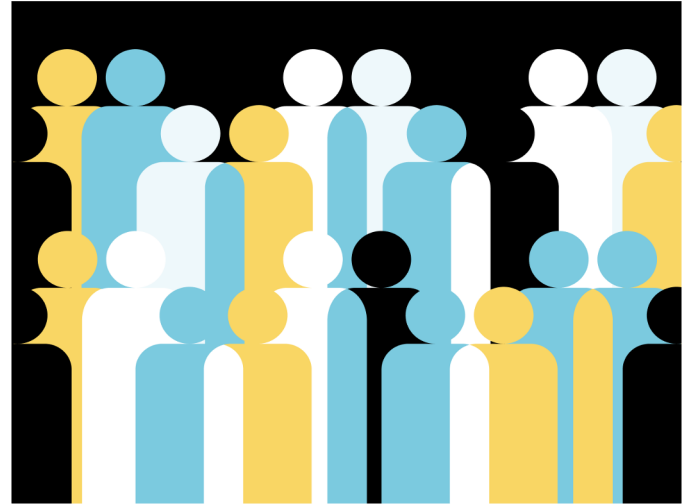


Community Call

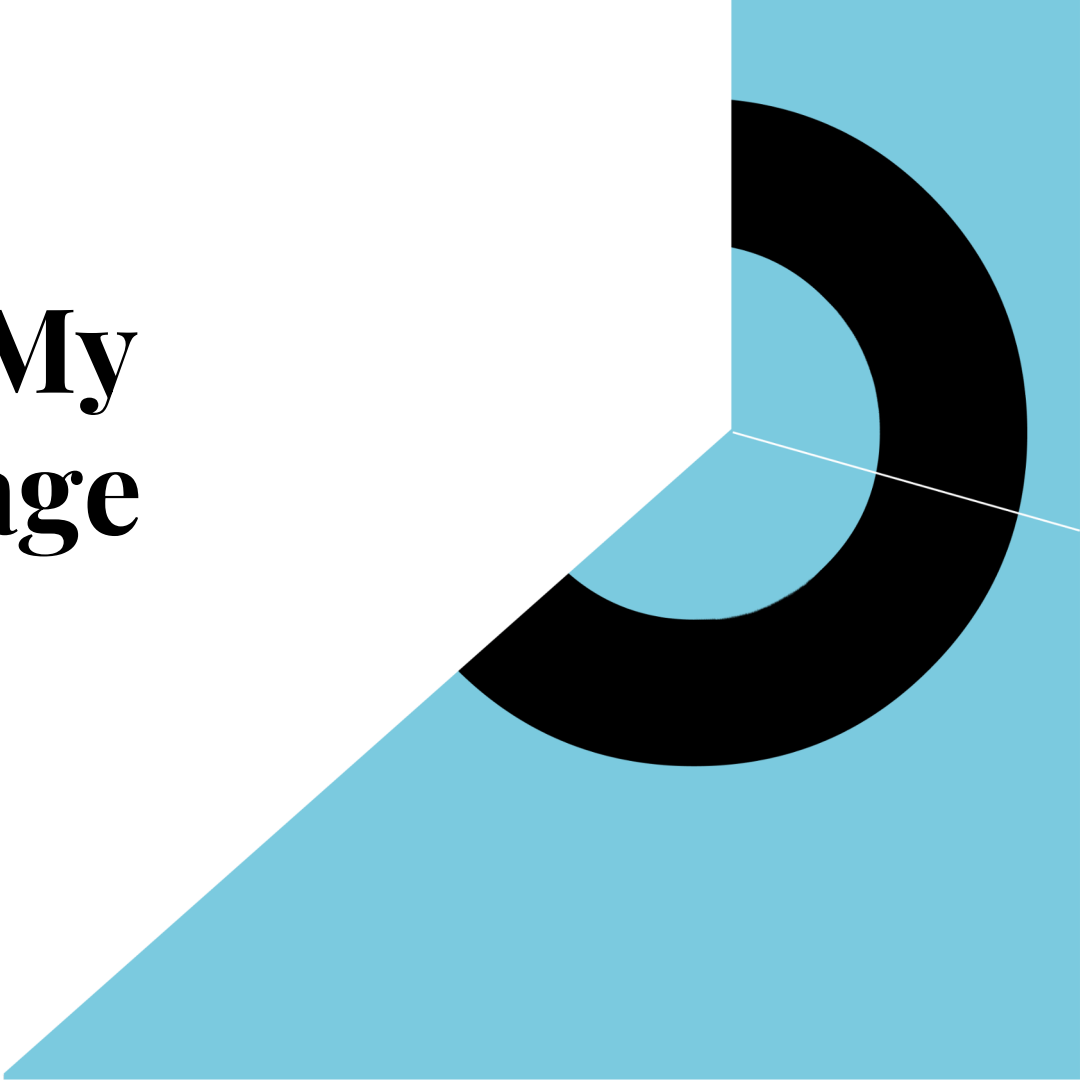
May 2023



Agenda

- Introducing new My Objectives page
- More Scorecard delights!
- Brainstorming & team retros with canvases
- WorkBoard Co-Author sneak peek

