

# WorkBoard Community Call

September 2022

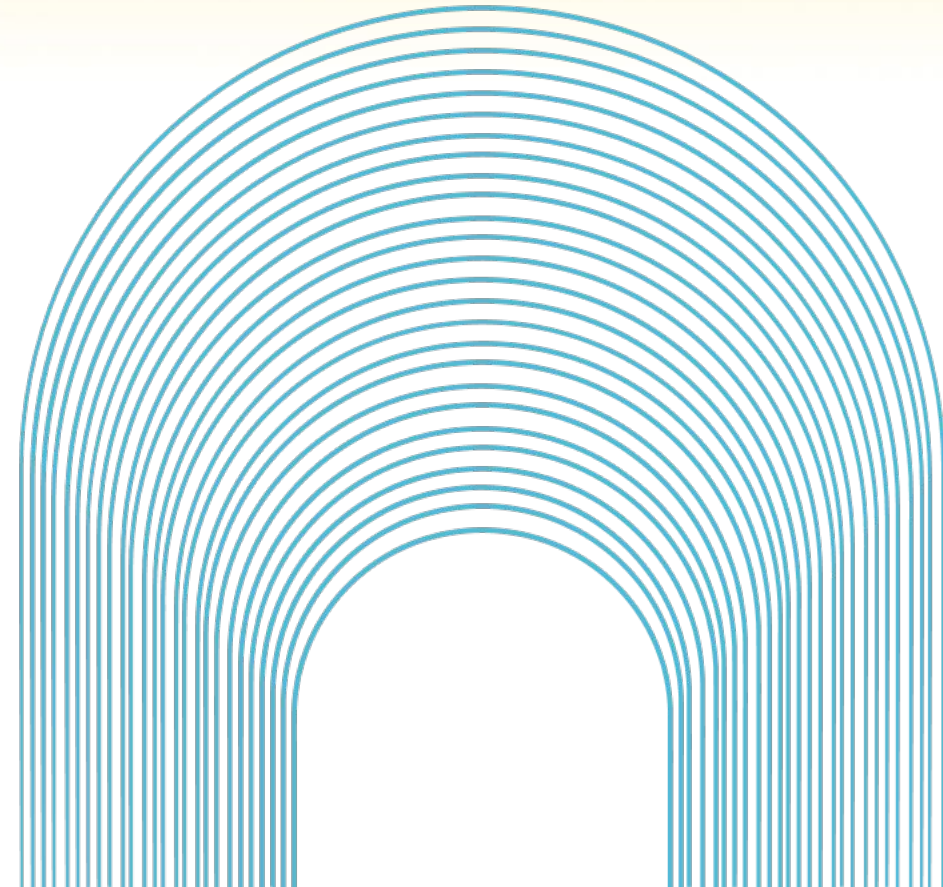


# Agenda

- Accelerate Conference!
- New Navigation teaser
- Analytics and Insights
- Branding customizations with Biz Reviews
- OKR Canvas enhancements
- Coming soon



# **WorkBoard Accelerate Conference!**





# Brilliant Strategy Meets Brilliant Execution

Join us on September 28 & 29!

8:30am to 12:30pm PDT

Register at [WorkBoard.com](https://WorkBoard.com)



# Agenda

## Wednesday, September 28

### The Value of a Modern Operating Rhythm

Rich Barger, Accenture

### Igniting Digital Transformation with OKRs

Leah Goldman, Akamai

### Transformation with OKRs to MBRs

John Goodwin, Poly, an HP Company

### WoBo Labs

- How to measure anything (OKRs)
- Accelerate with Analytics and Insights
- WorkBoard on WorkBoard
- WoBo Strategy

## Thursday, September 29

### Reducing Waste and Gaining Speed with a Digital Operating Rhythm

Charles Zentay, National Grid

### Accelerating Value with OKRs at Intel (Where It All Began)

John Walsh, Jason Gunderson and Mary Brett, Intel

### Unlocking Value and Growth with Outcome Mindset

Skyla Loomis, Rasha Dwidar and Sreekanth Ramakrishnan, IBM

### OKRs to create customer centric products

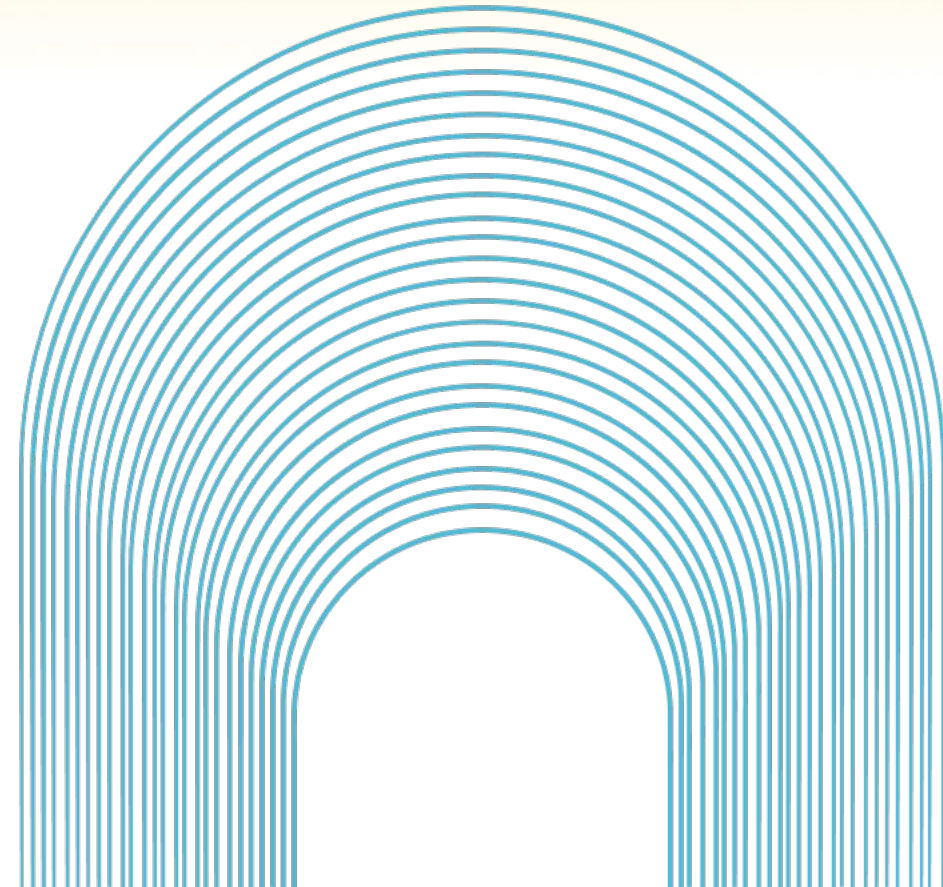
Rich Bayes, Dir of Product Management, Cisco

### WoBo Labs

- Good Conversations in OKR Canvas
- Keep It Digital with Scorecards & Business Reviews
- The Easy Button: Results Habits for Managers that Live Where You Do



# Simplified Navigation



## Fast, simple navigation!



**Simplified experience** with easy access to everything you need from the top navigation and more space to align, drive and accelerate results



New **unified search** giving you faster access to what you need across product areas or the entire platform



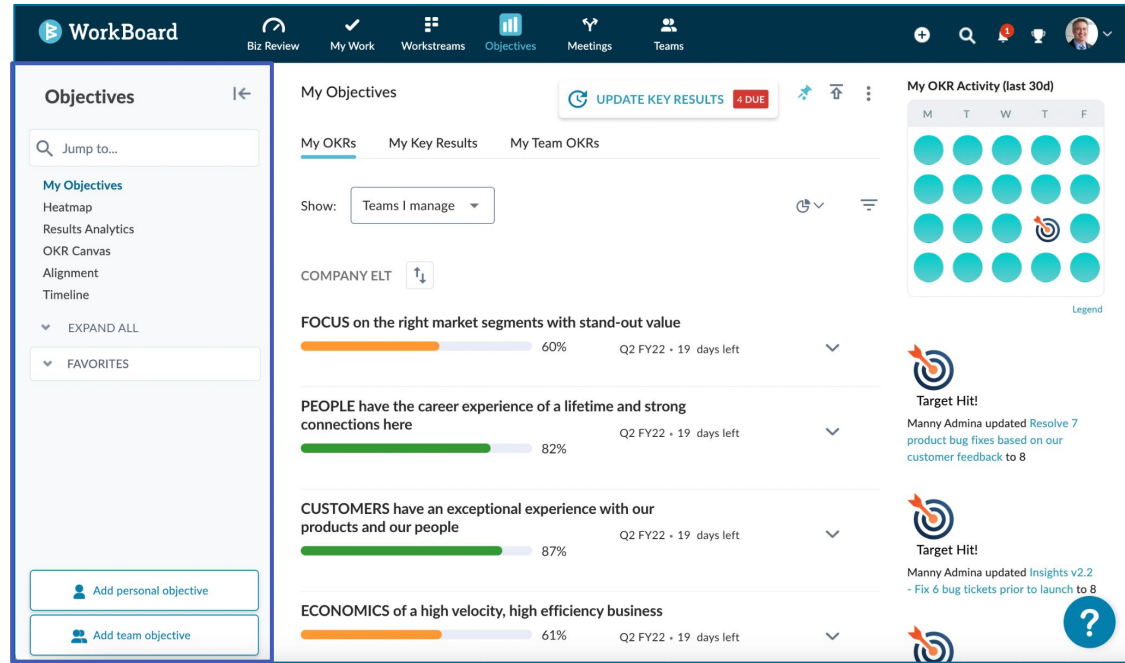
**Consistent create button** allows you to add new action items, workstreams, meetings, Biz Reviews, or Objectives from anywhere so you never miss a beat

# Before & After



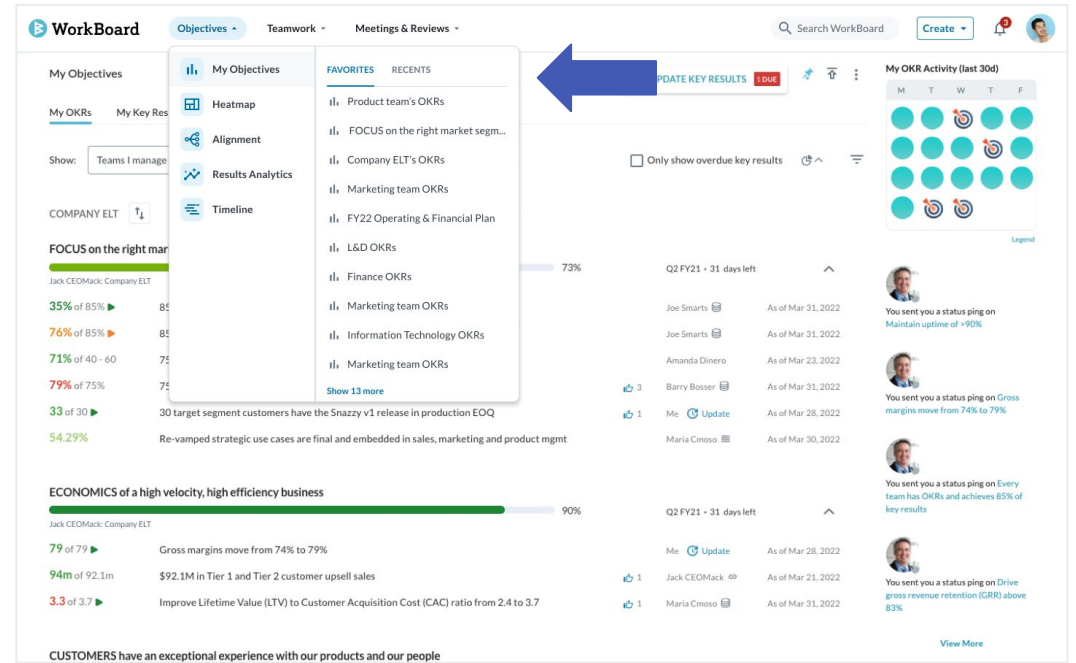
# Fewer clicks to find and switch between pages

## Before



- Features were clustered by “module”, without context or association with larger user motions
- Accessing a page or feature within a module required clicking the **top navigation bar** and then clicking on **left navigation**.

