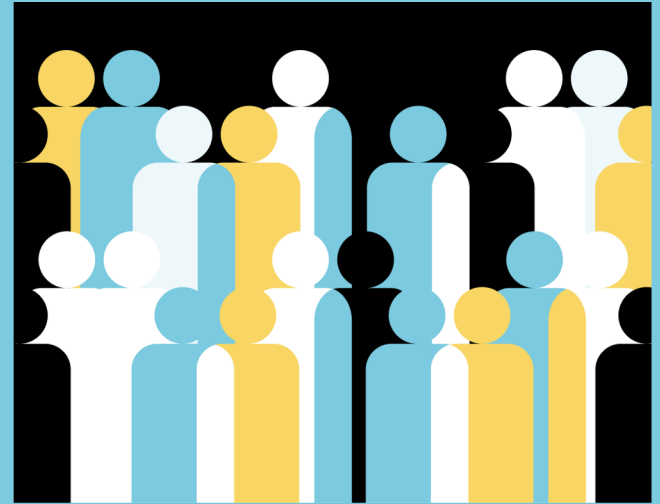


# WorkBoard Community Call

December 2022



# Agenda

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- Our biggest updates of 2022
- Pro tips for closing out your year & setting the stage for the next
- Our community event lineup and a quick preview of what's coming in 2023

# Our Biggest Updates of 2022

# OKR Canvas

Interactive whiteboard for elevated brainstorming in OKR sessions.

The screenshot shows the WorkBoard OKR Canvas interface for the Sales Team Q4 FY22. The interface includes a top navigation bar with a back arrow, the team name "Sales Team Q4 FY22", and buttons for "Invite" and "Publish OKRs". A central panel displays "PREVIOUS OKRS" for "Customer Marketing Q2 FY21" with two items:

- 14** Because it's cheaper to retain than obtain customers  
Peer/Leader: Customer Marketing  
2.5k of 20k  
1.8k of 10k  
30 of 100  
0% of 100  
Add \$2M of spend pipeline from marketing campaigns or testing in Tier 1 and Tier 2 accounts  
100% 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  
Sign-off of customer advocate program from leadership team
- 15** Test: Because it's cheaper to retain than obtain customers  
Peer/Leader: Customer Marketing  
1.8k of 10k  
10% surge in same-week WAU with every customer marketing campaign  
Sign-off of customer advocate program from leadership team

Below the previous OKRs are three sections: "Victories", "Observations", and "Shifts". The "Import OKRs" panel on the left offers options to "Import your team's previous OKRs" or "Upline manager's OKRs". A search bar at the bottom of the import panel reads "Not what you are looking for? Search for other OKRs." The interface also features a "Lock template" button and a sidebar with various tool icons.

The screenshot shows the WorkBoard OKR Canvas interface for the Sales Team Q1 2022. The interface includes a top navigation bar with a back arrow, the team name "Sales Team Q1 2022", and buttons for "Invite" and "Publish OKRs". A central panel displays "PREVIOUS OKRS" for "Customer Marketing Q2 FY21" with two items:

- 14** Because it's cheaper to retain than obtain customers  
Peer/Leader: Customer Marketing  
2.5k of 20k  
1.8k of 10k  
30 of 100  
0% of 100  
Add \$2M of spend pipeline from marketing campaigns or testing in Tier 1 and Tier 2 accounts  
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# WoBo Strategy

A solution for threading long-range strategy to quarterly OKRs.



**Strategic pillars**  
What must the team excel in to achieve the strategic vision?  
Add new pillar

**Become the preferred customer option for electric vehicles**

**Narrative**  
Establish Acme as the safest, most reliable and affordable option on the market for electric vehicles, extending availability to new North American markets by price point, and international markets. Seek to be voted #1 in Consumer Reports' electric vehicle category.

