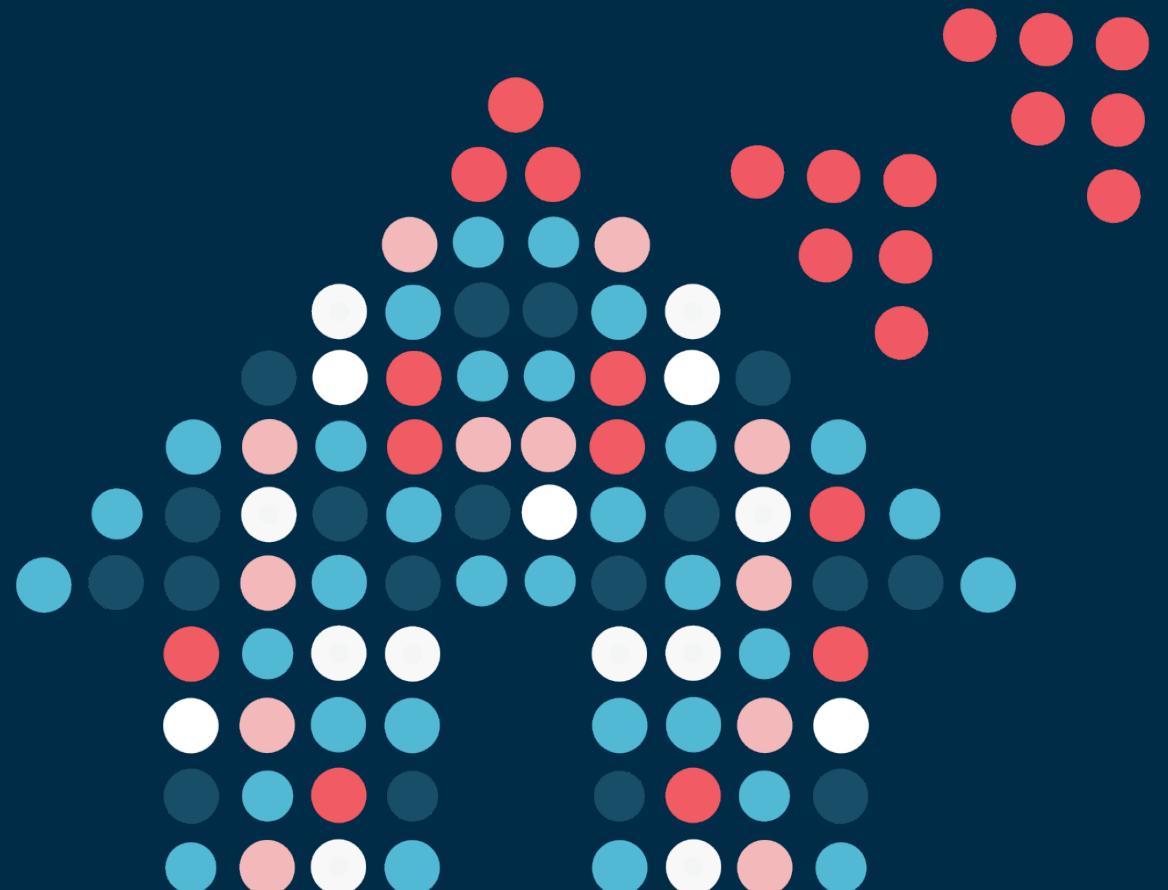


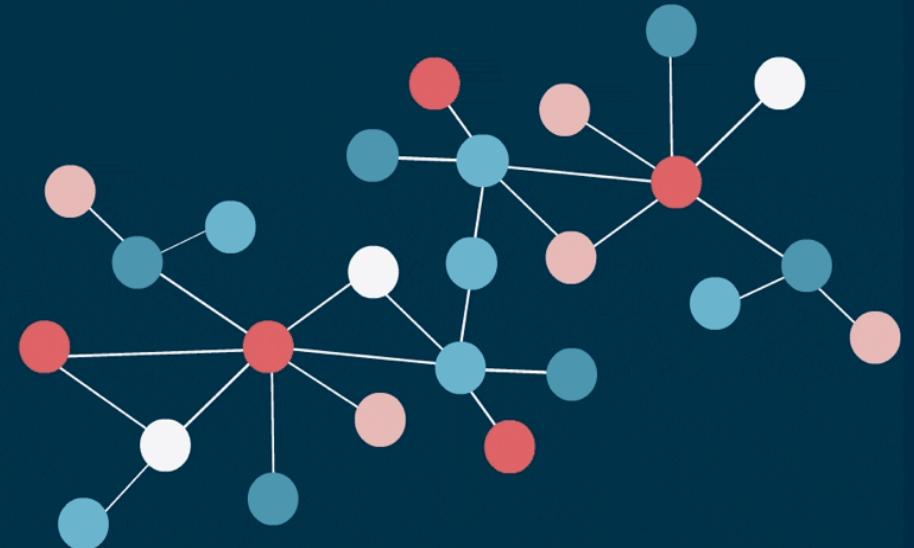
Leading from Home Webinar Series

**You're a digital leader
now, ready or not**



You'll Need More Transparency and Efficiency Now – Here's How

1. Reduce employee spin with more narrative on your Objectives
2. Work transparently to build trust and efficiency
3. Run smarter meetings to spare energy and time



Don't skip OKRs this quarter – over-communicate them



Your organization is looking to you for direction more than ever – use OKRs to channel energy, reinforce purposeful work, and harness the capacity you have to drive value to customers and the company.

1. Add Narrative to your objectives.
2. Give every employee access to see your objectives and how you've defined success
3. Consider a 45 day horizon for “response” OKRs



Add Team Objective and Key Results

OBJECTIVE

GROWTH: Make it easy for the right them to leave

Team | Company ELT • Jan 01, 2020 - Apr 30, 2020

KEY RESULTS



85% of new logo segments
Sourcing data from DA



85% revenue ret
Sourcing data from DA



75% WAU in Tie
Sourcing data from DA

Edit Objective

Objective *

[See sample OKRs](#)

GROWTH: Make it easy for the right customers to buy and hard for them to leave

Description

Team, our focus on the right segments has never been more important. Nothing changes on that front. Having said that, we know prospective customers may be distracted this quarter so we are expecting lower new bookings this quarter and now is the time to double down on helping our existing customers thrive in challenging times.

Team

Owner

Company ELT

Jack CEO Mack

Start date *



Jan 01, 2020

to



Apr 30, 2020

End date *

Objective alignment

Align this objective up to another one (or more)

View permissions in addition to team