## After



- **To access a feature or page:** I click on the thematic area (Objectives, Teamwork, and Meetings & Reviews) and use a secondary menu to access individual features.
- **Simplified navigation:** easier for users to settle into the platform, discover new information, or to find their way back to information and core pages.

# Objectives

The screenshot displays the WorkBoard interface. At the top, there are navigation tabs for 'Objectives', 'Teamwork', and 'Meetings & Reviews'. A search bar and a 'Create' button are also visible. A dropdown menu is open, showing options like 'My Objectives', 'Heatmap', 'Alignment', 'Results Analytics', and 'Timeline'. A blue arrow points to the 'UPDATE KEY RESULTS' button in the top right of the main content area.

**My Objectives**

- My Key Res
- Show: Teams I manage
- COMPANY ELT
- FOCUS on the right mar**
- Jack CEOMack: Company ELT
- 35% of 85
- 76% of 85
- 71% of 40 - 60
- 79% of 75
- 33 of 30
- 54.29%

**ECONOMICS of a high velocity, high efficiency business**

- Jack CEOMack: Company ELT
- 79 of 79
- 94m of 92.1m
- 3.3 of 3.7

**CUSTOMERS have an exceptional experience with our products and our people**

**Objectives List:**

- Product team's OKRs
- FOCUS on the right market segment
- Company ELT's OKRs
- Marketing team OKRs
- FY22 Operating & Financial Plan
- L&D OKRs
- Finance OKRs
- Marketing team OKRs
- Information Technology OKRs
- Marketing team OKRs

**Activity Log:**

- Q2 FY21 - 31 days left
- Joe Smarts As of Mar 31, 2022
- Joe Smarts As of Mar 31, 2022
- Amanda Dinero As of Mar 23, 2022
- Barry Bosser As of Mar 31, 2022
- Me Update As of Mar 28, 2022
- Maria Cmoso As of Mar 30, 2022
- Q2 FY21 - 31 days left
- Me Update As of Mar 28, 2022
- Jack CEOMack As of Mar 21, 2022
- Maria Cmoso As of Mar 31, 2022

**My OKR Activity (last 30d)**

M	T	W	T	F
🎯	🎯	🎯	🎯	🎯
🎯	🎯	🎯	🎯	🎯
🎯	🎯	🎯	🎯	🎯
🎯	🎯	🎯	🎯	🎯

Legend

[View More](#)

# Teamwork

The screenshot displays the WorkBoard interface. At the top, there are navigation tabs for 'Objectives', 'Teamwork', and 'Meetings & Reviews'. A search bar and a 'Create' button are also visible. The 'Teamwork' dropdown menu is open, showing options for 'My work', 'Workstreams', 'Teams', and 'My Direct & Dotted'. Under 'Workstreams', there are sub-options: 'Product roadmap', 'Squid squad', 'Leadership Development Pipeline', 'Product team', and 'Marketing team'. The main area shows a Kanban board with columns for dates from Monday to Saturday. The 'Wed Sep 21' column is active and contains several task cards. A 'New Action Item' button is located in the top right of the main area.

**WorkBoard** Objectives Teamwork Meetings & Reviews Search WorkBoard Create

**My Work**

- All Today This week
- A little hope will do you a lot of good!
- 25 25 down -- awe... From Workboard, Mar
- 30 Total Done

**Teamwork**

- My work
- Workstreams
  - Product roadmap
  - Squid squad
  - Leadership Development Pipeline
- Teams
  - Product team
  - Marketing team
- My Direct & Dotted

**Board Columns:**

- Mon Sep 19
  - Publish rolling schedule for quarterly cycle - it's on the teams and Ops Leads to schedule (RME - MONTH 4)
  - Product Marketing OKRs - Please provide feedback and/or validate (PRIVATE REQUEST)
- Tue Sep 20
  - Thought leadership - crank out first draft (JACK'S TO DO LIST)
- Wed Sep 21
  - follow up with Mary and Paul Carter on customer marketing ideas (JACK'S TO DO LIST)
  - Work with Alice on a coming back into the office plan (JACK'S TO DO LIST)
- Thu Sep 22
  - Board meeting Prep (JACK'S TO DO LIST)
  - Provide training playbook to Joe Smarts (JACK'S TO DO LIST)
  - Select 10 candidates to interview for open CISO (JACK'S TO DO LIST)
- Fri Sep 23
  - Follow up with Maria about JonasKit approach (JACK'S TO DO LIST)
- Sat Sep 24
- Sun Sep 25

# Meetings & Reviews

**WorkBoard** Objectives Teamwork **Meetings & Reviews** Search WorkBoard Create

## Biz Reviews

Favorites

+ New Collection + New Biz Review

Page 1 of 3

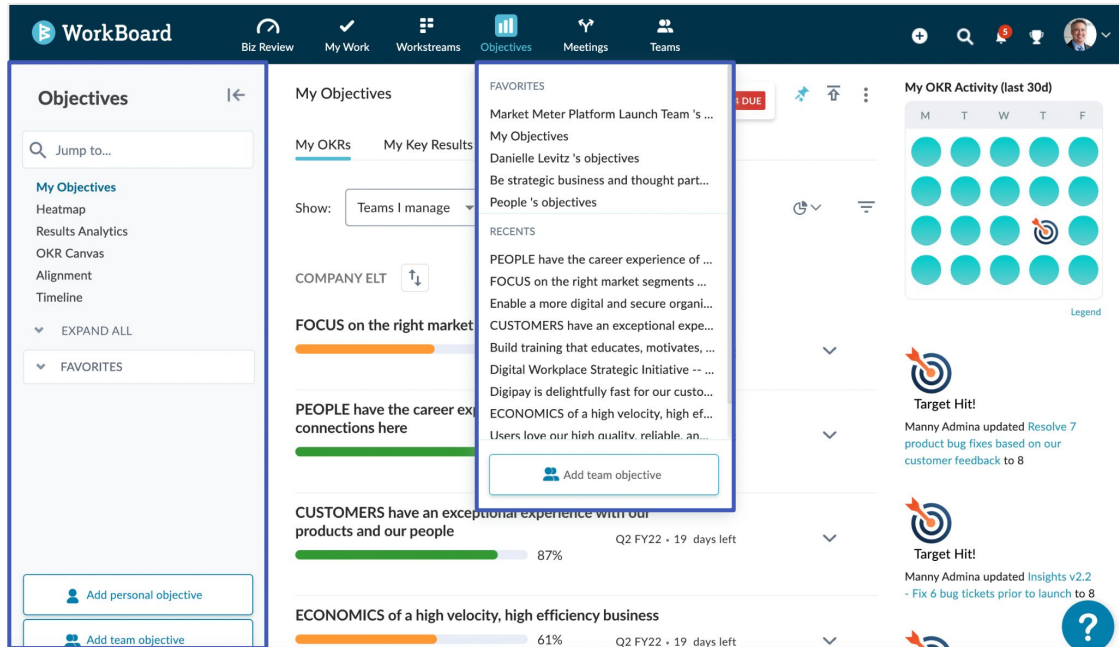
All Recents Favorites Search by name or owner Filters

3 collections, 234 reviews

Name	Modified	Owner	Access	Actions
Q4 QBR Planning_2021	Jan 3, 2022	You	Viewer	
All hands Q2 planning_2022_Redwood City	Jan 1, 2022	Jenny Bierman	Owner	
Q4 Sales_Blitz results and running review	Dec 25, 2021	Shawn Simpson	Editor	
Activations Q4	Nov 25, 2021	Kait Smith	Viewer	
Customer Success QoQ Business Review	Jan 19, 2022	Lilly Simmons	Owner	
Alignment Analytics	Jan 29, 2022	Robert Fox	Editor	

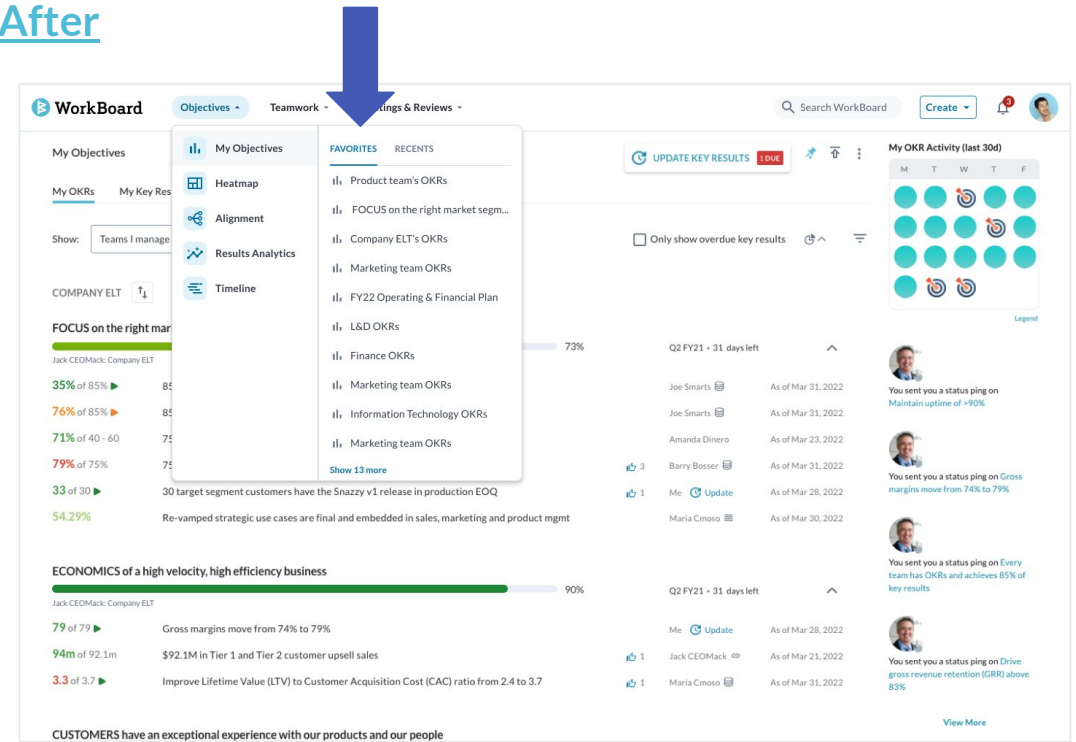
# Easier to curate your go-to list

## Before



- To find favorite, users used to mouse over a module or use the **left navigation** for the module. To find recents, they had to mouse over the module in the **top nav**, which was hard to discover.

