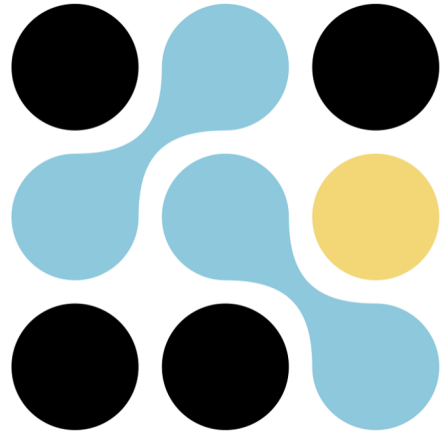


WorkBoard Community Call

February 2023



Agenda

- Using holistic data for better strategy execution
- Key result updates
- Connecting OKRs to your long range strategy
- Deepening expertise
- Community events

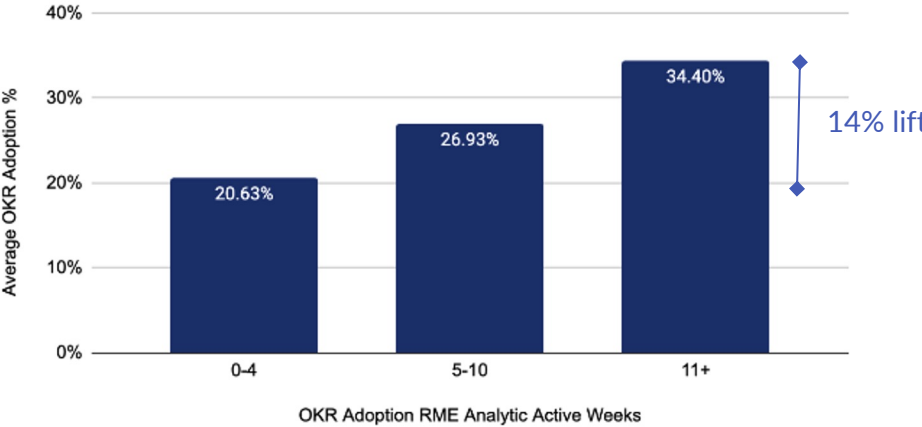
Using holistic data for better strategy execution

Empowering Customers with Data

RME Analytics provide helpful insights to customers (RME/BPO) and help increase adoption and strategy execution at scale

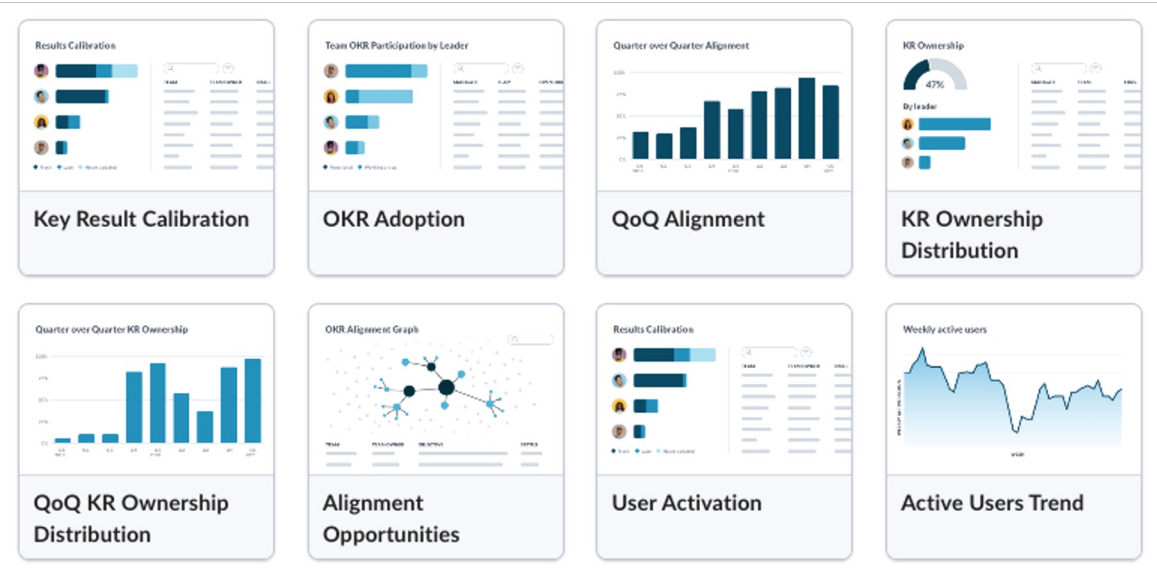
Our data shows that customers who use our RME analytics see an increase in **average result achievement by 14%**.

Organizations with 150+ teams see an even greater lift than organizations with fewer teams.



Results Management Analytics (RME) Overview

Out of the box **curated Analytic reports** designed to be a dashboard for Results Management Executives who are the champions to drive strategy execution across the organization.

