

Community Call

April 2025



Agenda

- AI Agents
- WorkBoardAI for Copilot
- OKRs
- Workstreams
- People Analytics
- Join the Conversation!



AI Agents

WorkBoard  AI

Meet your new digital team members

Hi, I'm John!

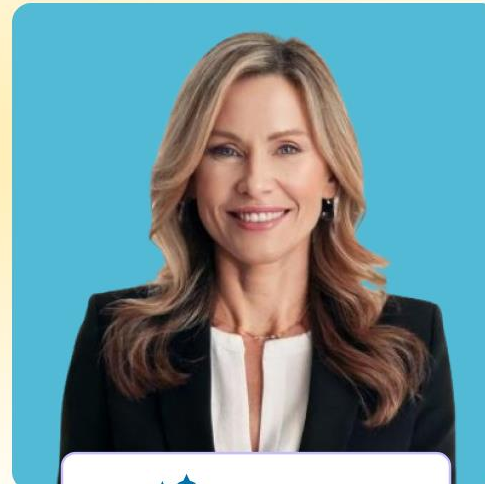
Digital Chief of Staff



 Hire me

Hello, I'm Sofia!

Digital Leadership Coach



 Hire me

Agents are radically better & easier

- ✓ To set and align OKRs
- ✓ To focus on progress and risks to them
- ✓ To guide team members to best outcomes

The screenshot shows a chat window titled "John" with a subtitle "Chief of Staff". On the left, there is a profile card for John, an AI Chief of Staff, with a blue background and a photo of a man in a suit. Below the photo, it says "John AI Chief of Staff" and "About Me: Proactive organization is my jam and making you look like a superstar is my peanut butter!". At the bottom of the profile card is a button labeled "Manage Responsibilities". The main chat area on the right shows a conversation. Roger Smithson asks, "what should I be doing today to be a good manager?". John responds at 01:10 PM, "Hi Roger! Let me check on your teams' current status to give you the most relevant recommendations." John then provides a detailed response at 01:10 PM, listing key actions based on the current status of teams. The response includes two main sections: "1. Address Overdue Key Results" and "2. Team Check-ins". The first section lists three items: Samantha Johansen has 2 metrics needing updates on team engagement and diversity goals; You have 2 metrics pending on work alignment and team diversity; Barry Bosser has 1 metric regarding coaching effectiveness. The second section lists two items: Samantha to discuss progress on improving confidence in strategy (target: 85%); Barry to review coaching effectiveness improvements (target: 83%). John then asks, "Would you like me to:" and lists three options: Send gentle reminders to team members about updating their KRs?; Create an action item for scheduling these check-ins?; Prepare a more detailed overview of any specific area? John concludes with, "Just let me know what would be most helpful, and I'll assist you right away." At the bottom of the chat window is a text input field with the placeholder "Ask me anything..." and a blue arrow button to the right.

John Chief of Staff

John

AI Chief of Staff

About Me:
Proactive organization is my jam
and making you look like a
superstar is my peanut butter!

Manage Responsibilities

Roger Smithson 01:09 PM
what should I be doing today to be a good manager?

John 01:10 PM
Hi Roger! Let me check on your teams' current status to give you the most relevant recommendations.

John 01:10 PM
Based on the current status of your teams, here are the key actions you should focus on today:

- 1. Address Overdue Key Results:** There are 5 overdue key results across your teams that need attention. Specifically:
 - Samantha Johansen has 2 metrics needing updates on team engagement and diversity goals
 - You have 2 metrics pending on work alignment and team diversity
 - Barry Bosser has 1 metric regarding coaching effectiveness
- 2. Team Check-ins:** Consider scheduling brief one-on-ones with:
 - Samantha to discuss progress on improving confidence in strategy (target: 85%)
 - Barry to review coaching effectiveness improvements (target: 83%)

Would you like me to:

- Send gentle reminders to team members about updating their KRs?
- Create an action item for scheduling these check-ins?
- Prepare a more detailed overview of any specific area?

Just let me know what would be most helpful, and I'll assist you right away.

