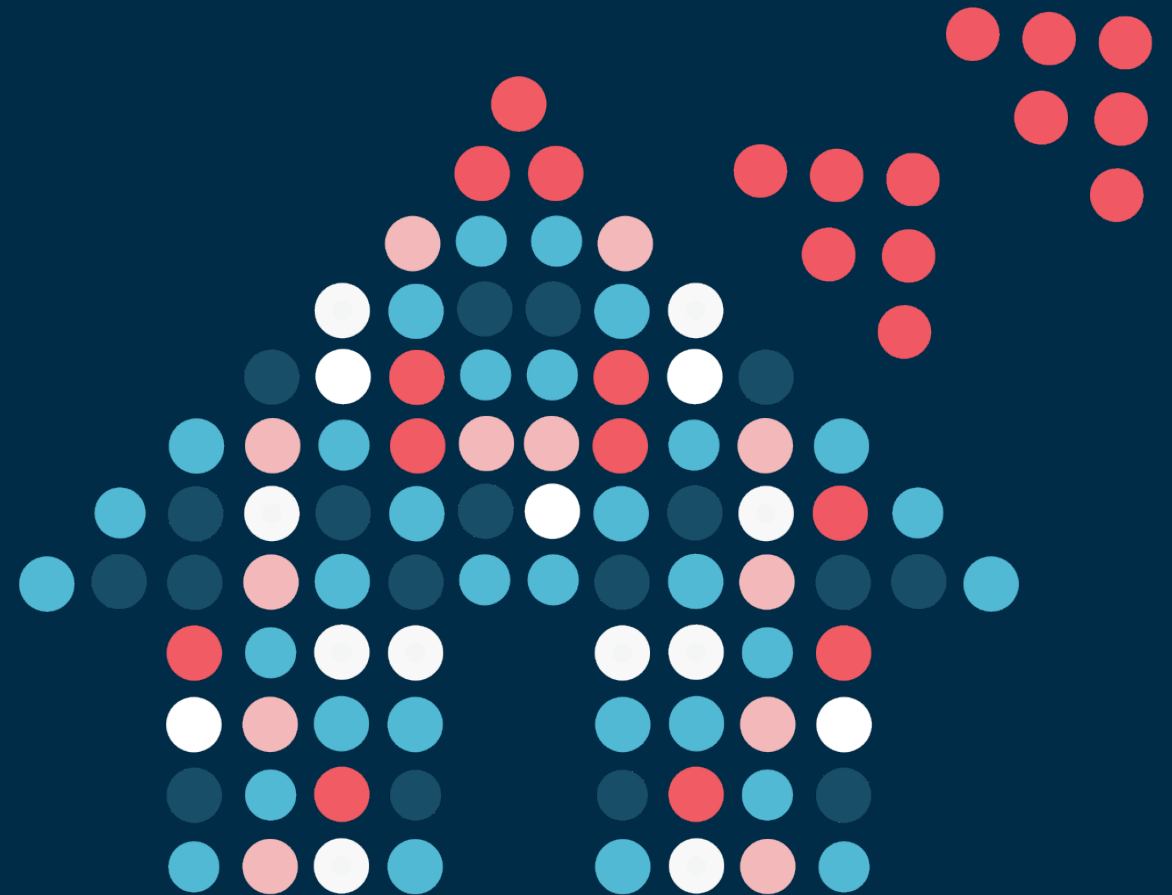


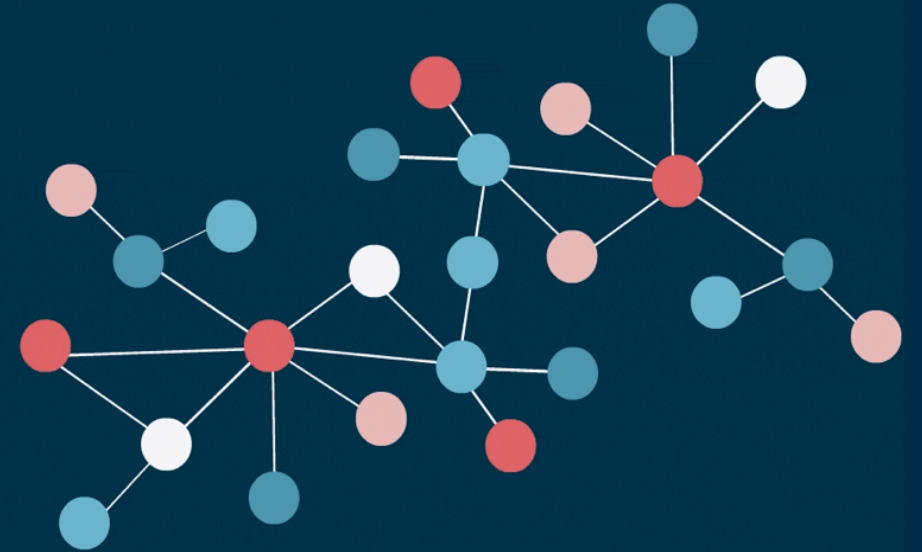
Leading from Home Webinar Series

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 customers to buy and hard for them to leave

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

KEY RESULTS



85% of new logos in target segments

Sourcing data from Data Platform



85% revenue retention

Sourcing data from Data Platform



75% WAU in Target Segments

Sourcing data from Data Platform

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



Start date *

End date *



Jan 01, 2020

to



Apr 30, 2020

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 CEOMack : Company ELT



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 ⌛ 19 ⌚ 11 👤

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
Manny Admina Mar 24, 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: [Bar Chart] [Pie Chart] [List Icon] [Checkmark] [Link]