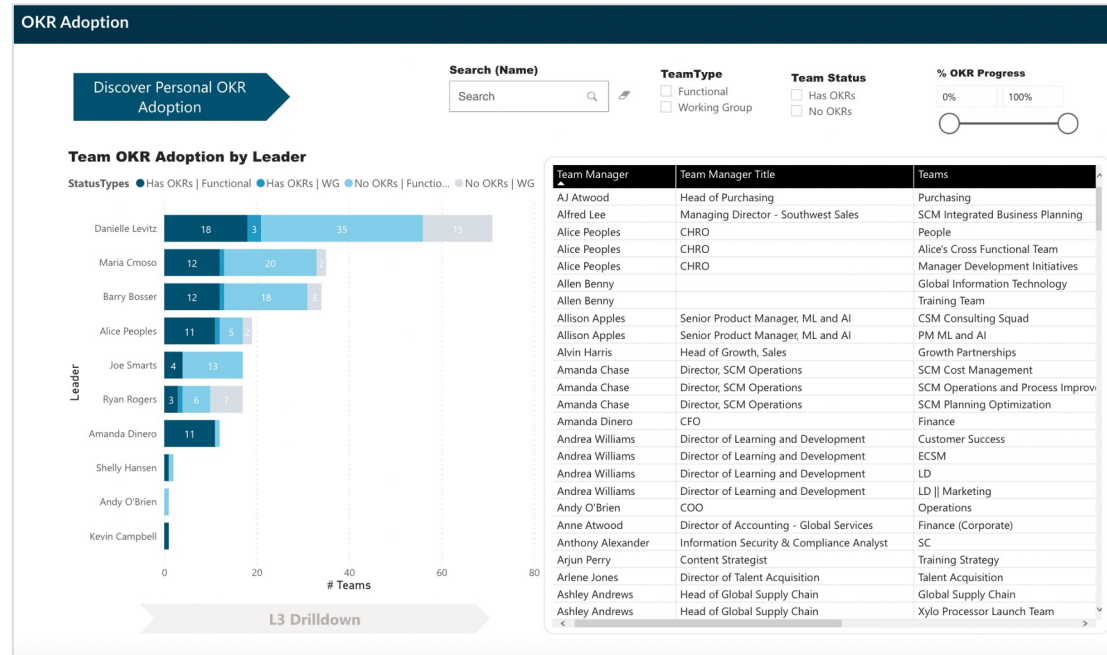


Overview of OKR Adoption

Understand and drive the maturity of your OKR program over time:

- See participation of teams in the OKR program
- Identify teams and leaders that need support in increasing OKR adoption within their respective parts of the business.

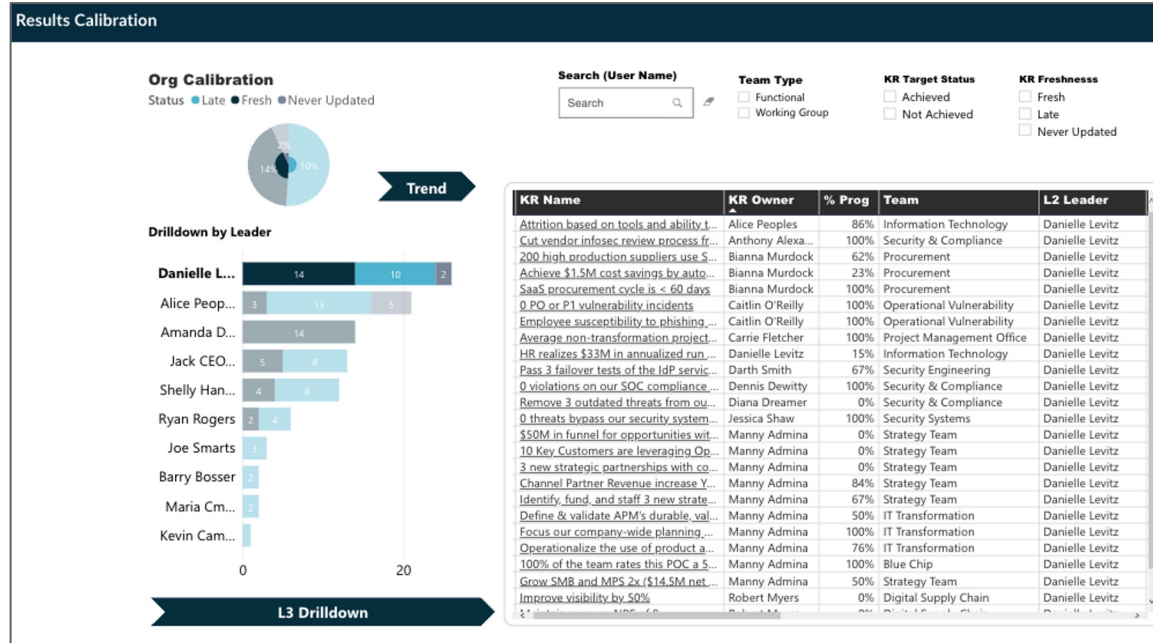
Recent Enhancement! Now you can see and compare breakdown of OKR Adoption for 3 layers of leaders with the new **L3 drilldown** button.



Overview of Key Result Freshness

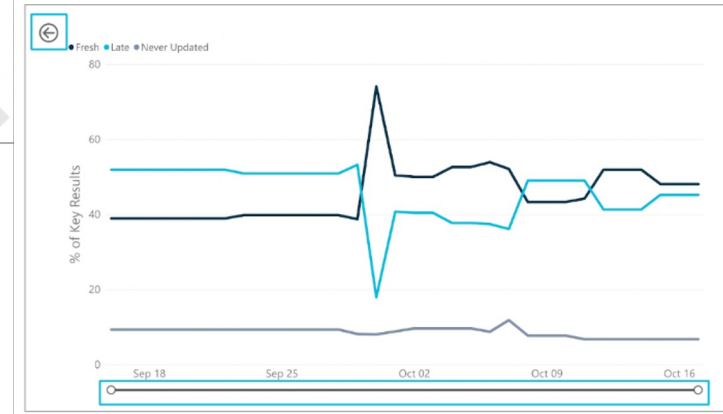
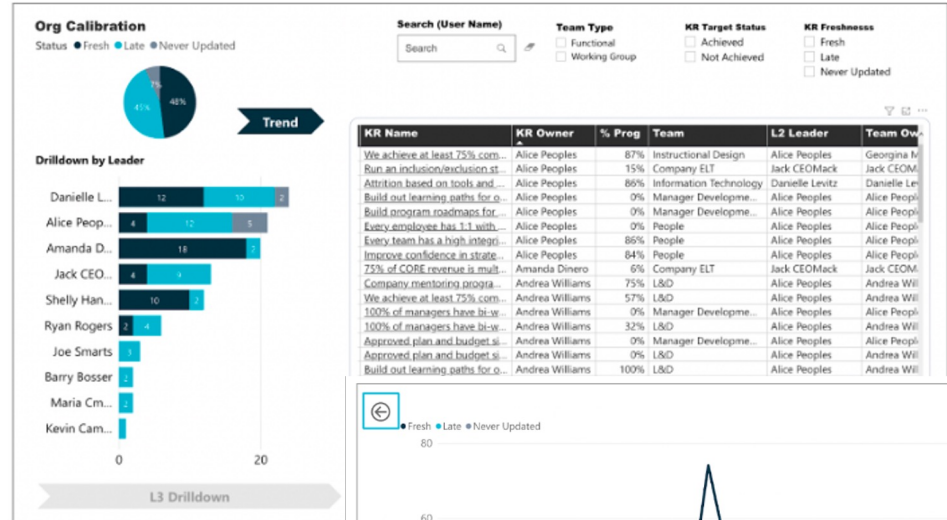
Quickly understand where calibration may be needed so everyone can make decisions based on the latest data.

