



# WorkBoard Community Call

July 2022



# Agenda

- Training and Enablement Opportunities
- Biz Review best practices and enhancements
- OKR enhancements
- And more delightful features and enhancements!

# Training and Enablement

# Deepen your WoBo skills at your own pace

## WoBo Learn

The screenshot displays the 'WoBo Learn' interface, organized into two main sections: 'Results Foundry Courses' and 'WorkBoard Platform Training'. Each course is presented as a card with a blue header, an icon, a title, a brief description, and pricing information.

**Results Foundry Courses:**

- Outcome Mindset Method:** Learn about OKRs and the Outcome Mindset in 1 hour! (FREE)
- OKR Fast Pass Program:** Build your OKR expertise in 3 hours! (\$79)
- OKR Coach Certification:** OKR Coaches certified in the Outcome Mindset Method™ help organizations achieve success by setting and achieving OKRs faster.

**WorkBoard Platform Training:**

- Welcome to WorkBoard:** This learning path will introduce the basics of utilizing WorkBoard to help your teams achieve their OKRs. (FREE, 9 Courses)
- WorkBoard for Admins:** Learn how to use the WorkBoard Administrator panel in this online course. (FREE - 12 min)
- WorkBoard Pro:** Learn the full power of the WorkBoard application and how to apply it in your organization!
- Launching Your Digital Operating Rhythm in WorkBoard (101):** Begin adopting and practicing a Digital Operating Rhythm in WorkBoard to best operationalize to drive faster strategy execution across teams and individuals. (FREE)

## WoBo Labs

The screenshot shows the 'WoBo Labs' interface, which is a dashboard for tracking OKR progress. It features a 'My Objectives' section with tabs for 'My OKRs' and 'My Direct's OKRs'. A dropdown menu is set to 'Teams I manage and co-manage'. The dashboard displays progress bars for various objectives, such as 'FOCUS on the right market segments with stand-out value' (63%), 'CUSTOMERS have an exceptional experience with our products and our people' (55%), 'ECONOMICS of a high velocity, high efficiency business' (62%), and 'PEOPLE have the career experience of a lifetime and strong connections here' (43%). A line chart shows progress over time for '40 of 50 - Product Management: Create and roll out 50 new customer delight features' from Jan 1 to Feb 24, 2022, with a predicted end date of Mar 21, 2022.