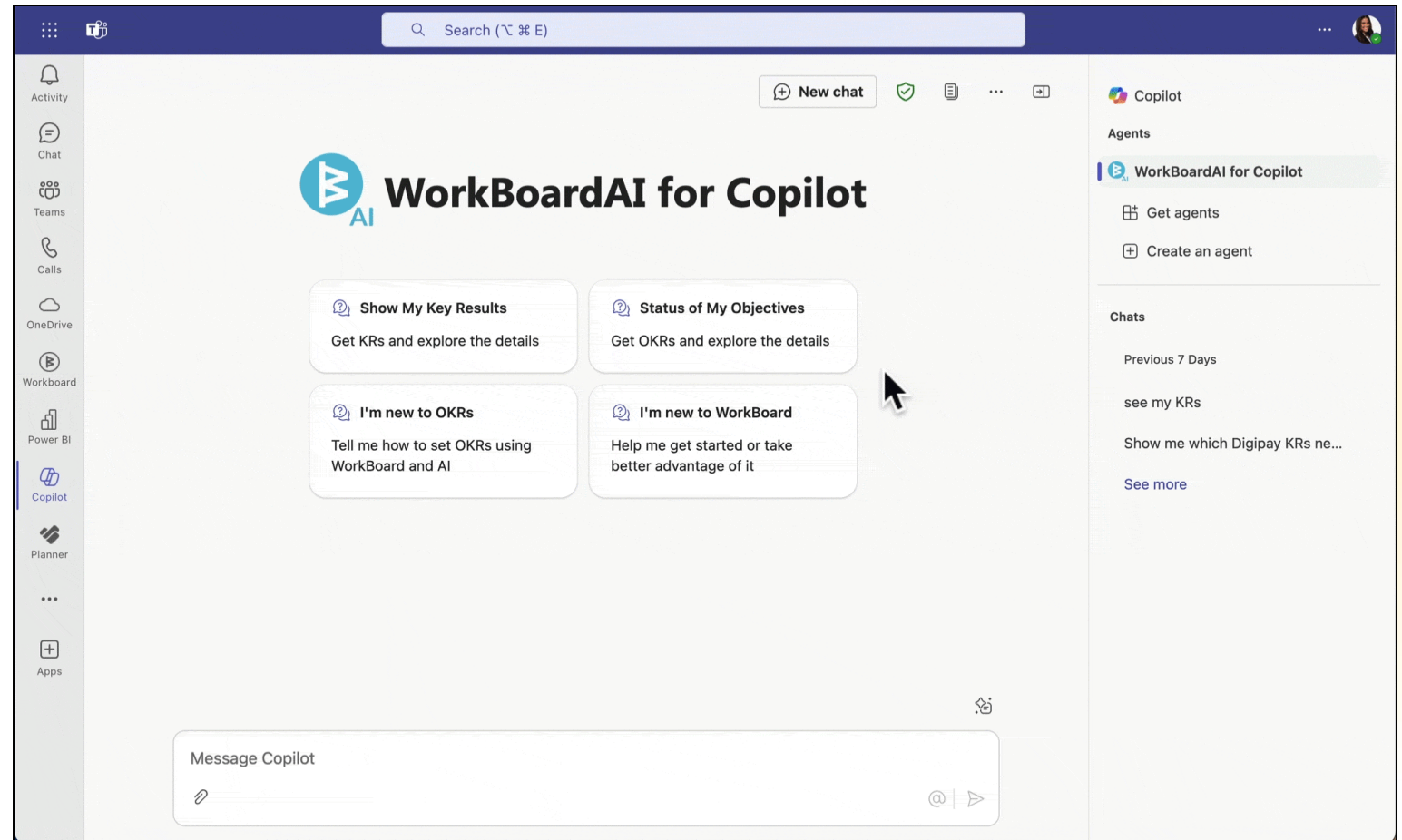
Ask me anything...

WorkBoardAI for Copilot

New WorkBoardAI Agent for M365 Copilot

- ✓ Ask Copilot for OKR status in chat
- ✓ Get recommendations to address risks and improve OKR progress
- ✓ Use Copilot to grab specific OKR or key result history while editing Word or PowerPoint documents
- ✓ Get coaching if you're new to OKRs and WorkBoard

Available now!