- Identify key results with stale data or results that have never been updated
- See which leaders may require support driving focus in their respective parts of the business with a breakdown of key result freshness.



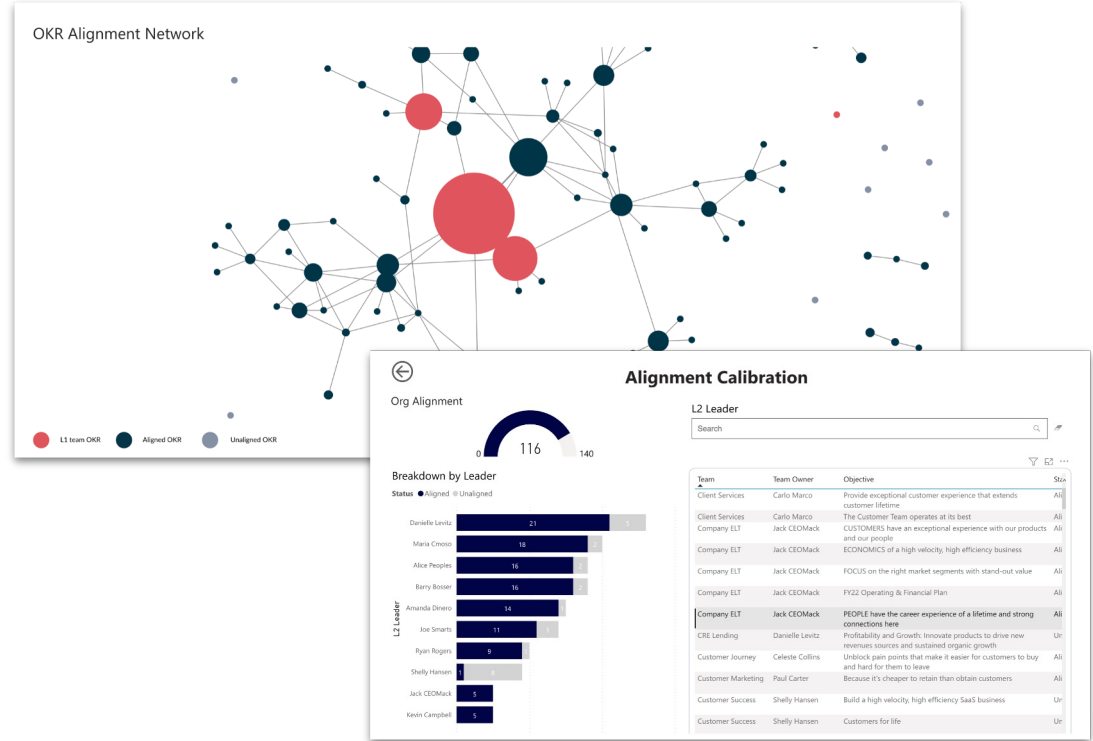
Improvements to Key Result Calibration Reports

- Summary stats showing distribution of fresh, late, or never updated results
- See the **trend over time** of fresh, late, or never updated results across teams
- Channel you focus on where to help with a breakdown view of result freshness for 3 layers of leaders with the new **L3 drill down** option.



Alignment Opportunity Report

- Quickly discover unaligned OKRs across the organization in a **single view**
- Have a **conversation and an explicit decision** on whether unaligned OKRs should be done at all
- Uncover leaders and teams with the **greatest opportunity to increase alignment**

