

WorkBoard Community Call

October 2022

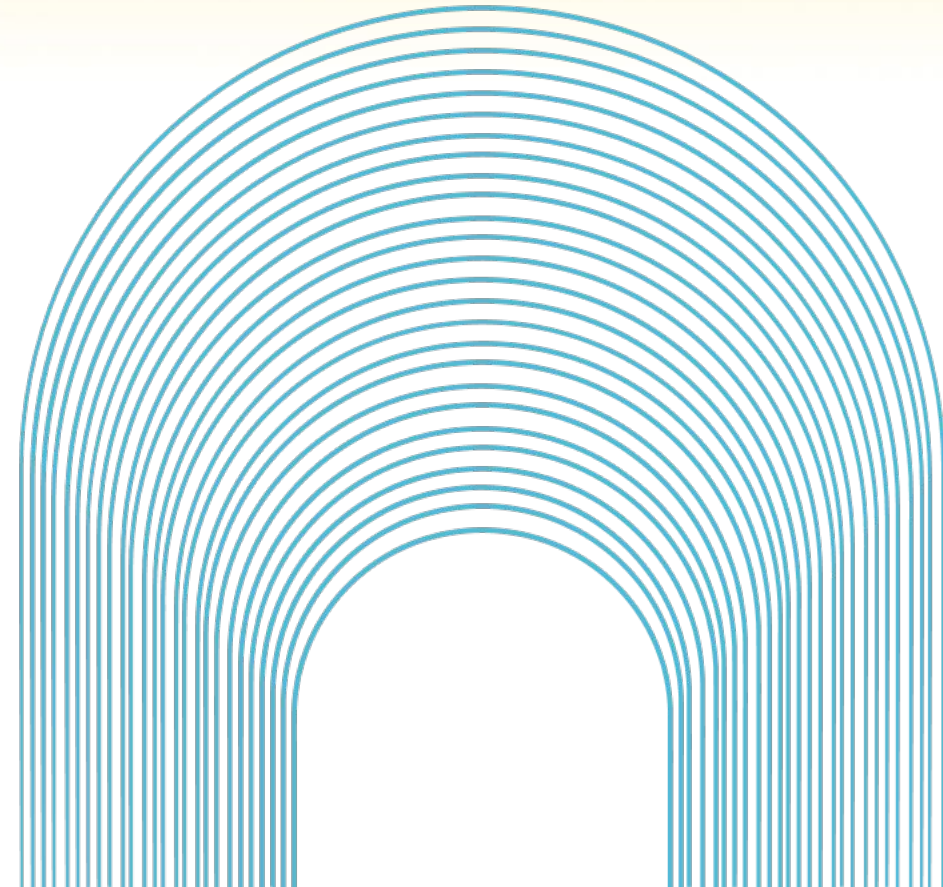


Agenda

- Accelerate Conference Highlights
- New Navigation - Timeline and Reminders
- WoBo Strategy - New Product Alert



WorkBoard Accelerate Conference



WorkBoard Accelerate

FALL 2022

- Charles Zentay of National Grid shared how the CIO org transformed their **operating model in 60 days**
- Rich Barger from Accenture highlighted that in 3 quarters with OKRs and WorkBoard, they **achieved 110% of their annual plan.**
- and much more! Catch the proceedings [here](#)

WorkBoard
Accelerate
FALL 2022

nationalgrid



Reducing Waste and Gaining Speed with a Digital Operating Rhythm

Charles Zentay
CIO: Strategy, Planning & Regulatory, National Grid

#OKRsAccelerate

WorkBoard
Accelerate
FALL 2022

accenture

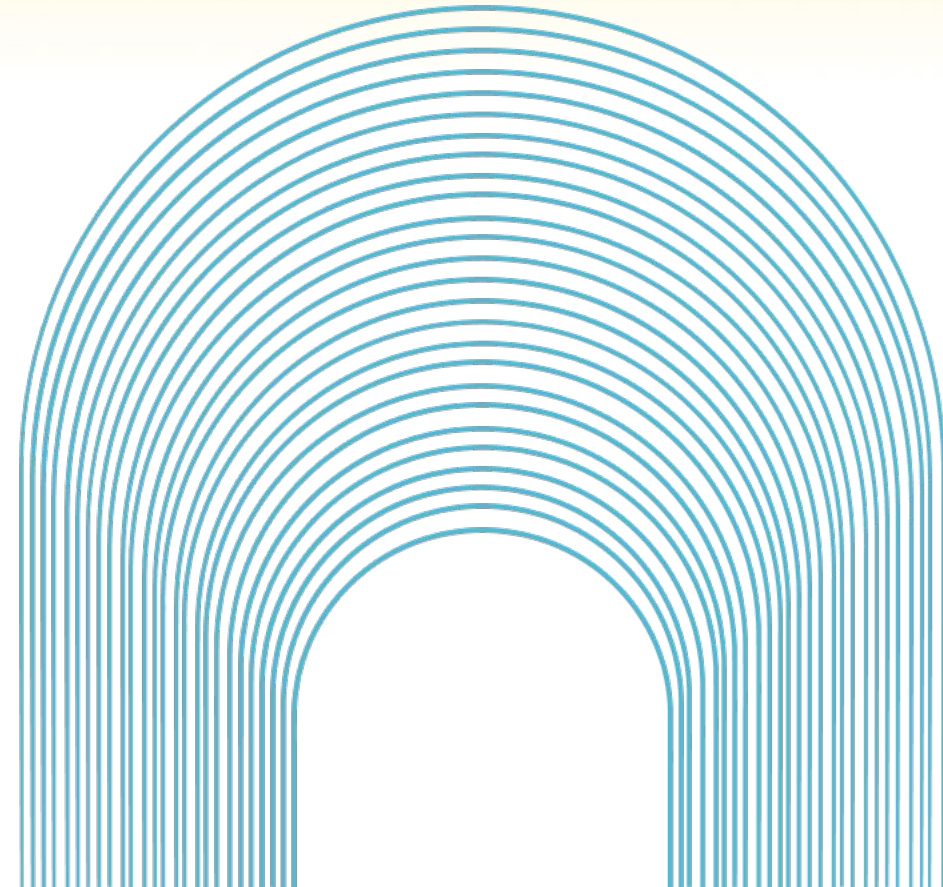


The Value of a Modern Operating Rhythm

Rich Barger
Global Director, Cyber Threat Intelligence Operations & Product Strategy, Accenture

