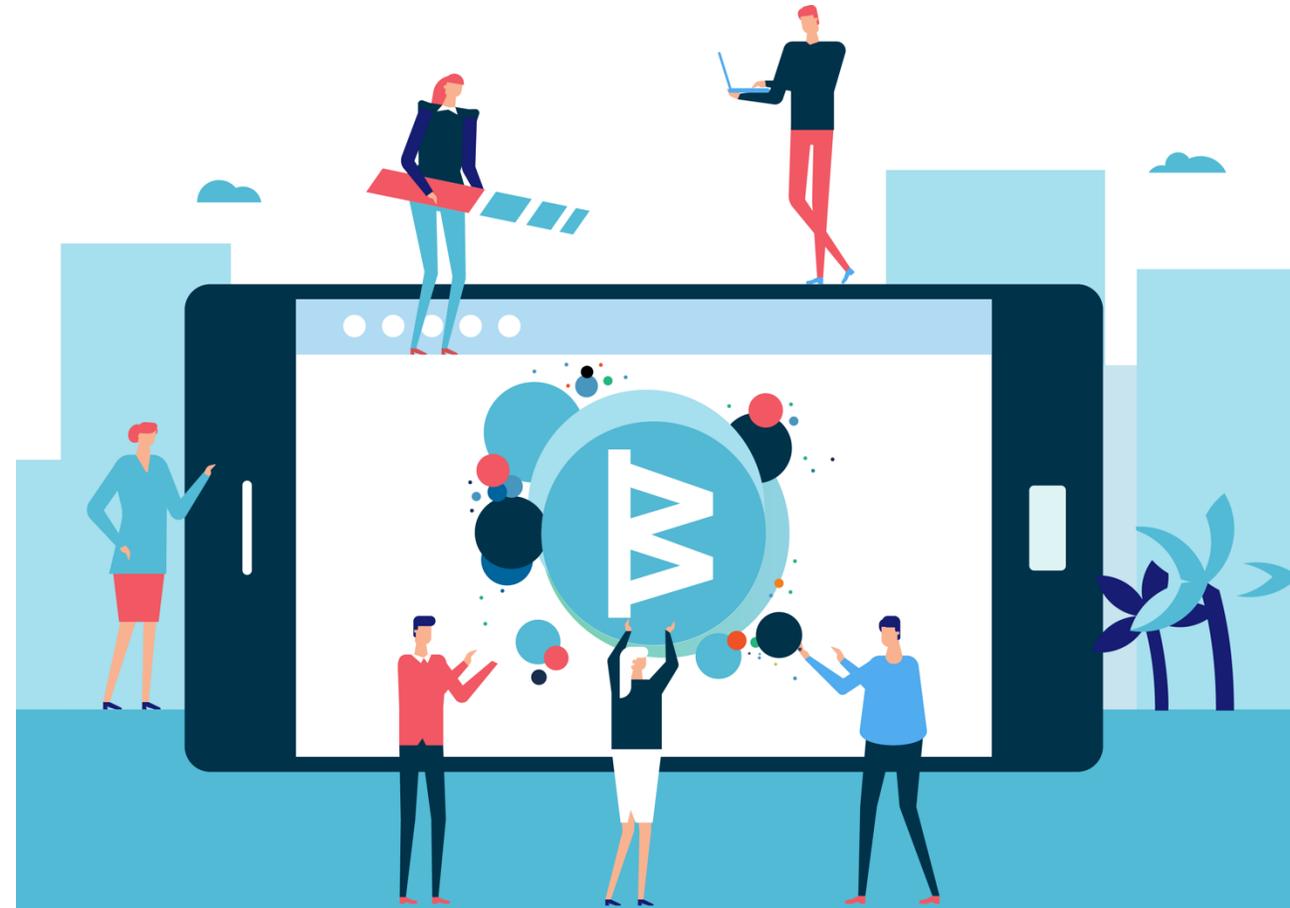


Welcome WorkBoard Community!