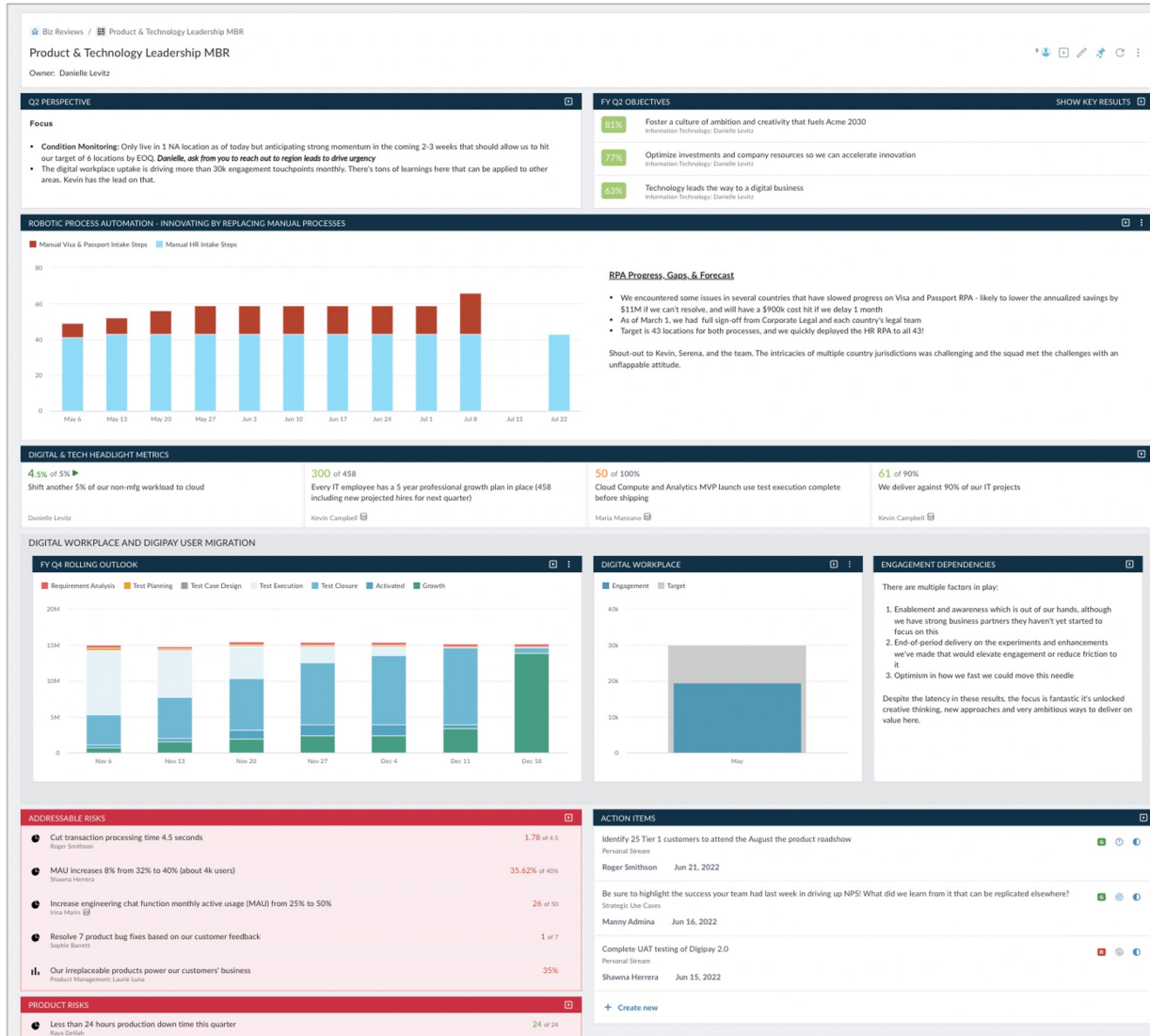
Self paced-learning modules available on-demand.  
Best practices on both the full WorkBoard solution.

<https://learn.workboard.com/>

45 minute LIVE weekly sessions dedicated to various WorkBoard modules – OKRs, meetings, biz reviews, workstreams

# Biz Reviews

# Get the most out of Biz Reviews



- Replace your powerpoints and get digital with Biz Reviews
- Streamline and automate scorecards
- Add any objectives, results, graphs, charts, iframes so you can focus on what matters most

# Biz Reviews Landing Pages & Collections

## Landing page

- Quickly find your Biz Reviews with search, filter and sort options
- Easily curate your list of go-to Biz Reviews

## Collections

- **Group a set of Biz Reviews** for a specific meeting, or for your own organization
- Share Biz Reviews as a set with others

WorkBoard

Biz Review My Work Workstreams Objectives Meetings Teams

+ New Collection + New Biz Review

### Biz Reviews

^ Favorites

- Q1 2022 QBR  
Modified: Jun 7, 2022
- 2020 Engineering Leadership RBR  
Modified: Dec 22, 2020
- DRW strategic quarterly planning program and...  
Modified: Jul 30, 2019

All Recents Favorites

Search by name or owner Filters

2 Collections, 109 Biz Reviews

↑	Name	Modified	Owner	Role	Actions
	Q1 2022 QBR	Jun 7, 2022	You	Owner	
	2022 QBRs	Jun 7, 2022	You	Owner	
	Engineering Q1-2022 QBR	Jun 13, 2022	You	Owner	Present
	Sales Q1-2022 QBR	Jun 13, 2022	You	Owner	
	Marketing Q1-2022 QBR	Jun 13, 2022	You	Owner	