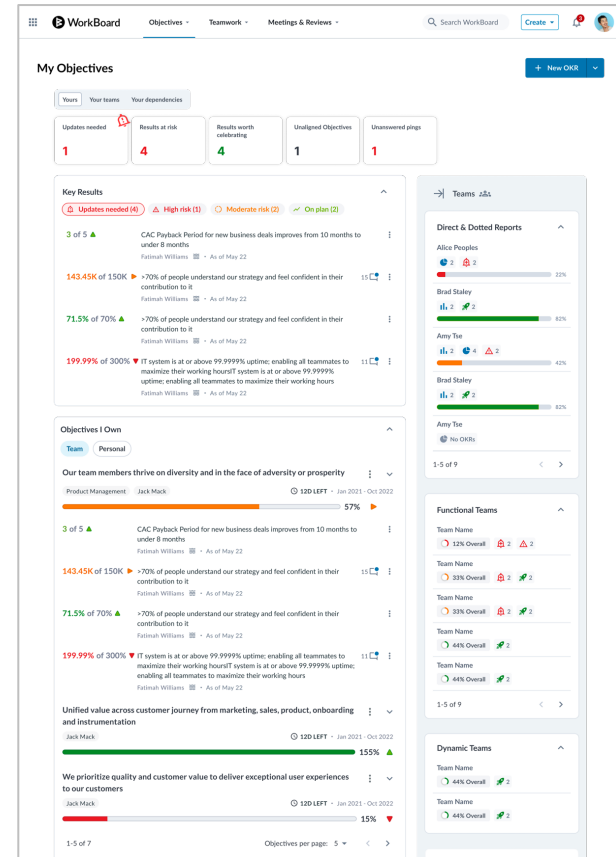
Introducing My Objectives Page



New 'My Objectives' Page

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 the results you own or contribute to top of mind** with Key Results I Own and Objectives I Own/Contribute To sections
- **Follow the momentum and add to the conversations** with new Results Feed
- **Lend a hand or celebrate progress** with a quick view of how your direct reports are doing!
- **Stay aligned with Leadership priorities** and understand how your work matters
- And so much more!



'My Objectives' Page Timeline

March

- Complete development of MVP
- Alpha testing of MVP

June

- ~ **Late June**: My Objectives 2.0 will become available for **all Customers in beta** (as separate page from the top navigation)

April - May

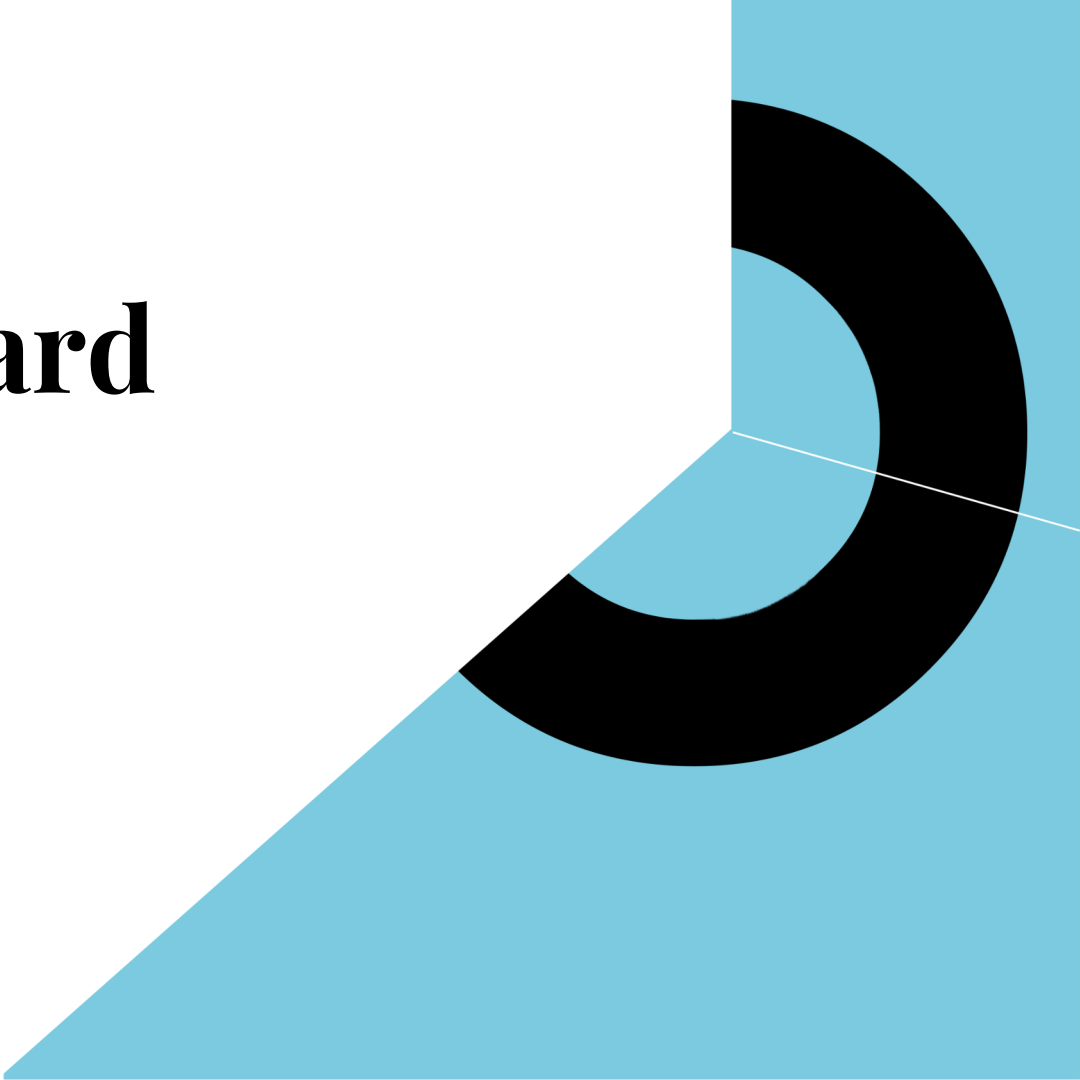
- Customer Beta – *In Progress*
- Development of post MVP features – *In Progress*