OKRs

Mass ping teams at scale with a reminder to update overdue results

Nudge multiple teams to take action on overdue key results with a single, streamlined tool.

- ✓ Pings are triggered centrally by WorkBoard admins.
- ✓ Target all teams across the organization, those reporting up to a specific leader, or individual teams.
- ✓ Customize the nudge message to drive clarity and urgency.

Available now!

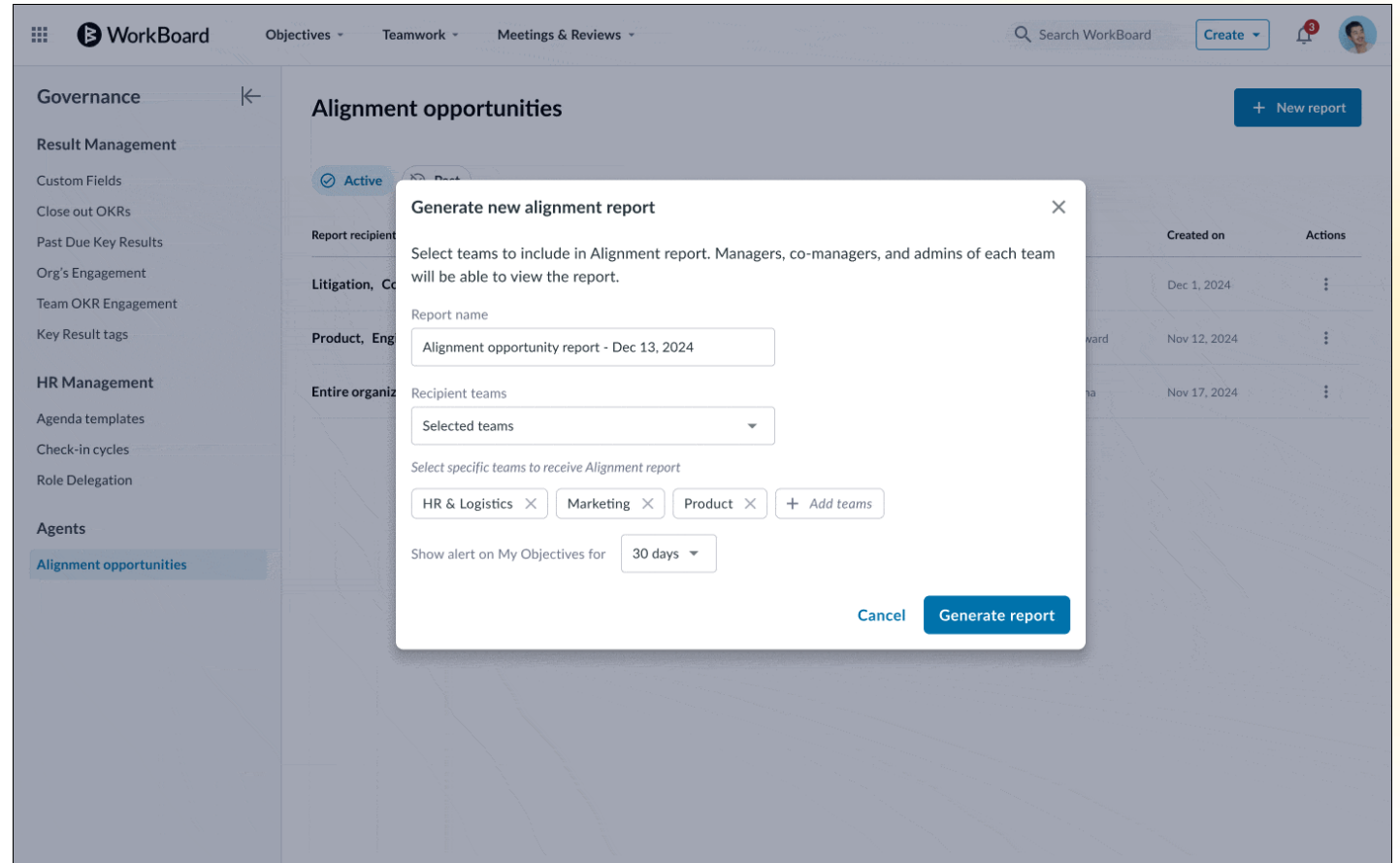
The screenshot shows the 'Mass Ping notification' configuration page in the WorkBoard AI interface. The left sidebar lists navigation options under 'Governance': Custom fields, Close out OKRs, Mass Ping (highlighted), Organizational Engagement - OKRs, Organizational Engagement - Teams, Key Result tags & clusters, and Objective Categories. The main content area is titled 'Mass Ping notification' and includes a description: 'Pings all past due, person-updated Key results that meet the criteria below.' It features a 'Key result owners' dropdown menu set to 'All teams in organization', with a note: 'Every team within the selected leaders' sub-organizations will receive the ping message.' Below this, it displays 'Total number of people receiving ping: 8' and 'Total number of Key Results: 12'. The 'Subject Line' is set to 'Updated requested'. The 'Message' field contains the text: 'You have been pinged for an Update. Your input is needed to keep things moving forward smoothly!'. At the bottom right, there are 'Cancel' and 'Send Ping' buttons.