# Biz Reviews Landing Pages & Collections

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## On the Horizon

- Seamlessly transition between them when in presentation mode
- Create pre-read and post-read packets from your collections

WorkBoard

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	Sales Q1-2022 QBR	Jun 13, 2022	You	Owner	
	Marketing Q1-2022 QBR	Jun 13, 2022	You	Owner	



# Biz Review Landing Page: Improved Findability

**Biz Reviews**

+ New Collection + New Biz Review

Page 1 of 3

April 2022 MBR  
You edited in the past week

Active Pipeline by Account  
You edited in the past week

Q4 QBR Planning\_2021  
You edited in the past week

Activations leading indicators  
You edited in the past week

Competitive Intelligence 2022  
You edited in the past week

All Recents Favorites

Search by name or owner Filters

4 Collections, 234 Biz Reviews

Name	Modified	Owner	Access	Actions
Activations Q4	Mar 3, 2022	You	Viewer	⋮
April 2022 MBR		Jenny Bierman	Owner	⋮
Q4 QBR Planning_2021	Dec 25, 2021	Shawn Simpson	Editor	⋮
Q4 Sales_Blitz results and running review	Nov 25, 2021	Kait Smith	Viewer	⋮
Customer Success MBR - April 2022	Apr 9, 2022	Lilly Simmons	Editor	⏪ ⚡ 📅 ⋮
Business Development MBR - April 2022	Apr 3, 2022	Robert Fox	Editor	⏪ ⚡ 📅 ⋮
Sales MBR - April 2022	Apr 1, 2022	Justin March	Editor	⏪ ⚡ 📅 ⋮
BizOps Recruiting Review	Feb 28, 2022	You	Owner	⋮

- Search by name or owner
- Sort alphabetically by header (Name, Modified, Owner)
- Quickly **filter** by active vs. archived, Collections vs. Biz Reviews
- Jump straight into **play mode** using mouse over actions.

# Biz Review Landing Page: Easily curate your go-to list

**Biz Reviews**

+ New Collection + New Biz Review

▼ Favorites Page 1 of 3 < >

April 2022 MBR  
You edited in the past week

Active Pipeline by Account  
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BizOps Recruiting Review	Feb 28, 2022	You	Owner	⋮

- Pin your favorites directly from the list Landing Page list
- **Archive** old Biz Reviews and get them out of your way (Last modified date might be a good clue).
- Quick filters for recents and favorites are sticky!

*Pro tip: If you have many biz reviews, use the **favorites filter** to get to what you need fastest*

# Group Related Biz Reviews with Collections

The screenshot shows the WorkBoard interface. At the top, there is a navigation bar with icons for Biz Review, My Work, Workstreams, Objectives, Meetings, and Teams. Below the navigation bar, the main content area displays a collection of Biz Reviews. The collection is titled "Q4 FY23 QBR" and contains 3 Biz Reviews. The reviews are listed in a table with columns for Name, Modified, Owner, Role, and Actions. The reviews are: Q3 FY23 Product & Engineering QBR, Q3 FY23 Marketing QBR, and Q3 FY23 Sales QBR. All reviews are owned by "You" and were modified on Jul 13, 2022. The interface also includes a "Share" button and a "New Biz Review" button.

↑	Name	Modified	Owner	Role	Actions
☰	Q3 FY23 Product & Engineering QBR	Jul 13, 2022	You	Owner	⋮
☰	Q3 FY23 Marketing QBR	Jul 13, 2022	You	Owner	⋮
☰	Q3 FY23 Sales QBR	Jul 13, 2022	You	Owner	⋮

