

WorkBoard Community Call

November 2022

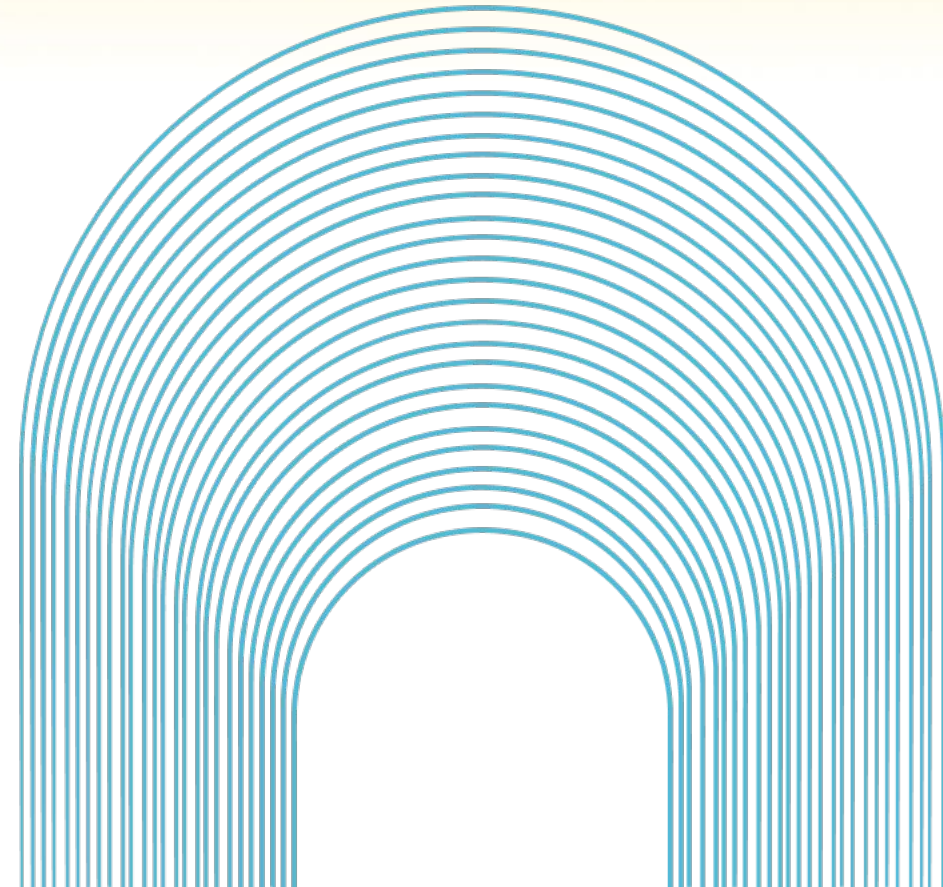


Agenda

- Weekly rituals and power moves in Microsoft Teams
- Awesome additions coming to Biz reviews
- The new, easier option to manage team membership



Weekly Rituals in Microsoft Teams



Receive @Mention Notifications in Microsoft Teams

Users will receive notifications directly in MSFT Teams when they are @mentioned on

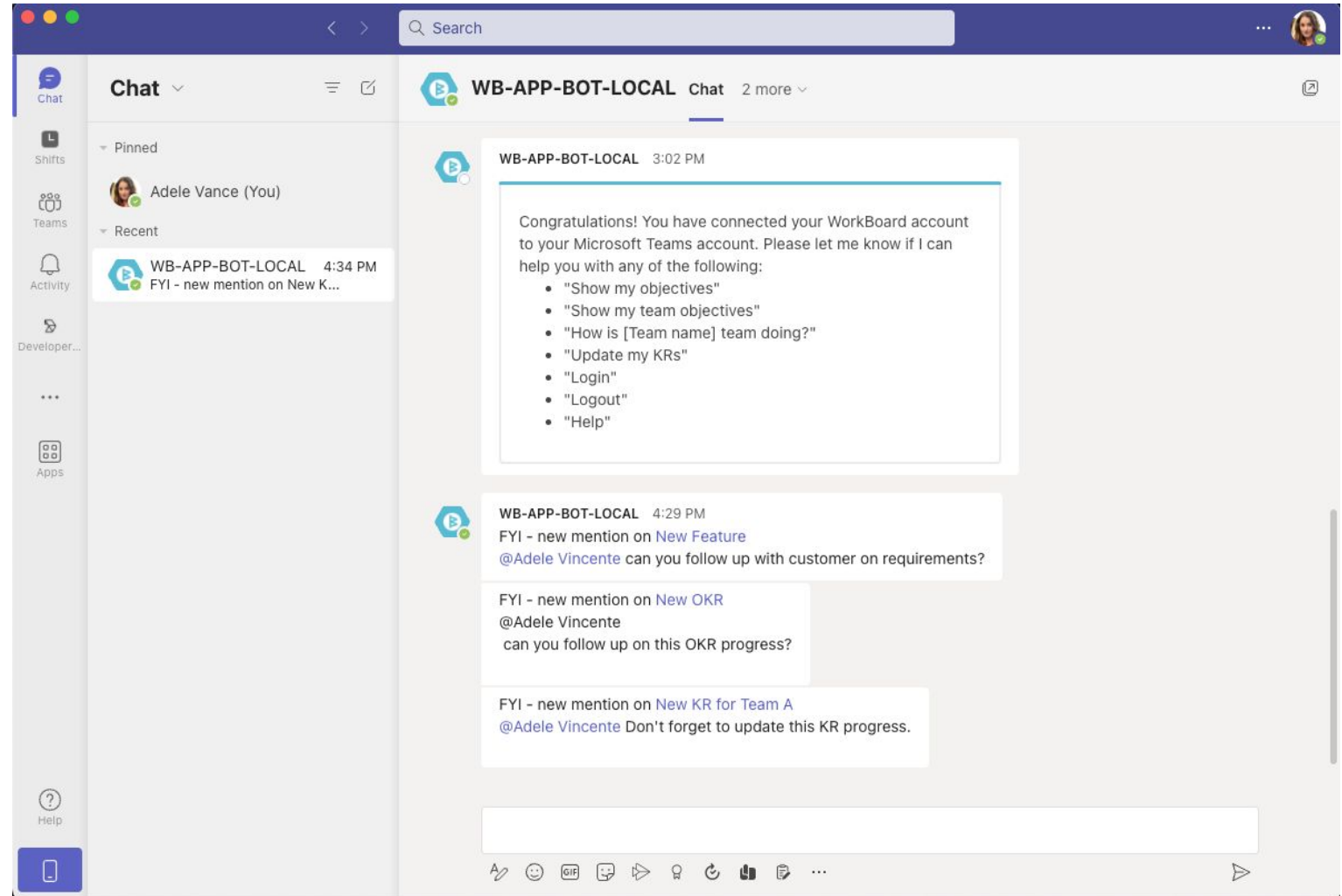
- Objective comments
- Key Result comments
- Action Item comments

Notifications will appear in the WorkBoard app channel with a link that takes you back to WoBo!