Upcoming WorkBoard Features

August 2020



Sameera Moinpour

Sr. Director & Practice Leader
Strategy Solutions

1

News, events and resources

2

Ready for you now

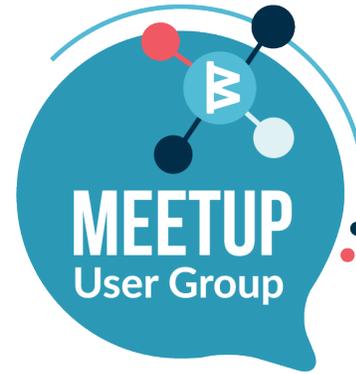
3

What's coming



We want to hear your stories!

Share best practices and network with your peers in our upcoming Meetups.



WorkBoard User Group Meetup

Hear and learn from other customers' experiences in an interactive setting.

First meetup: Week of Sep 21, 2020



Certified OKR Coaches Meetup

First meetup:

How to Enable Effective OKRs

Bring your own OKRs for tips and advice on how to improve them!

Sep 17, 11am Pacific



Feedback Survey

Look for an invite next time you log in to WorkBoard.

You might find these interesting ...

What goes wrong with **OKRs?**



 WorkBoard

Lean into the Red

In OKRs, as in life, talking about the hard things is vital to achieving your goals.



 WorkBoard

Watermelon Metrics

Not as sweet for your business as they look!



 WorkBoard

Insights and Stories

New posts every week!

www.workboard.com/blog

1

News, events and resources

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Ready for you now

3

What's coming



Include narrative on Biz Review charts

- ✓ Narrative or analysis as a bullet list on charts.
- ✓ Easier consumption of data and context side by side on slideshow mode.

The image shows two parts of the WorkBoard interface. The top part is the 'Add Chart' configuration window, and the bottom part is a 'Biz Review' chart with a narrative.

Add Chart Configuration:

- How do you want to display the key result data?*:
 - PLANNED VS ACTUALS
 - BAR
 - LINE
 - TABLE
 - STACKED BARS
- What time period do you want to display?*: Dec 15, 2018 to Dec 31, 2018
- Customize the actuals legend (optional): Thought Leadership Ads, Customer Ads
- Customize the target legend (optional): Target
- Add a narrative or analysis (optional):
 - Rich text editor with a blue arrow pointing to the 'Add a narrative or bullet list that will appear side by side' placeholder.
- Back button

Biz Review Chart:

- Chart Title: CODY Cena's Running Business Review
- Chart Type: CHART
- Legend: Cost/SQL (dark blue), Cost/QL (light blue)
- Time Period: Apr 01, 2020 - Jun 30, 2020
- Y-axis: 0 to 3.5k
- X-axis: Apr 1 to Apr 17
- Narrative: Sales & Marketing Qualified Leads. The retail verticals have nailed their target segments and rocketed both their sales and marketing qualified leads. Lead scoring is important for **three** reasons:
 - To avoid your sales team bothering leads before they are ready to buy
 - To identify which leads require more lead nurturing from your marketing team
 - To allow your sales team to more easily identify leads who are ready to buy

Template and copy Biz Reviews

- ✓ Drive uniform operational processes across teams by creating Biz Review templates
- ✓ Save time copying Biz Reviews from quarter to quarter

WorkBoard

Biz Review My Work Workstreams Objectives Meetings Teams

K2 Sell Through Campaign
Johnny Jackson

MESSAGE RESONANCE WITH TIER 1 & TIER 2 BUYERS

CAMPAIGN PURPOSE

As we shift our focus to CMOs in Tier 1 and Tier 2 target segments, we are tightening our message to be more specific to these buyers. In this campaign we are experimenting with a series of... see what has the highest value to them. The results will drive our website, collateral, sales enablements, and demand gen efforts.