Rows per page: 50 ▾ 1-3 of 3

Group a set of Biz Reviews for a specific meetings or for your own organization

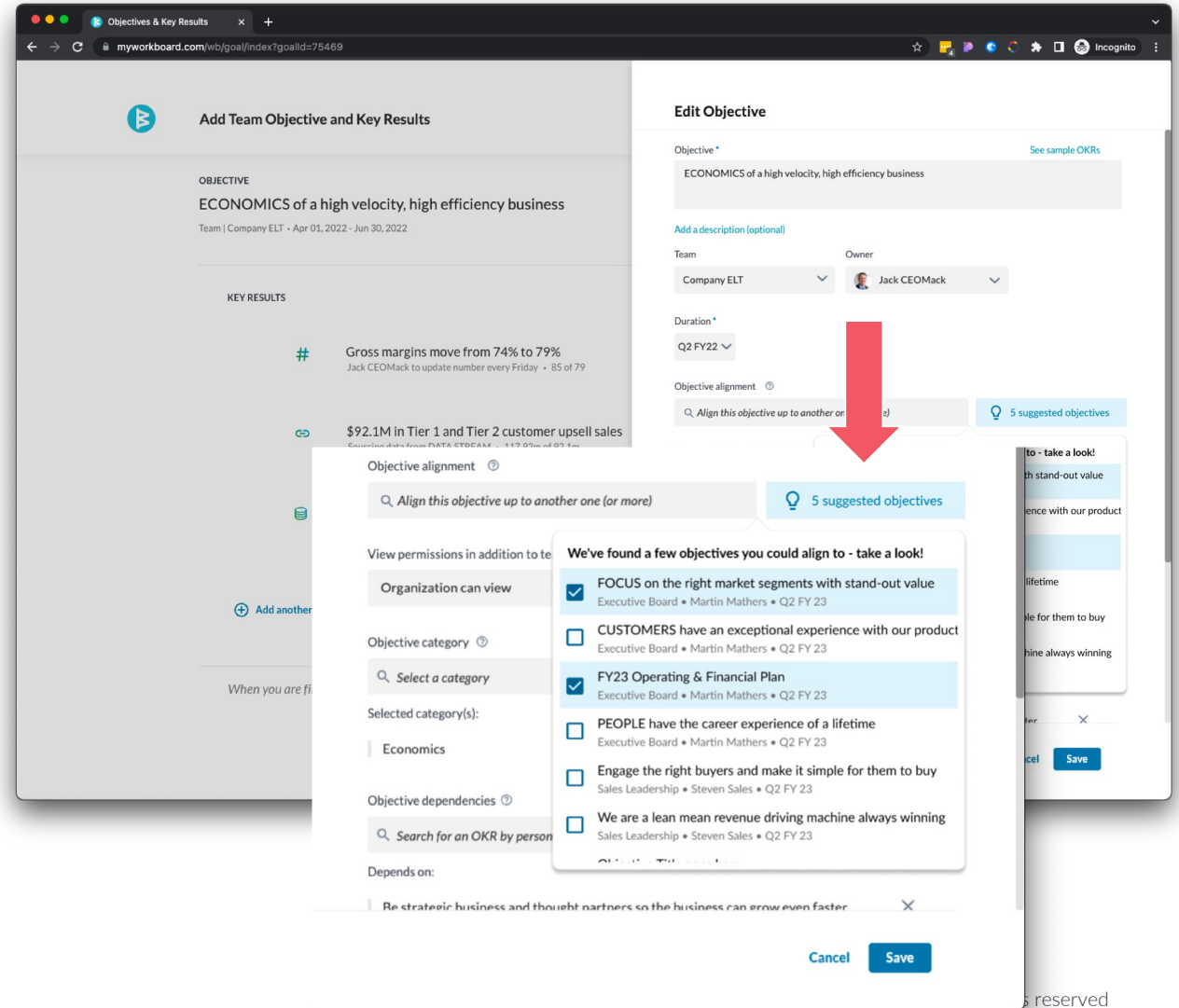
- The same Biz Review can be a part of **multiple collections**
- **Share** the set with one link to all stakeholders
- Manage who has **access** to the collection
- **Archive** collections and easily revisit

*Ex. The Biz Review can be in a shared leadership Biz Reviews collection and also a personal quarter specific collection for your own organization.*

# OKRs

# Using Smarts to Simplify Capturing Objective Alignment





- In-the-moment OKR alignment suggestions surface thematically related OKRs to help you quickly find and capture Objective Alignment.
- ML-driven algorithm generates a shortlist of similar OKRs from your upline teams.




