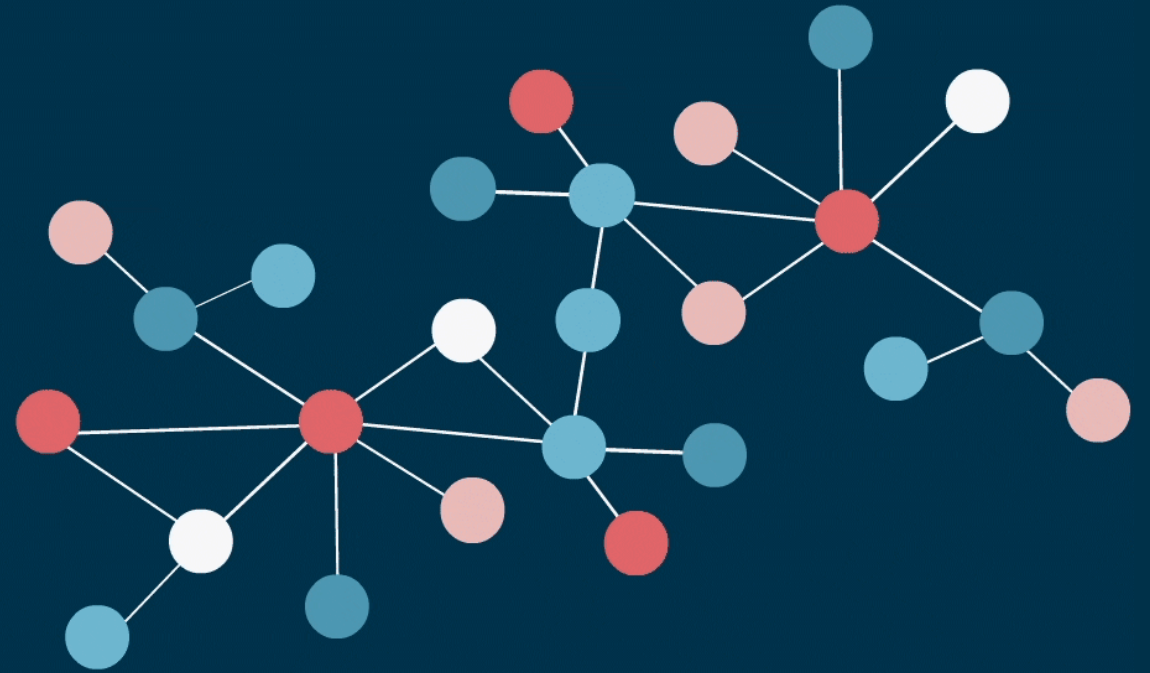




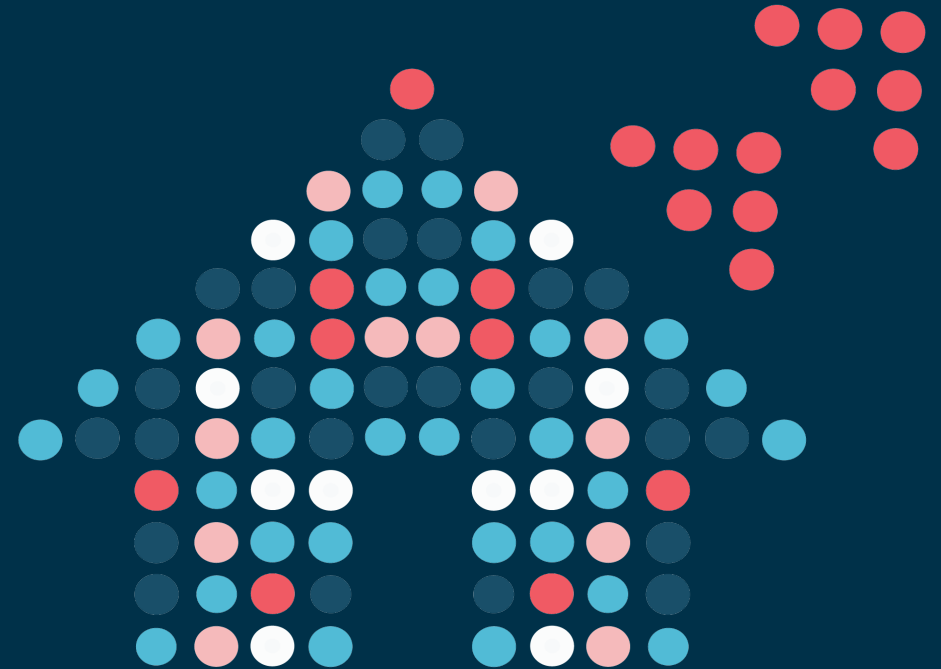
# Leading the Way Forward:

A Manager's Playbook  
to Crush WFH



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

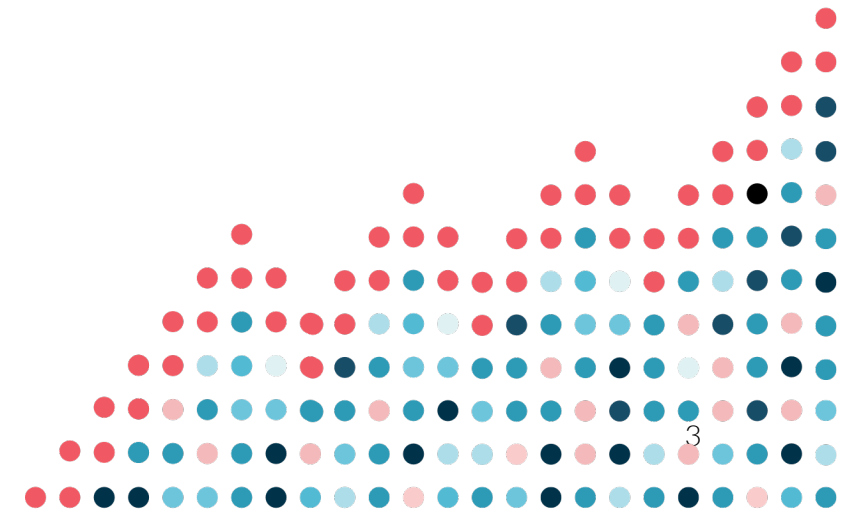
Digital transformation has been an organizational buzzword for years, but that doesn't lessen the shock of becoming a digital leader overnight. This how-to guide is meant to help you build immediate new habits around **leading from home**, and the **digital ops, transparency and communication** necessary for distributed workforces to ensure time and effort are spent where they matter most.



# This new normal is challenging...

# ... and full of opportunity

Paralyzing uncertainty and unclear day-to day priorities	→	<i>Establish radical clarity on your team</i>
Diminished transparency, trust and efficiency	→	<i>Work transparently to build trust and efficiency</i>
Over-meeting creates an illusion of productivity	→	<i>Meet to remove roadblocks and make decisions</i>
Stagnating data and slow decision making	→	<i>Smart, fast decisions to progress quickly</i>



# Establish radical clarity on your team

Keep your team connected, aligned, and moving toward results during uncertain times. Your team is being bombarded by messages of doom and distraction, and they are looking to you for direction more than ever. **Avoid the temptation to skip OKRs this cycle because you can't predict the future:** instead, use OKRs to channel energy, reinforce purposeful work and harness the capacity you have to drive value to customers and the company.



**Drive results progress for your team**  
Consistent visibility to team OKRs



**Surface Risks Faster**  
The faster you know, the faster you can address issues.

## YOUR CHECKLIST:



### Set great OKRs for the next 90 days

Run a great retrospective and reset with your team to set high integrity OKRs. Add an objective narrative to provide deeper context and over-communicate



### Clarify your intent on objectives

Add a description to each objective for greater context on your intention. Edit your OKR to add the description. Objective narratives can be viewed in the OKR popup under the “notes” tab for all.