## After



- **To access a feature, favorites, or recents**, click on a top menu item and select the page from the secondary navigation
- **Pin and unpin favorites easily** directly from the list, and quickly favorite recently visited pages.

# Easier to curate your go-to list

**WorkBoard** Objectives Teamwork Settings & Reviews Search WorkBoard Create

**My Objectives**

- My Objectives
- Heatmap
- Alignment
- Results Analytics
- Timeline

**My OKRs** My Key Results

Show: Teams I manage

COMPANY ELT

**FOCUS on the right market**

Jack CEOMack: Company ELT

- 35% of 85%
- 76% of 85%
- 71% of 40 - 60
- 79% of 75%
- 33 of 30
- 54.29%

30 target segment customers have the Snazzy v1 release in production EOQ

Re-vamped strategic use cases are final and embedded in sales, marketing and product mgmt

**ECONOMICS of a high velocity, high efficiency business**

Jack CEOMack: Company ELT

- 79 of 79
- 94m of 92.1m
- 3.3 of 3.7

Gross margins move from 74% to 79%

\$92.1M in Tier 1 and Tier 2 customer upsell sales

Improve Lifetime Value (LTV) to Customer Acquisition Cost (CAC) ratio from 2.4 to 3.7

**CUSTOMERS have an exceptional experience with our products and our people**

**UPDATE KEY RESULTS** DUE

Only show overdue key results

**My OKR Activity (last 30d)**

M T W T F

Legend

Q2 FY21 - 31 days left

- Joe Smarts As of Mar 31, 2022
- Joe Smarts As of Mar 31, 2022
- Amanda Dinero As of Mar 23, 2022
- Barry Bosser As of Mar 31, 2022
- Me Update As of Mar 28, 2022
- Maria Cmoso As of Mar 30, 2022

Q2 FY21 - 31 days left

- Me Update As of Mar 28, 2022
- Jack CEOMack As of Mar 21, 2022
- Maria Cmoso As of Mar 31, 2022

You sent you a status ping on **Maintain uptime of >90%**

You sent you a status ping on **Gross margins move from 74% to 79%**

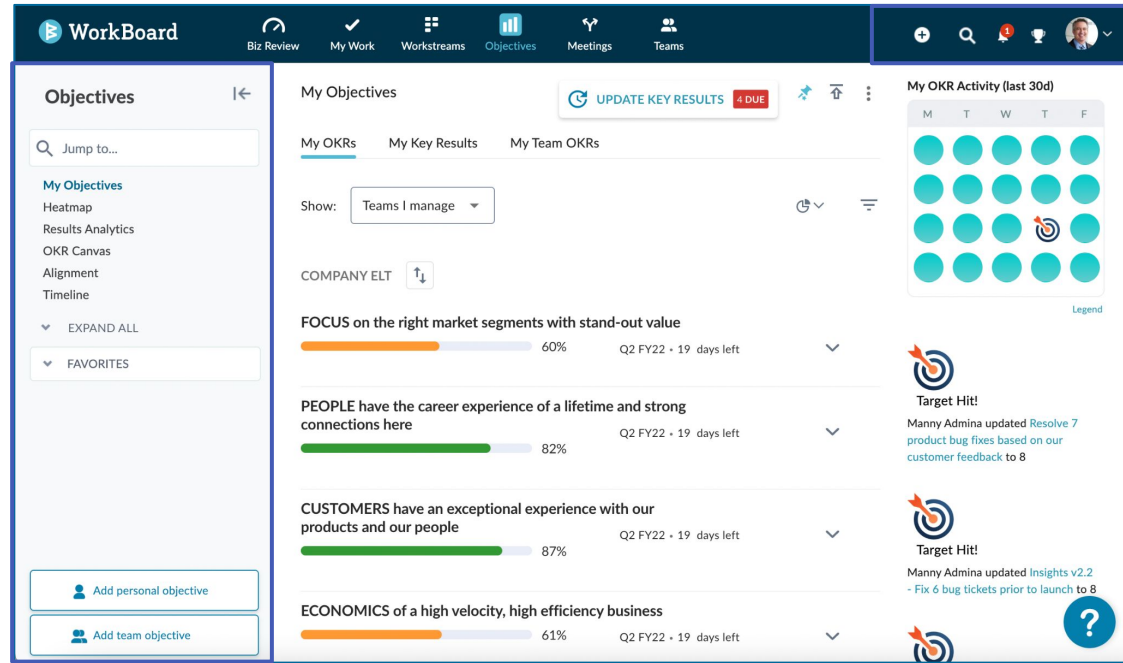
You sent you a status ping on **Every team has OKRs and achieves 85% of key results**

You sent you a status ping on **Drive gross revenue retention (GRR) above 83%**

View More

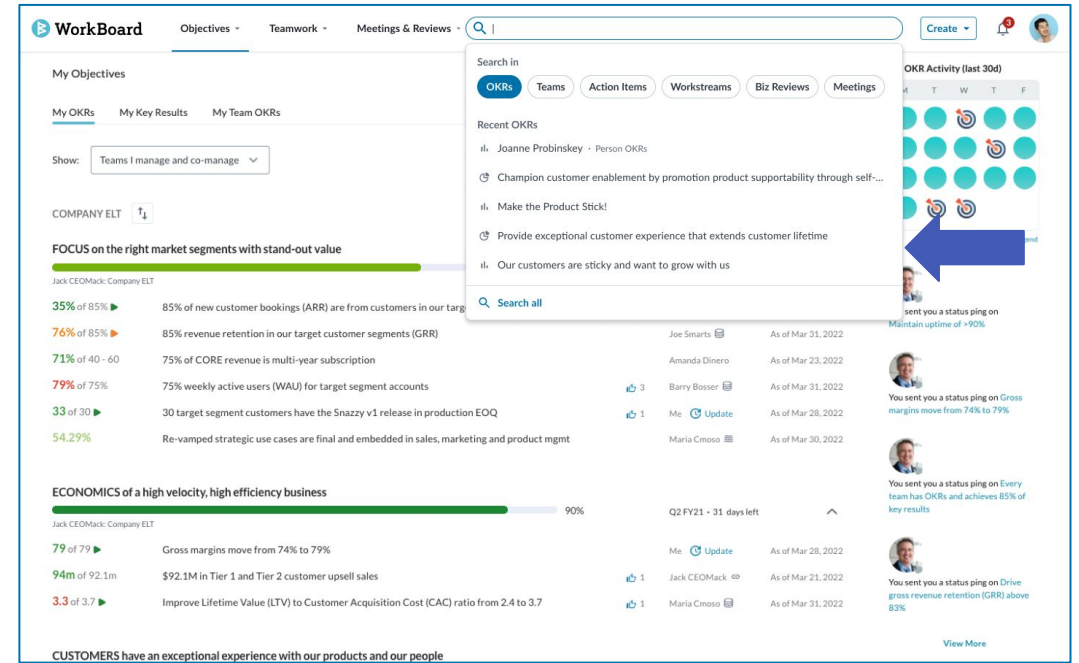
# One uniform pathway to search

## Before



- Search was split into two different pathways - global search in the **top navigation**, and local search in the **left navigation**, which required going to the module to “Jump to” a result.

## After



- **Search:** one unified search pathway that users need to learn or choose between. You don't have to go to the module in order to do a quick “jump to” search

# One uniform pathway to search

The screenshot displays the WorkBoard interface with a search dropdown menu open. The dropdown menu is titled "Search in" and contains several tabs: "OKRs" (selected), "Teams", "Action Items", "Workstreams", "Biz Reviews", and "Meetings". Below the tabs, the "Recent OKRs" section lists several items:

- Joanne Probinskey · Person OKRs
- Champion customer enablement by promotion product supportability through self-...
- Make the Product Stick!
- Provide exceptional customer experience that extends customer lifetime
- Our customers are sticky and want to grow with us

A blue arrow points from the "OKRs" tab to the "Recent OKRs" list. The background shows a dashboard with various OKR progress bars and a list of team members with their respective OKR updates.

**My Objectives**

My OKRs | My Key Results | My Team OKRs

Show: Teams I manage and co-manage

COMPANY ELT

**FOCUS on the right market segments with stand-out value**

Jack CEO Mack: Company ELT

35% of 85%	85% of new customer bookings (ARR) are from customers in our target segments	Joe Smarts	As of Mar 31, 2022
76% of 85%	85% revenue retention in our target customer segments (GRR)	Amanda Dinero	As of Mar 23, 2022
71% of 40 - 60	75% of CORE revenue is multi-year subscription	Barry Bosser	As of Mar 31, 2022
79% of 75%	75% weekly active users (WAU) for target segment accounts	Me	As of Mar 28, 2022
33 of 30	30 target segment customers have the Snazzy v1 release in production EOQ	Maria Cmoso	As of Mar 30, 2022
54.29%	Re-vamped strategic use cases are final and embedded in sales, marketing and product mgmt		

**ECONOMICS of a high velocity, high efficiency business**

Jack CEO Mack: Company ELT

79 of 79	Gross margins move from 74% to 79%	Me	As of Mar 28, 2022
94m of 92.1m	\$92.1M in Tier 1 and Tier 2 customer upsell sales	Jack CEO Mack	As of Mar 21, 2022
3.3 of 3.7	Improve Lifetime Value (LTV) to Customer Acquisition Cost (CAC) ratio from 2.4 to 3.7	Maria Cmoso	As of Mar 31, 2022