#OKRsAccelerate

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

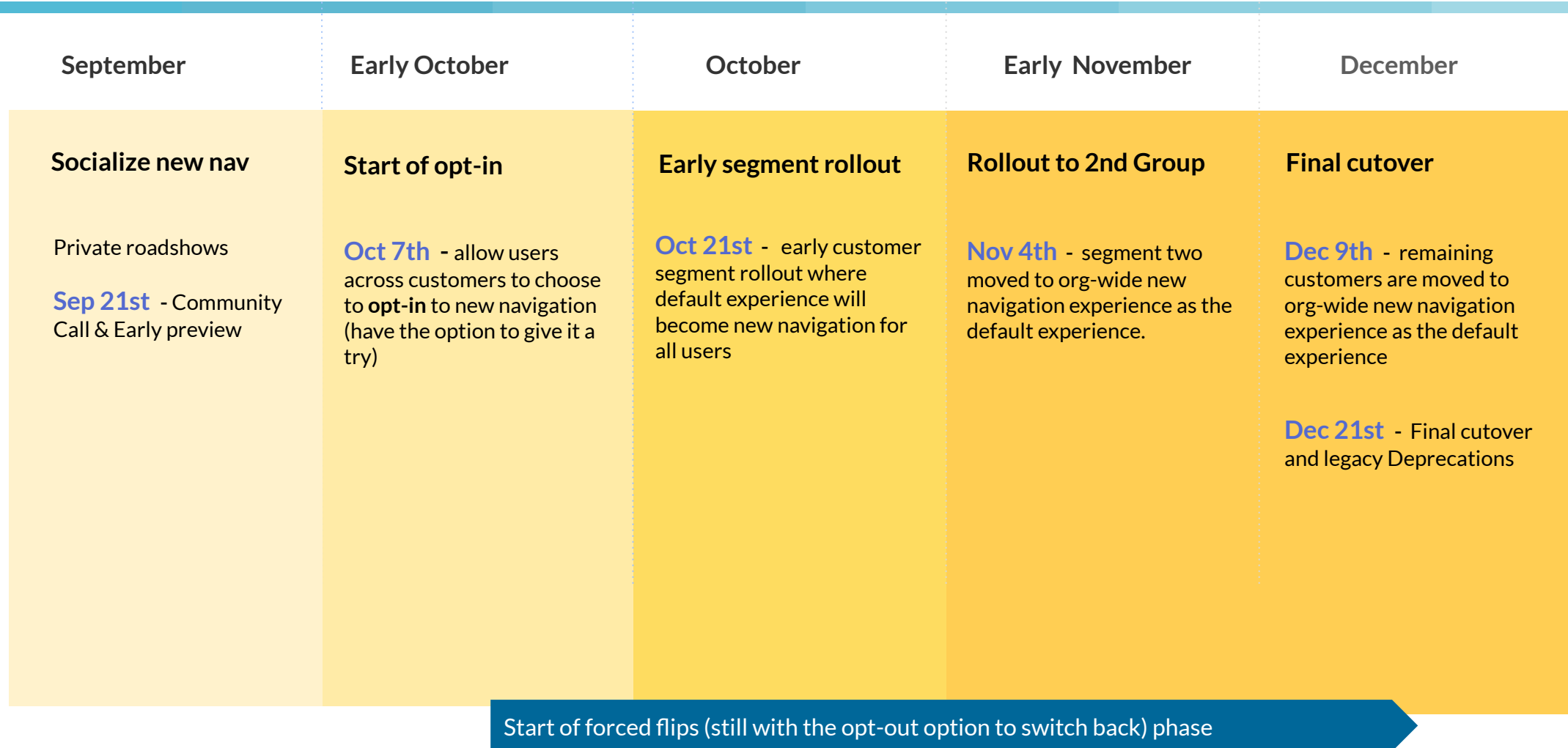
Timeline & Reminders

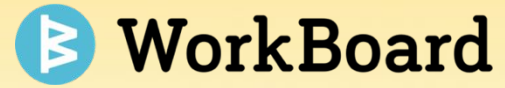
vNext Navigation Coming Your Way!

The screenshot displays the WorkBoard interface. At the top, there is a dark blue navigation bar with icons for a plus sign, search, notifications, a trophy, and a user profile. Below this, a white navigation menu is visible with options like 'UPDATE KEY RESULTS' (with a red '9 DUE' badge) and 'My OKR Activity (last 30d)'. The 'My OKR Activity' section features a calendar grid with days of the week (M, T, W, T, F) and a grid of circles representing activity. A legend is located below the calendar. A notification from Jack-Vika CEO is shown, stating: 'Jack-Vika CEO sent you a status ping on 85% revenue retention in our target customer segments (GRR)'. At the bottom, there are two items labeled 'Q2 FY22 • 0 days left' with dropdown arrows.