July

- ~ **Late July**, cutover customers to begins for legacy My Objectives in batches

Let's take a look...


More Scorecard Delights!

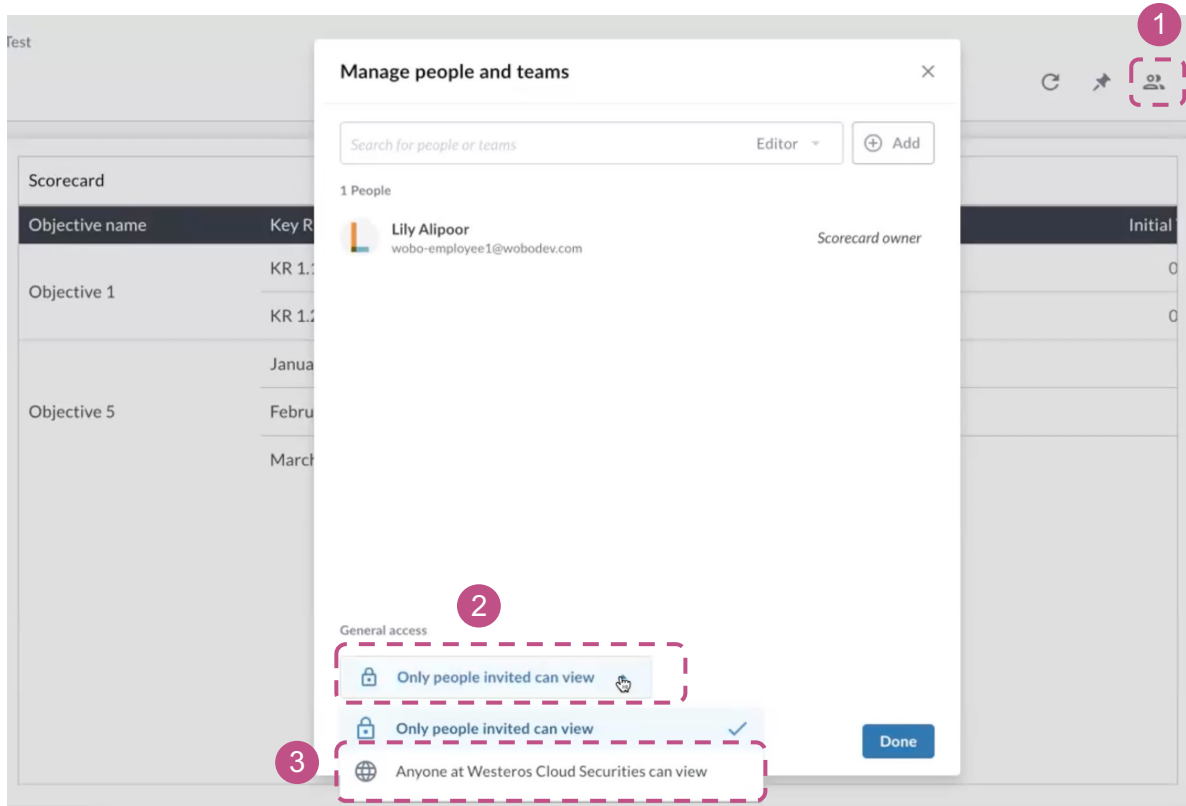


Share a Scorecard with your Entire Organization

Keep everyone in the loop by sharing a scorecard with your entire organization in just a few clicks.