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

- 100%** Achieve \$200M in Global Sales by 2025  
Target: \$200m
- 23%** Achieve >50% market share by cars sold in North America by 2025  
Target: 51%
- 17%** Reach 30% of revenue from international markets for electric vehicles  
Target: 30%

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

- Unknown** 50% YoY growth 2023 and 2024 in North America
- Disproven** Launch in China by mid-2022 with reverses by end of 2023
- Proven** Grow workforce by 8% by end of 2022

**INVESTMENT PLANS**

- 10m** \$500M investment in China expansion  
Target: \$500m
- 100m** \$320m North America growth investment plan  
Target: \$320m

**RISKS**

- Policy changes or political climate in China delays launch in 2023
- Semiconductor chip shortage limits vehicle manufacturing goals

**LINKED OBJECTIVES**

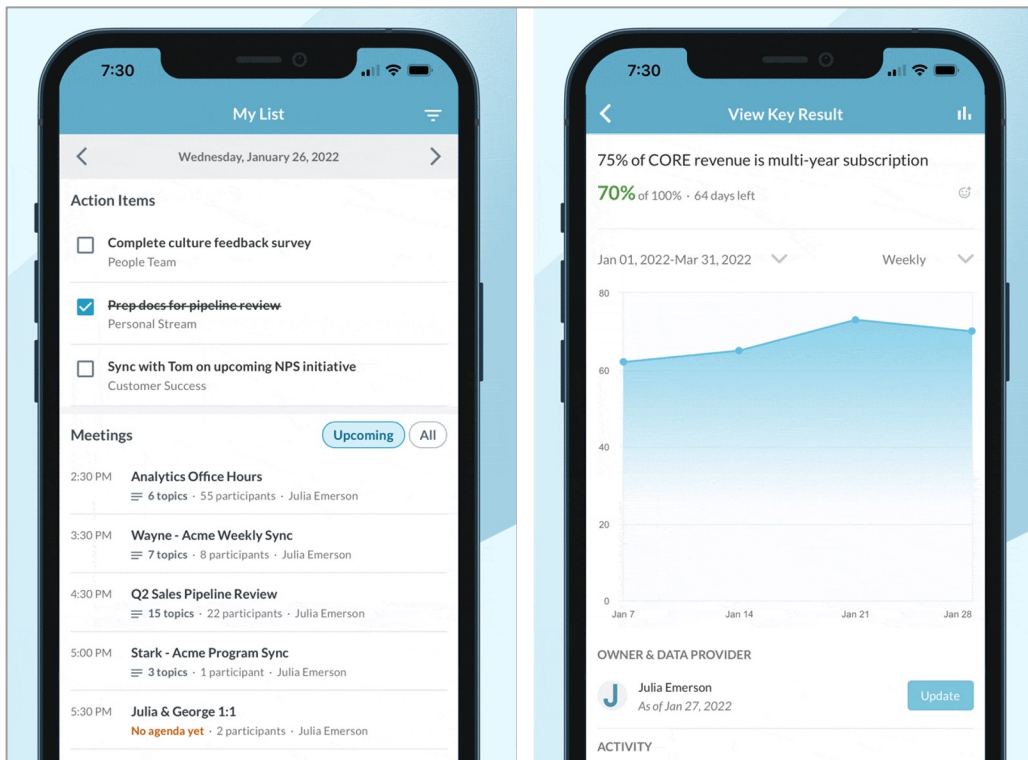
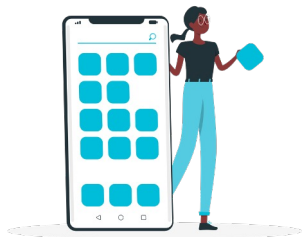
- 70%** Modernize our business and operating model to accelerate growth  
Business Objectives | 23M - Q1 FY22
- 66%** Create long-term partnerships in China

**ATTACHMENTS**

- 2022-1-L\_Fuels\_Friction...
- Competitor analysis 20...
- marketing\_session\_210323

# WorkBoard for Mobile

Review OKR Progress, assign items, create meetings, and execute your results from anywhere.