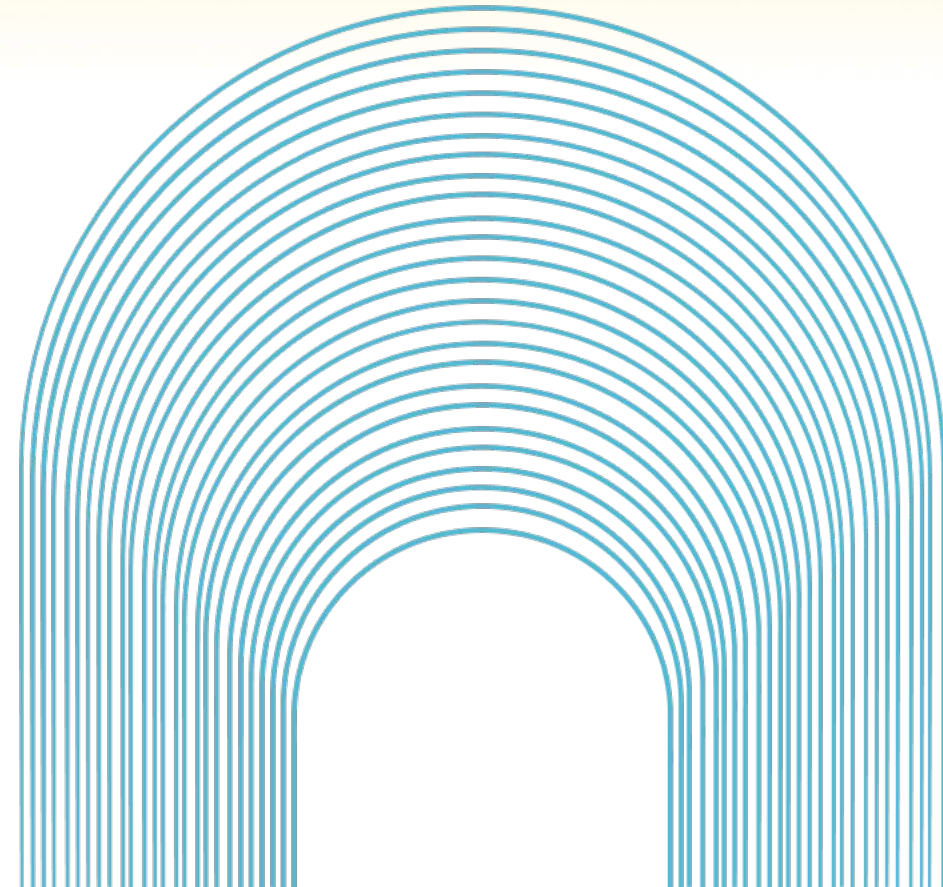
**You may not see the option to switch to new navigation if your organization has asked to participate in a later segment*

vNext Navigation Roll Out Timeline



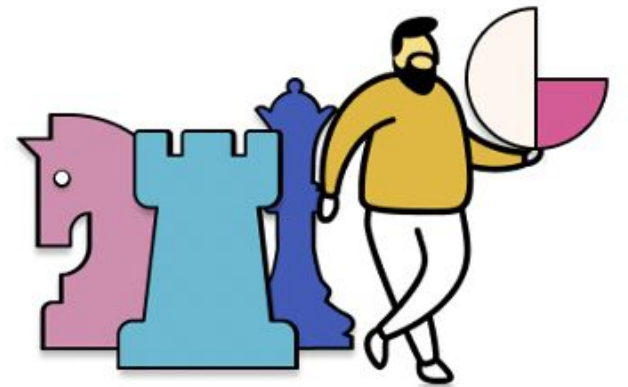


WoBo Strategy





**With WorkBoard, strategy execution is
as brilliant as your strategy.**



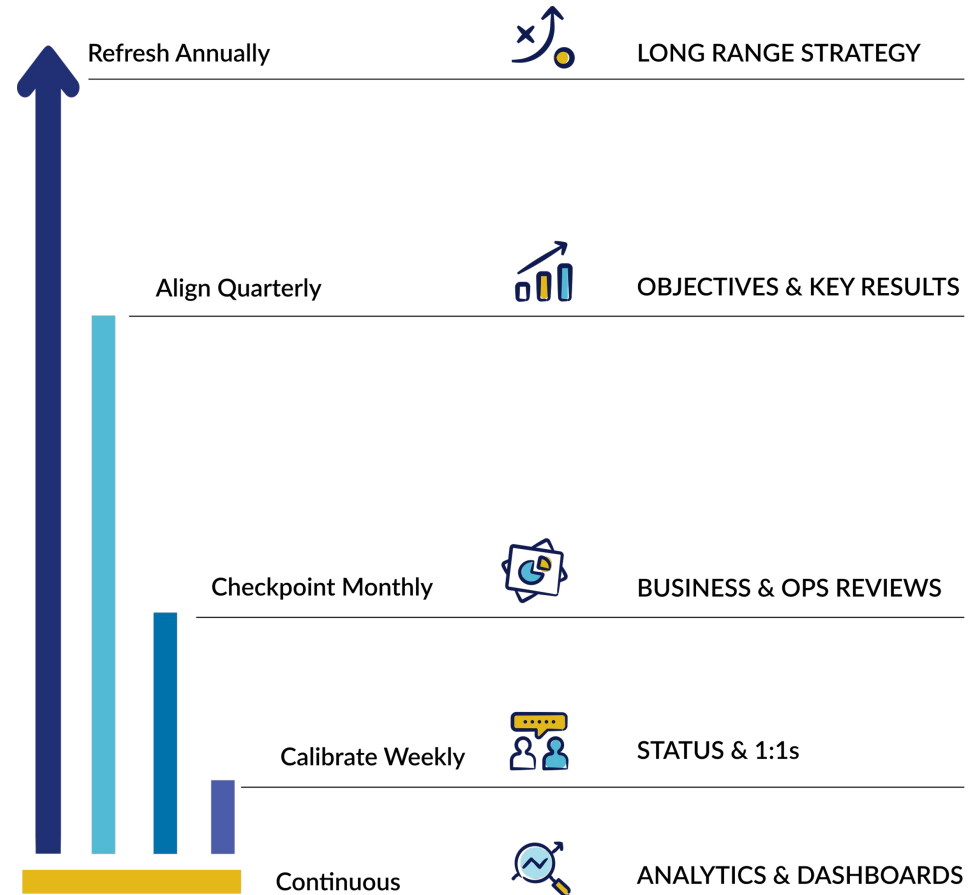
Both **long range strategy** and **short term execution** are required for a effective & efficient operating rhythm