How to use:

- 1 Click  Share
- 2 Click **General Access** dropdown
- 3 Select **Anyone at ... can view**



Test

Scorecard

Objective name	Key R	Initial
Objective 1	KR 1.1	0
	KR 1.2	0
	Janua	
Objective 5	Febru	
	March	

Manage people and teams

Search for people or teams

Editor

+ Add

1 People

Lily Alipoor
wobo-employee1@wobodev.com

Scorecard owner

General access

Only people invited can view

Only people invited can view

Anyone at Westeros Cloud Securities can view

Done

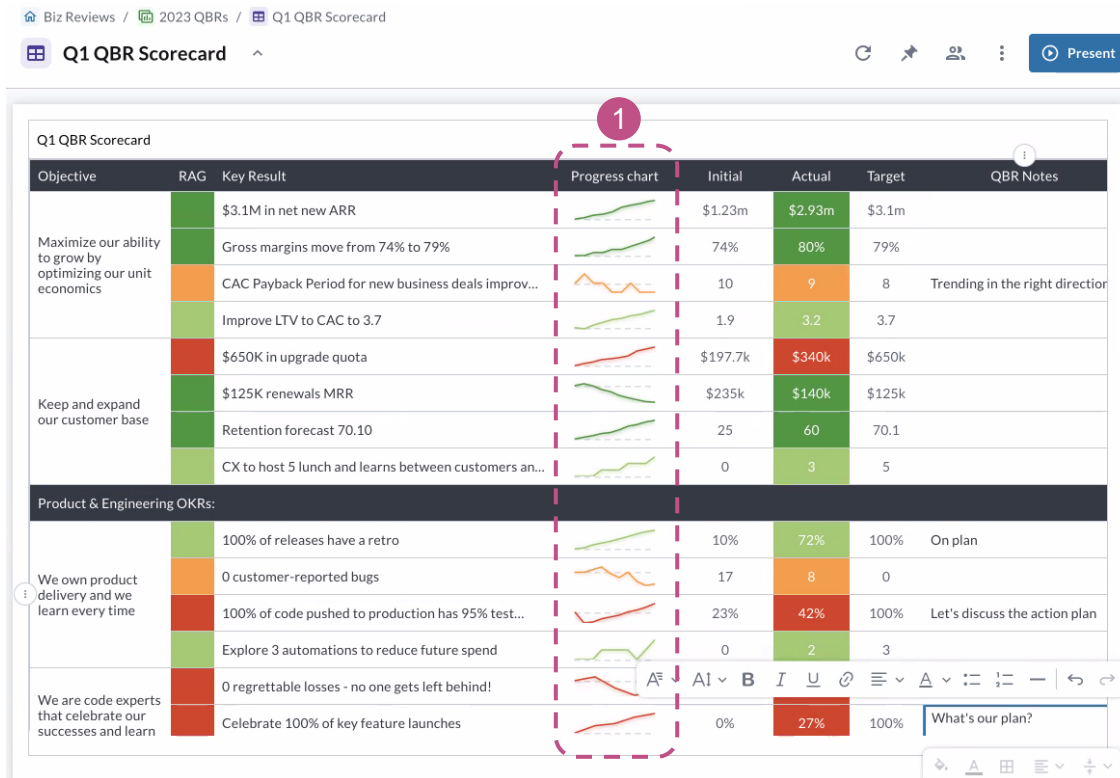
Monitor Momentum & Progress with the Scorecard Sparkline Field

See momentum and progress with one simple sparkline visual in your scorecards.

How to use:

- 1 Add Sparkline field as Scorecard Columns

Note:
Sparkline field added to default field list for New Scorecard!




Push Scorecard Free Text Field Entries as Key Result Comments


Make comments in two places – Now you can choose to push free text comments in scorecards as key result comments and memorialize notes or discussions.

How to use:

Single Cell


- 1 Select any Free Text Field Cell
- 2 Click  Submit as Key Result comment
- 3 Click Confirmation Message to Verify in KR

Entire Column in one action

- 1 Select Column
- 2 Click  Submit text as Key Result comments

Scorecard

Objective name	Key Result name	Actual	Target	Text field
Testing workstream	This is me testing workstream KRs	25%	4%	comment 1
range okr	survey kr for range	51	87.34	111
SRS Percent Stuff	SRS Kr 1 w/ Per	65%	105%	
SRS Testing Charts v02.13.23	Kr 4 chart testing	33	104	text 2
	Kr 3 chart testing	22	103	
free text row				text cell
Technology leads the way to a digital business	Digital workplace uptake drives >30,000 engagement points monthly	16k	30k	1
Personal Post Prod	KR1 personal post prod	100	100	personal

Confirmation Message:  Comment added to the Key Result KR1 personal post prod.