# Better Biz Reviews

More flexibility and customization to support better conversations in QBRs and MBRs.

The screenshot displays the 'Biz Reviews' section of the WorkBoard application. At the top, there is a navigation bar with 'WorkBoard' logo, 'Home', 'OKRs', 'Work', 'Meet & review', and 'Organization' menus. A 'Create' dropdown, search icon, and user profile are on the right. Below the navigation, the 'Biz Reviews' title is followed by '+ New Collection' and '+ New Biz Review' buttons. A 'Favorites' section shows five preview cards for collections, each with a 'Collection Title' and 'You edited in the past week' text. Below this, there are tabs for 'All', 'Recents', and 'Favorites', along with a search bar 'Search by name or owner' and a 'Filters' dropdown. The main content area shows '3 collections, 234 reviews' and a table of collections.

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 Qo-Q Business Review	Jan 19, 2022	Lilly Simmons	Owner	⋮
Alignment Analytics	Jan 29, 2022	Robert Fox	Editor	⋮
Product and Engineering Alignment RBR 2022	Feb 23, 2022	Justin March	Viewer	🔄 ⭐ 📄 ⋮
BizOps Recruiting Review	Feb 28, 2022	You	Owner	⋮
Customer Implementations	Jan 3, 2022	Kait Smith	Editor	⋮
App Services Onboarding Playbook	Jan 1, 2022	Robert Fox	Viewer	⋮
Project Skywalker 2022 Q1 Review	Dec 25, 2021	Jenny Bierman	Owner	⋮

# Integrations

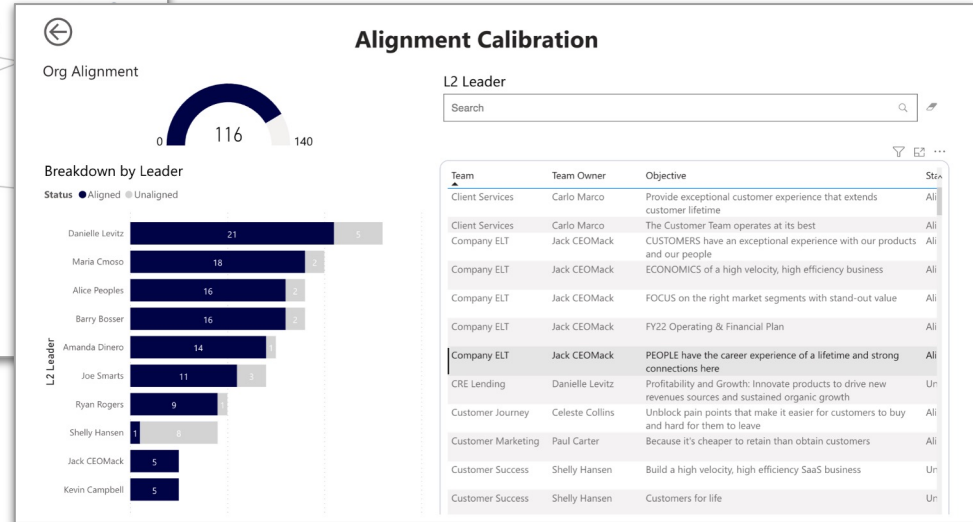
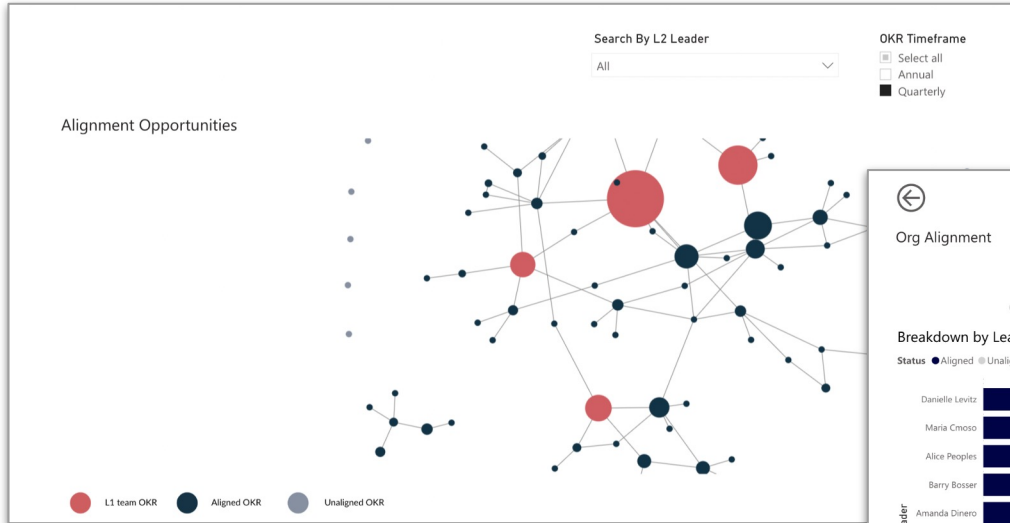
New data connectors to help you stay focused on progress to plan.