# Annual & Quarterly Key Results

Automate annual and quarterly key results with **Salesforce**, **Snowflake**, **Google Sheets** etc. or assign different team members to each quarterly key result

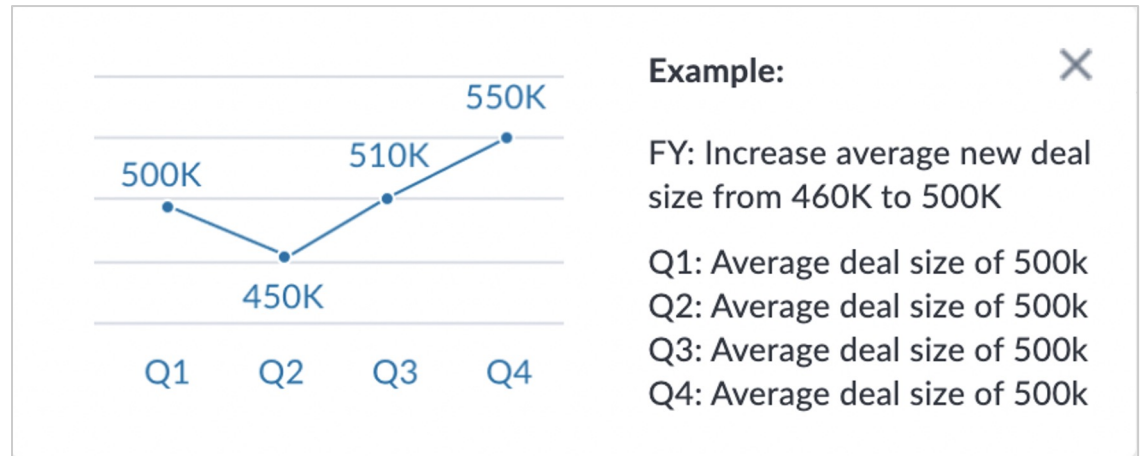
### SET YOUR TARGETS

Time period*	Target name* <sup>?</sup>	Target value*	Source
Q1 FY23	2 paid GXT customers	2	 ⋮
Q2 FY23	4 paid GXT customers	4	 ⋮
Q3 FY23	4 paid GXT customers	4	 ⋮
Q4 FY23	2 paid GXT customers	2	 ⋮

Who will measure progress and how often? \*

 Sathya Narayanan ▼ to update Monthly ▼

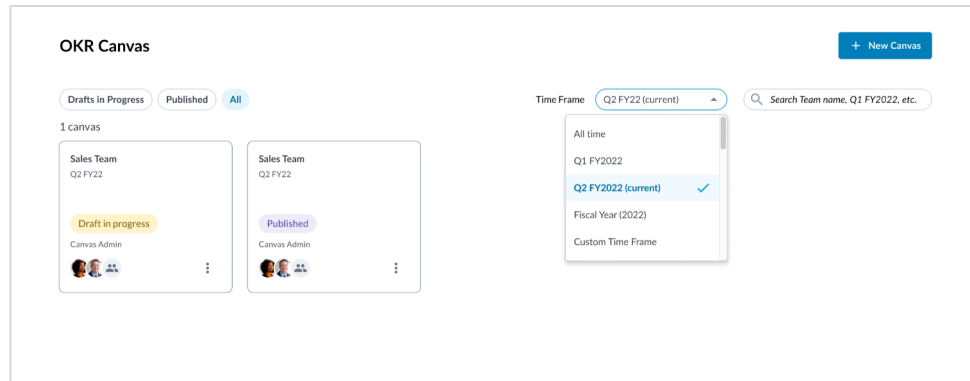
Calculate **averages of quarterly results** over the course of the year with measurement options.