Submit as Key Result comment

Submit text as Key Result comments

Text field
comment 1
111

100 of 100 - & explor

KR1 personal post prod

Last updated As of Jun 03, 2021

Apr 1, 2021 → Jun 30, 2021

Activity Attachment

Add new comment



AishaProdient Prodient • Apr 27, 2023 11:13 pm

personal

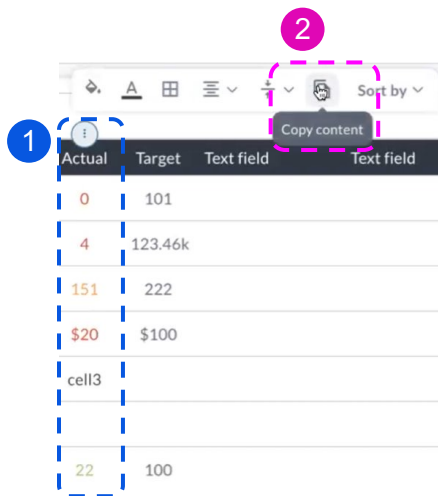
Copy any Scorecard Column to Paste Values in Free Text Field

Editing and managing content in scorecards just got a lot easier with the option to copy any scorecard column and paste those values into another free text field.

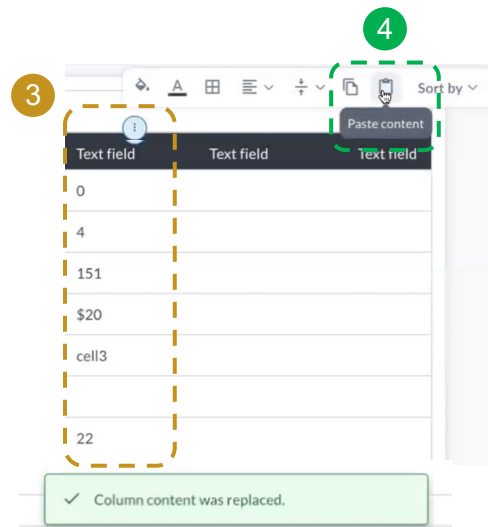
How to use:

- 1 Select any Column with text data
- 2 Click  Copy content icon
- 3 Select a Free Text Field
- 4 Click  Paste content

Copy Column



Paste Column



Note: copy/paste works between Scorecards!

Use Case: Copy column on Scorecard A > paste on Scorecard B!

Let's take a look...

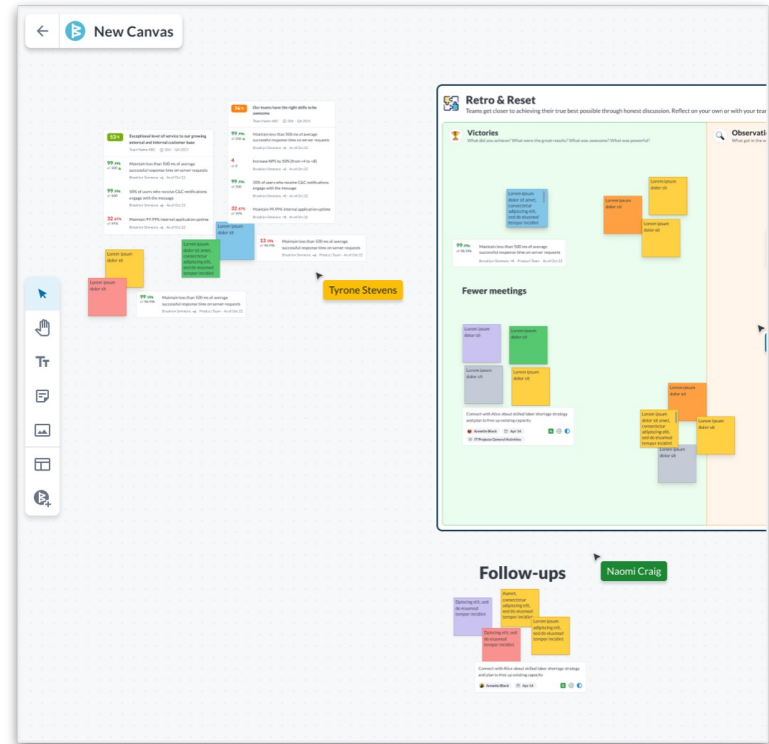
Brainstorming & Team Retros with Canvases

Full-Capability Brainstorming Whiteboard for Teams

On **May 26th**, WorkBoard rolled out **Canvas 2.0**, an upgraded version of WorkBoard's built-in whiteboard that lets teams ideate and collaborate on OKRs and now more!