Organization can view



Apply to objective and key results

GROWTH: Make it easy for the right customers to buy and hard for them to leave



Jack CEO Mack : Company ELT



59%



Apr 30, 2020

37 days left

Key Results

Aligns

Workstreams

Notes

Comments

History

Growth

Notes

Team, our focus on the right segments has never been more important. Nothing changes on that front. Having said that, we know prospective customers may be distracted this quarter so we are expecting lower new bookings this quarter and now is the time to double down on helping our existing customers thrive in challenging times.

Work Transparently



Transparency on commitments, actions, and decisions helps inter-dependent colleagues be more effective and is the foundation of trust between employees and managers.

1. Use an operations workstream to track agreed upon actions and give everyone visibility to status
2. Create a COVID response workstream so progress is visible to stakeholders everywhere
3. Turn on the WorkBoard daily digest

Workboard Daily Digest

Hi Jack, here are your notifications for Mar 23 2020



Focus on the good



You have 2 key results to update

[Update Now](#)



Mary changed the due date of [Publish supply chain message on corp web site](#) 7:34am

Due date added: March 23 2020



Barry commented on [Refresh strategy on WFH value prop:](#) 9:00am

"@Joanne Are we doing our best to help? Are there places we can lean in and be more helpful?"



Carl updated [75% WAU in Tier 1 and Tier 2 accounts to 72%](#) 9:56am



Carl got an 'Excellent' from Vinny for [75% WAU in Tier 1 and Tier 2 accounts.](#) 10:00am



Sandra commented on [External assets reflect new messaging.](#) 2:30pm
"@Mary - Please find the latest draft attached for review."