IMPRESSIONS

Demo Ads Thought Leadership Ads Customer Ads

Show data labels Apr 01, 2020 - Jun 30, 2020

CLICKS

Demo Ads Thought Leadership Ads Customer Ads

Show data labels Apr 01, 2020 - Jun 30, 2020

CTR

Demo Ads Thought Leadership Ads Customer Ads

Show data labels Apr 01, 2020 - Jun 30, 2020

COST

Demo Ads Thought Leadership Ads Customer Ads

Show data labels Apr 01, 2020 - Jun 30, 2020

Help

Format meeting topics and takeaways

- ✓ Better readability for your takeaways.
- ✓ Easily add numbered lists, bullets or bold text.

The screenshot displays the WorkBoard interface for a meeting titled "Right Buyer, Right Segment Strategy". The top navigation bar includes "Biz Review", "My Work", "Workstreams", "Objectives", "Meetings", and "Teams". The meeting details show it was held on "Oct 15 at 9:45am" with a duration of "00:00". There are options for "View meeting for", "Count up", and "Meeting feedback". A "Send Minutes" button is also present.

The meeting participants are listed below the title. The main content area is divided into two columns: "Topics for Discussion" and "Takeaways".

Topics for Discussion:

- 85% revenue retention in Tier 1 and Tier 2 customers (GRR) 81% of 85% by Jack C
- Engage the right buyers and make it simple for them to buy from us 73% by Jack C
- Add \$28M of upsell pipeline from marketing campaigns or tooling in Tier 1 and Tier 2 accounts 3m of 28m

Takeaways:

- We do not want to repeat the WilliamsCo and Osko account losses here. Joe's sending the strategic accounts team out to all Tier 1 and Tier 2 accounts to prevent another loss to competitor or other cause.
- Make sure to action the demand gen...
- Let's move the needle on this in the next 30 days:
 - Run 3 consecutive campaigns that touch at least 10,000 qualified leads in our Tier 1 and Tier 2 customer segments in CPG and Retail
 - Get the right folks out to 5 of the right industry events
 - Plan our own event for next month and

A blue arrow points to the formatting toolbar at the bottom of the Takeaways section, which includes icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, and Link. A "Send" button is also visible.

1

News, events and resources

2

Ready for you now

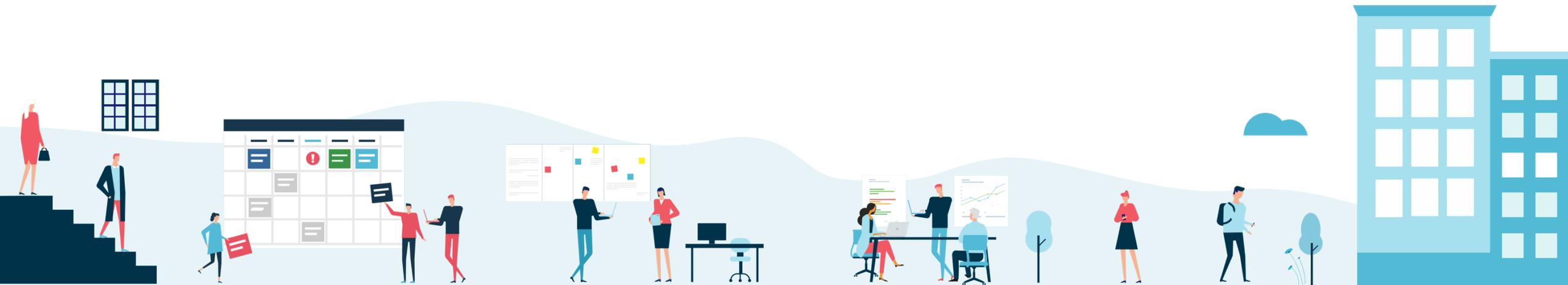
3

What's coming



Coming soon!