How to Use

1. Go to chat in MS Teams
2. Search for WorkBoard
3. Notifications will show in the chat tab

** Ability to comment directly back from notifications will be added later*

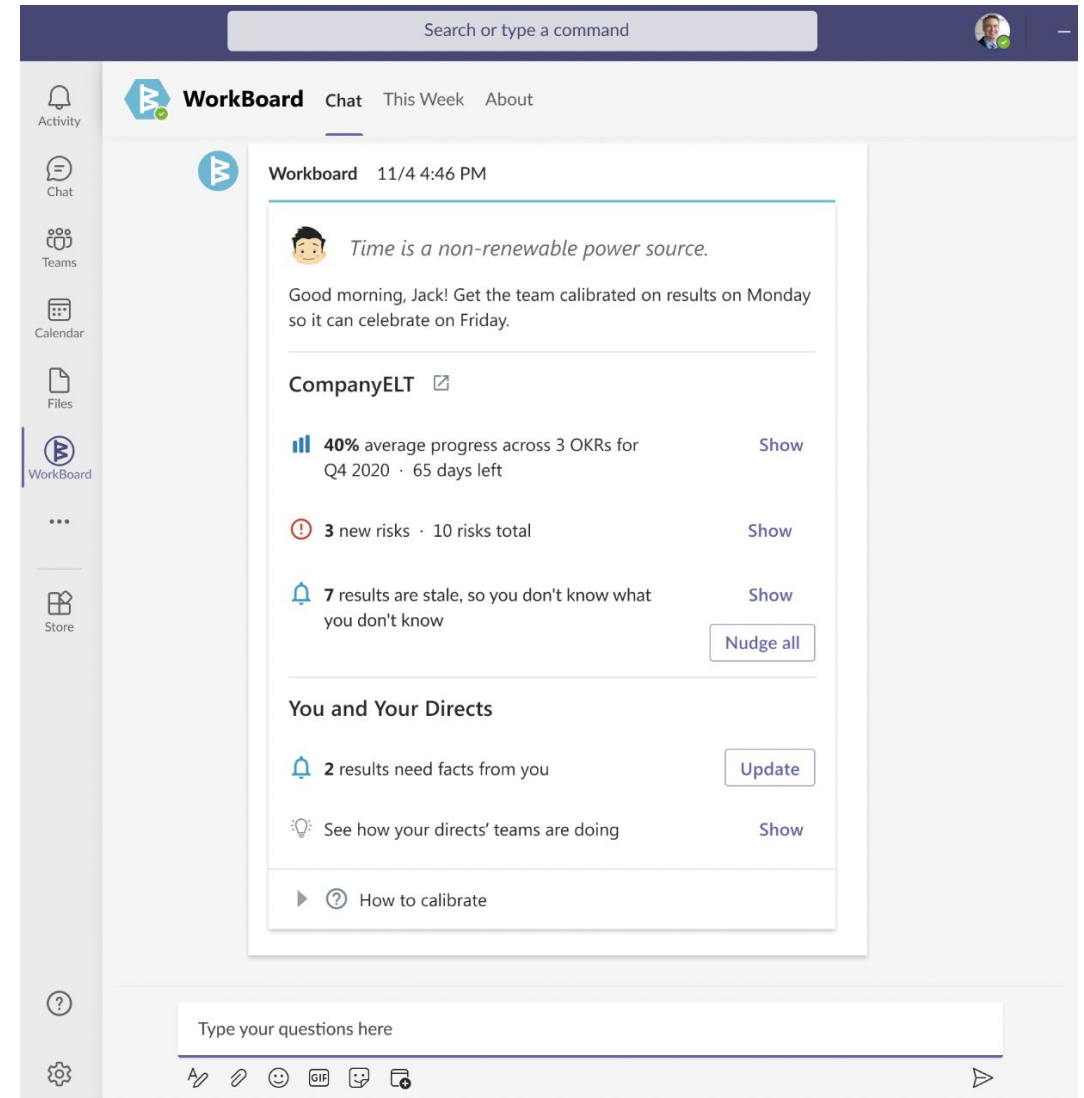


** Visible teams only*

Mondays: Calibrate & Kickstart Your Week in Microsoft Teams

At the start of the week, you'll receive a snapshot of the priorities for the week from WorkBoard in Microsoft Teams. This snapshot shows what the team should focus on for the coming week.

- Shows you where to focus for the week
- Helps you understand risks and where you need data
- Simple messages make sure you don't even have to leave Microsoft Teams



The screenshot shows a Microsoft Teams chat window for a channel named 'WorkBoard'. At the top, there is a search bar with the text 'Search or type a command' and a user profile picture. The chat header includes the 'WorkBoard' logo and navigation links for 'Chat', 'This Week', and 'About'. The main content of the chat is a message from 'Workboard' dated '11/4 4:46 PM'. The message contains a greeting and a summary of team performance metrics:

- CompanyELT** (with an external link icon):
 - 40% average progress across 3 OKRs for Q4 2020 · 65 days left (with a 'Show' link)
 - 3 new risks · 10 risks total (with a 'Show' link)
 - 7 results are stale, so you don't know what you don't know (with a 'Show' link and a 'Nudge all' button)
- You and Your Directs**:
 - 2 results need facts from you (with an 'Update' button)
 - See how your directs' teams are doing (with a 'Show' link)
- A link to 'How to calibrate' (with a play button icon).