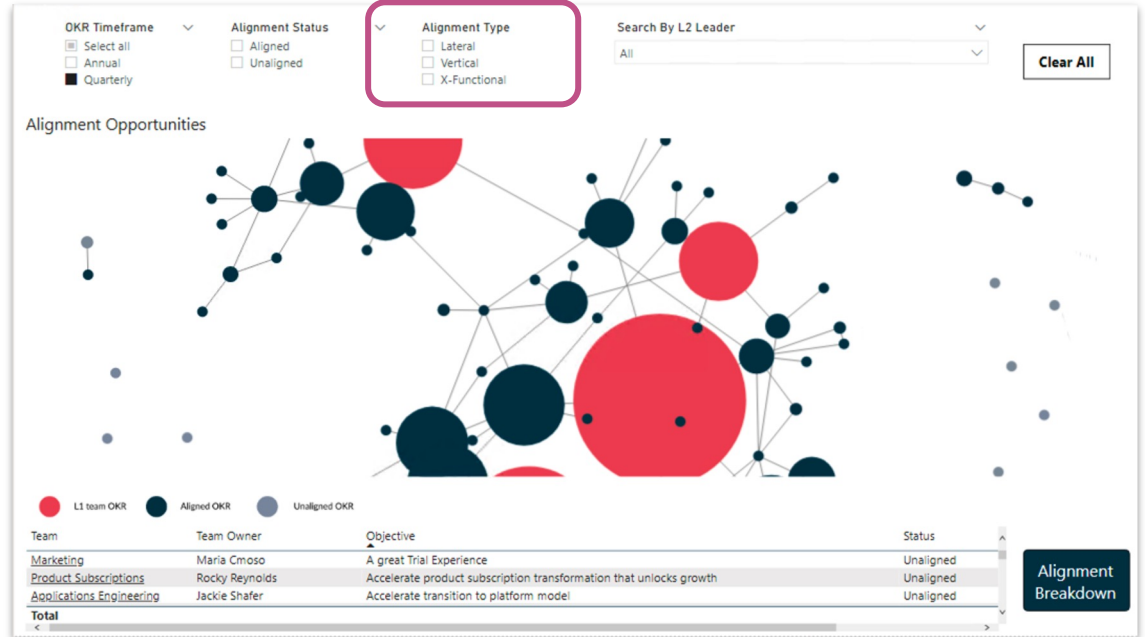


Enhancements to Alignment Opportunities

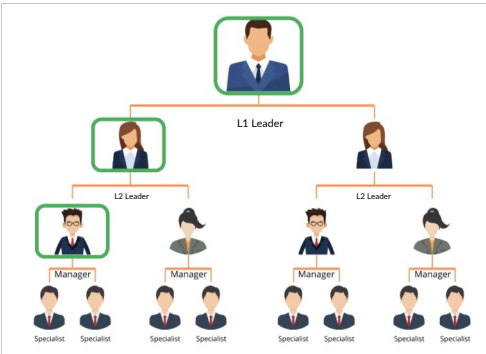
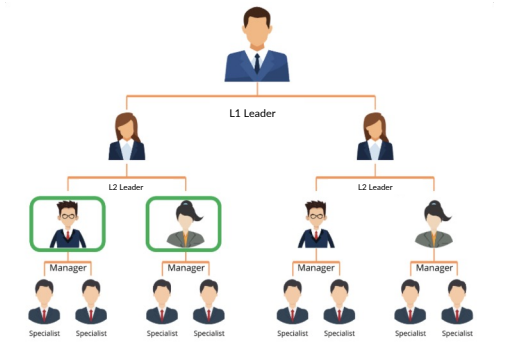
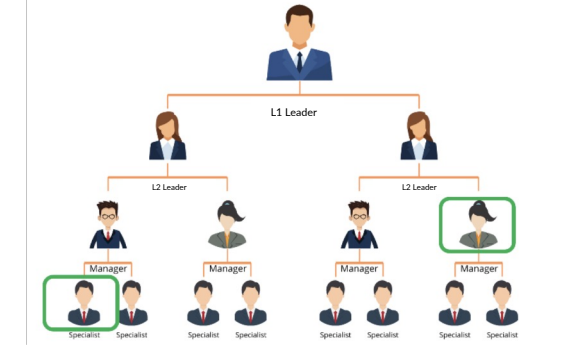
Alignment Opportunities now provides a breakdown of alignment by various **types of alignment types**:

- Lateral
- Vertical
- X-Functional

Note: Since an Objective can align to multiple Objectives, each of its alignment edges could be in any of the alignment types.



Overview of Alignment Types

Types of alignment	Vertical	Lateral	X-Functional
Definition	Alignment within a vertical reporting tree	Alignment that is within the same L2 leader* will be considered lateral alignment	Alignment between users that belong to different L2 leader level*
Example	 <p>The diagram shows a hierarchical structure. At the top is an L1 Leader (man). Below him are two L2 Leaders (women). The left L2 Leader has two Managers (men), and the right L2 Leader has two Managers (men). Each Manager has two Specialists (men). A green box highlights the top L1 Leader and the left L2 Leader, illustrating vertical alignment within the same reporting line.</p>	 <p>The diagram shows a hierarchical structure. At the top is an L1 Leader (man). Below him are two L2 Leaders (women). The left L2 Leader has two Managers (men), and the right L2 Leader has two Managers (men). Each Manager has two Specialists (men). A green box highlights two Managers under the same L2 Leader, illustrating lateral alignment within the same L2 leader's team.</p>	 <p>The diagram shows a hierarchical structure. At the top is an L1 Leader (man). Below him are two L2 Leaders (women). The left L2 Leader has two Managers (men), and the right L2 Leader has two Managers (men). Each Manager has two Specialists (men). A green box highlights a Specialist under the left L2 Leader and a Specialist under the right L2 Leader, illustrating alignment between different L2 leader levels.</p>

Overview of Results Management (RME) Analytics

Here's a quick overview of for our analytics use cases and [Help links!](#)

	Analytics Name	Use cases
1	Alignment Opportunities	How unaligned the objectives are in the organization and where are the opportunities
2	User Activation	How provisioning of users are distributed across the organization and does it matches the onboarding plan
3	Active User Trends	What is the current level of user engagement across your organization?
4	OKR Adoption Analytics	Where is team OKR adoption weakest in my organization?
5	KR Calibration	See which teams KRs have stale data?
6	KR Distribution	What is my organization's overall KR ownership distribution?
7	QoQ Alignment	Is alignment across the organization improving as we continue to increase our OKR adoption
8	QoQ KR Ownership Distribution	How well are KRs distributed across members of different teams in my organization?

Key Result Updates

New Measurement Option for Threshold Targets

Now you can set result directions to help you measure progress against results where you're looking to:

- **Not exceed** a specific target threshold (bug ceiling, budgets)
- **Not fall below** the target threshold (uptime, SLA)

How to leverage:

1. Create a key result
2. Select Advanced or More Options
3. Click on "Result Value" field
4. Select "Should not Exceed" or "Should not fall below"

Edit Key Result

Person responsible for business result
Pandiaraj Kaliappan

Add description (optional)

How will you measure your key result? *

Set a single key result target [Change measurement type](#)

Starting from * Result value ⓘ 0 ↑ Should increase to ▲ Target value * 12 Committed result ⓘ

Unit of measurement ⓘ ↓ Should decrease to Progress as ⓘ

Count as number ⓘ

Who will measure ⓘ → Should be equal to ↔ Should fall within range ⬆ Should not exceed ⬇ Should not fall below Bi-Weekly ⓘ On Friday ⓘ