Data-driven strategy execution

- Manage align-drive-accelerate cycle and inter-dependencies at scale
- Cohesive digital source of truth on strategy, plan vs actuals
- Headlights and continuous understanding

Culture of ambition and ownership

- Outcome Mindset
- Authorship, ownership, outcome accountability
- Iterative experiment and bias to learning
- Lean into the signal culture (vs fear the red)



Brainstorm Area

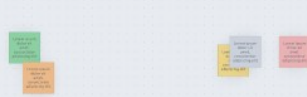
Strategy pillar brainstorm:

Given our vision and the many choices for investment and growth, what specific course will we take?



Outcomes brainstorm:

At the end of the horizon, what are the major growth and business outcomes that will be the hallmarks of strategy achievement?



Assumptions discussion:

What are the material hypotheses on which the strategy and outcomes rest? What could change that would alter our course?



Jack Ceomack

Innovate our platform

Outcomes

- Reduce the # of hospital visits to x
- \$500 in revenue to segment x

Assumptions

- APAC market will be as big as EU
- Competition will reduce the in-patient experience to business call/direct savings by x%

Transform our core

Expand our perimeter

Add new pillar

Long Range Strategy



PROBLEMS & OPPORTUNITIES

Increase the clarity and iteration on long-range strategies and the assumptions that inform them.

Long-term direction and near-term execution should converge; neither succeeds without the other.

Set and forget -- no one has access to the strategy to inform their choices.

Leaders want people to “be more strategic” with little enablement to do so.

WoBo Strategy

DIRECTION & CAPABILITIES

Collaborative strategy authoring with prompts and frameworks to tease out strategic choices.

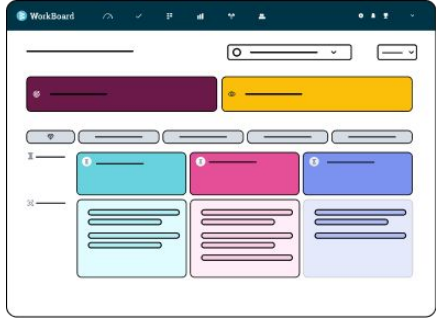
Strategy links to OKRs for execution and smarter iteration.

Publish and share the strategy. Team and organization see the strategy and align via OKRs.

Democratize strategic thinking for teams everywhere.

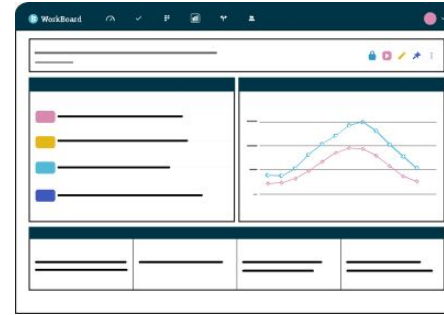
Digital Operating Rhythm to Drive Strategy Execution

Manage *and measure* the elements of execution transparently and efficiently on a consistent, natural cadence.



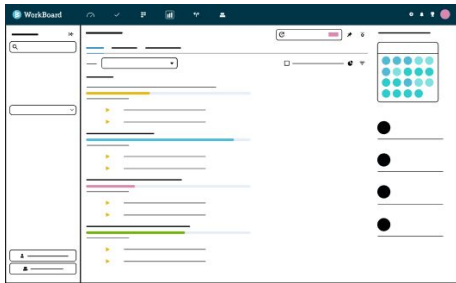
Long range strategy

Pillars, outcomes, narratives, assumptions and status of assumption, risks, investments, links to OKRs
2x ANNUAL REVIEW/REFRESH CADENCE



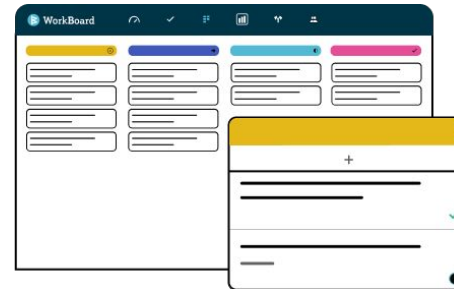
Biz Reviews & initiative reviews

X-F visibility on strategy execution; includes OKRs, KR, workstreams, and actions
MONTHLY REVIEW CADENCE,
WEEKLY ACCURACY



Quarter Objectives & Key Results

What we are trying to achieve and the measures of success this quarter (headlights over taillights)
WEEKLY REVIEW CADENCE, QUARTERLY RESET



Workstreams

Body of work and actions with owners, due dates, status, notes, comments, attachments. Links to OKRs. (Similar to Jira for developers, suited for non tech teams, replaces Excel trackers and email.)
DAILY/WEEKLY FOLLOW THROUGH

WoBo Strategy

Codify & align Multi-year strategies
for the business, products, and key initiatives so everyone knows the strategy.

Create a shared understanding
of the strategy pillars, long-range outcomes and progress. Track underlying assumptions and whether they're untested, proven or disproven.

Connect long range strategy outcomes to quarterly key results
Align OKRs to each strategy pillar, bring long-range strategy into OKR sessions and OKRs into strategy refresh sessions.