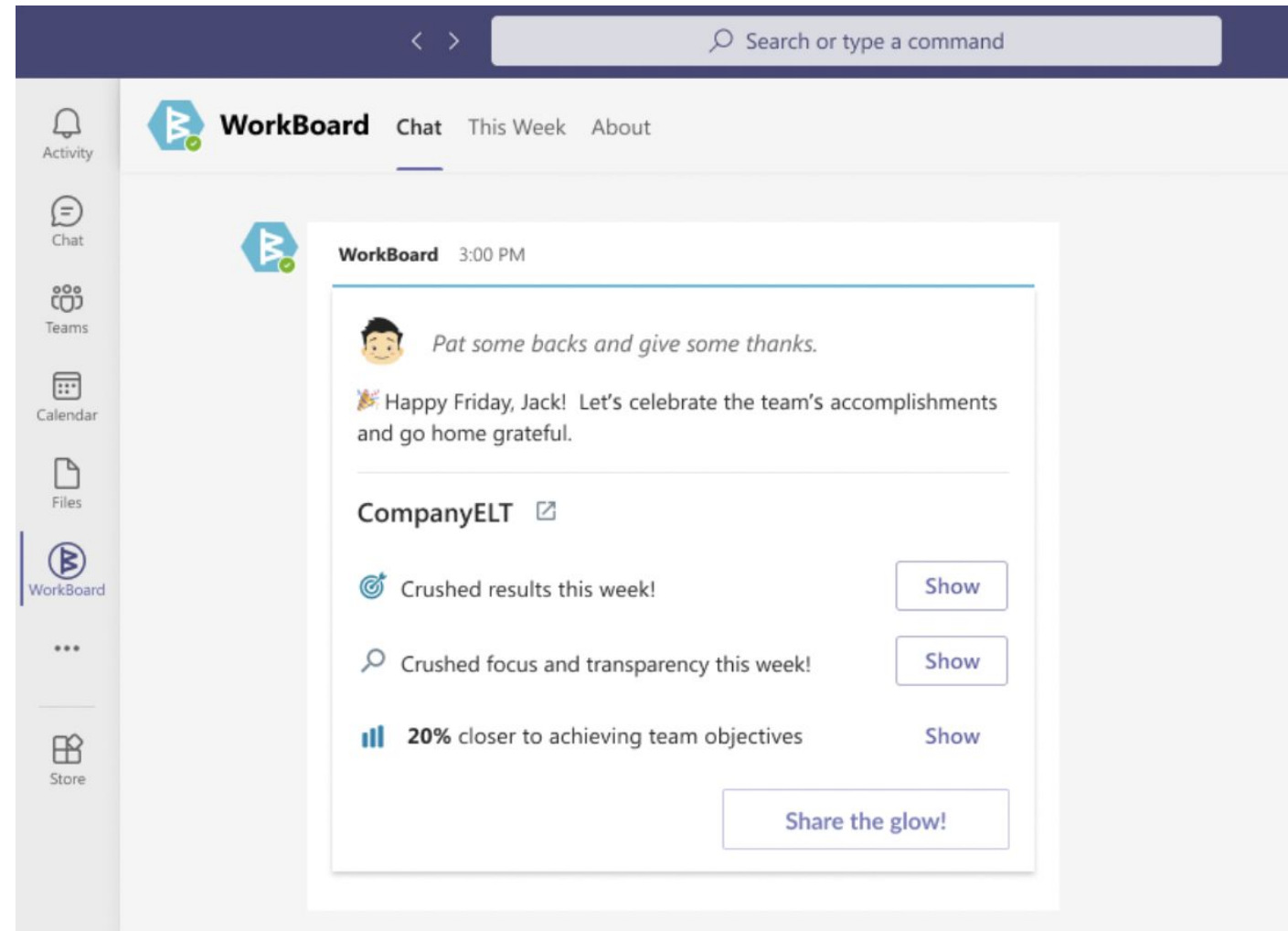
At the bottom of the chat, there is a text input field with the placeholder 'Type your questions here' and a set of icons for actions like reply, edit, emojis, GIFs, and attachments.

Fridays: Celebrate Your Wins in Microsoft Teams

After focusing and driving towards your outcomes through the week, you and your team can savor your wins at the week's end.

On Fridays, you will get a message that highlights:

- Your team's victories this week
- How they progressed toward their results and how engaged
- How focused they were this week.



The screenshot shows a Microsoft Teams chat interface. At the top, there is a search bar with the text "Search or type a command". Below the search bar, the chat header includes the "WorkBoard" logo, the name "WorkBoard", and tabs for "Chat", "This Week", and "About". On the left side, there is a vertical navigation menu with icons for Activity, Chat, Teams, Calendar, Files, WorkBoard (highlighted), and Store. The main chat area displays a message from "WorkBoard" at 3:00 PM. The message content includes a greeting: "Pat some backs and give some thanks. Happy Friday, Jack! Let's celebrate the team's accomplishments and go home grateful." Below the greeting, there is a section titled "CompanyELT" with three bullet points, each followed by a "Show" button: "Crushed results this week!", "Crushed focus and transparency this week!", and "20% closer to achieving team objectives". At the bottom right of the message, there is a "Share the glow!" button.

Add WorkBoard Tabs to Your Microsoft Teams Channels

You can add WorkBoard Tabs in your Team Channels easily with Microsoft Teams, to see Meetings, Biz Reviews and Workstreams that the Team is working on.

1. Click Teamwork from the main menu
2. Select Teams from the dropdown
3. Select one of your team chats in Microsoft Teams.
4. At the top of the Team chats page, click on the + sign.

The screenshot shows the Microsoft Teams interface for the 'Executive Leadership Team' channel. The left sidebar shows the 'Teams' list with 'Executive Leadership Team' selected. The main content area displays a 'Company Strategic Priorities' tab. The 'OBJECTIVES' section includes:

- 76% FOCUS: Drive extraordinary value to customers in our target segments
- 69% CHURN: Customers for life
- 63% ECONOMICS: Build a high velocity, high efficiency business
- 85% INNOVATE: Maximize our platform to maximize our market position
- 91% PEOPLE: We attract, retain and enable the best people to operate at their best

The 'HOTBOX' section lists key performance indicators:

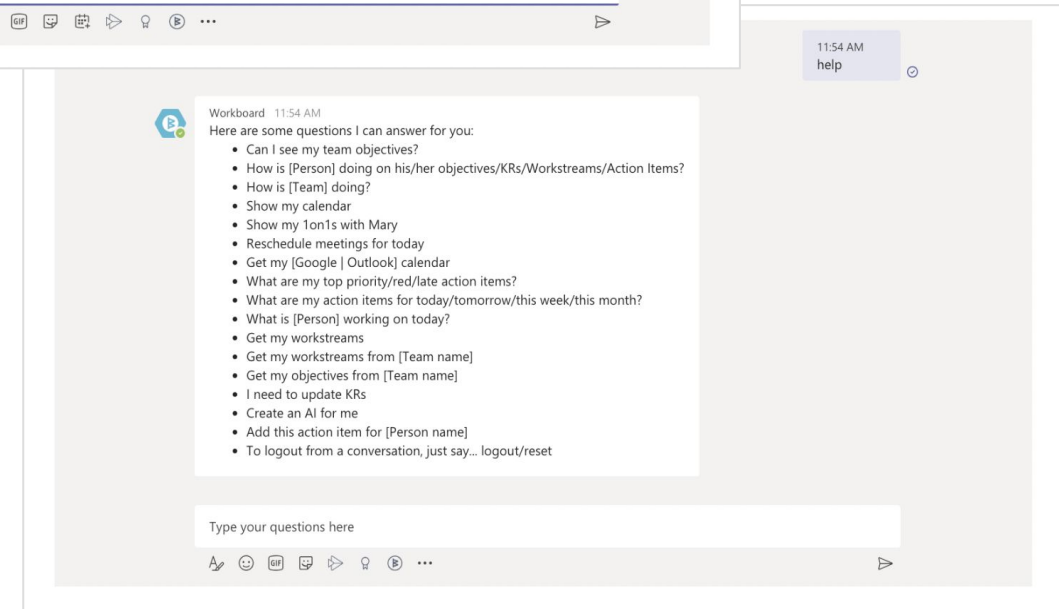
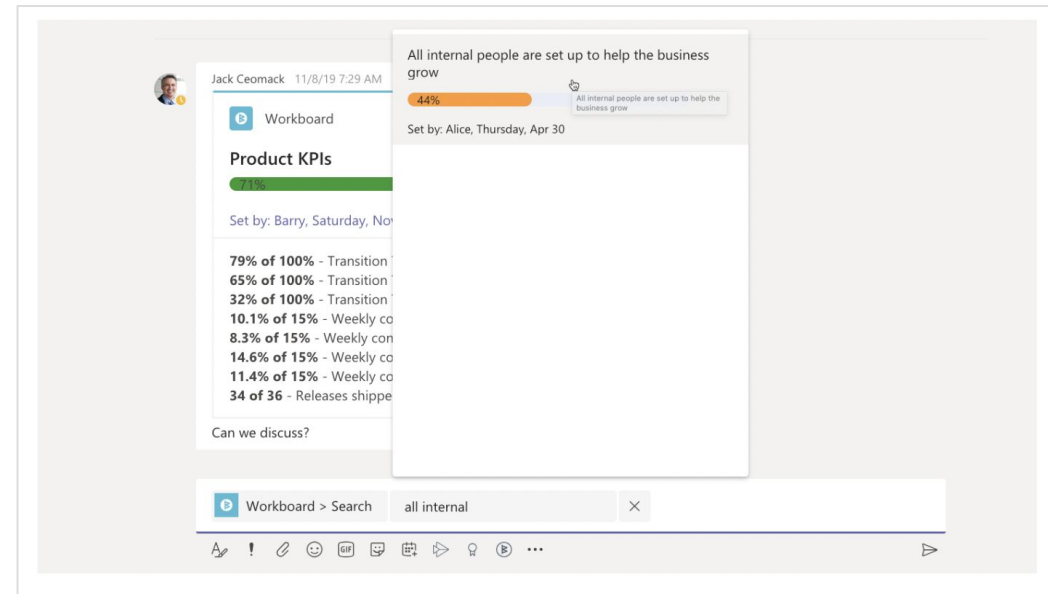
- 30 new strategic partnerships activated this quarter (14 of 30)
- Add \$28M of upsell pipeline from marketing campaigns or tooling in Tier 1 and Tier 2 accounts (12.25m of 28m)
- 85% revenue retention in Tier 1 and Tier 2 customers (GRR) (81.5% of 85%)
- Add \$28M of upsell pipeline from platform marketing campaigns (1m of 28m)
- Increase average number of users per account from 45 to 90 (60.13 of 90)

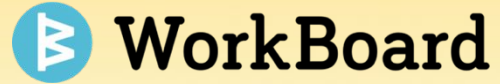
The 'RESULTS' section at the bottom shows:

- 27.5k of 35k ACV goes from \$18k to \$35k
- 84% of 85% 85% of new logo ARR is customers in Tier 1 and Tier 2...
- 9 of 8 Customer Acquisition Cost (CAC) Payback Period for new busines...
- 74.5% of 75% 75% WAU in Tier 1 and Tier 2 accounts

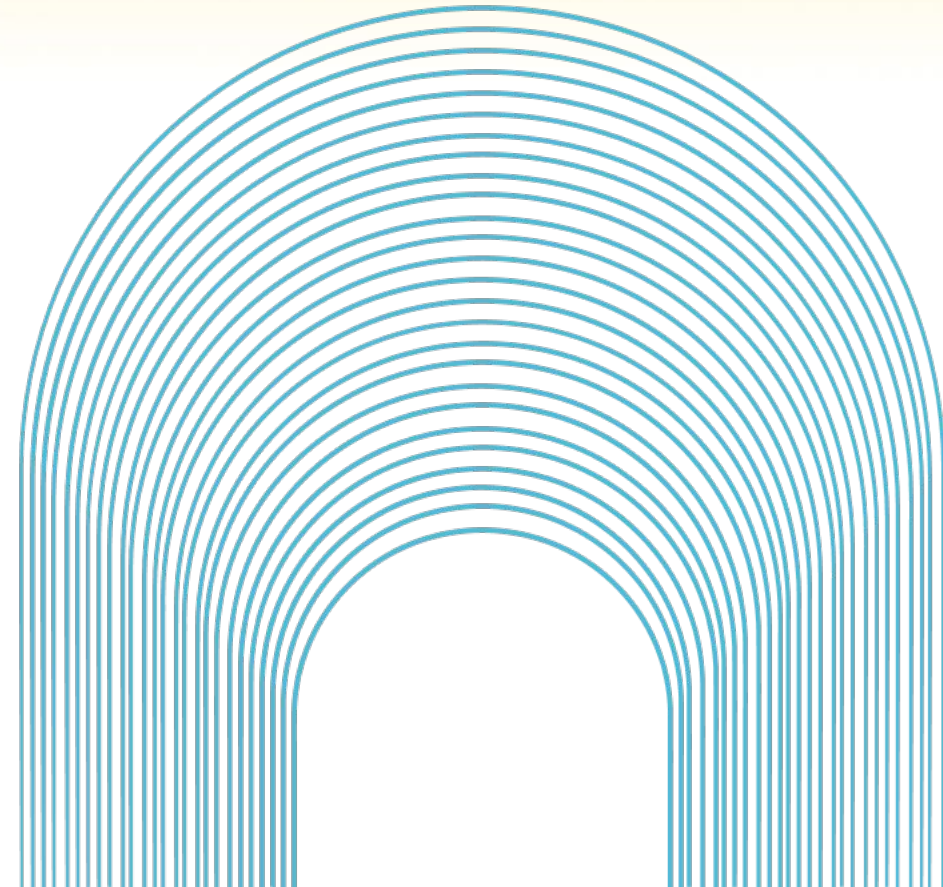
Bring WorkBoard into Your Chat Conversations

- Pull WorkBoard Objectives directly into a chat you're having with a colleague by using @WorkBoard and then typing the name of your Objective.
- Outside of your Team Channels you can chat with the WorkBoard app directly. Submit a command and the WorkBoard app will come back with an answer.
- Don't know the WorkBoard App Commands? Type 'Help' in the search box with the WorkBoard App to get a list of them.