Now you can:

- **Ideate any time on any topic.** Start a canvas for any reason ... or no reason! Conduct structured Retro conversations or freeform brainstorms.
- **Bring Action Items onto the canvas** as well as Objectives and Key Results. See where progress is being made, and where there are blockers.
- **Create Action Items** from sticky notes. Capture dependencies that need attention or steps the team needs to take.
- **Include images on the canvas.** Add key context or personalization to your brainstorms.
- **More easily access Canvas.** Access Canvas directly from the global "Create" menu, as well as from the 9-dot menu.

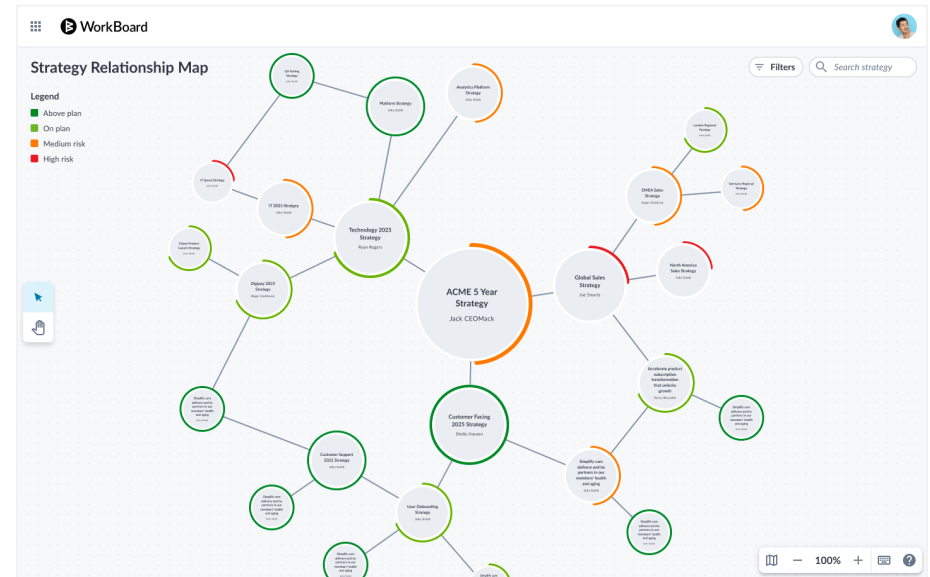


Let's take a look...

Long Range Strategy Relationship Map

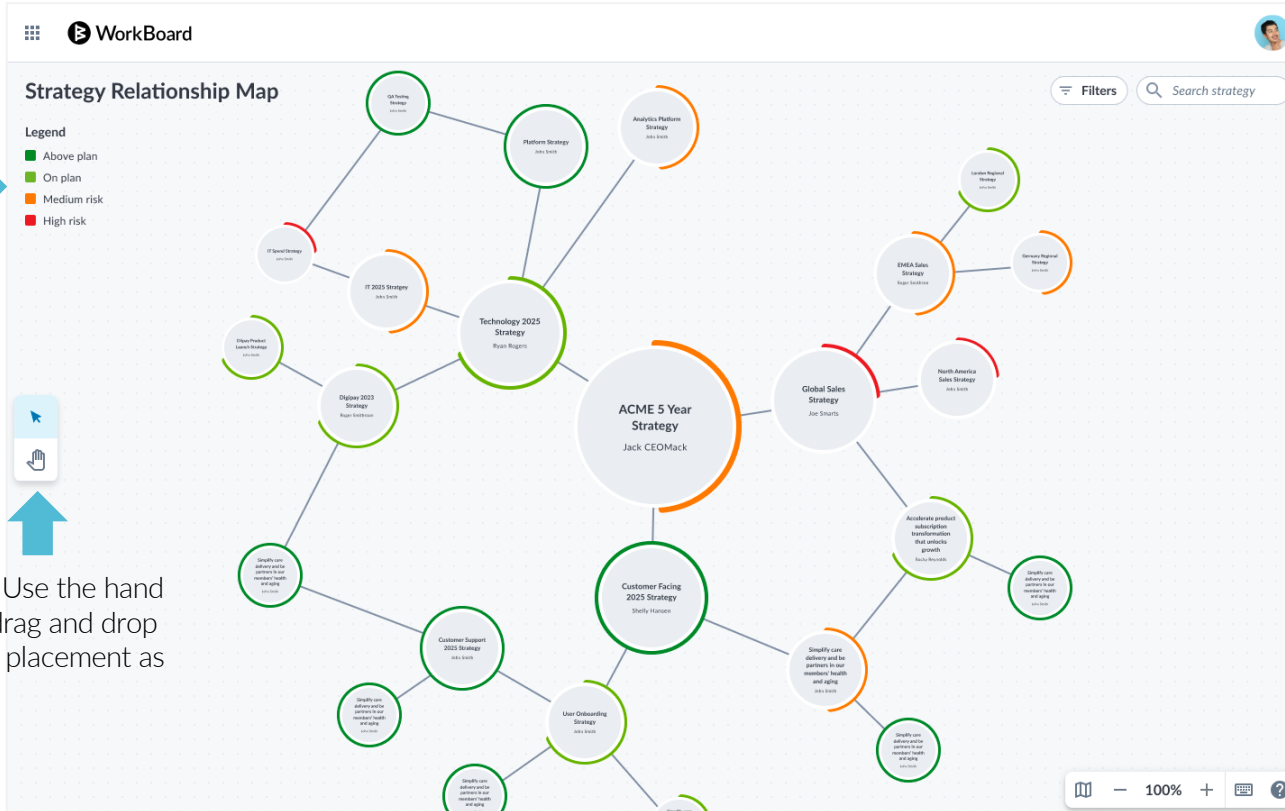
Strategies Across the Enterprise, Connected.