The image displays the WorkBoard Strategy tool interface. On the left, a strategic map shows a central goal, "Leading a Sustainable Future 2025", connected to various strategy pillars and initiatives. On the right, a detailed view of a strategy pillar, "Digipay is the new Acme currency", is shown. This view includes a narrative, strategic pillars, outcomes with progress bars and targets, assumptions, investment plans, risks, linked objectives, and attachments.

Digipay Product Strategy
FY22 - FY24 - Product - Quarterly

Strategic pillars
What must the team excel in to achieve the strategic vision?

- 1 Digipay is the new Acme currency
- 2 Our innovation and teaming approach define the new Acme Way

[Add new pillar](#)

OUTCOMES
What are the business outcomes if we achieve this strategy?

- 0% Target: 100% Employees can give and receive NFTs in Digipay
- 13% Target: 100% All employee and partner purchases and payments in NA and LatAm have moved to Digipay by EOY 2023 and globally 2024
- 2% Target: 20% 20% of digipay transactions are initiated and completed entirely by voice
- 0% Target: 1% Volume is such that merchant and cc fees are <1%
- 85% Target: 100% All back-end processes run in public cloud globally
- 0 Target: 200 There are less than 200 Help Desk inquiries on Digipay monthly by Jun 2023

[Add outcome](#)

ASSUMPTIONS
What must be true in order for the team to achieve this strategy?

- ✓ Proven We can capture the data out of our retros and it's logically represented in future retros and sprints
- ⊗ Unknown We get the support we need from Comms organization and HR to drive awareness, behavior, and migration
- ⊗ Unknown Our team will not have high attrition this year

[Add assumption](#)

INVESTMENT PLANS

- 27 Target: 31 31 team members (19 developers)

[Add investment target](#)

RISKS

[Add risk](#)

LINKED OBJECTIVES

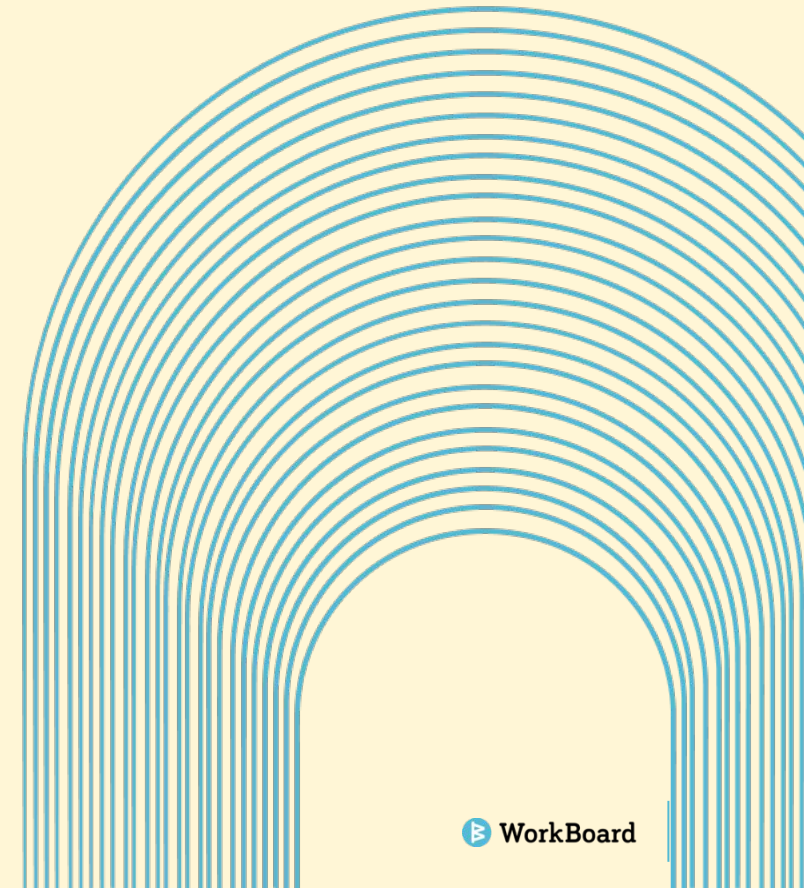
- 77% Digipay is delightfully fast for our customers
Digipay ⊗ 6 days · Q2 2022
- 78% Onboarding is easier than associates' favorite consumer app
Digipay ⊗ 6 days · Q2 2022

[Link objectives](#)