Put actions in: Staff ops

Topics for Discussion

○ Add topics here

R Health Status

Jack CEOMack 03:06 pm Mar 20



Internal Response -- employee needs

Jack CEOMack 02:59 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



Stock 300 symptom kits and at-home meal service options

Staff ops : Manny Admina

Mar 30 **R**
Added by: Jack C



Establish safety net protocols

Staff ops : Alice Peoples

Mar 23 **G**
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?

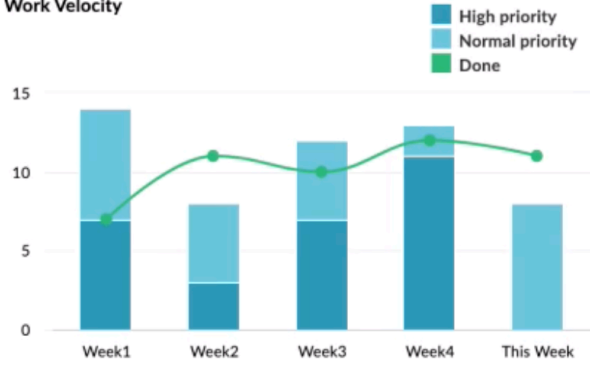
Jack CEOMack 03:07 pm Mar 20

For week of:

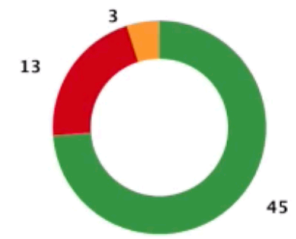
Mar 10 - Mar 16, 2020

📅

Work Velocity



Risks



Stats by Workstream

Staff ops

2

1

1

2

3

Done

Resolved

Date Setback

Red Flags

Lates

	Send initial CEO message on WFH and our response	Jack Ceomack .	Mar 15, 2020	Mar 17
	Issue WFH to all CA employees ASAP	Alice Peoples	Mar 16, 2020	Mar 20