Cancel Save

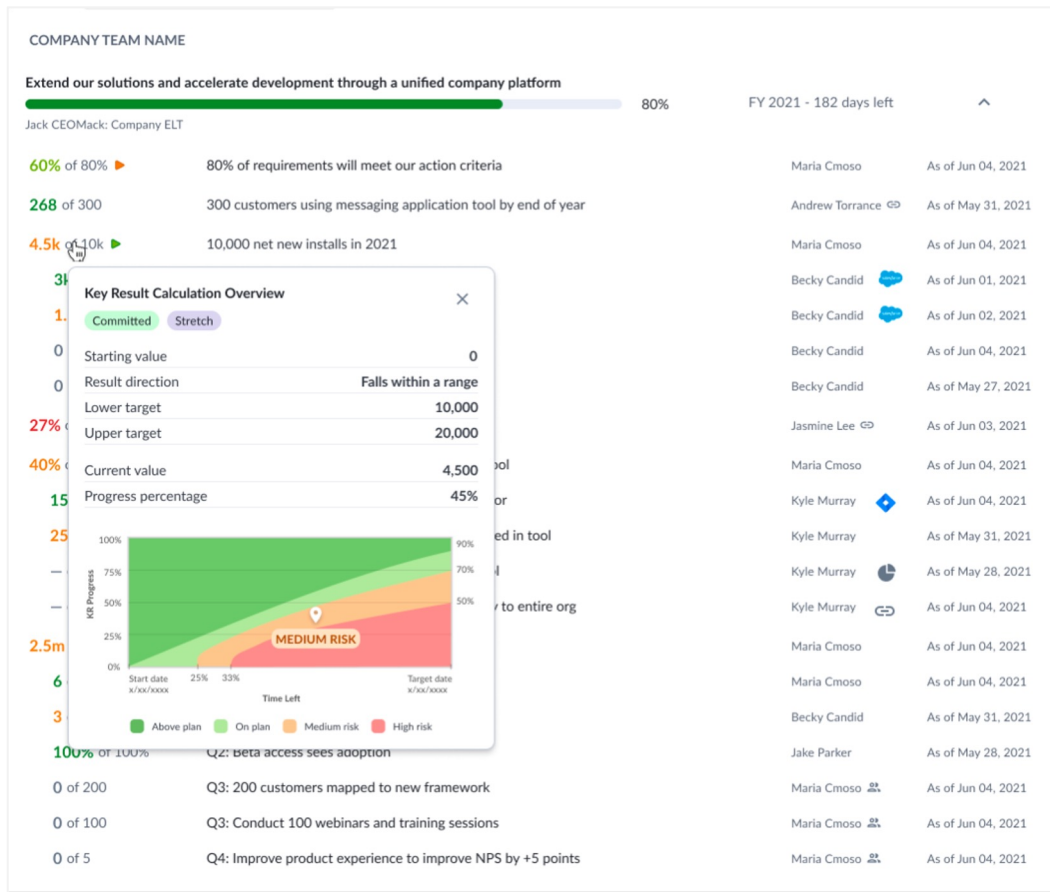
One-click Overview of Your Result Progress and Risk Indicators

Ever wondered what's driving the color predictions for **RAG colors** on your key results?

Now get a **summary overview** of key result progress and where you fall on trajectory to plan in one click!

How to leverage:

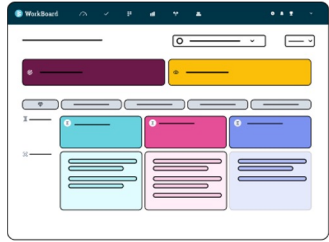
Click on the Key Result actual vs. target in any of the OKR pages, heatmap or key result details pages



Connecting OKRs to long range strategy

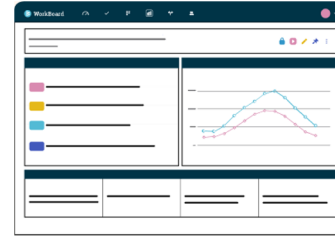
Digital Operating Rhythm to Drive Strategy Execution

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



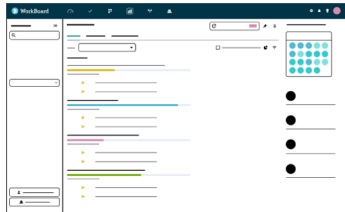
Long range strategy

Pillars, outcomes, narratives, assumptions and status of assumption, risks, investments, links to OKRs



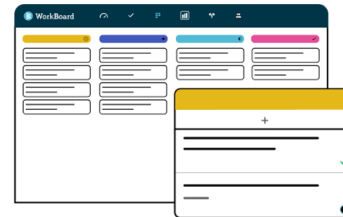
Biz Reviews & initiative reviews

X-F visibility on strategy execution; includes OKRs, KRAs, workstreams, and actions



Quarter Objectives & Key Results

What we are trying to achieve and the measures of success this quarter (headlights over taillights)



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.)

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

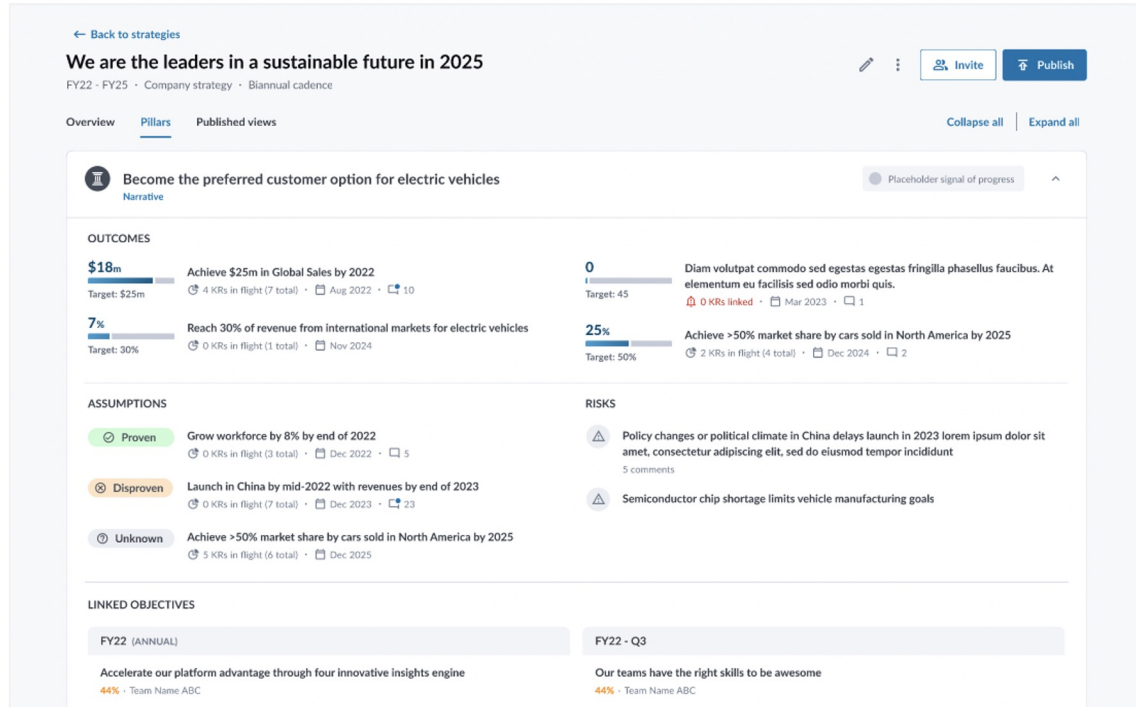
The screenshot displays the 'Digipay Product Strategy' interface. It features a 'Strategic pillars' section with the question 'What must the team excel in to achieve the strategic vision?'. A pillar is defined as 'Digipay is the new Acme currency', with a sub-point: 'Our innovation and teaming approach define the new Acme Way'. Below this is an 'Add new pillar' button. The 'OUTCOMES' section lists five business outcomes with progress bars and targets: 0% (Employees can give and receive NFTs), 12% (All employee and partner purchases), 2% (20% of digipay transactions), 0% (Volume is such that merchant and cc fees are -1%), and 85% (All back-end processes run in public cloud). The 'ASSUMPTIONS' section lists three items: 'Proven' (data capture), 'Unknown' (support need), and 'Unknown' (high attrition).