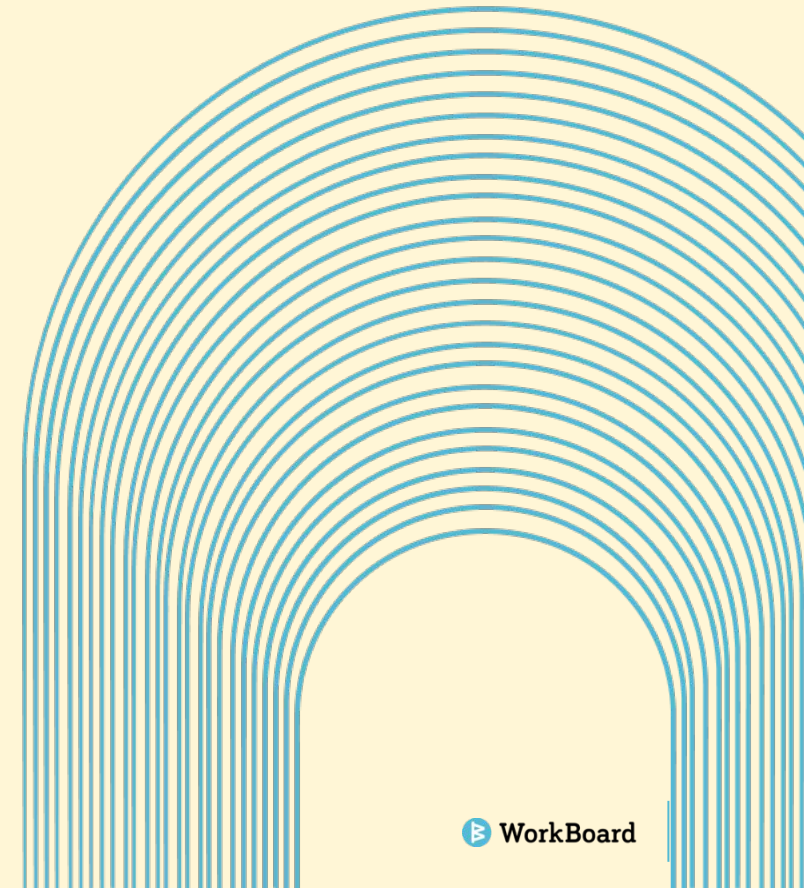
ATTACHMENTS

[Add attachment](#)