### Use OKRs to guide your actions for the week

Tune into your team OKRs every Monday, and make sure your actions align to the results you want to drive.



### Use the heatmap to see what needs your attention

Use the filters above the heatmap to immediately see where your teams need help and what needs your attention. Comment with @ mentions, celebrate with an emoji or add the objective to a meeting agenda.

# Work transparently to build trust and efficiency

Transparency on commitments, actions, and decisions in one place helps teams be more effective and clear expectations are a foundation for trust between employees and managers. Transparency enables managers and teammates to see progress towards key results without asking for it.



## Monitor Execution

Get visibility on team progress without waiting for meetings.



## Do the Right Work Faster

Prioritize and manage activity across the team so it adds up to results

## YOUR CHECKLIST:



### Use workstreams for the KR plan of action.

Create workstreams and tailor the board view to the work your team needs to achieve their key results. Get the big action items on the board, set their priority level and assign them to right people. Favorite the workstream so you can get right to it and tie it back to your OKRs.



### Master your own to-do list

Use the “my work this week” to see your action items and meetings in the context of your objectives. Cut to work you’ve delegated, your overdue list, and easily ping, add a comment, or adjust the due date.



### Get a daily digest and automated weekly status reports

Turn on the WorkBoard daily digest summary report in your email preferences and the weekly snapshots to see what progressed (and what didn’t). Get a quick view of what changed in each workstream in the report — new red flags, what got done, and what’s fallen behind.

# Meet to remove roadblocks and make decisions

We all need to shift our meeting habits to focus on aligning toward team outcomes. There's no time to meet to get informed when we can show up informed and ready to discuss roadblocks and solve for blockers. Meeting all day saps energy and leaves everyone frustrated by their inability to do meaningful work — and meaningful work is exactly where we *all* need to focus, now more than ever.



## Stay Focused on Results

Easier way to keep the team's efforts focused on outcomes



## Save Time

Get status data faster, reduce internal meetings consuming time

## YOUR CHECKLIST:



### Run an efficient Monday huddle.

1. Put specific KRs and actions on the agenda for fact-based conversations (and make them recurring).
2. Use smart bullets to memorialize important discussions and decisions.
3. Cut to last meeting actions for easier follow through



### Make meeting follow through easy

Capture meeting actions and assign them to team members in WorkBoard. Create an ops workflow to track all action items from recurring meetings.



### Set your directs up for success

Start your 1on1s with “How are you?” Use the PACE (performance, alignment, competency, engagement) meter to align on with your team. Ensure your team members work connects back to the team OKRs.



### Integrate your calendar, MS Teams, Slack

Connect your WorkBoard to Outlook and/or Gmail and integrate to Slack or Microsoft Teams to curate smart agendas from any app.

# Make smart, fast decisions to progress quickly

It's critical to make it easy to focus on what's most important and what's within your influence and control. We're all operating with imperfect information about the future: but we can harness the *good* information we do have to inform level-headed decisions to help sustain our businesses and inform our teams. Being informed helps increase your team's confidence in your leadership.



## Manage Cross-Team Dependencies

They want early warning on issues with adjacent team's KRs.



## Save Time

Get status data faster, skip internal meetings consuming time



## Accelerate Decisions

Slow data causes slow decisions which cause low results.

### YOUR CHECKLIST:



#### Get instant visibility on dependencies and peer team progress

Use the "Jump to" search on the Objectives menu to get instant visibility into peer team OKRs. Favorite major dependencies for one-click visibility using the pushpin.



#### Curate your team dashboard

Use the Running Business Review to organize and arrange any key result, objective or workstream, and tune it to any audience. Communicate results in context and let people self-serve.



#### Search for anything in seconds

Use the global search to search for any decision made, any action, and any element that exists in WorkBoard. Use the mobile app to tune into progress while you're on the go.



#### Remove roadblocks for your directs

See all the OKRs that belong to your direct and dotted line reports in a single view and quickly spot and address risks to results that are past due.