**CUSTOMERS have an exceptional experience with our products and our people**

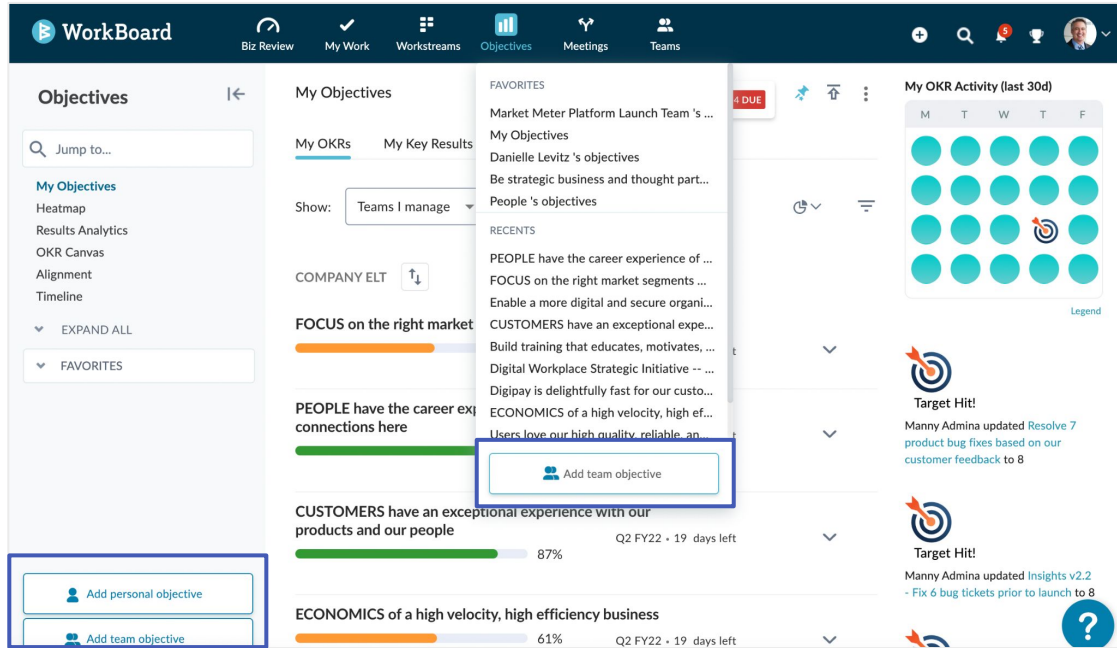
OKR Activity (last 30d)

View More



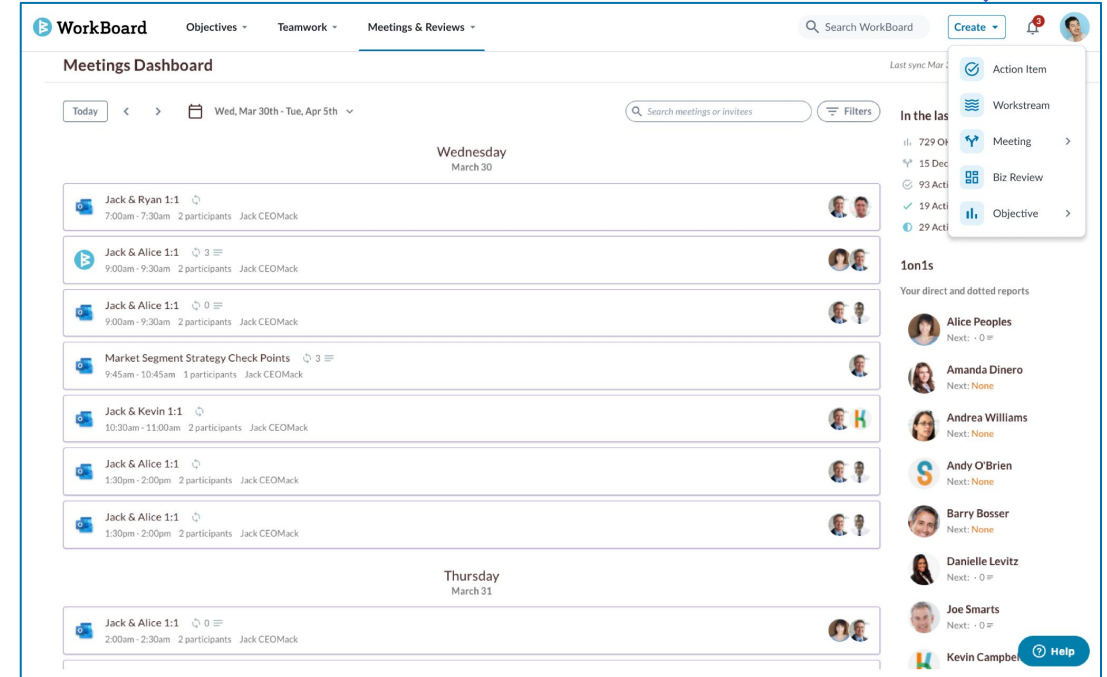
# Consistent creation mechanism across the app

## Before



- To create new content, users had to go to a specific module, open the left navigation and click on create buttons tucked under the **left navigation** per module, or mouse over the **top nav**.

## After



- **Create**: clear and consistent call to action to create most items from top navigation create button.

# Consistent creation mechanism across the app



The screenshot displays the WorkBoard interface. At the top, there are navigation tabs for 'Objectives', 'Teamwork', and 'Meetings & Reviews'. A search bar and a 'Create' button are visible in the top right. The main content area is titled 'Meetings Dashboard' and shows a calendar view for Wednesday, March 30, and Thursday, March 31. A list of meetings is displayed, including 'Jack & Ryan 1:1', 'Jack & Alice 1:1', and 'Market Segment Strategy Check Points'. On the right side, there is a '1on1s' section listing direct and dotted reports such as Alice Peoples, Amanda Dinero, and Andrea Williams. A 'Create' dropdown menu is open, showing options: Action Item, Workstream, Meeting, Biz Review, and Objective.

# Admin

The screenshot displays the WorkBoard Admin interface. At the top, there is a navigation bar with the WorkBoard logo, tabs for Objectives, Teamwork, and Meetings & Reviews, a search bar, a 'Create' button, and a user profile icon. A dropdown menu is open on the left, listing 'OKR Canvas', 'Strategy', 'Admin tools', 'Governance', and 'Org engagement'. The main content area features a 'My Team OKRs' section with a 'My Team OKRs' dropdown. Below this, there are two main OKR sections: 'FOCUS on the right market segments with stand-out value' and 'ECONOMICS of a high velocity, high efficiency business'. Each section includes a progress bar, a title, and a list of key results with their current status and target values. To the right, there is a 'My OKR Activity (last 30d)' calendar grid and a list of activity notifications with user avatars and descriptions. At the bottom, there is a 'View More' link and a footer section with the text 'CUSTOMERS have an exceptional experience with our products and our people'.

**WorkBoard** Objectives Teamwork Meetings & Reviews Search WorkBoard Create

OKR Canvas Strategy Admin tools Governance Org engagement

UPDATE KEY RESULTS DUE

My OKR Activity (last 30d)

Legend

**FOCUS on the right market segments with stand-out value**

Jack CEO Mack: Company ELT 73%

Q2 FY21 - 31 days left

- 35% of 85% ▶ 85% of new customer bookings (ARR) are from customers in our target segments
- 76% of 85% ▶ 85% revenue retention in our target customer segments (GRR)
- 71% of 40 - 60 75% of CORE revenue is multi-year subscription
- 79% of 75% 75% weekly active users (WAU) for target segment accounts
- 33 of 30 ▶ 30 target segment customers have the Snazzy v1 release in production EOQ
- 54.29% Re-vamped strategic use cases are final and embedded in sales, marketing and product mgmt

Joe Smarts As of Mar 31, 2022

Joe Smarts As of Mar 31, 2022

Amanda Dinero As of Mar 23, 2022

Barry Bosser As of Mar 31, 2022

Me Update As of Mar 28, 2022

Maria Cmoso As of Mar 30, 2022

You sent you a status ping on Maintain uptime of >90%

You sent you a status ping on Gross margins move from 74% to 79%

**ECONOMICS of a high velocity, high efficiency business**

Jack CEO Mack: Company ELT 90%

Q2 FY21 - 31 days left

- 79 of 79 ▶ Gross margins move from 74% to 79%
- 94m of 92.1m \$92.1M in Tier 1 and Tier 2 customer upsell sales
- 3.3 of 3.7 ▶ Improve Lifetime Value (LTV) to Customer Acquisition Cost (CAC) ratio from 2.4 to 3.7

Me Update As of Mar 28, 2022

Jack CEO Mack As of Mar 21, 2022

Maria Cmoso As of Mar 31, 2022

You sent you a status ping on Every team has OKRs and achieves 85% of key results

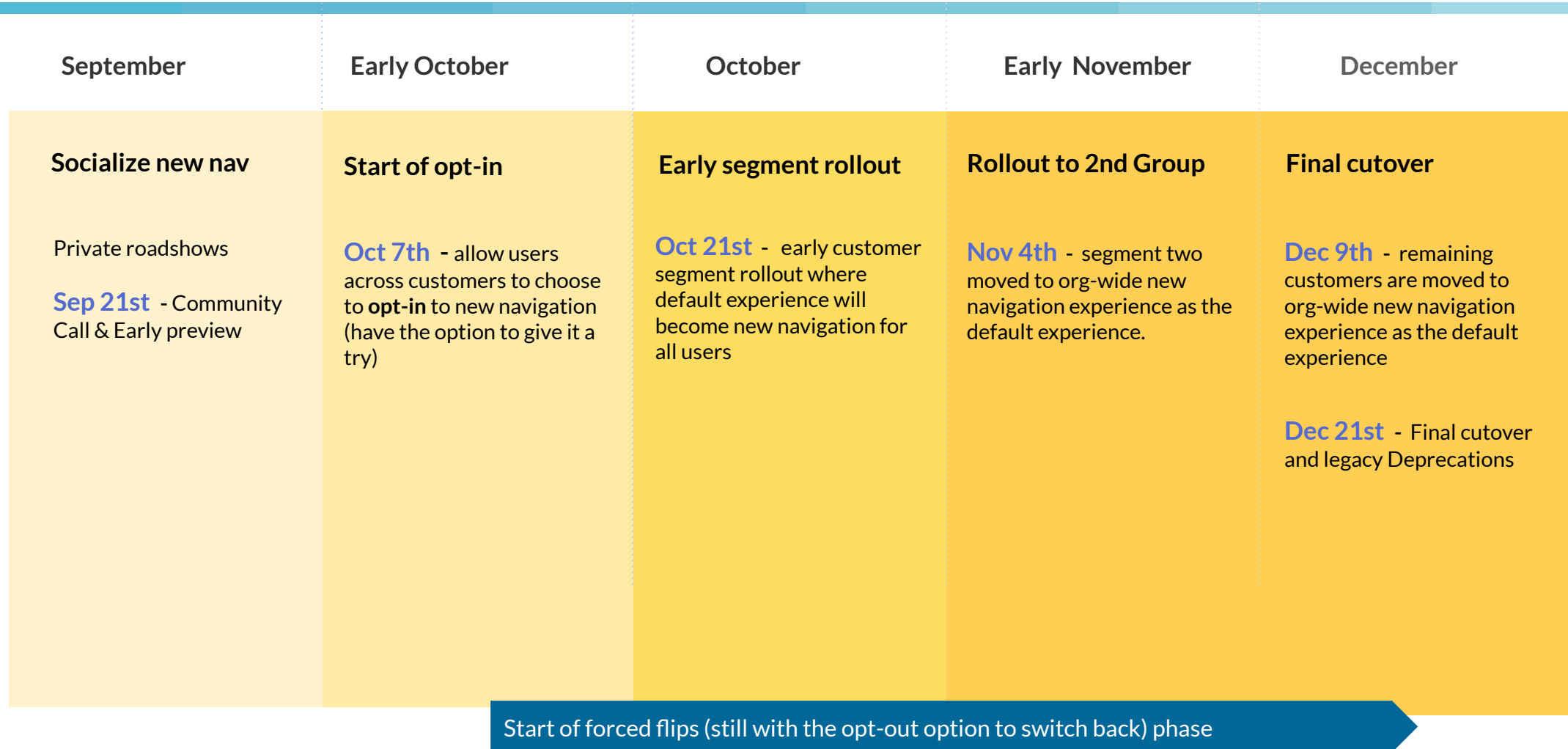
You sent you a status ping on Drive gross revenue retention (GRR) above 83%