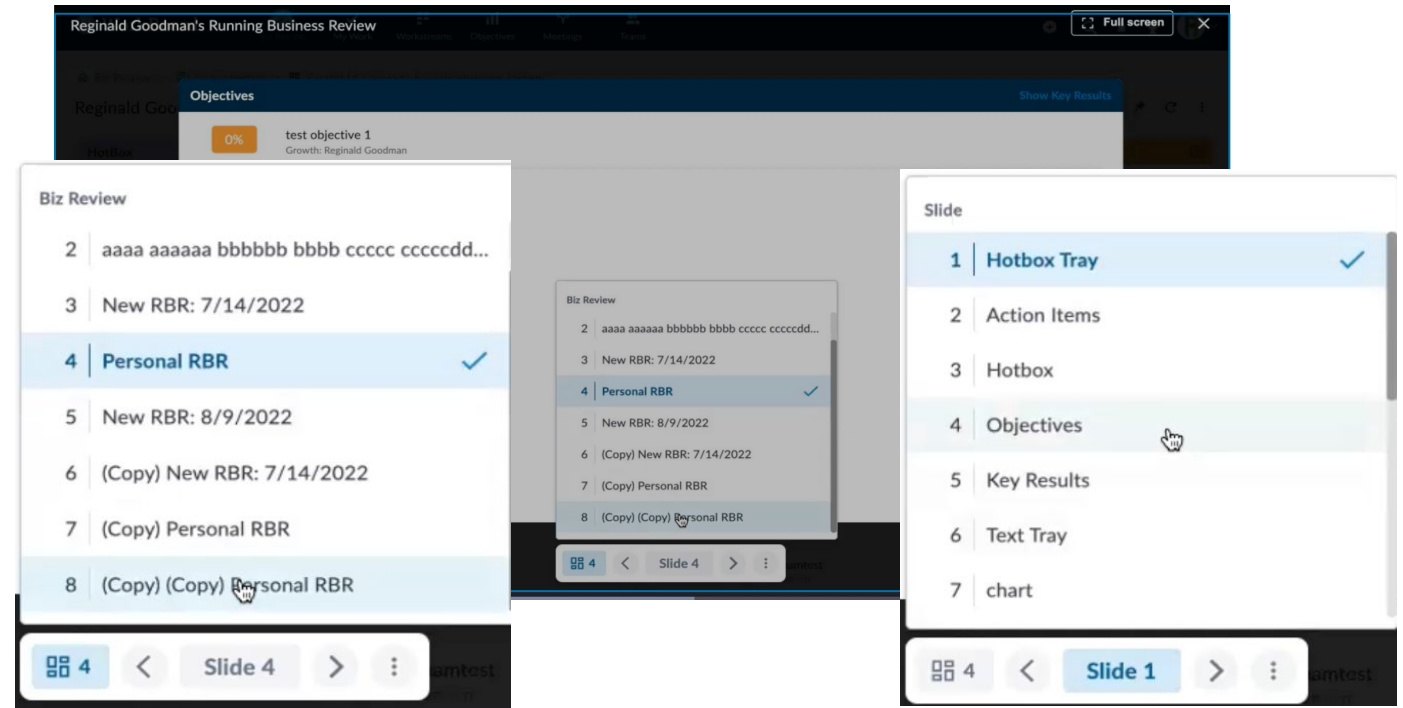
Biz Reviews Sneak Peek



Present a Collection of Biz Reviews as a Single Biz Review

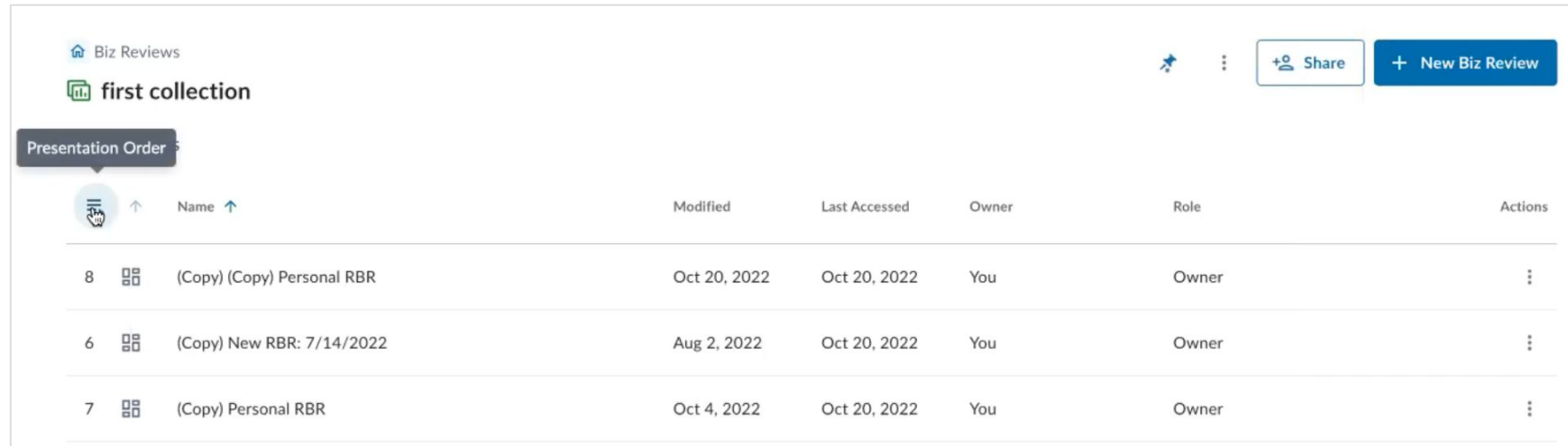
Powerpoint Quality Presentation Controls

- Transition seamlessly between Biz Reviews in Present mode
- Jump between any Biz Review in Collection
- Jump between any Tray in current Biz Review
- Available in all Biz Reviews, too!



Manage Your Collection Presentation Order

- **Set the MBR agenda:**
Set the Presentation Order to sequence Biz Reviews in Present mode
- **Keep backup material out of the main preso:**
Exclude any Biz Review from Presentation Order



	Name	Modified	Last Accessed	Owner	Role	Actions
8	(Copy) (Copy) Personal RBR	Oct 20, 2022	Oct 20, 2022	You	Owner	⋮
6	(Copy) New RBR: 7/14/2022	Aug 2, 2022	Oct 20, 2022	You	Owner	⋮
7	(Copy) Personal RBR	Oct 4, 2022	Oct 20, 2022	You	Owner	⋮

On the Horizon... Scorecards

Scorecards: Custom OKR Dashboards on Demand

Build custom OKR dashboards with a few clicks

Add any OKR attribute as a column

The screenshot shows the WorkBoard interface. On the left, a scorecard titled "FY22 Business QBR Scorecard" is displayed with a table of metrics. On the right, the "Scorecard Builder" panel is open, showing a configuration interface with "Rows (10)" and "Columns (8)". The configuration panel lists several attributes that can be added to the scorecard, such as "Objective name", "Key result name", "Actual", "Target", "Text field", and "Add column".

Objective	Key Result	Actual Q1 22	Target Q1 22	Actual as of 4/28	Actual Q2 22	Target Q2 22	Text
People	Employee retention	90%	75%	87%	76%	80%	
	Employee Satisfaction	60%	75%	60%	63%	65%	
Customer Support	NPS	5.9	8.6	6.5	7.8	8.6	
	CX Stat	89.9%	90%	92%	95%	95%	
Revenue Gen	Contract growth	13%	10%	13%	13%	13%	
	MRR	6M	34M	8M	12M	34M	
Targets	Margin	55%	65%	65%	70%	72%	
	Return Rate	66%	67%	66%	70%	72%	
Targets	Lead Gen	15%	55%	15%	35%	55%	
	Renewal	78%	75%	79%	80%	75%	

The screenshot shows a search panel titled "Search for key result attributes". It contains a list of attributes that can be added to a scorecard, including "Objective name", "Key Result name", "Actuals", "Targets", "Initial value", "Owner", "Assignee", "RAG rating", "Confidence flag", "Confidence narrative", "Text field", "Last comment", "Sparkline", "Data source", "Last update date", "Start date", "End date", "Forecast value", "Committed flag", "Update frequency", "Result directionality", "Objective category", and "Objective percentage complete".