- **View all the strategies** in the enterprise with transparency like never before
- **Make strategic decisions** based on the relationships between strategies
- **Understand the impact** and performance of individual and connected strategies
- **View and review misalignment** instantly
- **Take action** by drilling into the details
- **And much more!**

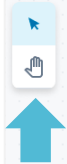


See the Relationships Between Every strategy in the Company

Strategy RAG colors to represent risk to strategy achievement and progress made to date



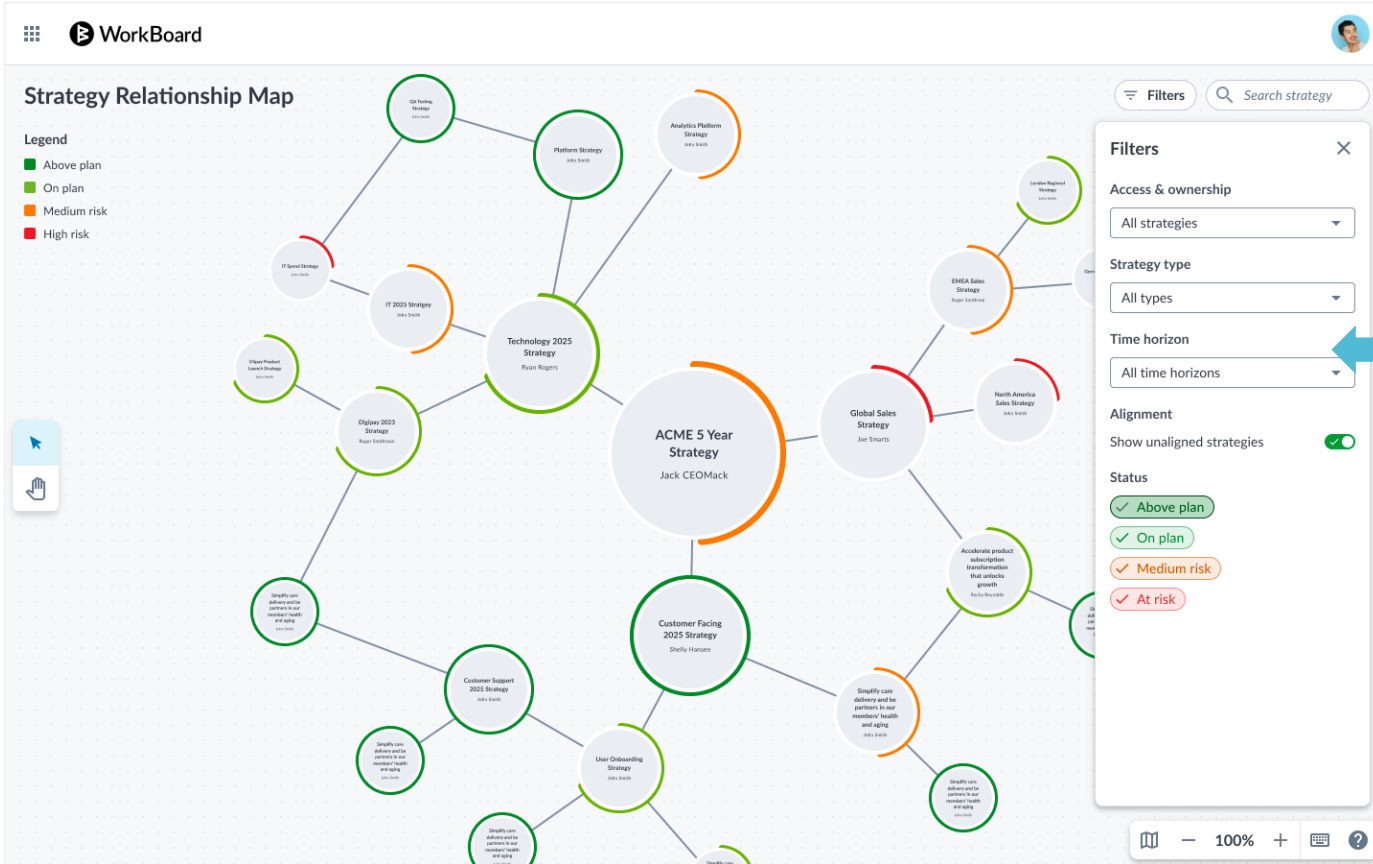
Pro Tip: Use the hand tool to drag and drop strategy placement as needed.