View More

CUSTOMERS have an exceptional experience with our products and our people

# Timeline & Onboarding

# vNext Navigation Roll Out Timeline



# Opt-in: Onboarding Flow

WorkBoard makes the new navigation available for Acme.

When Jack logs in, while he still sees the old navigation he is familiar with, he sees a pop up that prompts him to give the new navigation a try.

The screenshot displays the WorkBoard interface. At the top, a navigation bar includes icons for 'Biz Review', 'My Work', 'Workstreams', 'Objectives', 'Meetings', and 'Teams'. Below this, the main content area shows 'My Objectives' with tabs for 'My OKRs', 'My Key Results', and 'My Team OKRs'. A dropdown menu is open over the 'Show:' field, displaying 'Teams I manage' and a tooltip that says 'Click to go forward, hold to see history'. The main content area lists several objectives with progress bars: 'COMPANY ELT', 'FOCUS on the right market segments with stand-out value' (52%), 'ECONOMICS of a high velocity, high efficiency business' (36%), 'CUSTOMERS have an exceptional experience with our products and our pe' (56%), 'PEOPLE have the career experience of a lifetime and strong connections he' (72%), and 'FY22 Operating & Financial Plan' (58%).

A modal window is overlaid on the screen, featuring a video player and two buttons: 'Remind me later' and 'Learn more'. The modal text reads: 'Take a sneak peek at the new and improved navigation, and see how you can give it a test drive!'.

At the bottom right, there is a small text snippet: 'give me an update on KR - we need list of customers.' and a question mark icon.

# Trying out the new navigation

The screenshot shows a meeting interface with a dark blue header. The header contains navigation icons for 'Biz Review', 'My Work', 'Workstreams', 'Objectives', 'Meetings', and 'Teams'. The 'Meetings' icon is highlighted. Below the header, the meeting title is 'New Navigation Timeline' with a time range of 'Fri, Aug 5 · 9:26pm - 9:56pm'. The meeting details section includes 'Meeting Details', 'ADD:' with icons for charts and documents, and two columns: 'Topics for Discussion' and 'Takeaways'. The 'Topics for Discussion' column has a placeholder 'Add topics here' and two items: 'FYI Dashboard for tracking roll out' and 'WoBone page coming soon!'. The 'Takeaways' column has a placeholder 'Add takeaways here' and two empty rows. A user menu is open on the right, showing the user's name 'Hi, Pat' and a list of options: Profile, Profile Settings, Preferences, Integrations, Help Center, Video Tutorials, Administrator tools, Key Results feed, Switch to new navigation, and Logout. A large blue arrow points to the 'Switch to new navigation' option.

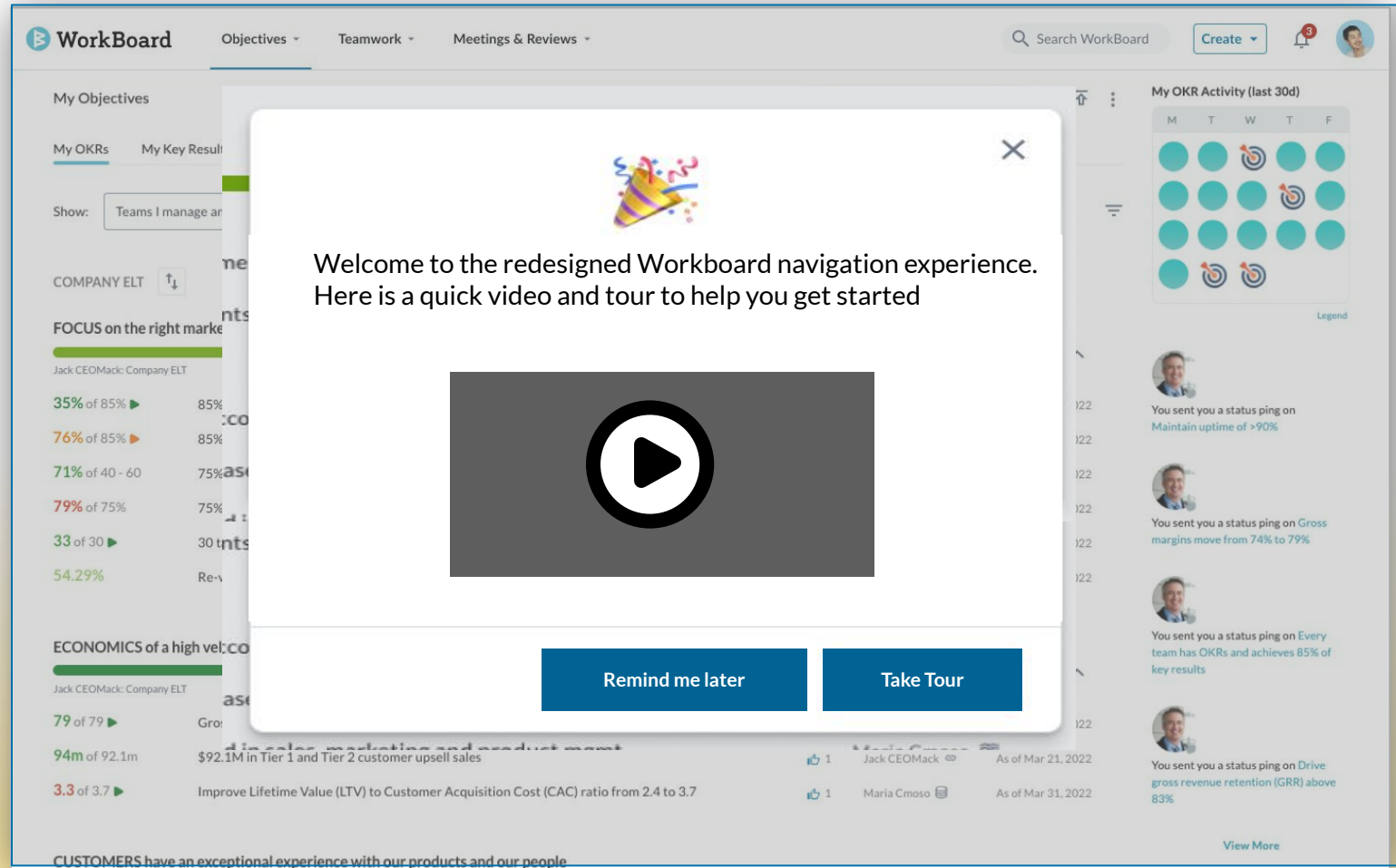
# Navigation defaults to New Experience

Sammy works at Acme.

WorkBoard now **defaults** Acme to the new navigation org-wide.

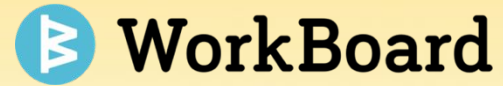
If Sammy hadn't decided to opt-in earlier, now in this stage, when he logs in, he now finds himself in the **new navigation** with a guided tour to help him find his way.

Sammy will still have the option to **switch back** to the old navigation during this phase.

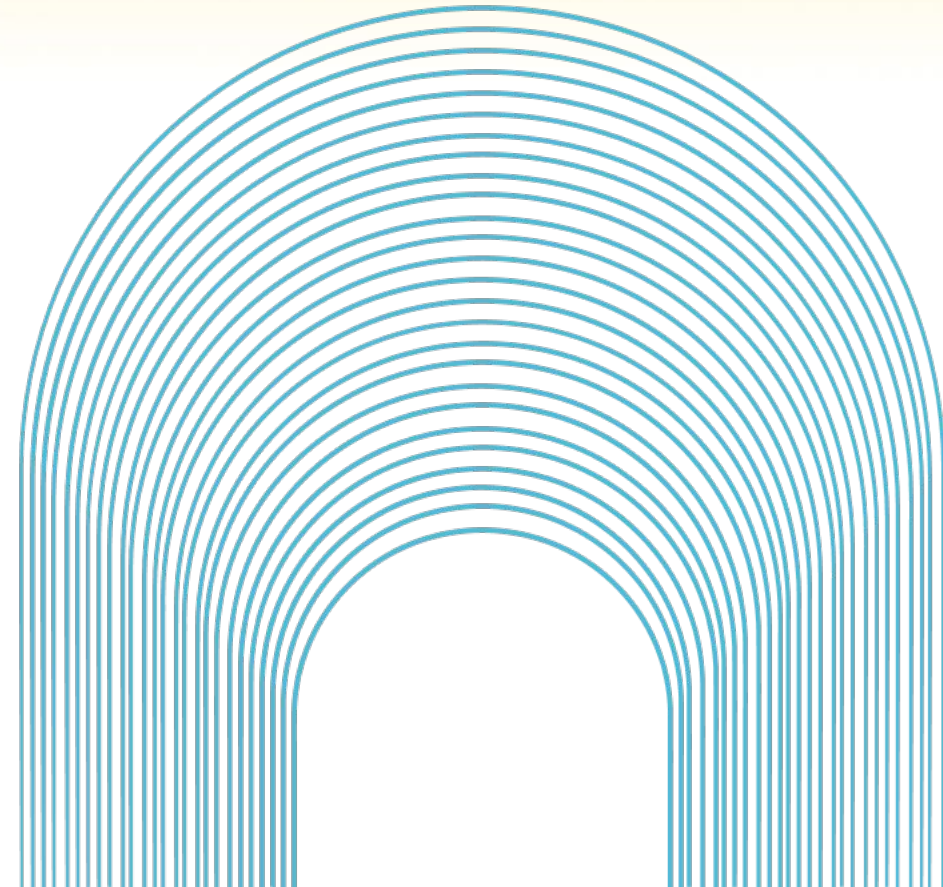


The screenshot displays the WorkBoard user interface. At the top, there are navigation tabs for 'Objectives', 'Teamwork', and 'Meetings & Reviews'. A search bar and a 'Create' button are also visible. The main content area is partially obscured by a central modal window. This modal features a colorful party hat icon and the text: 'Welcome to the redesigned Workboard navigation experience. Here is a quick video and tour to help you get started'. Below the text is a large video player with a play button icon. At the bottom of the modal, there are two buttons: 'Remind me later' and 'Take Tour'. The background interface shows 'My Objectives' on the left, a central list of OKRs with progress bars (e.g., '35% of 85%', '76% of 85%', '71% of 40 - 60', '79% of 75%', '33 of 30', '54.29%'), and 'My OKR Activity (last 30d)' on the right, which includes a calendar grid and a list of recent activity items with user avatars and dates.