Live Data: build one Scorecard & reuse for every MBR!

Scorecards: Easily Format, Annotate, & Share

- Align to brand and style guides: format text, background, & borders
- Add inline text comments to provide context for each Key Result
- Share Scorecards with WoBo Users & Teams as Viewers or Editors

The screenshot displays the WorkBoard interface for a 'FY22 Business QBR Scorecard'. The top navigation bar includes 'Present' and 'Share' buttons. Below the navigation is a rich text editor toolbar with options for font (Lato), size (14), bold, italic, underline, and text color. A color selection palette is open over the table, showing various color options. The table contains the following data:

Objective	Key Result	Target Q1 22	Actual Apr 28 Q2 22	Actual Q2 22	Target Q2 22	Commentary
People	Employee Retention	75%	87%	76%	80%	On track
	Employee Satisfaction	75%	60%	63%	65%	New survey results
Customer Support	NPS	8.6	6.5	7.8	8.6	Tracking upwards
	CX Stat	90%	92%	95%	95%	Goal met 🙌
	Contract growth	10%	13%	13%	13%	Beat expectations
Revenue Gen	MRR	34M	8M	12M	34M	Plan of action in dev
	Margin	65%	65%	70%	72%	Improving
	Return rate	67%	66%	70%	72%	Beat expectations
Targets	Lead Gen	55%	15%	35%	55%	Capacity constraints
	Renewal	75%	79%	80%	75%	Goal met 🙌

Digitized MBRs: Embed Scorecards in Biz Reviews

Embed Scorecards in Biz Reviews:
Presentation-ready MBR deck with Charts, Action Items & more!

The screenshot shows the WorkBoard interface with a scorecard embedded in a business review. The scorecard is titled 'FY22 Business QBR Scorecard' and displays various metrics across different categories.

Objective	Key Result	Actual Q1 22	Target Q1 22	Actual Apr 28 Q2 22	Actual Q2 22	Target Q2 22	Risk Type
People	Employee Retention	90%	75%	87%	76%	80%	Operational
	Employee Satisfaction	60%	75%	60%	63%	65%	Operational
Customer Support	MRR	5.9	8.6	6.5	7.8	8.6	Operational
	Margin	89.9%	90%	92%	95%	95%	Operational 🟢
Revenue Gen	Return rate	13%	10%	13%	13%	13%	Operational
	Lead Gen	15%	55%	15%	35%	55%	Financial
Targets	Renewal	78%	75%	79%	80%	75%	Financial 🟢

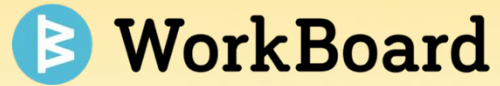
Below the scorecard, there are three panels: 'Key Results' (75% FOCUS on customers...), 'Custom Panel' (New feature kick-off), and 'Biggest Movers' (Create a community for our partners/resellers -43%).

Create an MBR Collection
Organize each month's MBRs in a single, sharable location

The screenshot shows a collection of 'FY22 Scorecards' in the WorkBoard interface. The table lists the scorecards with their order, names, modification dates, owners, and sharing permissions.

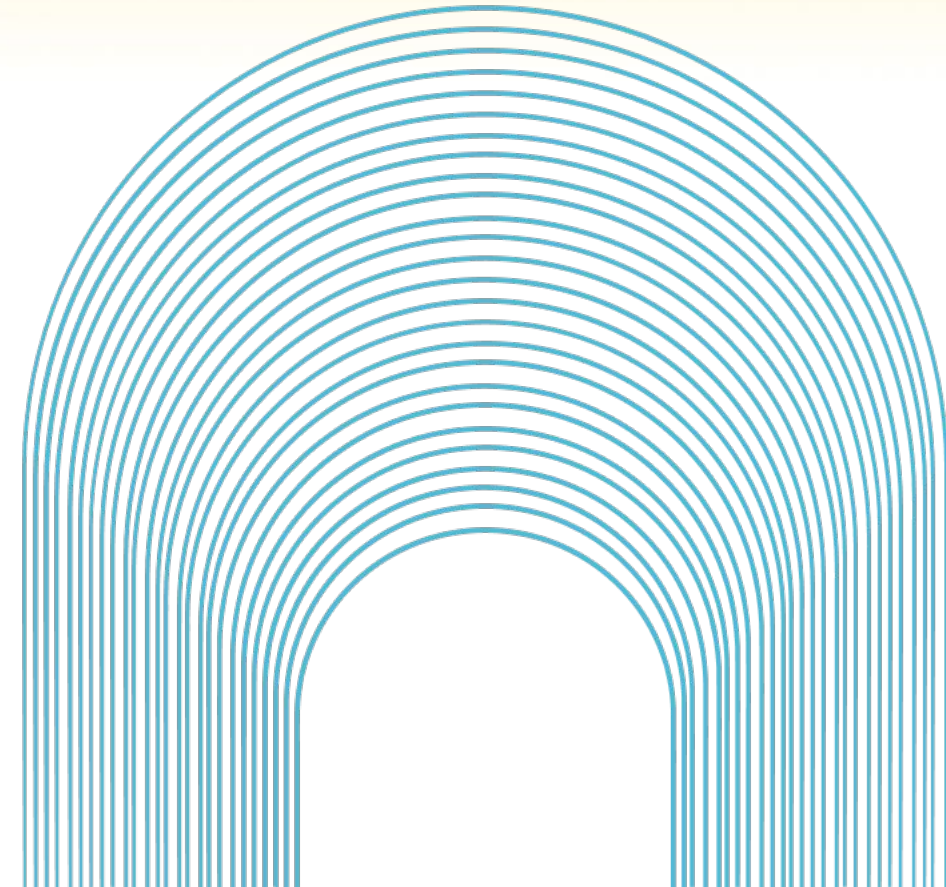
Present Order	Name	Modified ↑	Owner	Sharing	Actions
1	FY22 Business QBR Scorecard	Today	You	Owner	⋮
3	FY22 Strategy Execution	Jan 29, 2022	Robert Fox	Editor	⋮
2	FY22 Regional OKR Execution	Feb 23, 2022	Justin March	Editor	⋮
4	FY22 People Experience	Feb 28, 2022	You	Owner	⋮

Let us know if you're
interested in joining the Beta
program.