# Analytics and Insights

Tools to elevate your strategy execution posture across the organization.



# New Navigation

Simplified navigation to make it easier to find and access what you need.

The screenshot displays the WorkBoard interface with a navigation menu open. The menu includes options for 'My Objectives', 'Heatmap', 'Alignment', 'Results Analytics', and 'Timeline'. A sub-menu for 'My Objectives' is also visible, listing 'Global Sales's objectives', 'Our strategic partnerships help ...', 'CUSTOMERS have an exception...', 'Drive demand to build the sales ...', 'Danielle Levitz's objectives', and 'Market Meter Platform Launch ...'. The main content area shows two objective cards: 'FOCUS on the right market segments with stand-out value' and 'CUSTOMERS have an exceptional experience with our products and our people'. Each card includes a progress bar, a title, a subtitle, and a list of key results with their current status and target values. The right sidebar features 'Recent OKR News' with three items: 'Excellent!', 'Target Hit!', and another 'Target Hit!'. The top navigation bar includes the WorkBoard logo, 'Objectives', 'Teamwork', and 'Meetings & Reviews' tabs, a search bar, and a 'Create' button.

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

### My Objectives

My OKRs My Key Results

Show: Teams I manage

COMPANY ELT

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

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

Jack CEO Mack: Company ELT

- 106% of 110% 110% of new customer bookings (ARR) are from customers in our target segments
- 83.71% of 85% 85% revenue retention in our target customer segments (GRR)
- 74% of 75% 75% of CORE revenue is multi-year subscription
- 63% of 75% 75% weekly active users (WAU) for target segment accounts
- 85.71% Re-vamped strategic use cases are final and embedded in sales, marketing and product mgmt
- 0 of 80 80% weekly users for target segment accounts

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

Jack CEO Mack: Company ELT

- 87 of 83 Drive gross revenue retention (GRR) above 83%
- 280 of 85 85 Tier 1 and Tier 2 logos renewed

#### Recent OKR News

- Excellent!**  
You gave Roger Smithson a badge for Onboarding is easier than associates' favorite consumer app
- Target Hit!**  
Manny Admina updated Digipay spike test less than 3ms response to 2
- Target Hit!**  
Roger Smithson updated HR realizes \$33M in annualized run rate savings from RPA (measured by 3rd party service termination and h/c reallocation) to 43.91m
- You sent you a status ping on Maintain uptime of >90%

Only show overdue key results

Q2 FY22 • 43 days left

- 4 Joe Smarts As of Dec 17, 2022
- 1 Joe Smarts As of Dec 20, 2022
- Amanda Dinero As of Nov 02, 2022
- 3 Barry Bosser As of Dec 20, 2022
- Maria Cmoso As of Dec 08, 2022
- Jack CEO Mack Never updated
- Me Update As of Nov 15, 2022
- Joe Smarts As of Dec 15, 2022

View More

# 4 Tips to Start 2023 Results Aligned

# 1. Make the Company-Wide Strategy Transparent

Put your long range company and functional strategies into WoBo strategy and connect those to your quarterly objectives and key results.