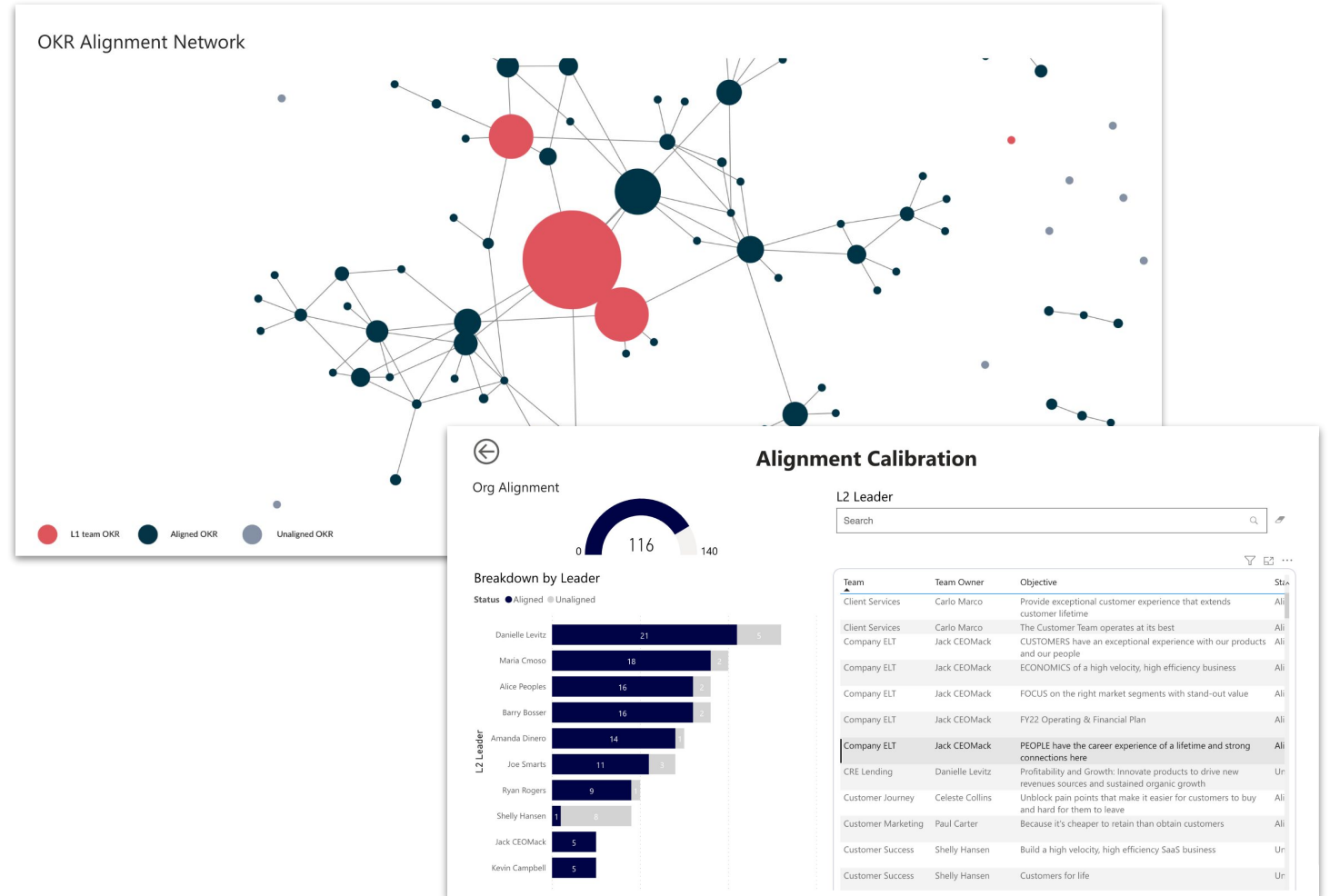


# ***Analytics & Insights***



# Objective Alignment Analytics

- Highlights where alignment isn't captured to surface potential alignment breakdowns
- Drives focus by supporting conversations to evaluate if unaligned work should be done at all – so the business can make explicit decisions about resource allocation
- Quickly discover unaligned OKRs across the entire organization in a single view
- Identify gaps in understanding of the strategy and get the detail in one click
- Visibility into resource allocation; are they driving efficient strategy execution
- Uncover leaders and teams with the greatest opportunity to increase alignment



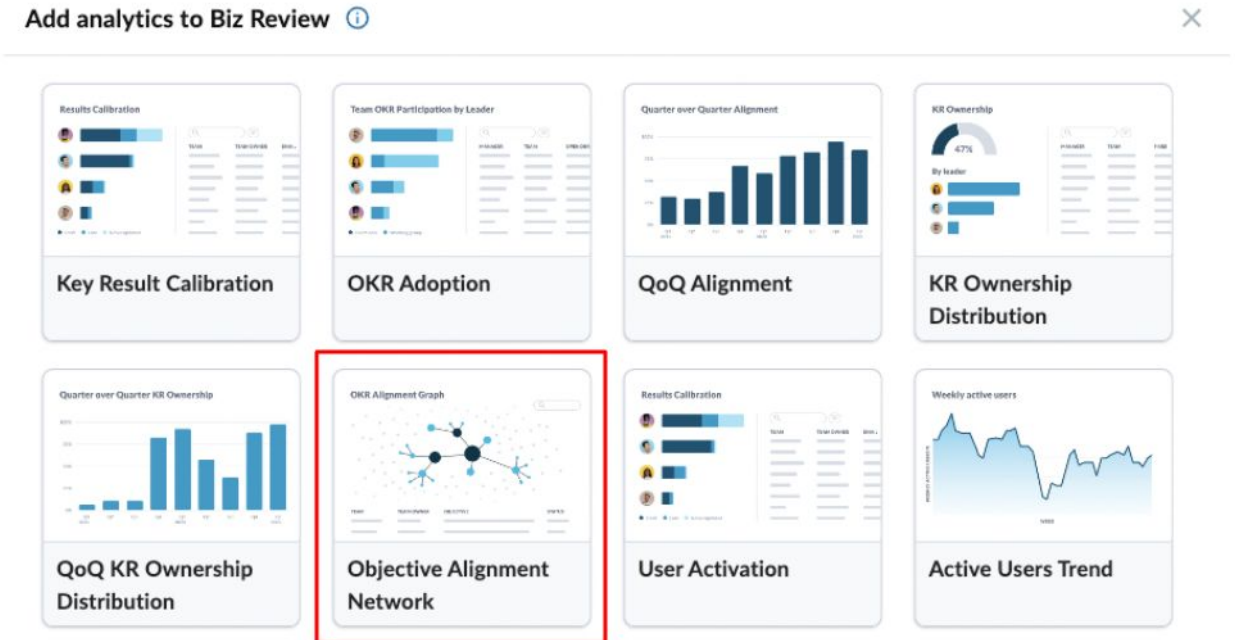
# Objective Alignment Analytics

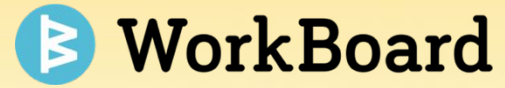
## Steps to Activate

1. The report will be automatically be turned on for all customer organizations
2. Share the report from 'Biz Review Analytics' under administrator tools with specific users

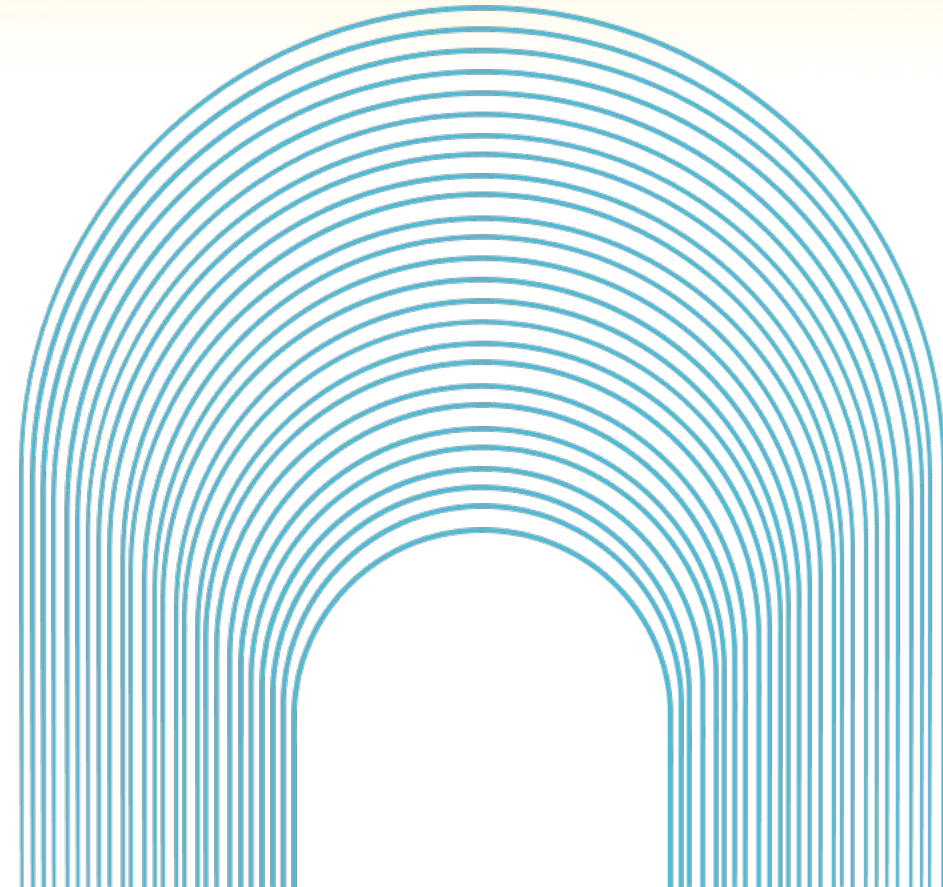
## Adding it to a Biz Review

1. Create a running business review
2. Add Analytics tray
3. Select Objective Alignment Network (Name will change to align)





# **Biz Reviews**



# Customize Biz Reviews with Your Branding

Set the color and customize the look and feel of your QBRs.