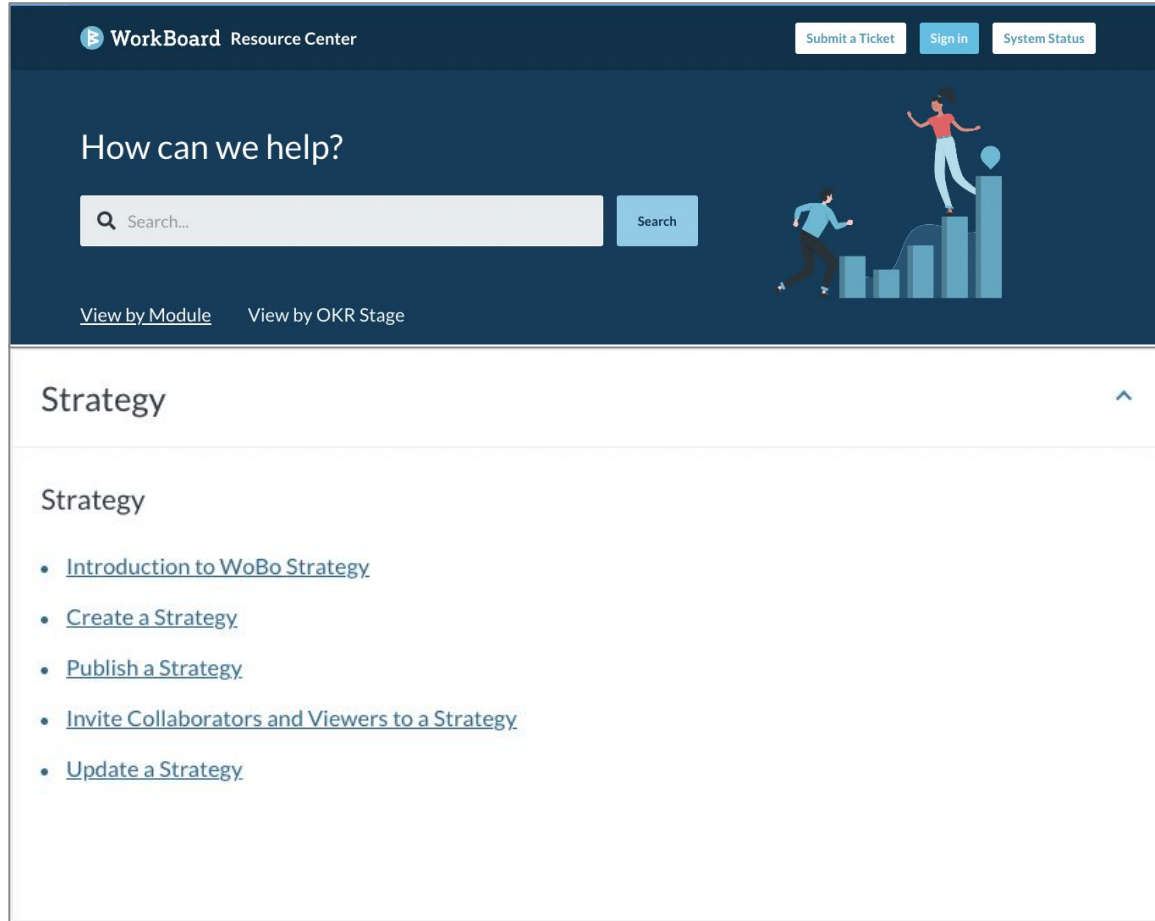
Product Demo



Help Center Articles



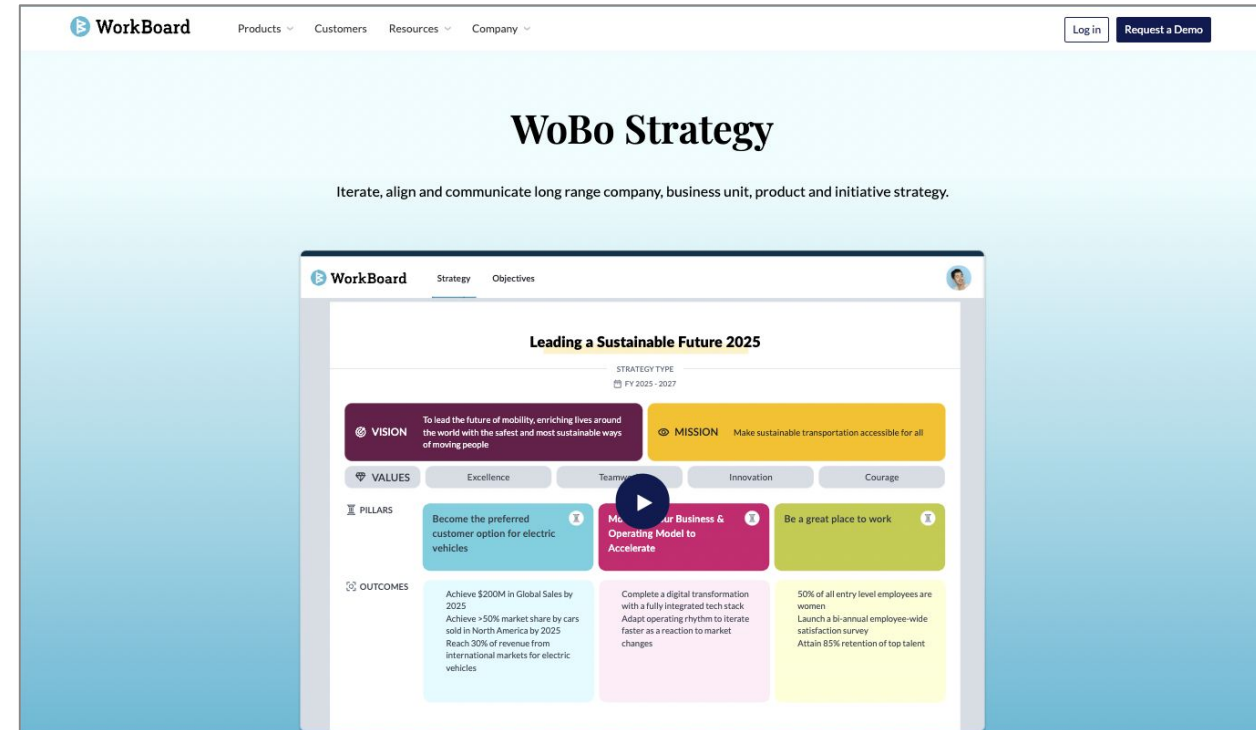
Strategy Support Toolkit



The screenshot shows the WorkBoard Resource Center interface. At the top, there are navigation links for "Submit a Ticket", "Sign In", and "System Status". Below this is a search bar with the text "How can we help?" and a "Search" button. To the right of the search bar is an illustration of two people climbing a bar chart. Below the search bar are two tabs: "View by Module" and "View by OKR Stage". The main content area is titled "Strategy" and contains a list of links:

- [Introduction to WoBo Strategy](#)
- [Create a Strategy](#)
- [Publish a Strategy](#)
- [Invite Collaborators and Viewers to a Strategy](#)
- [Update a Strategy](#)

[Help center walkthrough guides](#)

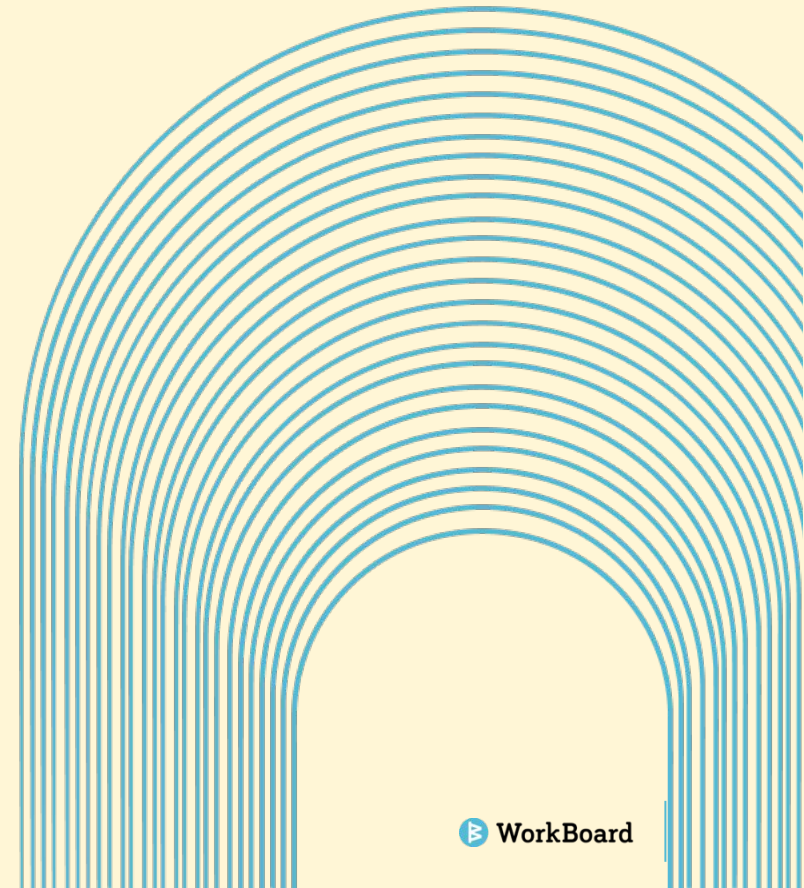


The screenshot shows a video player interface for "WoBo Strategy". The video title is "WoBo Strategy" and the subtitle is "Iterate, align and communicate long range company, business unit, product and initiative strategy." The video player shows a preview of the strategy content, which includes:

- VISION:** To lead the future of mobility, enriching lives around the world with the safest and most sustainable ways of moving people.
- MISSION:** Make sustainable transportation accessible for all.
- VALUES:** Excellence, Teamwork, Innovation, Courage.
- PILLARS:** Become the preferred customer option for electric vehicles; Measure our Business & Operating Model to Accelerate; Be a great place to work.
- OUTCOMES:** Achieve \$200M in Global Sales by 2025; Complete a digital transformation with a fully integrated tech stack; 50% of all entry level employees are women.

[Link to overview video of WoBo Strategy](#)

What's Coming Next?