Identify alignment opportunities across the organization

Shorten your OKR reset cycle by automating the work of identifying cross-functional tie-off and alignment opportunities at scale.

The new Alignment Report utilizes AI to audit OKRs across the organization and surfaces dependencies and collaboration opportunities for each team!

Available now!



Greater Visibility for KR Co-Owners

If you co-own key results, they will now show up everywhere you see your KRs!


- My Objectives Page
- Direct and Dotted Page
- User OKR list page
- User profile page
- Check-ins

Available now!

Coming soon:

- *Notifications for KRs you co-own*
- *Showing KR co-owners on Scorecards*

Edit Key Result




What is your key result name?*


[See sample OKRs](#)

Close the top 3 skill gaps across each IT department

Person responsible for business result

 Kevin Campbell

Who's co-owning this result?

 Jackie Shafer

Workstreams

Easily visualize project timelines

The Timeline view provides a **visual way to track projects and milestones** within and across workstreams.

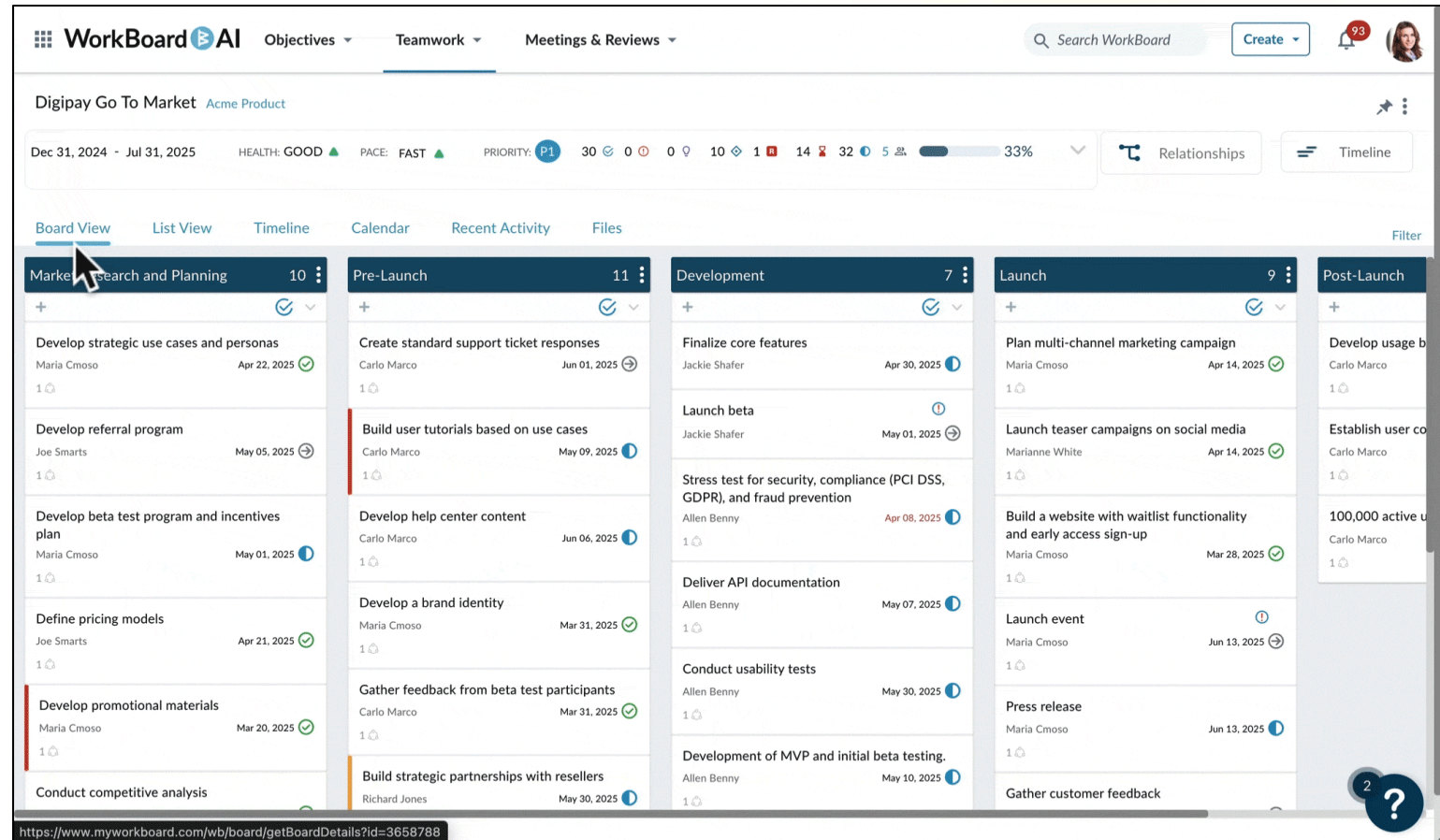
- ✓ Organize, filter, or color-code displayed items by assignee, status, column, priority, and more.

- ✓ View the project across days, weeks, months, quarters or years.

New updates!

- ✓ Save your view settings
- ✓ See a legend at the bottom of the screen for color-coded views
- ✓ Center the view on Today
- ✓ Archived workstreams and groups that don't have data are hidden