1. Link results to related bodies of work
2. Assign Key results owners for easier accountability
3. Archive old teams and cross-functional working groups
4. Result prediction of your quarter end outcomes
5. Performance enhancements



Link results to related bodies of work

- ✓ Connect execution to results, even when progress is not directly calculated from work completion
- ✓ Drill down into details on related action items, workstreams, or Jira issues that are driving result outcomes

The screenshot displays the WorkBoard interface. At the top, there's a navigation bar with icons for Biz Review, My Work, Workstreams, Objectives, Meetings, and Teams. The main content area features a KPI card titled "85% of new logo ARR is customers in Tier 1 and Tier 2 segments" with a progress indicator showing "83% of 85% - Company ELT". Below the title is a line chart showing the trend of this metric from May 1, 2020, to August 21, 2020. The chart shows a fluctuating line that generally stays between 60% and 80%, with a notable peak around July 24th. To the right of the chart, there's a "DATA SOURCE" section listing "Datstream: Automatic Updates - New Logo ARR (T1 & T2)" and a "RELATED WORK" section with two items: "Workstream: Tier 1 and Tier 2 account win plans" and "Workstream: New Tier 1 and Tier 2 customer references". A blue arrow points to the "Link related work" button, which has a dropdown menu open showing options: "Action item", "Workstream", "Jira issues", and "Link".

Date	Value (%)
May 1	61
May 8	67
May 15	62
May 22	60
May 29	63
Jun 5	61
Jun 12	65
Jun 19	62
Jun 26	60
Jul 3	63
Jul 10	62
Jul 17	61
Jul 24	78
Jul 31	75
Aug 7	62
Aug 14	80
Aug 21	83

Assign owners for results

- ✓ Make accountability easier for the team's shared outcomes
- ✓ Capture result owners even where the data source may be other business systems, or even other team members closer to the data.

* *Work with your organization's OKR coaches and project team to decide how and when to take advantage of this capability.*

The screenshot displays the WorkBoard interface for a KPI card. The card is titled '87 of 88 - Company ELT' and has the goal 'Measure eNPS in each function and get an average score of 88 (monthly pulse)'. The current score is 87, and there are 28 days left. The chart shows a line graph of eNPS scores from March 6 to May 13, 2020, with a target line at 88. The owner is Julie Lam, and the data source is 'Datastream: Automatic Updates - Company NPS'. The objective is 'PEOPLE: We attract, retain and enable the best people to operate at their best'. A blue arrow points to the owner's name.

Date	eNPS Score
Mar 6	80
Mar 13	78
Mar 20	80
Mar 27	82
Apr 3	85
Apr 10	85
Apr 17	85
Apr 24	85
May 1	85
May 8	85
May 13	85



Add Team Objective and Key Results

OBJECTIVE

PEOPLE: We attract, retain and enable the best people to do their best

Team | Company ELT • Mar 01, 2020 - Jun 30, 2020



KEY RESULTS

80% of people feel we value their growth and development
Jack CEOMack to update percentage

All roles have a defined ramp-up period before placement
Manny Admina to update number of roles

Meet our hiring plan in every quarter
Alice Peoples to update number of hires

Every team has OKRs and is responsible for them

Edit Key Result



What is the result you want to measure?*

[See sample OKRs](#)

80% of people feel we value their growth and development

Owner of this key result

Julie Lam

[Add description \(optional\)](#)

Where will the key result data come from?

Result from a person

[Change data source type](#)



Start value*

0

Target value is

↑ Higher ↓

Target value*

80

Unit of measurement

Count as number

Calculate overall progress as

Last entered value

Person responsible for updating

Johnny Jackson

to update

Weekly

on

Friday

[Add key result dependencies \(optional\)](#)

Objectives



Jump to...

My Objectives

Heatmap

Alignment

Timeline

COLLAPSE ALL

FAVORITES

Product Management

David Zu



Provide RevOps data and insights that move us from good to incredible

2 of 10

100% of Rev Ops requests use Zendesk by Feb 15th

10 of 2k

Define and publish Revenue Ops SLAs

20% of 100%

Deliver quarterly tools usage report value survey



Provide exceptional customer experience that extends customer lifetime

90% of 100%

100% of new accounts active on high-value features at least twice a week

100 of 400

Define and publish Revenue Ops SLAs

20% of 50%

At least 50% of customers use our differentiated features



The Customer Experience team operates at its best

5 of 6

6 new hires hit their first quarter targets

0 of 5

5 new CSMs onboard their first account within 60 days of hire

20% of 50%

Reduce average initial response time on P1 tickets by 50%

Data from rolled-up key results: Averaging achieved values

Darry Bart | Product Delivery
6 of 6 · Source: Leila Alapour
Release notable CMO quality-of-life features every two weeks into production