Staff ops Company ELT

Jan 01, 2020 - Mar 31, 2020

HEALTH: GOOD

PACE: STEADY

PRIORITY: P1

3 R 12 X 19 O 11 C

16% ▾

Timeline

Board View

34 List View

Calendar

Recent Activity

Files

Filter

Internal Response Actions 13 :

- + Set stipend for WFH upgrades / supplies per employee (Amanda Dinero, Mar 18, 2020)
- + Send initial CEO message on WFH and our response (Jack CEOmack, Mar 17, 2020, ✓)
- + Fast follow up CEO message - focal areas (Jack CEOmack, Mar 17, 2020)
- + Issue WFH to all CA employees ASAP (Alice Peoples, Mar 20, 2020, ✓)
- + Set bi-weekly walking "ask me anything" CEO conversations (Manny Admina, Mar 24, 2020)
- + Staffing model refresh for CS teams (Alice Peoples, Mar 20, 2020)
- + Set up weekly touchpoint with people managers (led by VP People) (Manny Admina, Mar 24, 2020, ✓)

External Response Actions 11 :

- + Message to postpone Summit event to registered guests (Maria Cmoso, Mar 23, 2020)
- + Publish supply chain message on corp web site (Maria Cmoso, Mar 23, 2020)
- + Send personal email to Tier 1 and Tier 2 customers (Jack CEOmack, Mar 30, 2020)
- + External assets reflect new messaging (Maria Cmoso, Mar 26, 2020)
- + Digital experience for trainings and enablement (Suzy Sandstorm, Mar 28, 2020)
- + Publish blog 1: Our WFH transition (Maria Cmoso, Mar 18, 2020, ✓)
- + All Tier 1 clients have weekly contact plans in place (Carly Salesforce, Mar 21, 2020)

BAU Actions 7 :

- + Update quarter OKR schedule (Manny Admina, Mar 26, 2020)
- + Reschedule OpComm to MWF (Manny Admina, Mar 20, 2020)
- + Schedule weekly all hands (Manny Admina, Mar 18, 2020)
- + Re-assess pipeline and revise sales forecast (Amanda Dinero, Mar 21, 2020)
- + Review hiring plan and budget and adjust for annual plan (Alice Peoples, Mar 22, 2020)
- + Send CEO "daily doses" to the org (Jack CEOmack, Apr 01, 2020, ✓)
- + Ensure managers have weekly 1:1s scheduled (Alice Peoples, Mar 30, 2020)

Health Status 3 :

- + Stock 300 symptom kits and at-home meal service options (Manny Admina, Mar 30, 2020)
- + Create Running Business Review with health status metrics (Manny Admina, Mar 27, 2020)
- + Establish safety net protocols (Alice Peoples, Mar 23, 2020)

Avoid meeting mania to spare energy and resources



Most of us have had twice as many meetings the last two weeks and it's not sustainable. Meeting all day saps energy and leaves everyone frustrated by their inability to do meaningful work — and meaningful work is exactly where you need focus.

1. Create smart meeting agendas in WorkBoard to focus conversations
2. Track actions from those meetings in your operations workstream
3. Use the automatic weekly snapshots to see what's done and what's fallen behind

ELT Stand-up

View meeting for

Mar 04 at 3:00pm

Count up

00:00

Meeting feedback



Description

Team - With so much swirling around us, a weekly stand-up is pretty vital to our ability to respond in a fast and coordinated way. We face two important challenges:

1. How we care for/respond to the needs of clients & our employee's day to day
2. How we help the org quickly adapt to a fast-changing business landscape

ADD:

Put actions in: [Staff ops](#)

Topics for Discussion

Add topics here

R Health Status

Jack CEOMack 03:06 pm Mar 20

Takeaways

Add takeaways here



How do we ensure our employees are safe and have what they need in this new WFH posture?

Jack CEOMack 03:09 pm Mar 20

Mar 30

Added by: Jack C



Stock 300 symptom kits and at-home meal service options

Staff ops : Manny Admina



Establish safety net protocols

Staff ops : Alice Peoples

Mar 23

Added by: Jack C

+ Add another



How do we bring the conviction and momentum teams need as they are bombarded with fear messages and health concerns?