Choose your colors for specific trays, sections, or an entire Biz Review to match your brand.

Access the Color Picker via the 'three dots' menus. Enter a specific Hex color for an exact match.

The screenshot displays the WorkBoard interface for a Biz Review titled "Operating Committee Priorities". The interface includes a navigation bar with icons for "Biz Review", "My Work", "Workstreams", "Objectives", "Meetings", and "Teams". The main content area shows a list of objectives with progress indicators:

- 63% PEOPLE have the career experience of a lifetime and strong connections here
- 50% ECONOMICS of a high velocity, high efficiency business
- 38% CUSTOMERS have an exceptional experience with our products and our people
- 30% FOCUS on the right market segments with stand-out value

A color picker overlay is visible, showing a grid of color swatches and a "Restore defaults" button. A second, larger color picker overlay is open, displaying a gradient bar and the hex color "#BC881A". A context menu is also visible, listing options such as "Share", "Duplicate", "Change tray colors", "Set as Start Page", "Delete", and "Archive".

Objectives

63%

PEOPLE have the career experience of a lifetime and strong connections here

Operating Committee: AshaProdstest Prodstest

50%

ECONOMICS of a high velocity, high efficiency business

Operating Committee: AshaProdstest Prodstest

38%

CUSTOMERS have an exceptional experience with our products and our people

Operating Committee: AshaProdstest Prodstest

30%

FOCUS on the right market segments with stand-out value

Operating Committee: AshaProdstest Prodstest

Priority Focus Workstreams

0%

Leadership Development Pipeline

Operating Committee: AshaProdstest Prodstest

0%

Staff Ops

Operating Committee: AshaProdstest Prodstest

0%

Strategic Use Cases

Operating Committee: AshaProdstest Prodstest

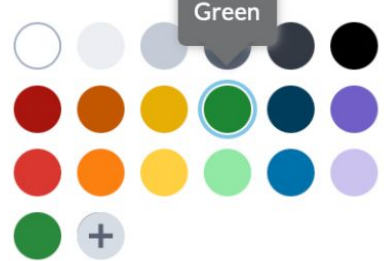
T1 & T2 Bookings Performance


General trend toward higher bookings number across North America and EMEA for Monthly New Booking compared to our current forecast, especially from Apr - May. We didn't anticipate the expansion potential in several accounts, which has resulted in 121% GRR over the last 6 months. **Jan - March Cumulative Target: \$325M** **Jan - March Cumulative Bookings: \$462M** Next month new booking indicators

- Pipeline: \$90M
- Commit: \$30M
- Best Case: \$40M


**Growth strategy:** Focus on expansion in existing accounts.


Celebration Box

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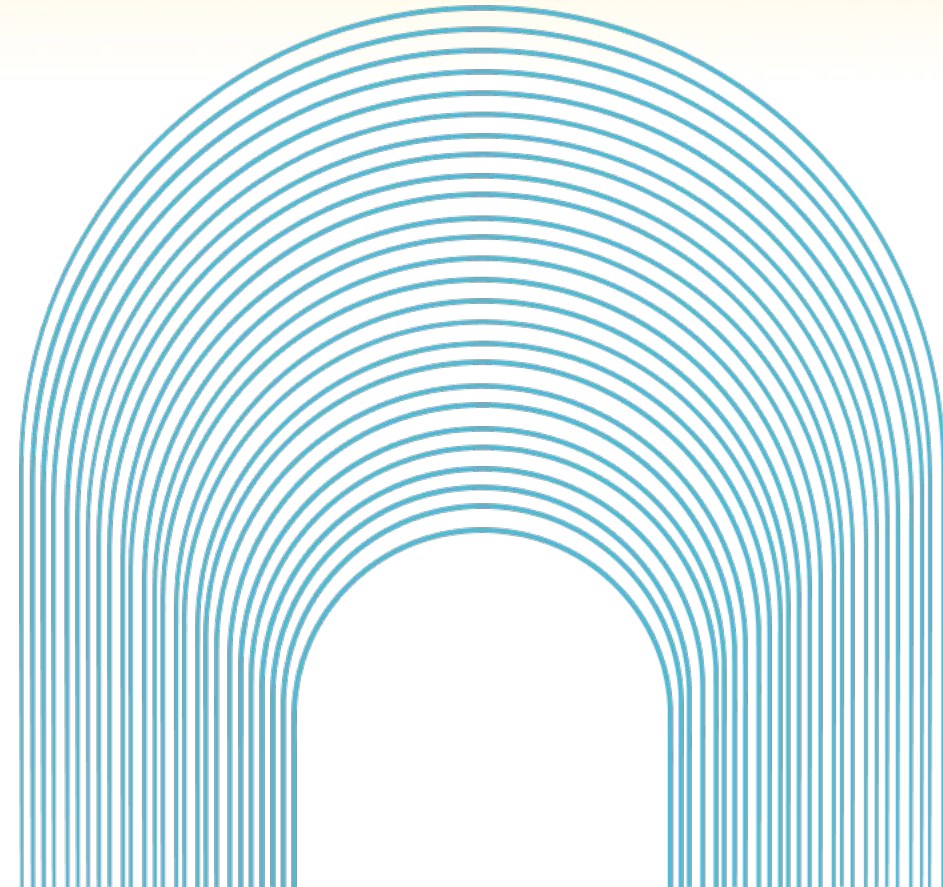
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[Restore defaults](#)

 Change tray color ▶

 Remove tray

# OKR Canvas



# OKR Canvas Custom Time Period Support

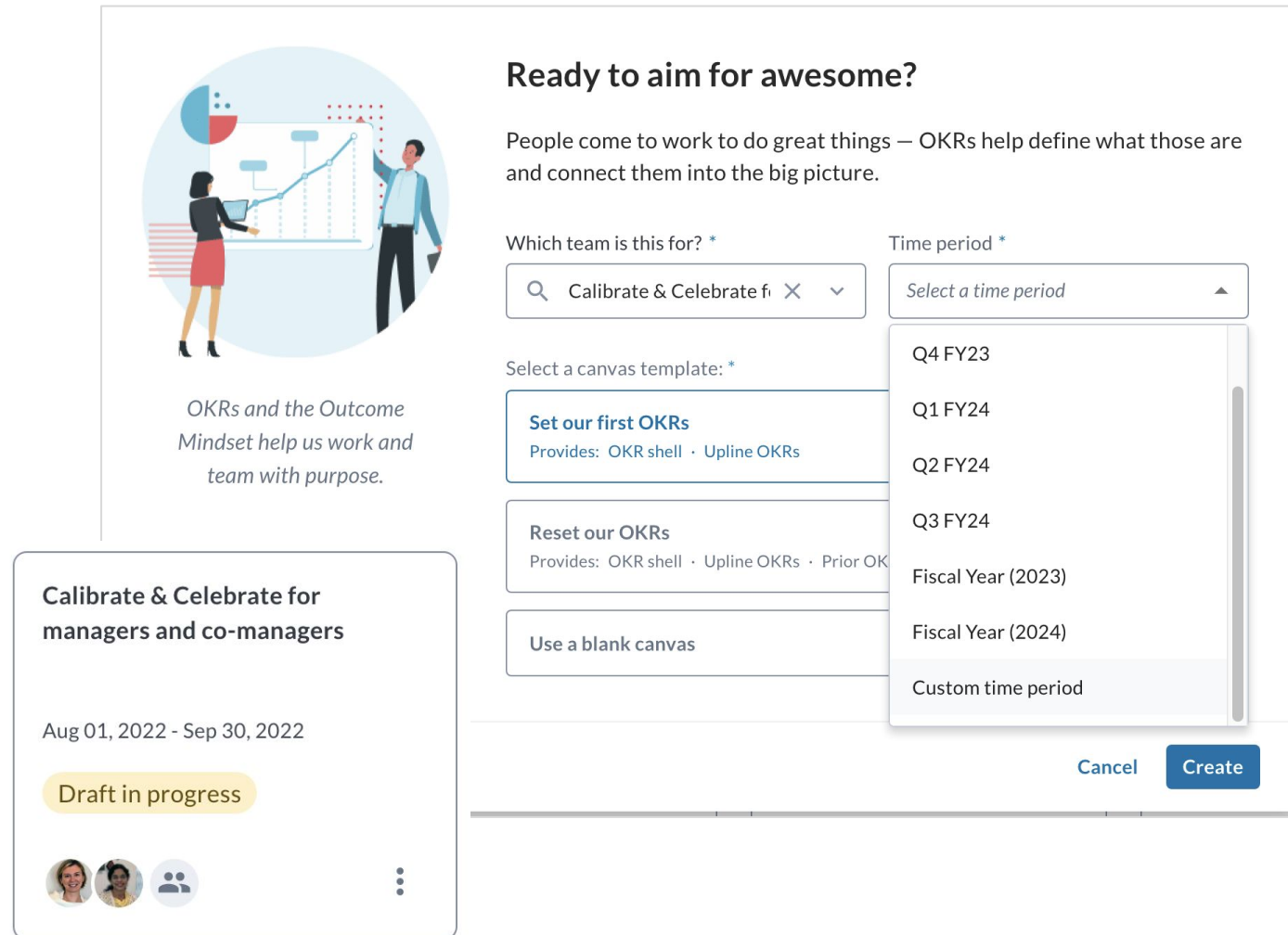
Create OKR Canvases for annual OKRs or custom time periods

## Internal Note:

- Only a single OKR canvas per team can be created for the same time period (the same date range) per team.
- Should remove some friction and give teams a path to more canvases for the same team