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Darry Bart | Product Delivery
6 of 6 · Source: Leila Alapour
Release notable CMO quality-of-life features every two weeks into production

Jason Mraz Updated Nov 18, 2019

Jonathan Krenshaw Never Updated

Jackie Lemie Updated Nov 18, 2019

104 days left 0 ↑ 4 ↓

Abby Krenshaw Updated Nov 18, 2019

John Marcus Never Updated

Louis Johnson Updated Nov 18, 2019

Archive teams and cross-functional working groups

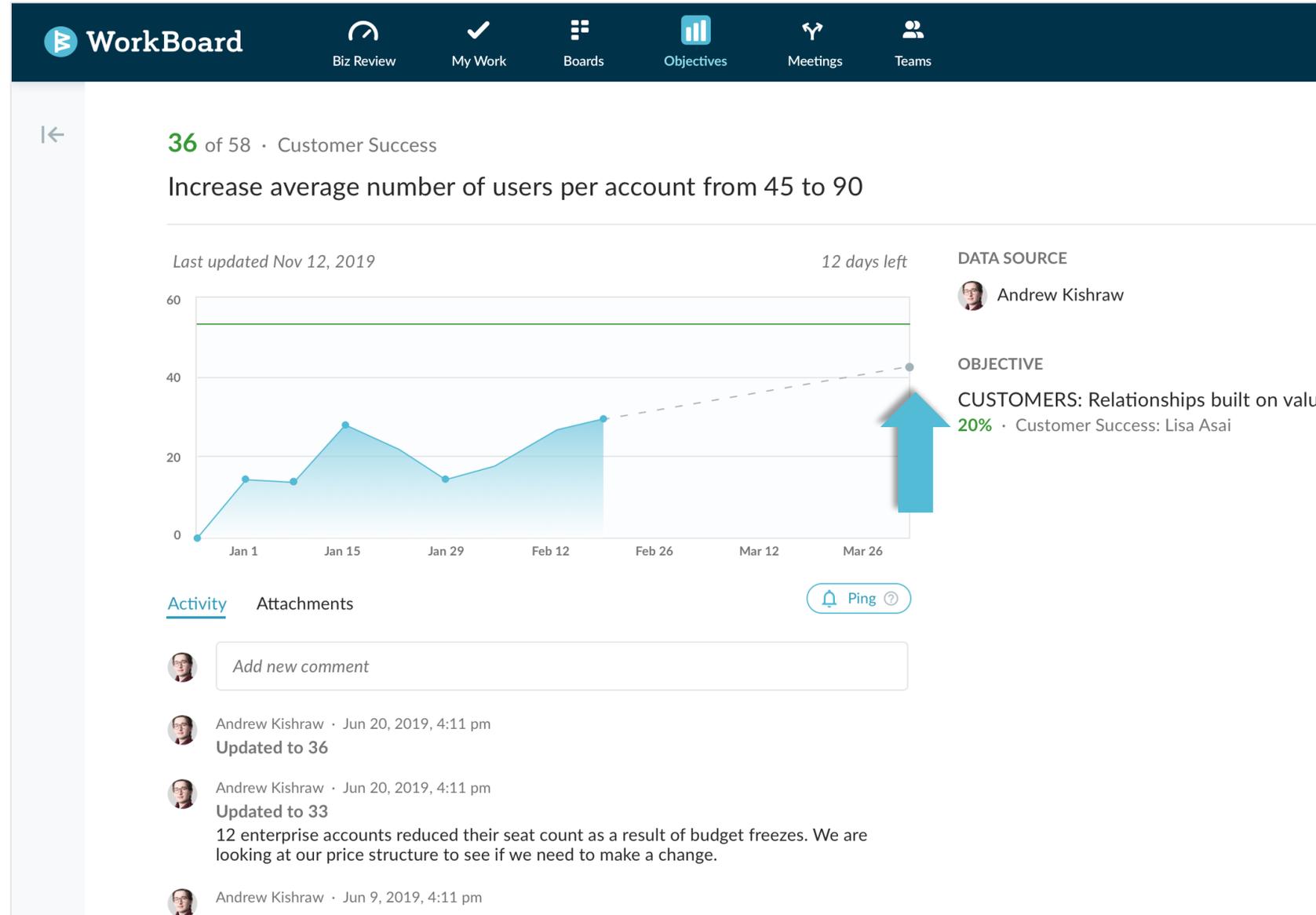
- ✓ Manage work and OKRs following org restructures or the completion of short-term cross-functional projects.