# OKR Canvas

# Canvas is even more delightful!

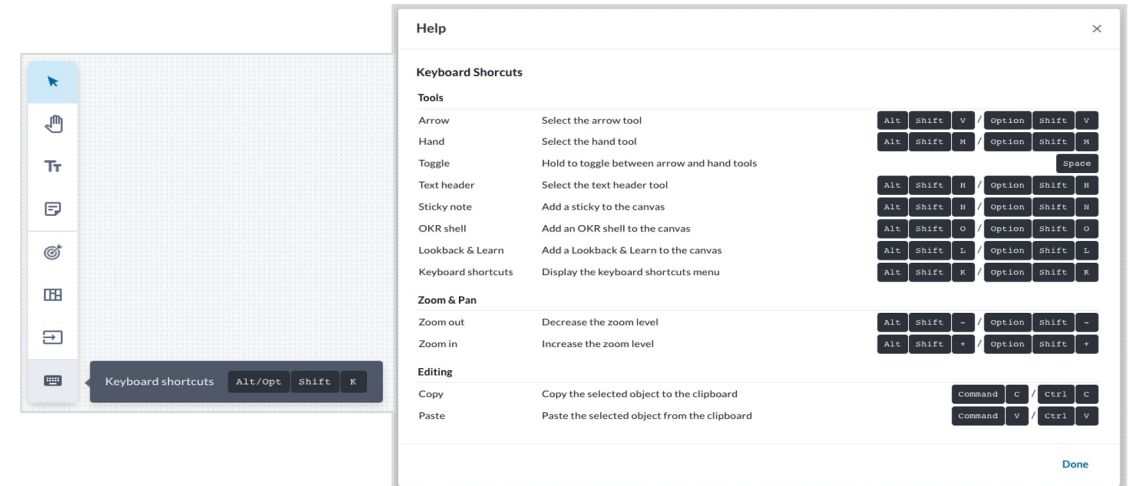
## Easily find your canvas with search and filters



- Quick filter to current cycle canvases with **draft OKRs**
- Easily **filter** to published OKRs or a specific quarter from past cycles
- **Search** for Canvases by team or timeframe

*Coming soon: Multi-select – move multiple objects in bulk*

## Keyboard Shortcuts



- **Keyboard shortcuts** to canvas provide **improved usability and accessibility**



and a few more...

# Easier to spot the agenda for your next meeting

A visual refresh to help you get what you need - it's easier to spot the agenda for your next meeting, and get ahead of agenda-less gatherings.

- The page **auto-scrolls to your next meeting**
- The red line on the page outlines the **current time of day in your meeting list**