The screenshot shows a 'WorkBoard' strategy map. It features a central 'Strategic Pillars' node with three pillars: 'Become the preferred customer option for digital vehicles', 'Modernize our Business & Operating Model to Accelerate', and 'Be a great place to work'. The map is connected to various 'Strategic Outcomes' nodes, such as 'Increase the number of digital vehicles sold' and 'Reduce the number of digital vehicles sold'. The interface includes a 'WorkBoard' header, a 'Strategic Pillars' section, and an 'ATTACHMENTS' section with an 'Add attachment' button.

More Readable and Actionable View of Your Strategy

View your your **entire strategy in a single page**:

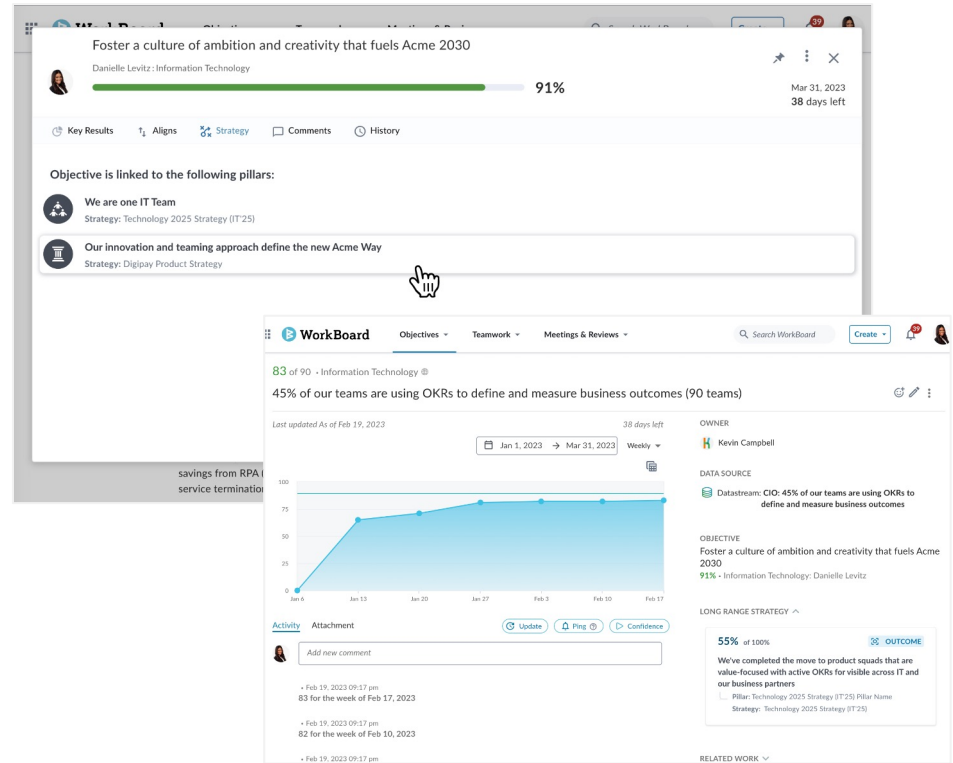
- **Surfaced insights** to help you determine which pillar(s) requires your attention
- Quick view of long range outcomes with **near-term execution KR in flight** - and ones without!
- **Drill into each pillar property** for a deep dive or to take action via comments, updates, or edits



Clear View into How OKRs Contribute to Long Range Strategy

Teams are better positioned to help drive daily and weekly strategic choices with long-range strategy top of mind:

- Quick view into how Objectives are aligning up to pillars from the long range strategy.
- Easy to follow thread on how key result execution contributes to long-range outcomes, assumptions or investment plans.



OKR Progress Flow and Threads Through to Long-Range Strategy

Progress from Key Results can automatically flow into long-range outcomes:

- Drive an **up-to-date view of progress** against long-range strategy outcomes
- Choose how the measurements should flow through (add up, or average or simply connect) to drive a **seamless connection** between long-range strategy and OKRs.

The screenshot displays a strategic planning tool interface. At the top, a strategy statement reads "We are the leaders in a sustainable future in 2025" for FY22 - FY25, Company strategy, Biannual cadence. A modal window is open, showing an outcome: "\$200M in ARR end of 2024" with a target of \$200m and actual progress of \$100m. Below the outcome, key results are listed, including "North America sales of \$100M ARR" and "EMEA sales of \$100M ARR". A table of linked key results is shown, with columns for "Outcome", "Target completion", "Target value", "Unit of measurement", and "Who will measure progress?". The table lists two linked key results: "Achieve \$20M in net new revenue from EU" and "\$2.3M in Tier 1 and Tier 2 customer upsell sales". A pink arrow points to the "Automate outcome progress via linked key results" checkbox, which is checked.

← Back to strategies

We are the leaders in a sustainable future in 2025
FY22 - FY25 · Company strategy · Biannual cadence

Overview Pillars Published views

Invite Publish

Collapse all Expand all

Placeholder signal of progress

OUTCOME

\$200M in ARR end of 2024
Jan 31, 2026 · Jack Nolan is measuring progress

PROGRESS

ACTUAL: \$100m

LAST updated Jan 2, 2022

TARGET: \$200m

KRs AUTOMATING PROGRESS (2)

65m of 100m ▲ North America sales of \$100M ARR
John Smith · Q4 FY21 · As of Oct 29

35m of 100m EMEA sales of \$100M ARR
John Smith · Q4 FY21 · As of Oct 22 · Overdue

LINKED KR (1)

45k of 50k ▲ Lorem ipsum dolor sit amet, consectetur adipiscing elit. A erat ha
John Smith · Q4 FY21 · As of Oct 29

ACTIVITY (3)

Add a comment...