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

- **Become the preferred customer option for electric vehicles**

[Add new pillar](#)

**Become the preferred customer option for electric vehicles**

**Narrative** Establish Acme as the safest, most reliable and affordable option on the market for electric vehicles, extending availability to new North American markets by price point, and international markets. Seek to be voted #1 in Consumer Reports' electric vehicle category.

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Target: 30%

[Add outcome](#)

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

- Unknown** 10% YoY growth 2023 and 2024 in North America
- Disproven** Launch in China by mid-2022 with revenues by end of 2023
- Proven** Grow workforce by 8% by end of 2022

[Add assumption](#)

**INVESTMENT PLANS**

- \$0m** \$500M investment in China expansion  
Target: \$500m
- \$100m** \$320m North America growth investment plan  
Target: \$320m

[Add investment target](#) [Link or upload existing plan](#)

# 2. Facilitate Teams' Alignment on Their Objectives and Key Results

- Communicate alignment and tie off schedules
- Use OKR canvas
- Communicate OKRs in beginning of year kick offs and all hands

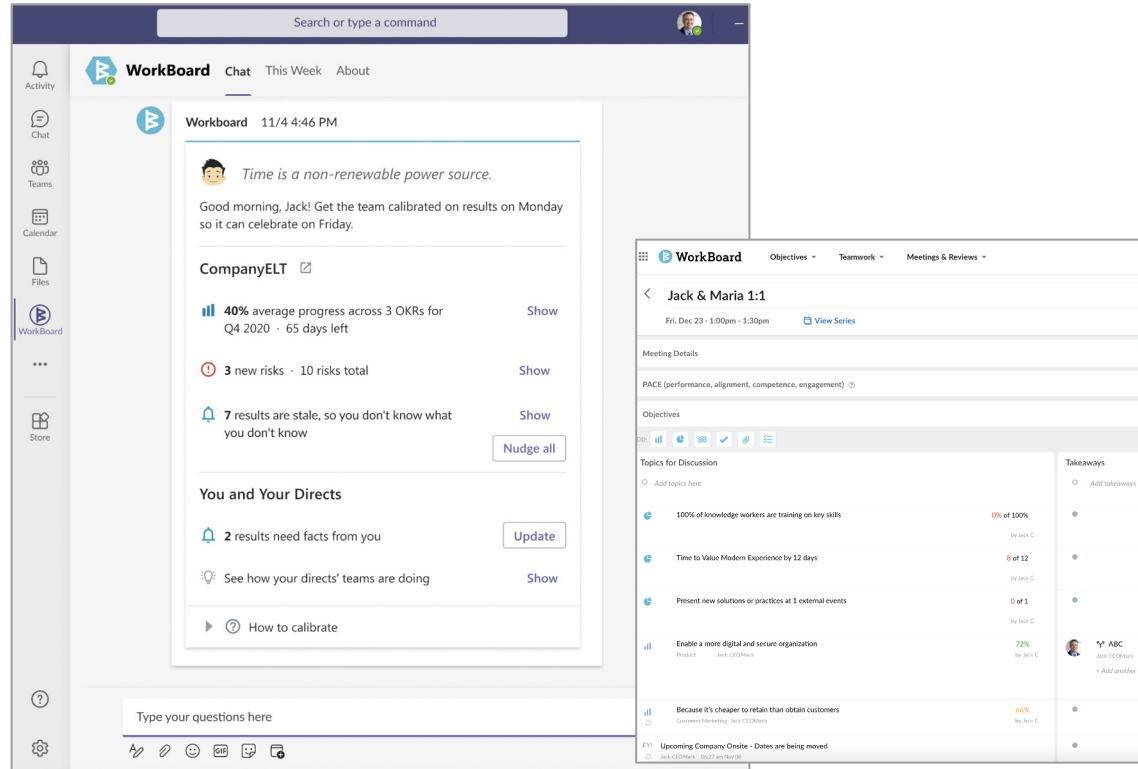
The screenshot displays the WorkBoard interface for the Sales Team Q4 FY22. At the top, there is a navigation bar with a back arrow, the team name 'Sales Team Q4 FY22', and buttons for 'Invite' and 'Publish OKRs'. Below this, the main workspace is divided into several sections:

- Import OKRs:** A central panel with two sub-sections: 'Your team's previous OKRs' (Pull in your team's OKRs from the previous quarter) and 'Upline manager's OKRs' (Pull in your manager's OKRs from the current quarter). A search bar below reads 'Not what you are looking for? Search for other OKRs.'
- Customer Marketing Q2 FY21:** A detailed view of a previous OKR cycle. It shows two OKRs with progress bars and data points:
  - OKR 1: 'Because it's cheaper to retain than obtain customers' (Tier 1 and Tier 2 accounts). Progress: 2.5M of 20M (12.5% of 20M). Key results: 30% surge in same-week WAU with every customer marketing campaign; 100% of campaigns focused on Tier 1 and Tier 2 new logins and customers; Sign off of customer advocate program from leadership team.
  - OKR 2: 'Yes, Because it's cheaper to retain than obtain customers' (Tier 1 and Tier 2 accounts). Progress: 1.8M of 10 (18% of 10). Key results: 50% surge in same-week WAU with every customer marketing campaign; Sign off of customer advocate program from leadership team.
- Victories:** A section for celebrating achievements, with a prompt: 'What did you achieve? What were the great results? What was awesome? What was powerful?'
- Observations:** A section for reflecting on performance, with a prompt: 'What got in the way? Where did the team fall short of intended outcomes, why and what was in the way?'
- Shifts:** A section for planning adjustments, with a prompt: 'What will we adjust? What will you adjust or want others to adjust to achieve more of intended results next quarter?'

Additional elements include a 'Lock template' button and a mobile device icon. The bottom right corner features the WorkBoard logo.

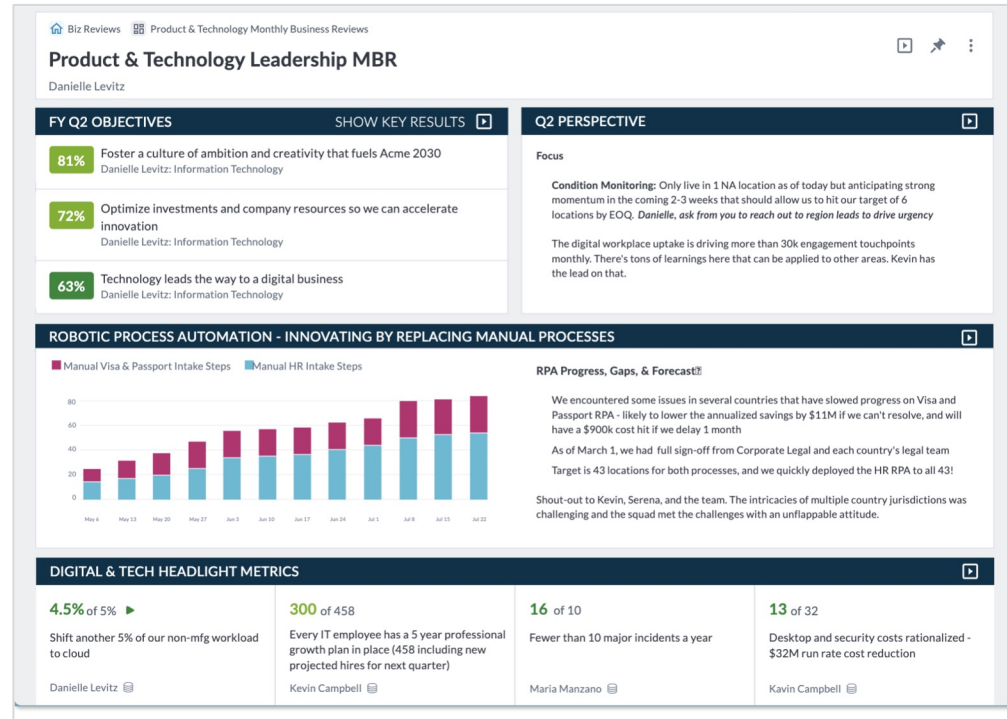
# 3. Make it Easy to Align Time to Outcomes