Available now



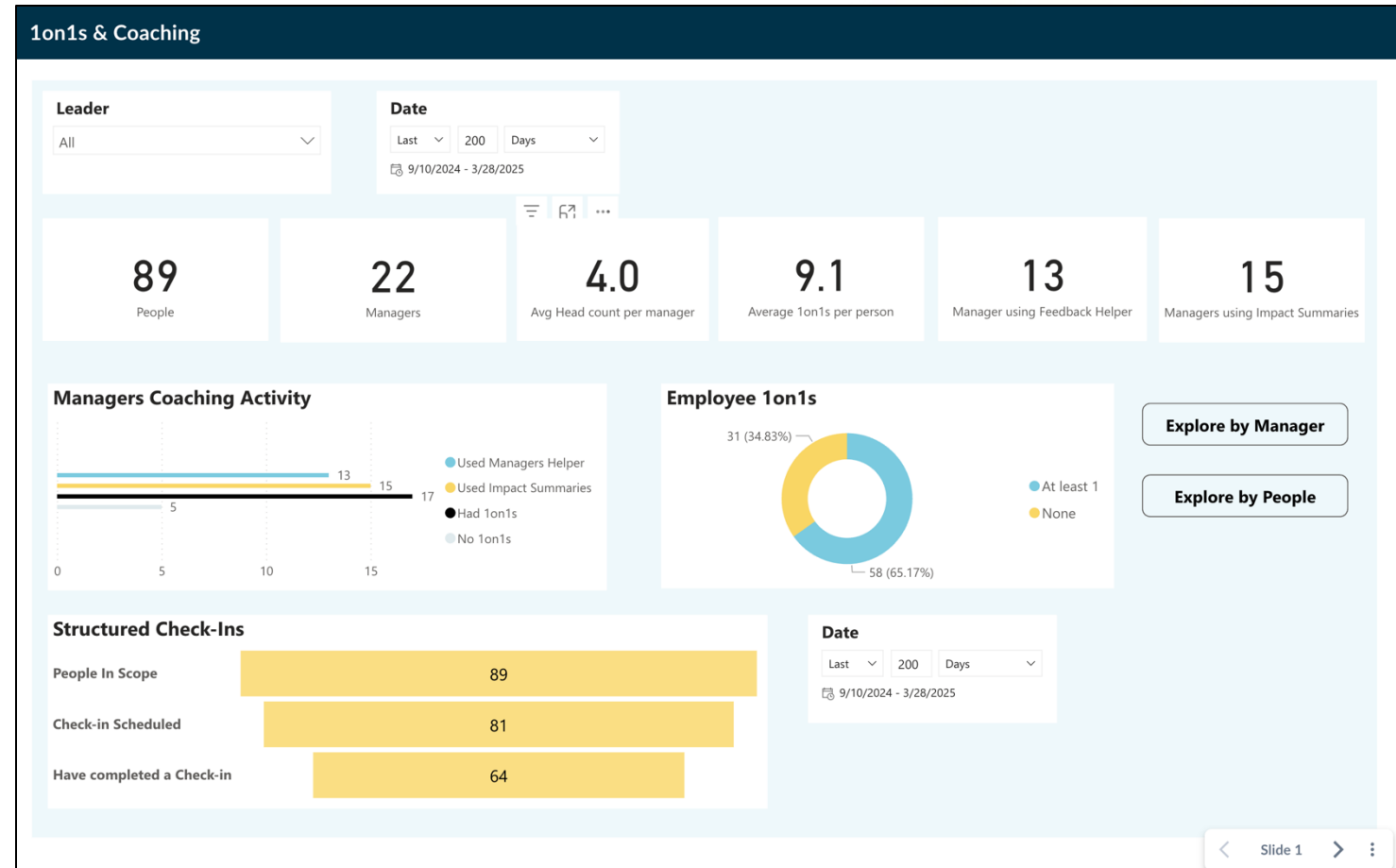
People Analytics

Analyze manager effectiveness with the 1on1 & Coaching Report

Get a strategic lens into how consistently managers are engaging their teams—and how that coaching shows up in business outcomes. Spot strengths, identify coaching gaps, and connect the dots between engagement and team performance.

- Track 1on1 frequency and coverage by manager and team
- See usage of tools like Feedback Helper and Impact Summaries
- Understand which employees are getting regular coaching
- Drill down to manager or employee-level details to take action