Automated update · Apr 30, 2021, 9:09 pm
Updated progress to \$100M

Jasmine Lee · Mar 16, 2021, 9:09 pm
Lorem ipsum dolor sit amet, consectetur adipiscing elit. A erat ha

Joe Smarts · Mar 15, 2021, 9:09 pm

Outcome *

\$200M in ARR

Target completion Target value Unit of measurement

Dec 05, 2025 \$ 100 Count as currency

Who will measure progress?

Lily Allipoor

Linked key results:

Achieve \$20M in net new revenue from EU Team: Desiree Malone · 5m vs 20m value

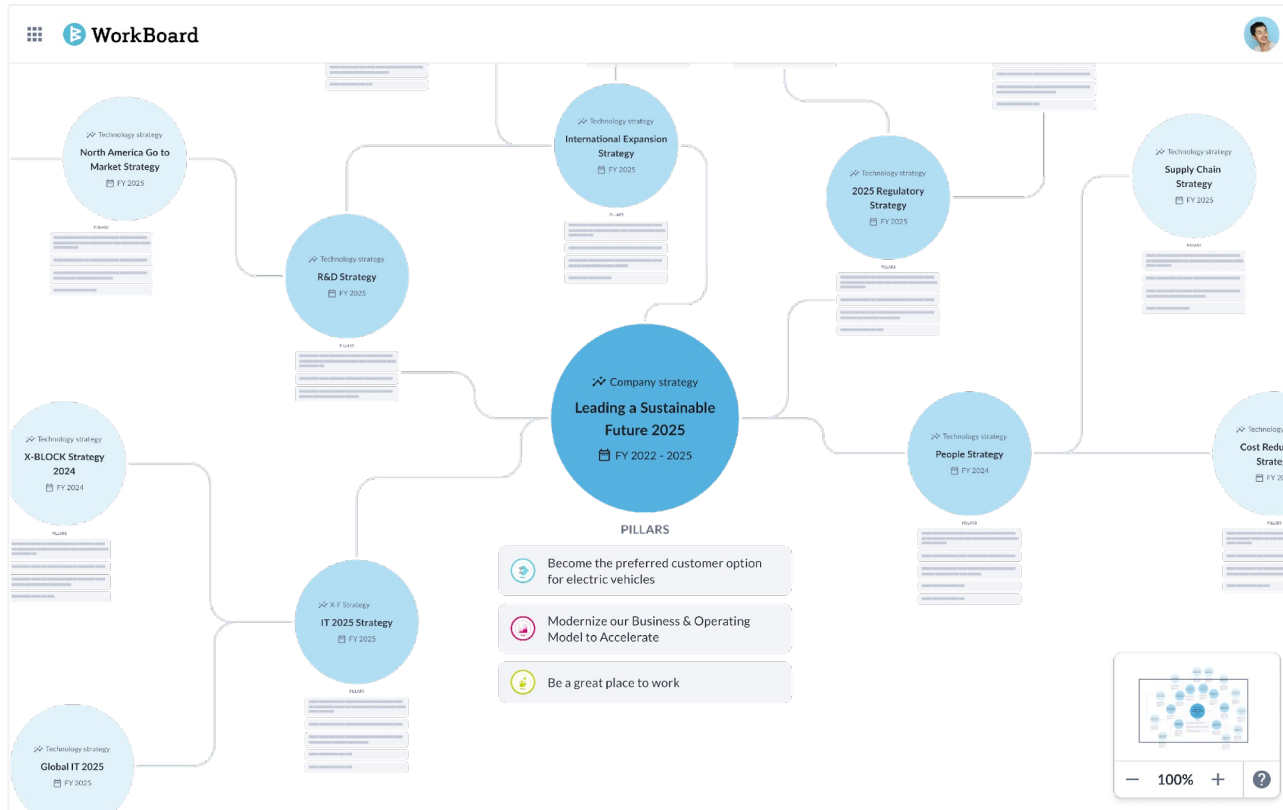
\$2.3M in Tier 1 and Tier 2 customer upsell sales Team: Desiree Malone · 1.78m vs 2.3m value

Automate outcome progress via linked key results:

Calculate outcome progress as:

Total of key results

Coming Soon: View into the relationships between strategies



On the Horizon

Coming 1H 2023

Beta starting in mid March

The new My Objectives page is designed to help you:

- **Take immediate action** on your results that require focus, attention or celebration via Action Cards.
- **Keep your results top of mind** with Key Results I Own and Objectives I Own/Contribute To sections
- **Stay in the loop and contribute to the conversation** taking place with Results Feed
- **Lend a hand or celebrate great progress** with your Direct Reports or Teams
- **Stay aligned with Leadership priorities** and understand how your work matters
- And so much more!

Let us know if you're interested in participating in a beta!