Strategic Use Cases

1

0

0

0

10

Done

Resolved

Date Setback

Red Flags

Lates

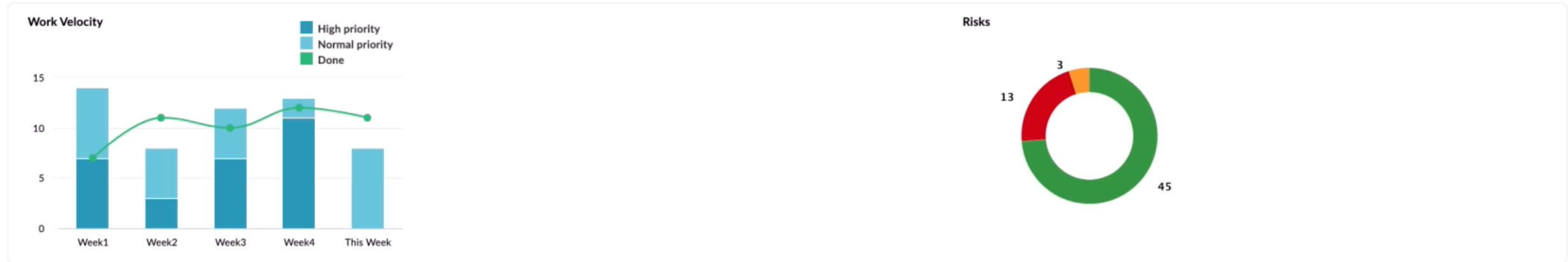
1 Deleted This Week

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

Staff ops

2

✓

Done

1

✓

Resolved

1

↶

Date Setback

2

🚩

Red Flags

3

🕒

Lates

Stock 300 symptom kits and at-home meal service options

6

🗨️

G

➤

R

Manny Admina

Mar 20, 2020

Fast follow up CEO message - focal areas

6

🗨️

G

➤

R

Jack Ceomack

Mar 19, 2020

Strategic Use Cases

1

✓

Done

0

✓

Resolved

0

↶

Date Setback

0

🚩

Red Flags

10

🕒

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:

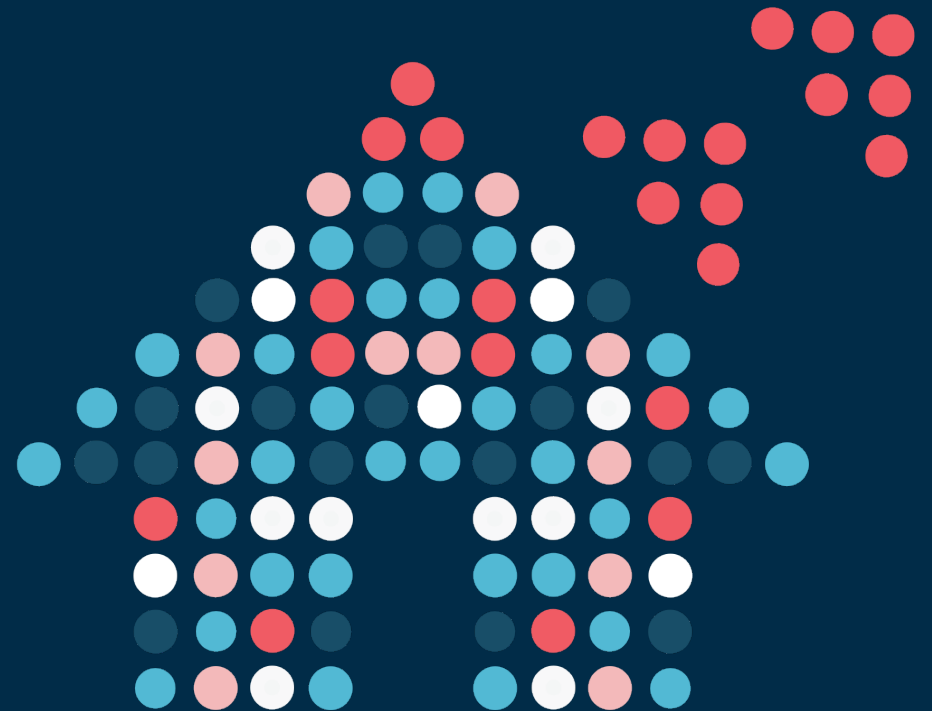
Mar 10 - Mar 16, 2020



Stats by Workstream

Staff ops		2	1	1	2	3
		Done	Resolved	Date Setback	Red Flags	Lates
Staffing model refresh for CS teams		Alice Peoples		Mar 19, 2020		
Message to postpone Summit event to registered guests		Maria Cmoso		Mar 20, 2020		
Reschedule OpComm to MWF		Manny Admina		Mar 20, 2020		
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		

What are you curious about?



Thank you for joining!