- Structure your operating rhythm to be outcome focused
- Put OKRs on your meeting agendas in the new year (both team and 1:1s)
- Ensure all meetings have **smart agendas**
- Connect **WorkBoard Meetings to Workstreams** with action items so folks know what they should be working on and follow through happens.
- Calibrate on Mondays, celebrate on Friday



# 4. Digitize Your Biz Reviews

- Shift your MORs and QBRs into running biz reviews
- Everyone has the data, no one is collating slides
- Package and manage the order of multiple reviews from the quarter into one collection.
- Seamlessly present your entire collection as one Biz Review in your next QBR with the Play All tool.
- Easily move between reviews in a collection or quickly jump across slides, for a flawless presentation experience.



# **Build Your Expertise and Community**



# Our 2023 Community Event Lineup

Join other strategy operation leaders, P&L owners, and results management leaders like yourself in an opportunity to share perspectives on strategy execution, build new connections, and learn from each other.

## Schedule:

Feb. 7	Strategy Execution Leader Meeting - Silicon Valley
Mar. 2	Strategy Execution Leader Meeting - Chicago
Mar. 23	Strategy Execution Leader Meeting - London
Apr. 14	CIO Round Table - New York City
May 18	Accelerate Spring & SEE Awards
Jun. 22	Accelerate Europe - London



# Join our Upcoming Classes












Class	Description	Dates	How to Sign Up
<b>Outcome Method Mindset</b>	Learn about OKRs and the Outcome Mindset in 1 hour	<ul style="list-style-type: none"><li>• January 4th at 1:00pm PT</li><li>• January 11th at 6:00am PT</li><li>• February 1st at 1:00pm PT</li><li>• February 8th at 6:00pm PT</li></ul>	<a href="https://learn.workboard.com">learn.workboard.com</a>
<b>OKR Fast Pass Course</b>	Build your OKR expertise in 3 hours	<ul style="list-style-type: none"><li>• January 4th at 8:00am PT</li><li>• February 1st at 8:00am PT</li></ul>	<a href="https://learn.workboard.com">learn.workboard.com</a>
<b>OKR Coach Certification</b>	Become a certified OKR coach	<ul style="list-style-type: none"><li>• January 3rd &amp; 5th at 8:00am PT</li><li>• January 10th &amp; 12th at 8:00am PT</li><li>• January 18th &amp; 20th at 9:00am CET</li><li>• January 17th &amp; 19th at 1:00pm PT</li><li>• January 24th &amp; 16th at 8:00am PT</li></ul>	<a href="https://learn.workboard.com">learn.workboard.com</a>
<b>Results Management Leader Certification</b>	Learn how to lead your organizations alignment, accountability, and OKR operating cycle to ensure you achieve strategy faster	<ul style="list-style-type: none"><li>• Winter Cohort launches January 18th</li></ul>	<a href="https://lp.workboard.com/2023-winter-rme.html">https://lp.workboard.com/2023-winter-rme.html</a>

# Tune into the OKR Podcast

Designed to help leaders use the OKR technique and other cutting-edge strategies to keep their distributed teams connected, aligned, and moving toward results.

There is a dearth of information on how to do OKRs well and reap their full benefit. That's where this podcast comes in!