Available now

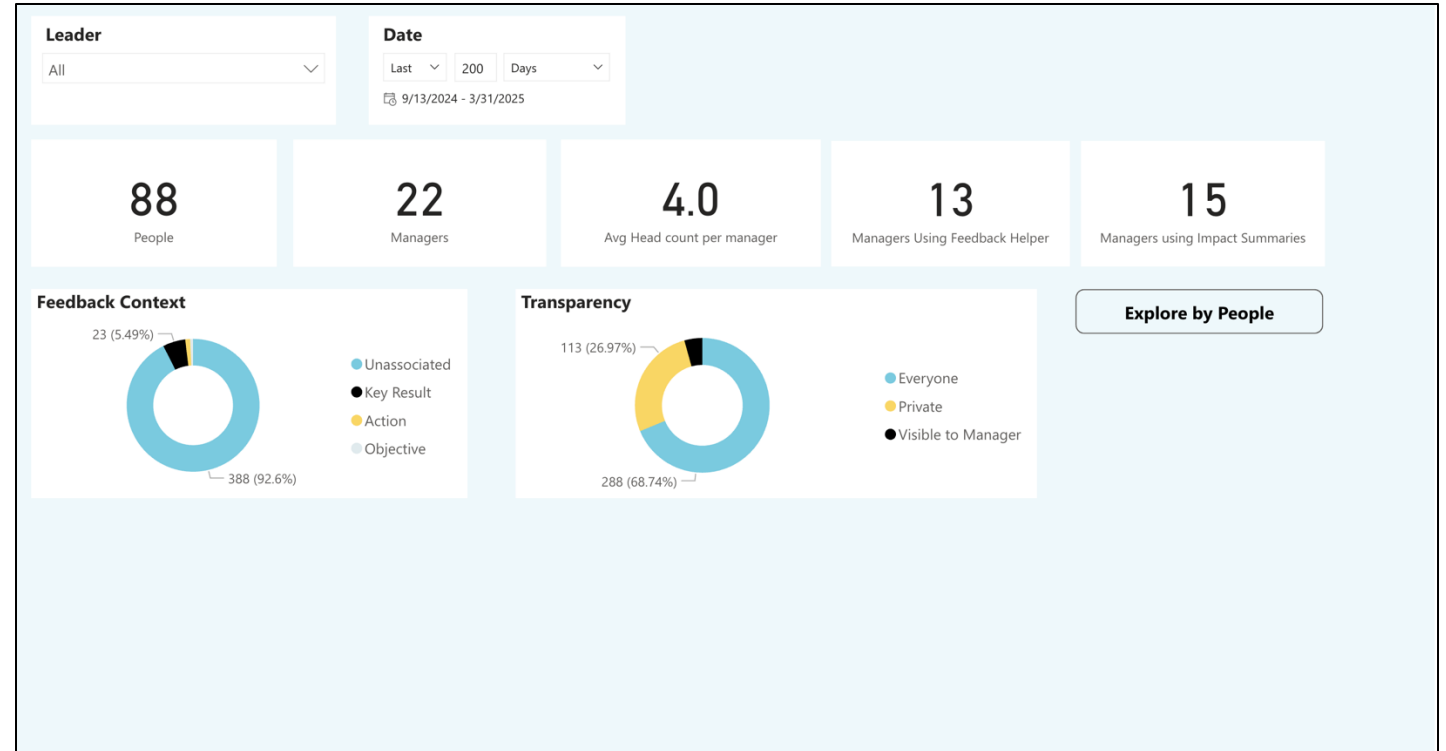


Identify and foster great coaching behaviors with the Feedback Report

Get deep visibility into how feedback is shared across your organization—who's receiving it, who's giving it, and how it connects to work, transparency, and coaching tools.

- See how many people gave or received feedback over time
- Understand the transparency and context of each feedback interaction
- Track adoption of tools like Feedback Helper and Impact Summaries
- Drill down to individual-level activity for feedback statistics

Available now



Join the Conversation!

 **WorkBoard** LONDON MEET UP

Network and Learn with the Local WorkBoard Community

HOSTED BY **8x8**

ALDGATE, LONDON

15 MAY 2025 | 2:00PM-5:00PM



REGISTER NOW

[WORKBOARD.COM/MEETUP2025-LONDON](https://workboard.com/meetup2025-london)



Laura Gibbons
Strategy and Business
Transformation Analyst



Rory Thompson
Strategic Initiatives Mgr.



Harry Blease
Sr. Digital Strategy Lead





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Strategy Execution MOUNTAIN RETREAT

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DEER VALLEY



Accelerate is the world's largest strategy execution & OKR conference. With tailor-made programming aimed at uniting a vibrant community of OKR and strategy execution leaders, Accelerate 2025 will be the most exciting yet — **register before June 30th to secure early bird rates!**

Ideal for Executives & Strategy Execution Leaders

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 WorkBoard



Deidre Paknad
CEO & Co-Founder, WorkBoard

 A.O. Smith



Steven Shafer
President and Chief Operating
Officer, A.O. Smith

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 GHX



Jaclyn Pedersen
Director of OKR Strategy and
Alignment, GHX

 MARS



Beth Dawson
Director, Strategic Initiatives, Mars

 MARS



Amanda Albers
Program Manager, Strategic
Initiatives, Mars



Register now and save!

Early-bird pricing through June 30th

\$999 Individuals

\$1599 Bring a peer (2 tickets)

www.workboard.com/accelerate2025



What are You Curious About?



Thank you!