Request to Join Teams

Distributed Team Membership Management



Allow Users to Request To Join Teams

Teams and team membership continuously **shifts** within an organization, and it's difficult to ensure organizational integrity rapidly at scale.

The new solution to **request to join teams** aims to enable a more **distributed** team membership management model where:

- ★ Users are empowered to see what teams exist and **ask to join a team**.
- ★ Administration bottleneck is lessened with a **seamless approval flow** for team leaders to manage requests
- ★ **Central admin tool** to approve requests in bulk or work through the queue.

The image displays two screenshots of the WorkBoard interface. The top screenshot shows the 'Teams' management page, which includes a search bar, filters, and a table of teams. The bottom screenshot shows a detailed view of the 'Market Meter Platform Launch Team', featuring a 'Request to join team' button and a list of OKRs with progress indicators and assignees.

Name	Manager	My Role	Members	Actions
Software Engineering	Pietro Maggio	---	11	⋮
Demand Gen Marketing	Stewart Sweeney	---	2	⋮
Market Meter Platf				
Investment PMO				

OKR	Progress	Assignee	Due Date
All the right Platform X buyers in our pipeline	28%	Laurie Luna	Nov 07, 2022
We've nailed our cutting edge platform road map	37%	Sophie Barrett	Nov 07, 2022

Let us know if you'd like this option for your organization!

Scenarios: People Requesting To Join a Team

Scenario 1

Kathy recently joined a company. She searches for her manager's teams and other cross functional squads she supports.

She **requests to join** the teams; the team leads get notified and quickly add her.

Scenario 2

Jeff sends Varshan a link to a project based dynamic team. Varshan realizes he isn't on the team.

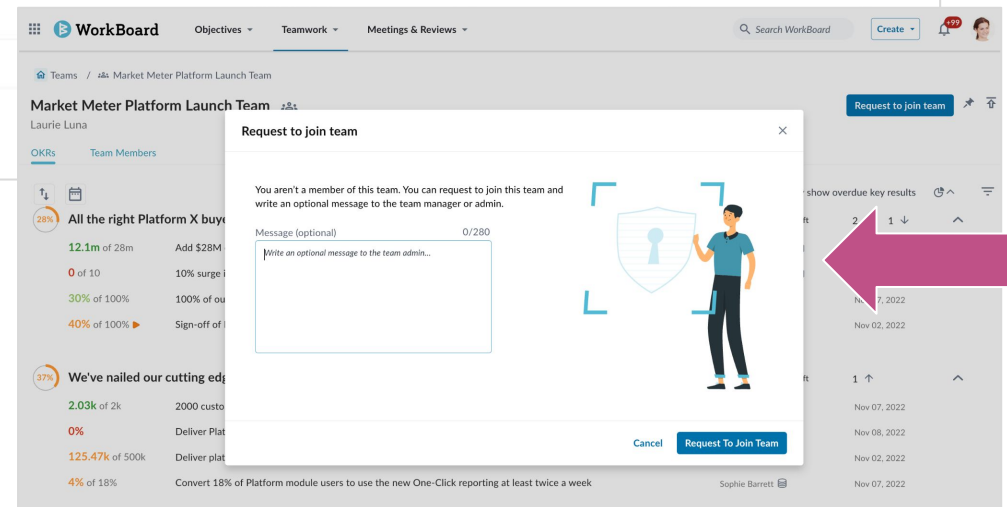
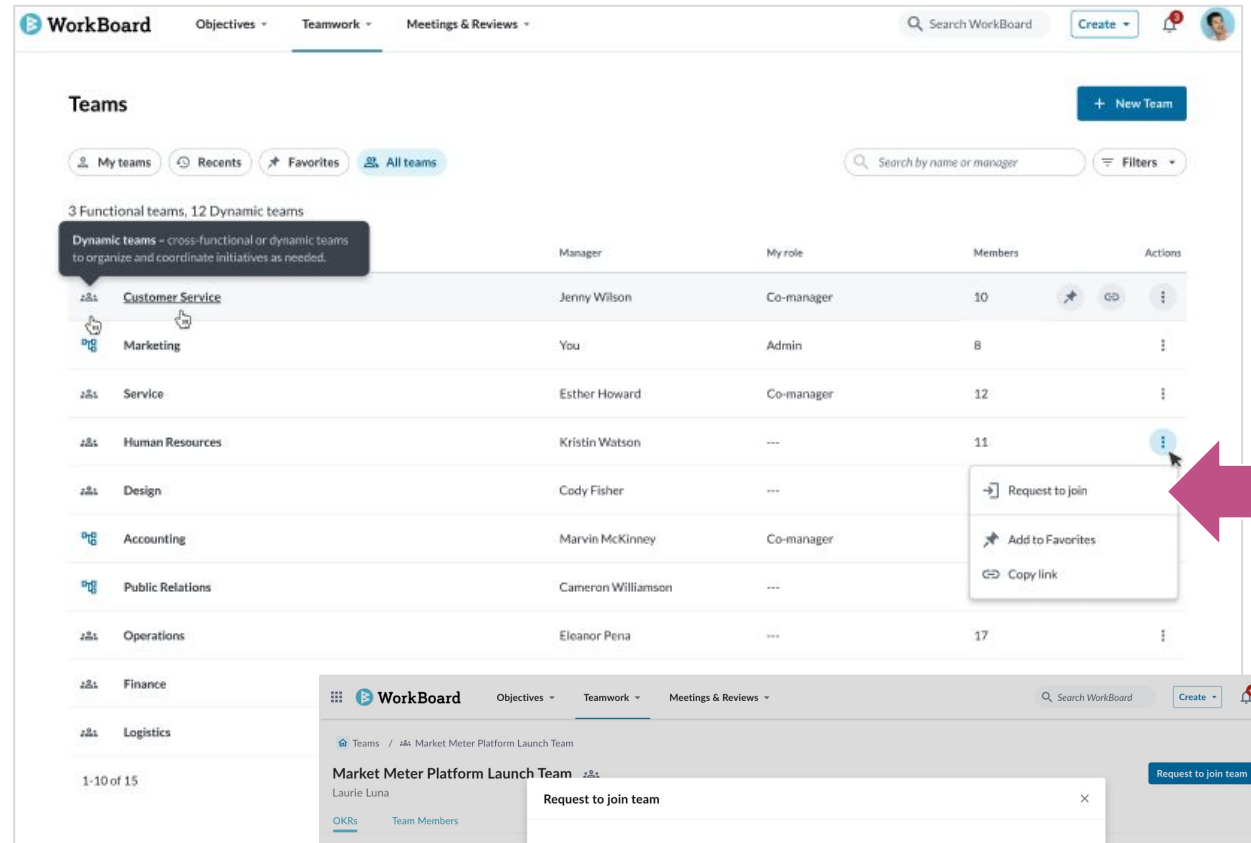
Varshan **requests to join** so he can better stay in the loop and collaborate with Jeff on workstreams.