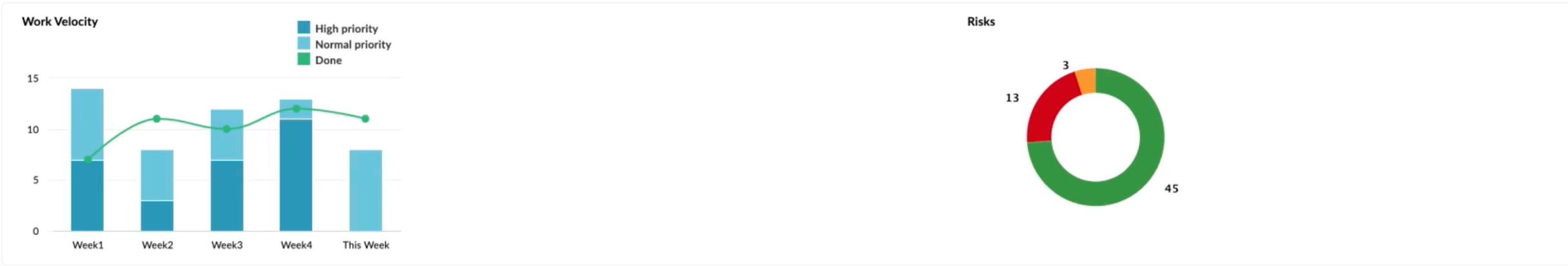
Jack CEOMack 03:07 pm Mar 20

Internal Response -- employee needs

Jack CEOMack 02:59 pm Mar 20


[OKRs](#)
[3 Workstreams](#)
[106 Action Items](#)
[Weekly Snapshots](#)
[Team Members](#)

For week of: Mar 10 - Mar 16, 2020



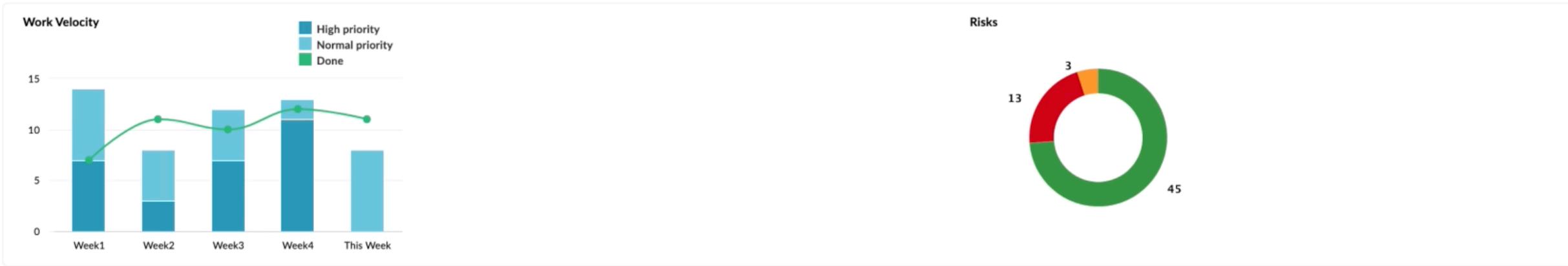
Stats by Workstream

Workstream	Done	Resolved	Date Setback	Red Flags	Lates
Staff ops	2 ✓	1 ✅	1 ↪	2 🚨	3 🚨
Send initial CEO message on WFH and our response	Done	Resolved	Date Setback	Red Flags	Lates
Issue WFH to all CA employees ASAP	Jack Ceomack .	Mar 15, 2020	Mar 17		
Alice Peoples		Mar 16, 2020	Mar 20		
Strategic Use Cases	1 ✓	0 ✅	0 ↪	0 🚨	10 🚨
Done	Resolved	Date Setback	Red Flags	Lates	

1 Deleted This Week

Action Items	Workstream	Owner	Deleted By	Due Date
Item 1	Private Request	Jack CEOMack .	Jack CEOMack	Feb 25, 2020