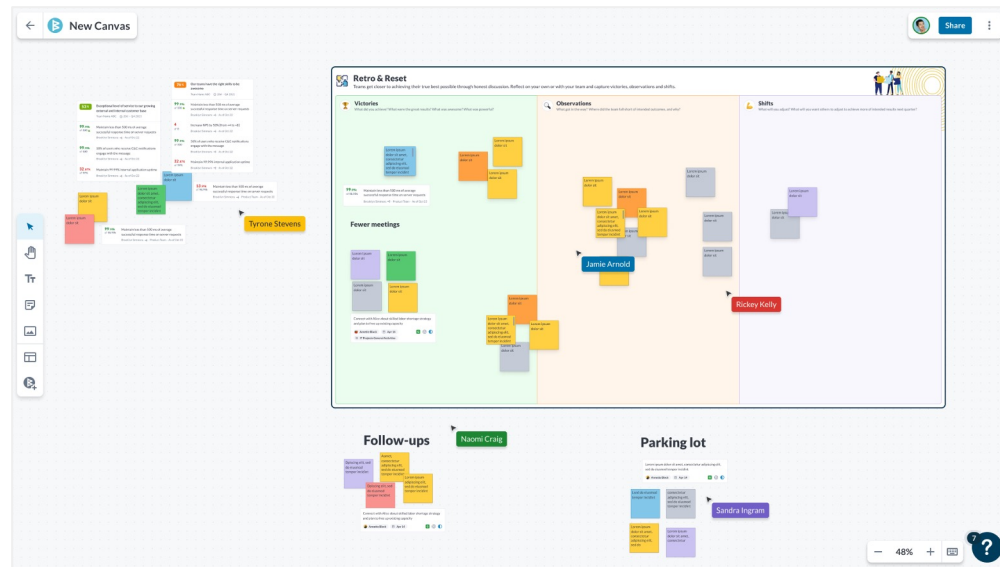
The screenshot displays the 'My Objectives' dashboard. At the top, there are summary cards for 'Updates needed' (1), 'Results worth celebrating' (4), 'Results at risk' (4), 'Unaligned Objectives' (1), and 'Unawarded pins' (1). Below this, the 'Key Results I Own' section shows two progress bars for 'PRODUCT & ENGINEERING' and 'PRODUCT DESIGN', both at 45% completion. The 'Objectives I Own' section shows two progress bars for 'Accelerate our platform advantage through four innovative insights engine', one at 100% and another at 48%. The 'Results Feed' section contains several activity items with user avatars, comments, and progress indicators. The 'Favorites' section at the bottom shows a grid of objective cards for various users and categories. On the right side, there are panels for 'Teams', 'Functional Teams', 'Dynamic Teams', and 'Leadership', each displaying team names and overall progress bars. A search bar and a 'New OKR' button are visible at the top right.

Brainstorm and Retros

Beta starting in early March

Explore, discuss and ideate on how to best move the needle on objectives, results and actions with a seamless flow from data to decision, and back to actionable data.

- Create and invite people to collaborate on a canvas
- Use structured retro templates to run team retrospectives
- Bring their objectives, planned and actual results, and actions onto a Canvas and in the flow of team discussions
- Turn ideas generated during brainstorming into action items that are transparent and trackable



Let us know if you would be interested in participating in the **beta of the new experience**.

Opportunities to deepen your own expertise

Opportunities to deepen your own expertise



Class	Description	Dates	How to Sign Up
Outcome Method Mindset	Learn about OKRs and the Outcome Mindset in 1 hour	<ul style="list-style-type: none">• March 1st at 1:00pm PT• March 8th at 6:00am PT• April 5th at 1:00pm PT	learn.workboard.com
OKR Fast Pass Course	Build your OKR expertise in 3 hours	<ul style="list-style-type: none">• March 1st at 8:00am PT• April 5th at 8:00am PT	learn.workboard.com
OKR Coach Certification	Become a certified OKR coach	<ul style="list-style-type: none">• February 28th & March 2nd at 8:00am PT• March 21st and 23rd at 1:00pm PT• March 28th and 30th at 8:00am PT• April 4th and 6th at 1:00pm PT	learn.workboard.com
Results Management Leader Certification	Learn how to lead your organizations alignment, accountability, and OKR operating cycle to ensure you achieve strategy faster	<ul style="list-style-type: none">• Spring Cohort launches April 18th	workboard.com/rme-certification

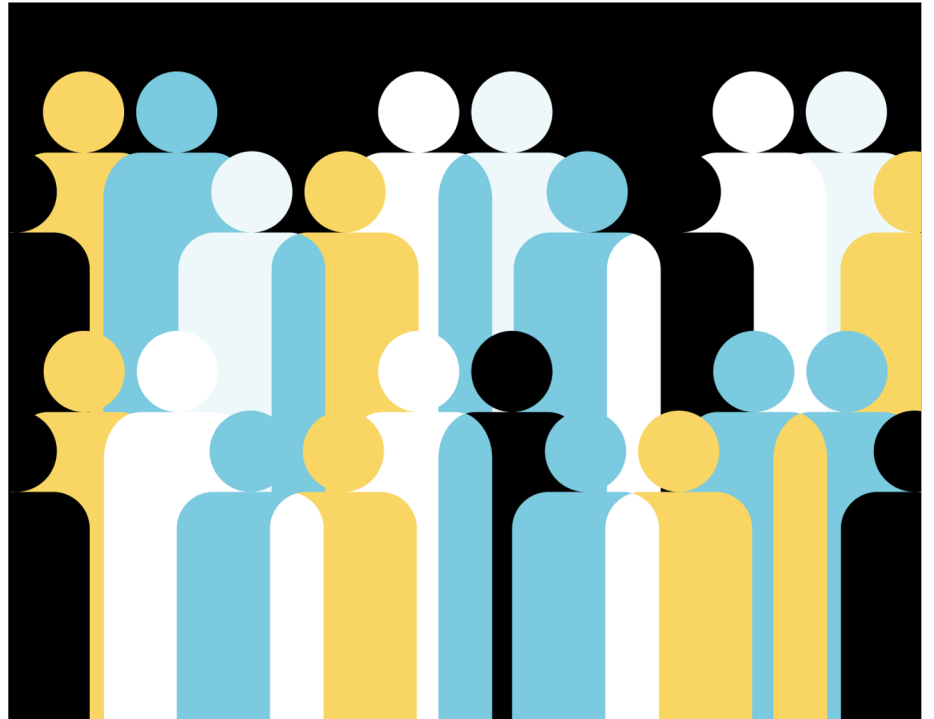
Community Events

Community Calls: Save the Date(s)!

Our next Community Call is March 29.

Make sure to [Sign up](#) for all our monthly calls so you don't miss a single one!

- Mar. 29
- Apr. 26
- May 31
- Jun. 28
- Jul. 26
- Aug. 30
- Sep. 27
- Oct. 25
- Nov. 29
- Dec. 20



Our 2023 Live 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:	
March 2	Strategy Execution Leader Meeting - Chicago
March 23	Strategy Execution Leader Meeting - London
April	Strategy Execution Leader Meeting - Denver
May	Strategy Execution Leader Meeting - Atlanta
Fall 2023	Accelerate
Fall 2023	Accelerate Europe - London

Register now for the
March 2nd event in Chicago



“This is the most helpful discussion I've been a part of this year.”

— Chief of Staff, Nike

What are you curious about?

Thank you