Actively manage your strategy to drive urgency and take action

← Back to strategies

We are the leaders in a sustainable future in 2025

FY22 - FY25 · Company strategy · Biannual cadence

Invite Publish

Overview Pillars Published views Collapse all Expand all

Become the preferred customer option for electric vehicles

Narrative Placeholder signal of progress

OUTCOMES

- \$18m** Achieve \$25m in Global Sales by 2022
Target: \$25m · 4 KR in flight (7 total) · Aug 2022 · 10
- 7%** Reach 30% of revenue from international markets for electric vehicles
Target: 30% · 0 KR in flight (1 total) · Nov 2024
- 0** Diam volutpat commodo sed egestas egestas fringilla phasellus faucibus. At elementum eu facilisis sed odio morbi quis.
Target: 45 · 0 KR linked · Mar 2023 · 1
- 25%** Achieve >50% market share by cars sold in North America by 2025
Target: 50% · 2 KR in flight (4 total) · Dec 2024 · 2

ASSUMPTIONS

- Proven** Grow workforce by 8% by end of 2022
0 KR in flight (3 total) · Dec 2022 · 5
- Disproven** Launch in China by mid-2022 with revenues by end of 2023
0 KR in flight (7 total) · Dec 2023 · 23
- Unknown** Achieve >50% market share by cars sold in North America by 2025
5 KR in flight (6 total) · Dec 2025

RISKS

- Policy changes or political climate in China delays launch in 2023** lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt
5 comments
- Semiconductor chip shortage limits vehicle manufacturing goals**

LINKED OBJECTIVES

FY22 (ANNUAL)	FY22 - Q3
Accelerate our platform advantage through four innovative insights engine 44% · Team Name ABC	Our teams have the right skills to be awesome 44% · Team Name ABC

Publish your strategy on a page with mission, vision, values

Your Strategy Name Here

Company strategy | FY 2025 - 2027

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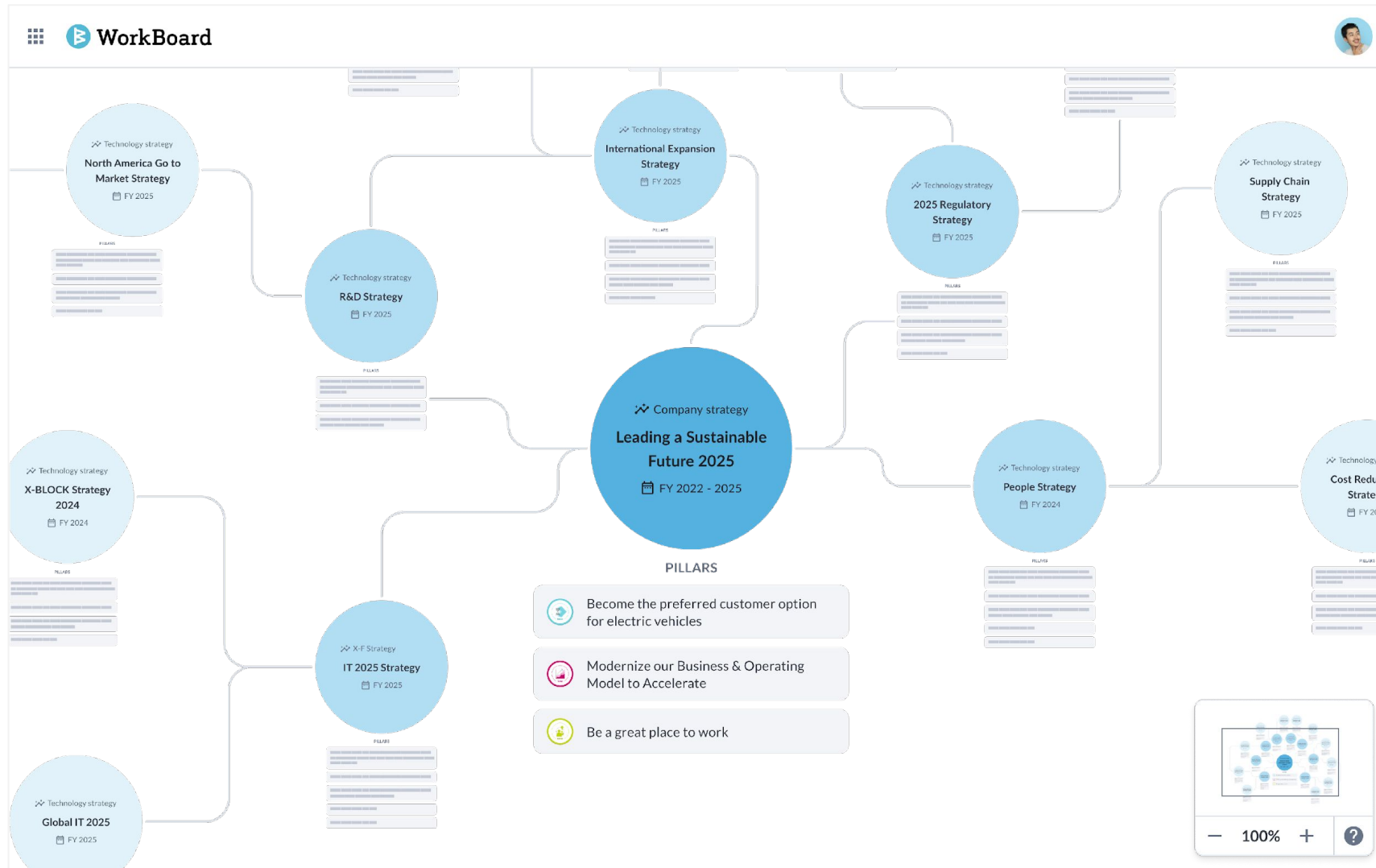
PILLARS

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OUTCOMES

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See the relationships between every strategy in the company



What are you curious about?

Thank you!