For week of: Mar 10 - Mar 16, 2020

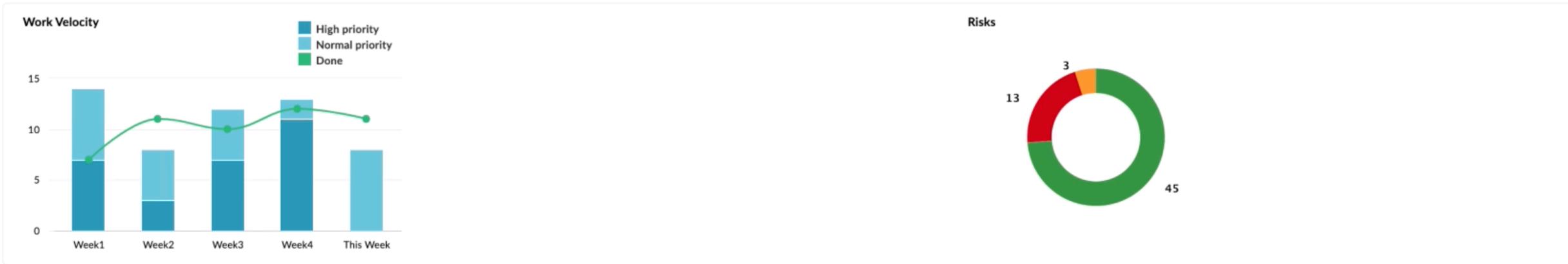


Stats by Workstream

Workstream	Done	Resolved	Date Setback	Red Flags	Lates
Staff ops	2 ✓	1 ✅	1 ↪	2 🚨	3 🚨
Stock 300 symptom kits and at-home meal service options	6	1	1	1	1
Fast follow up CEO message - focal areas	6	1	1	1	1
Strategic Use Cases	1 ✓	0 ✅	0 ↪	0 🚨	10 🚨

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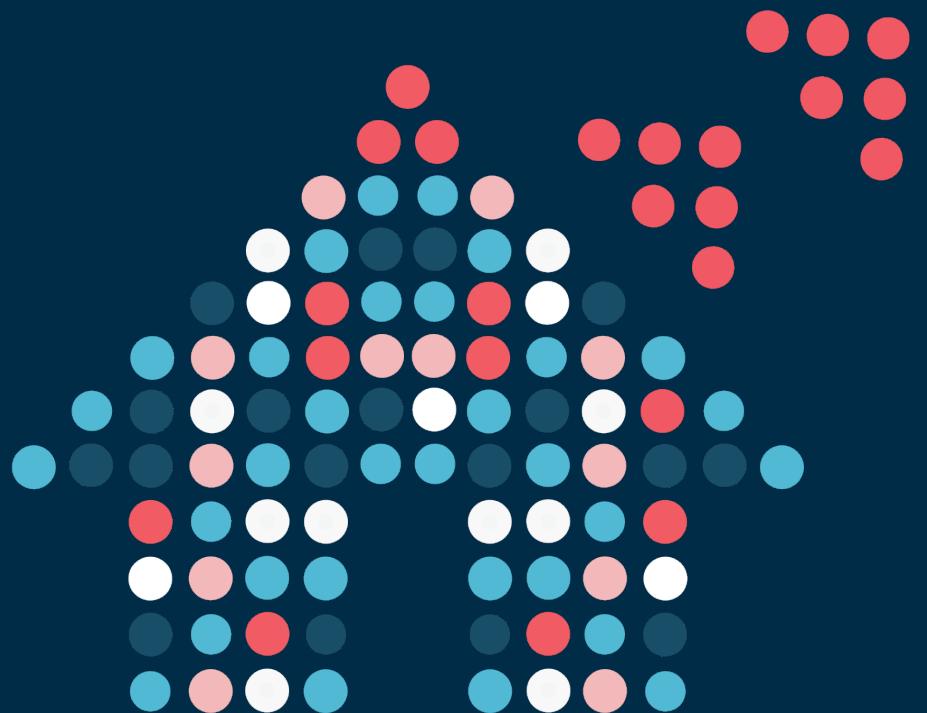
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Staff ops	2 ✓	1 ✅	1 ↪	2 🚫	3 🚫
Staffing model refresh for CS teams 					
	Alice Peoples				Mar 19, 2020
Message to postpone Summit event to registered guests 					
1 	Maria Cmoso				Mar 20, 2020
Reschedule OpComm to MWF 					
	Manny Admina				Mar 20, 2020

Workstream	Done	Resolved	Date Setback	Red Flags	Lates
Strategic Use Cases	1 ✓	0 ✅	0 ↪	0 🚫	10 🚫

Action Items	Workstream	Owner	Deleted By	Due Date
1 Deleted This Week				

What are you curious about?



Thank you for joining!