<p><b>OKRs for Agile, Outcome-Focused Organizations</b></p> <p><b>JEFF GOHELL</b> Co-author of Lean UX, OKR expert</p>  <p>Jeff Gohell, business agility and OKR framework expert, organizational designer, author and speaker, sits down with Deldre to share his unique approach to cultivating a product-focused mindset across large, complex enterprise organizations. Jeff uncovers how agile organizations that manage to outcomes are fundamentally in opposition to legacy, command and control leadership practices - and more importantly, how leaders can empower their people with the right framework for autonomy, discovery, and learning.</p> <p><a href="#">LISTEN NOW</a></p>	<p><b>Driving Agile Transformation in a Self-Directed Culture</b></p> <p><b>ANTHONY COPPEDGE</b> Principal Agile Digital Sales Global Transformation Lead, IBM</p>  <p>Anthony Coppedge, Principal Agile Digital Sales Global Transformation Lead at IBM, sits down with Deldre to share how he introduced OKRs across Sales and Digital Marketing to ensure the creation of customer value is the focus of every employee in the org, and why a self-directed culture is at the core of successful business transformations.</p> <p><a href="#">LISTEN NOW</a></p>	<p><b>How to Scale OKRs in Large, Complex Organizations</b></p> <p><b>SAMEERA MOINPOUR</b> VP of Strategic Services at WorkBoard</p>  <p>In this HCI Podcast episode, Dr. Jonathan H. Westover talks with Sameera Moinpour about how to scale OKRs in large, complex organizations.</p> <p><a href="#">LISTEN NOW</a></p>
<p><b>Innovating &amp; Mobilizing Faster at AstraZeneca</b></p> <p><b>CINDY HOOTS</b> Chief Information Officer &amp; Chief Digital Officer, AstraZeneca</p>  <p>Cindy Hoots, CIO at AstraZeneca, sits down with Deldre to share her unique perspective on driving innovation at speed and scale. Cindy shares the importance of operationalizing the strategy and how it helped get everyone aligned and focused on outcomes.</p> <p><a href="#">LISTEN NOW</a></p>	<p><b>Why Do OKRs Fail?</b></p> <p><b>SAMEERA MOINPOUR</b> VP of Strategic Services at WorkBoard</p>  <p>5 ways OKRs go sideways and why. Tried OKRs and they didn't work or hearing that from a colleague? This episode talks about why OKRs fail, the root issues, and gives a fresh perspective gaining their true value.</p> <p><a href="#">LISTEN NOW</a></p>	<p><b>Bringing Strategy to Life with OKRs at Cisco</b></p> <p><b>VIKAS BUTANEY</b> Chief Product Officer and GM at Cisco</p>  <p>Vikas Butaney, Chief Product Officer and GM at Cisco, shares how the organization implemented OKRs, the power of every employee being aligned on the mission, and advice for new business leaders who need to connect distributed teams.</p> <p><a href="#">LISTEN NOW</a></p>
<p><b>How Zendesk Uses OKRs to Scale Efficiently</b></p> <p><b>COLLEEN BERUBE</b> COO and IVP Operations at Zendesk</p>  <p>Zendesk CIO Colleen Berube says 'it's just how we run the business' as she shares how OKRs flow into WorkBoard Biz Reviews and they ensure every major initiative has an</p>	<p><b>OKRs at Google</b></p> <p><small>A COOPERATION WITH:</small> <b>MARGO GEORGIADIS</b> CEO, Former, Mapping Pioneer Former President at Google, Ancestry.com</p>  <p>Margo Georgiadis, former president of the Americas at Google for 8 years, leads a master class for executives on how Google uses OKRs. Margo shares her learnings</p>	<p><b>OKRs in a Modern Operating Rhythm</b></p> <p><small>with Daniel Esenberg, Executive Editor at McKinsey &amp; Co., and Deldre Palkind, CEO and Co-Founder, WorkBoard</small></p>  <p>WorkBoard CEO and OKR Podcast host Deldre Palkind appears on the McKinsey on Start-ups podcast to discuss how OKRs and</p>

**What are you curious about?**

**Thanks for a great 2022.**

**Happy Holidays!**