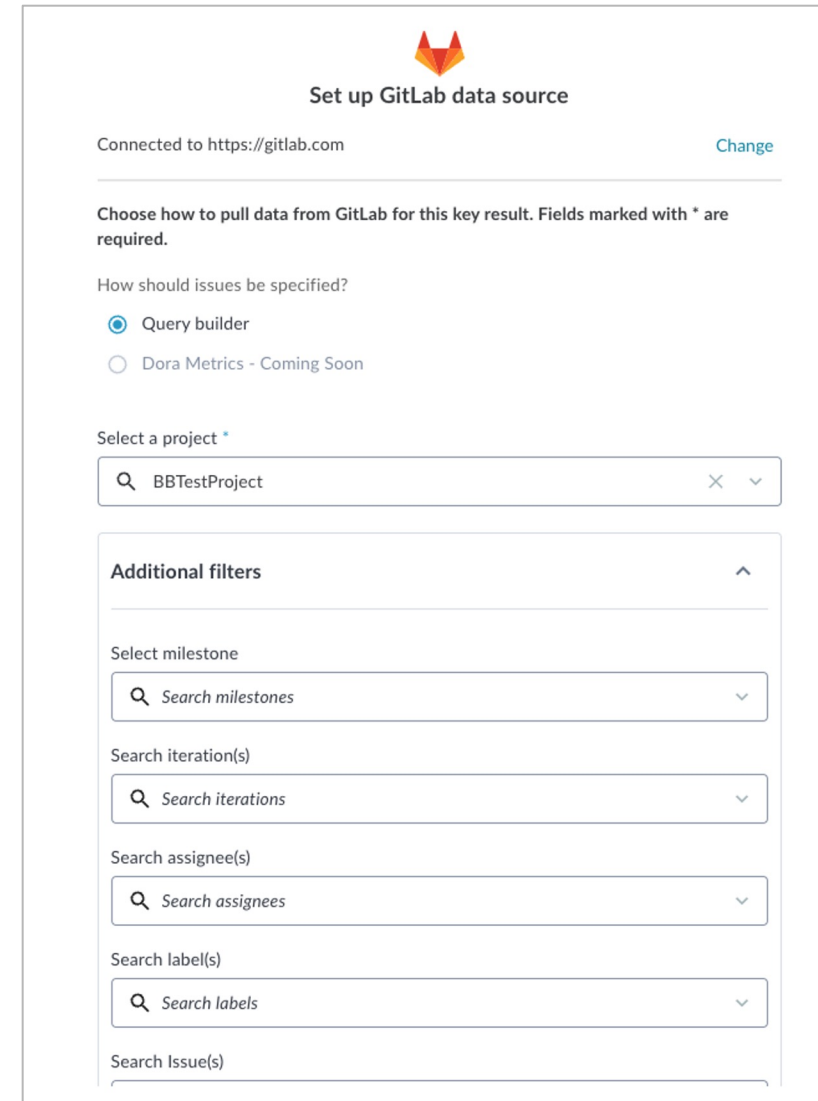
The screenshot shows a 'Meetings Dashboard' interface. At the top, there's a header with the title 'Meetings Dashboard' and a user profile 'jack.ceomack'. Below the header, there's a navigation bar with 'Today', navigation arrows, a calendar icon, and a date range 'Thu, Jun 23rd - Wed, Jun 29th'. A search bar contains 'Search meetings or invitees' and a 'Filters (2)' button. The main content is organized by day:

- Thursday, June 23**
  - 2:00am - 2:30am: Jack & Alice 1:1 (1 invitee, Jack CEOMack)
  - 2:30am - 3:00am: Jack & Alice 1:1 (1 invitee, Jack CEOMack)
  - 9:30am - 10:00am: Jack & Alice 1:1 (2 invitees, Jack CEOMack)
  - 2:00pm - 3:00pm: Invitation to Weekly Product Ops Sync (4 invitees, Jack CEOMack)** - This row is highlighted with a red line.
- Friday, June 24**
  - 7:00am - 7:30am: Jack & Joe 1:1 (2 invitees, Jack CEOMack)
  - 8:30am - 9:00am: Jack & Dan 1:1 (2 invitees, Jack CEOMack)
  - 10:00am - 10:30am: Jack & Alice 1:1 (1 invitee, Jack CEOMack)
- Saturday, June 25**

# Early access to GitLab New Key Result Data Connector

Users can now automate KRs based on data extracted from GitLab.

GitLab is a code repository & update tracking system. Enterprise development teams may have key results that measure and track the number, frequency, and quality of those changes.



The screenshot shows the 'Set up GitLab data source' configuration page. At the top, there is the GitLab logo and the title 'Set up GitLab data source'. Below the title, it indicates the connection to 'https://gitlab.com' with a 'Change' link. A note states: 'Choose how to pull data from GitLab for this key result. Fields marked with \* are required.' Underneath, there is a question 'How should issues be specified?' with two radio button options: 'Query builder' (selected) and 'Dora Metrics - Coming Soon'. Below this is a 'Select a project \*' dropdown menu with 'BBTestProject' selected. A section titled 'Additional filters' is expanded, showing several search input fields: 'Select milestone' (with 'Search milestones'), 'Search iteration(s)' (with 'Search iterations'), 'Search assignee(s)' (with 'Search assignees'), 'Search label(s)' (with 'Search labels'), and 'Search Issue(s)'.

# What are you curious about?

# Thank you!