The screenshot displays the WorkBoard interface for a team named 'Market Meter Platform Launch Team'. The interface includes a navigation bar with 'Objectives', 'Teamwork', and 'Meetings & Reviews'. A search bar and a 'Create' button are visible in the top right. The team page shows a 'Request to join team' button. Below this, there are two OKR cards. The first OKR is 'All the right Platform X buyers in our pipeline' with a 28% completion rate. It lists four key results: 'Add \$28M of upsell pipeline from platform marketing campaigns', '10% surge in same-week WAU with every customer marketing campaign', '100% of our campaigns are focused on Tier 1 and Tier 2 new logos and customers', and 'Sign-off of Platform X customer advocate program from leadership team'. The second OKR is 'We've nailed our cutting edge platform road map' with a 37% completion rate. It lists three key results: '2000 customers use new UI feature', 'Deliver Platform MVP to production', and 'Deliver platform features impacting 500k in Q3 & Q4 renewals'. Below the OKRs, there is a list of team members with their names and roles.

OKR	Progress	Key Results	Team Members
All the right Platform X buyers in our pipeline	28%	<ul style="list-style-type: none">Add \$28M of upsell pipeline from platform marketing campaigns10% surge in same-week WAU with every customer marketing campaign100% of our campaigns are focused on Tier 1 and Tier 2 new logos and customersSign-off of Platform X customer advocate program from leadership team	<ul style="list-style-type: none">Lily LovegoodLaurie LunaAutomatic UpdatesAutomatic Updates
We've nailed our cutting edge platform road map	37%	<ul style="list-style-type: none">2000 customers use new UI featureDeliver Platform MVP to productionDeliver platform features impacting 500k in Q3 & Q4 renewalsConvert 18% of Platform module users to use the new One-Click reporting at least twice a week	<ul style="list-style-type: none">Sophie BarrettLaurie LunaRachel PalmeraSophie Barrett

People Can Request To Join Teams

- Discover teams from Teams Landing page or, a team member shares a Team URL with them.
- Click **Request to Join** button
- (Optional) Fill out snippet on why they'd like to join
- Request to join changes to “pending request” while they wait
- They will receive an email once their request is approved (or denied)

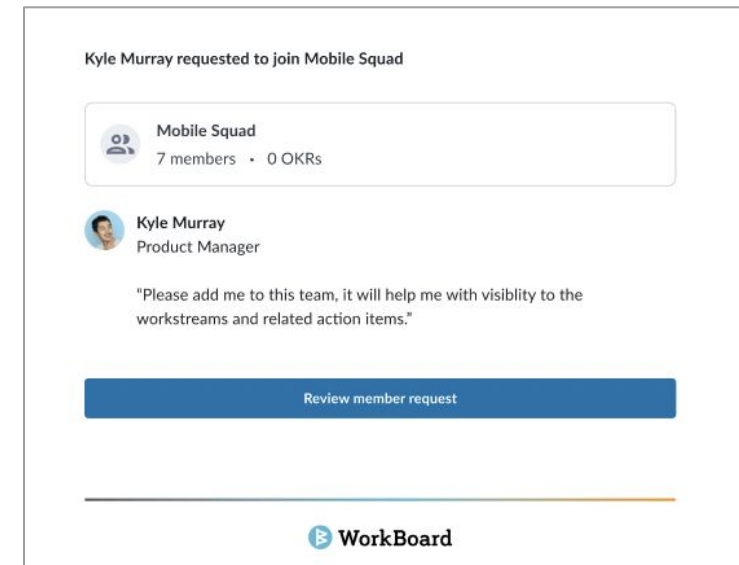
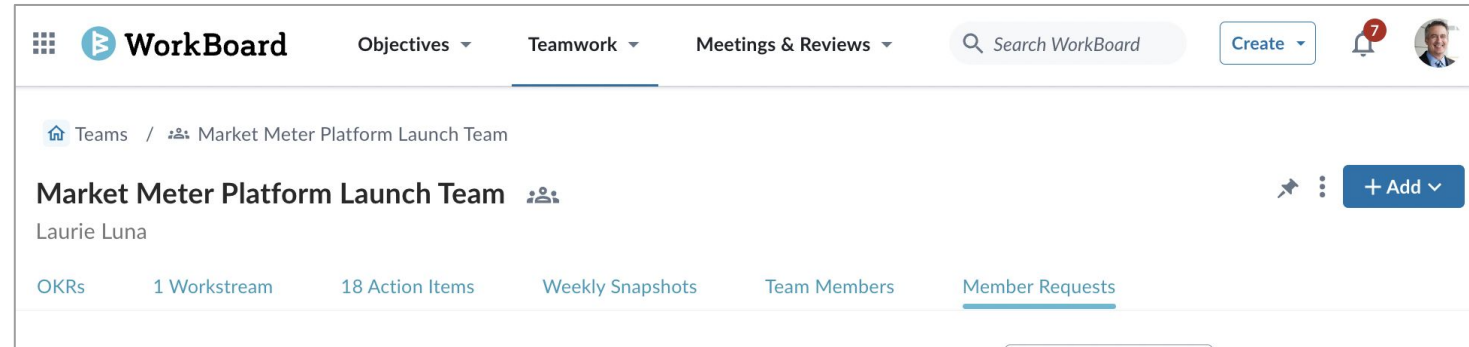


Team Manager Approval Flow

Flow for manager or admin:

- Manager receives notification:
 - **Email notification**
 - **In-app notification under the bell**
- They can quickly approve (or deny requests) from the Member Requests tab on the team's page queue on Teams Page

*Team Managers, co-managers and admins can all approve requests to join the team



Admin Easy Button: Manage Queue in Bulk

Admin can assist managers to **remove approval bottleneck** with an easy bulk approval flow.

How to Use:

1. Go to Admin tools
2. Go to Team Member Requests under **Org Management**
3. Requests can be **approved or denied in bulk**, or one by one in a queue - helping save time and admin overhead

The screenshot shows the WorkBoard Admin interface. The top navigation bar includes the WorkBoard logo, navigation menus for 'Objectives', 'Teamwork', and 'Meetings & Reviews', a search bar, and a 'Create' button. The left sidebar lists 'Admin Tools' with categories: 'User Management' (Directory, Reporting Structures, External Users), 'Org Management' (Org Structure, Functional Teams, Dynamic Teams, Org Configuration, Data Streams, Business Groups, Biz Review Analytics, Team Member Requests), and 'IT Policies' (Security, Administrators). The main content area is titled 'Team Member Requests' and shows '1 member request'. A table lists the request with columns for checkboxes, Team Name, Name, Title, Note, and Actions. The table contains one row for 'Marketing' by 'Irina Marin' for 'SVP Mobile Apps', with 'Approve' and 'Reject' buttons in the Actions column.

<input type="checkbox"/>	Team Name	Name	Title	Note	Actions
<input type="checkbox"/>	Marketing	Irina Marin	SVP Mobile Apps		Approve <input type="button" value="v"/> Reject

What are you curious about?

Thank you!