The screenshot displays the WorkBoard interface for a team named 'Product Management' managed by David Zu. The interface includes a navigation bar with options like 'Biz Review', 'My Work', 'Workstreams', 'Objectives', 'Meetings', and 'Teams'. A left sidebar shows navigation options such as 'Workload & Bandwidth', 'Priorities & Risks', 'My Directs', and 'Reports', along with expandable sections for 'EXPAND ALL', 'FAVORITES', 'TEAMS', and 'ARCHIVED'. The main content area shows three OKRs with progress indicators and completion percentages. A context menu is open over the OKRs, offering 'Edit Team Name' and 'Archive Team' options.

OKR	Progress	Due Date	Assignees	Last Updated
Provide RevOps data and insights that move us from good to incredible	50%	104 days left	Julia Andrew, John Marcus, Workstream	Updated Nov 18, 2019
Provide exceptional customer experience that extends customer lifetime	50%	104 days left	Rolled-up KR, Cascaded KR, Mirrored KR	Updated Nov 18, 2019
The Customer Experience team operates at its best	50%	104 days left	Abby Krenshaw, John Marcus, Louis Johnson	Updated Nov 18, 2019

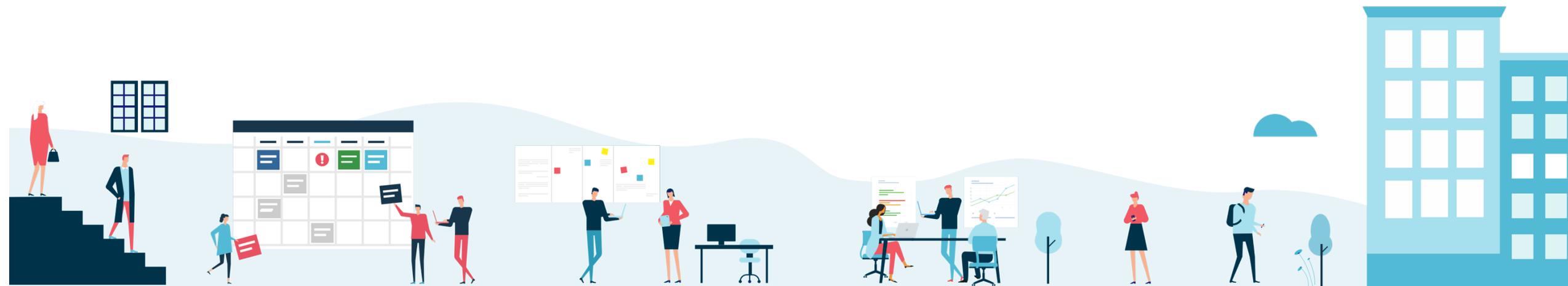
Prediction of your quarter end outcomes

- ✓ Get a preview of your predicted final score based on current course and speed
- ✓ Impact your quarter end outcomes by taking corrective action earlier



On the horizon

1. Enhanced meeting & calendar integrations
2. Deeper integrations with Microsoft Teams & Jira
3. Smart auto population of Biz Reviews & Hotbox
4. Support for committed key results
5. Confidence rating for results
6. Connecting company vision and values to OKRs
7. Small dose insights & weekly focus nudges



What are you **curious** about?



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