## On the horizon

- Canvases won't require

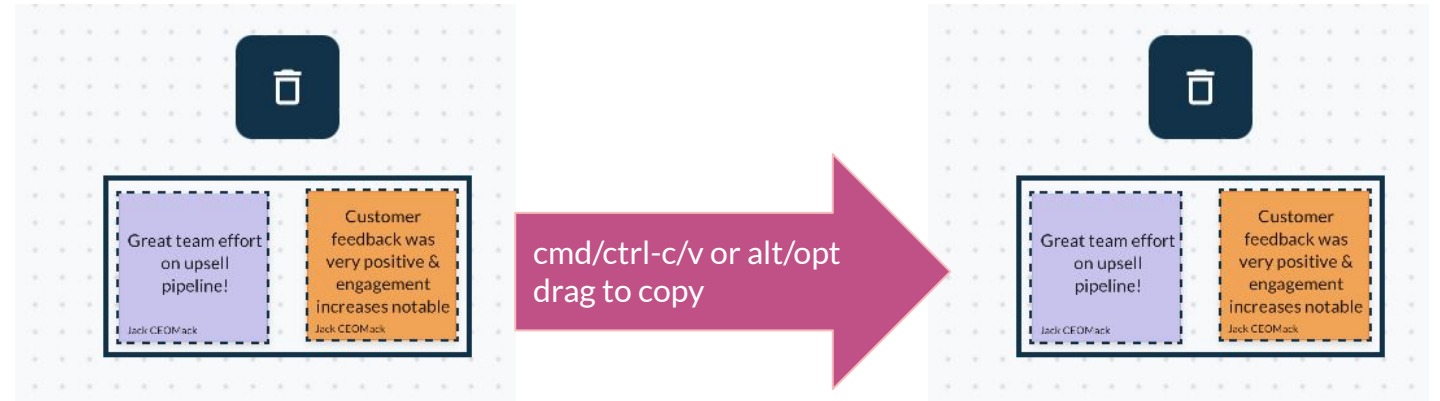


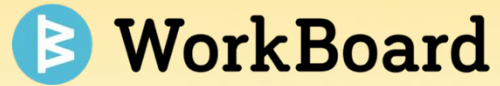
The screenshot displays the OKR Canvas creation interface. On the left, a preview of a canvas titled "Calibrate & Celebrate for managers and co-managers" is shown for the period "Aug 01, 2022 - Sep 30, 2022". The canvas status is "Draft in progress" and it lists three team members. A callout box above the canvas reads: "OKRs and the Outcome Mindset help us work and team with purpose." The main configuration panel on the right is titled "Ready to aim for awesome?" and includes a motivational quote: "People come to work to do great things — OKRs help define what those are and connect them into the big picture." The panel contains several fields: "Which team is this for?\*" with a dropdown menu showing "Calibrate & Celebrate for managers and co-managers"; "Time period\*" with a dropdown menu showing "Select a time period" and a list of options including "Q4 FY23", "Q1 FY24", "Q2 FY24", "Q3 FY24", "Fiscal Year (2023)", "Fiscal Year (2024)", and "Custom time period"; "Select a canvas template:\*" with three options: "Set our first OKRs" (Provides: OKR shell · Upline OKRs), "Reset our OKRs" (Provides: OKR shell · Upline OKRs · Prior OKRs), and "Use a blank canvas". At the bottom right of the panel are "Cancel" and "Create" buttons.



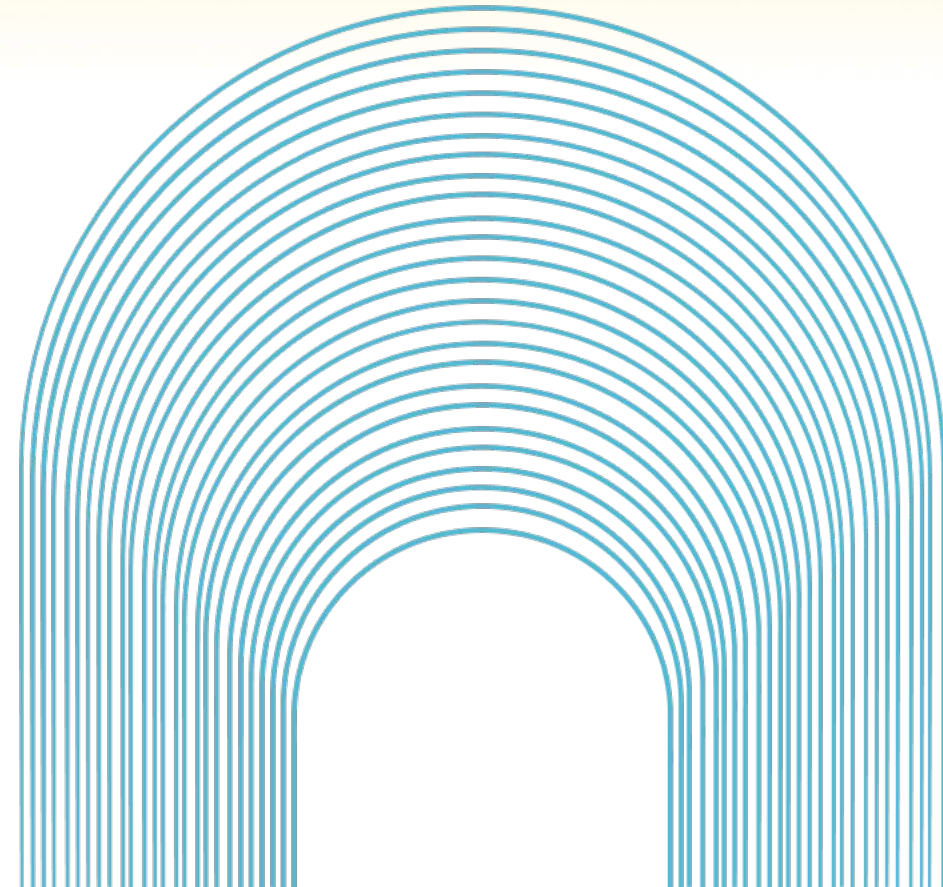
# OKR Canvas Usability Improvements

- Copy a group of stickies with keyboard shortcuts
- Improvements to bulk moving of stickies to move them into Reflect and Reset templates





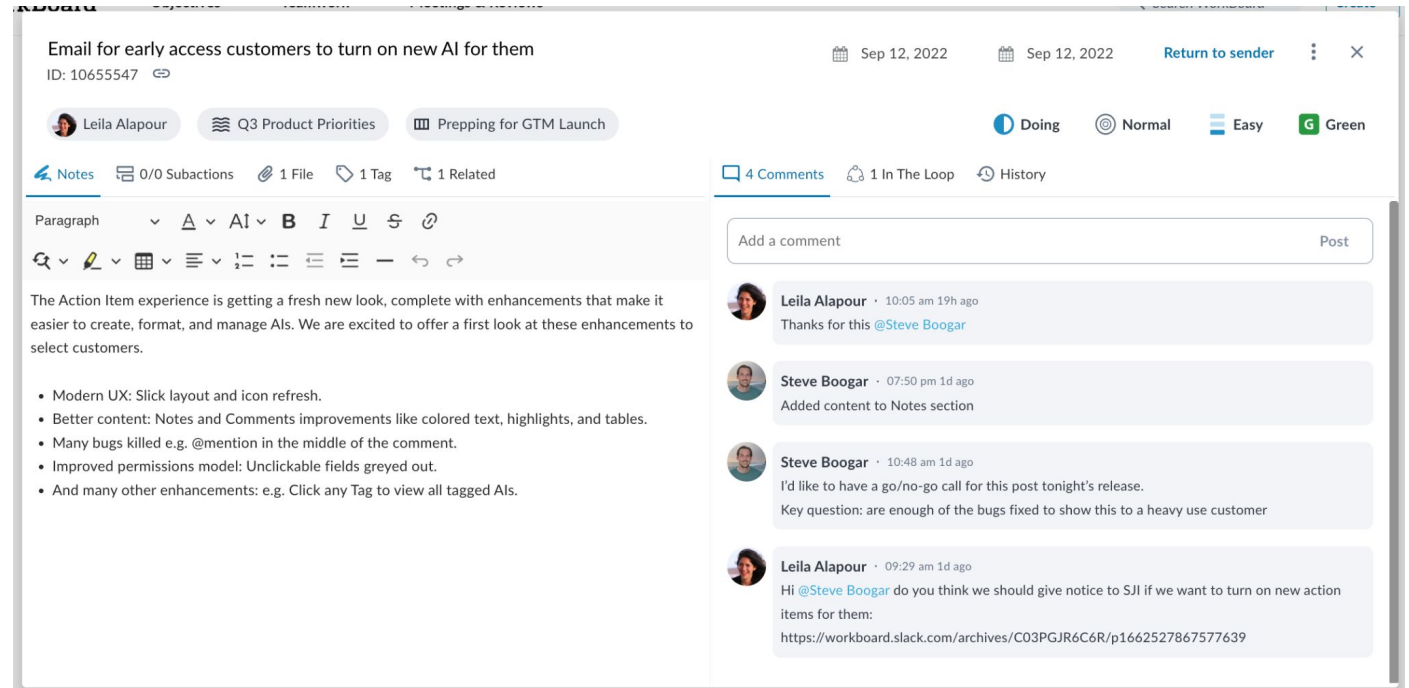
# Coming Soon! Action Item Refresh



# Refreshed Look and Feel of Action Item Popup

The Action Item popup is getting a fresh new look, complete with enhancements that make it easier to create, format, and manage AIs.

- **More modern look and feel**
- **Better content:** Notes and Comments editor improvements such as colored text, highlights, and tables.
- **Bug squash:** e.g. @mention in the middle of the comment.
- **And other enhancements:** e.g. Click any Tag to view all tagged AIs.



# Streamlined Flow to Copy Actions

- Smart presets for every field
- 5 Additional action item fields
- Confirmation message with link to new AI
- Option to iterate through multiple copies
- Set an AI Relationship in the same flow (if activated)
- Cleaned up user experience

## Current Copy AI Popup

The current interface is a 'Copy action item' popup. It features a 'Copy this action item to:' section with a 'Workstream' dropdown menu (currently showing 'Q2 Marketing Priorities') and an 'Assign to' dropdown menu (currently showing 'Lily Alipoor'). Below this is a 'Due' dropdown menu (currently showing 'None'). An 'Add' button is located at the bottom right of this section. At the bottom of the popup, there is a 'List of actions items to be created:' section with a table header containing 'Team', 'Workstream', 'Assign to', and 'Due'. At the very bottom, there are 'Cancel' and 'Save' buttons.

## New Copy AI Popup

The new interface is a 'Copy Action Item' popup. It features a 'Details' section with a 'Name' field (containing 'Marketing campaign #4'), a 'Workstream' dropdown menu (containing 'Team Workstream'), and an 'Assign To' dropdown menu (containing 'Tara Sandoval'). Below this are 'Start' and 'End' date pickers (both set to 'Jul 21, 2022'). The 'Status' section includes a 'Status' dropdown (set to 'Next'), a 'Priority' dropdown (set to 'Normal'), a 'Level of Effort' dropdown (set to 'Medium'), and a 'Confidence' dropdown (set to 'Green'). The 'Relationship' section includes a 'Relates To' dropdown (set to '7937586'). At the bottom, there is a checkbox for 'Create another copy' (checked), and 'Cancel' and 'Create' buttons.



See you at Accelerate  
next week!

Register now and invite your team!

What are you curious about?

Thank you!