Use zoom, keyboard navigation, scroll bars and center tool to navigate around

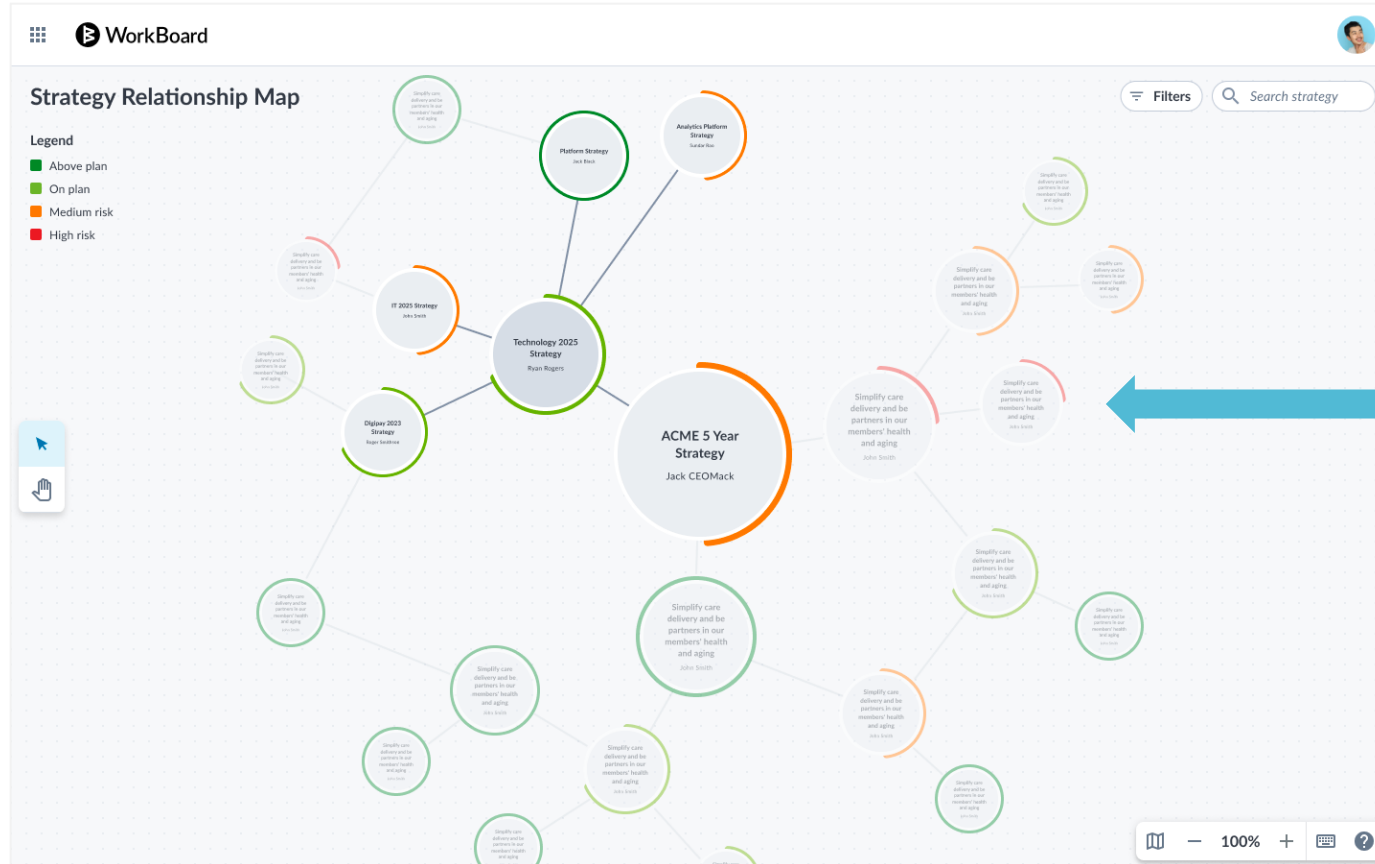


Filter to the Strategies That Matter Most in the Moment



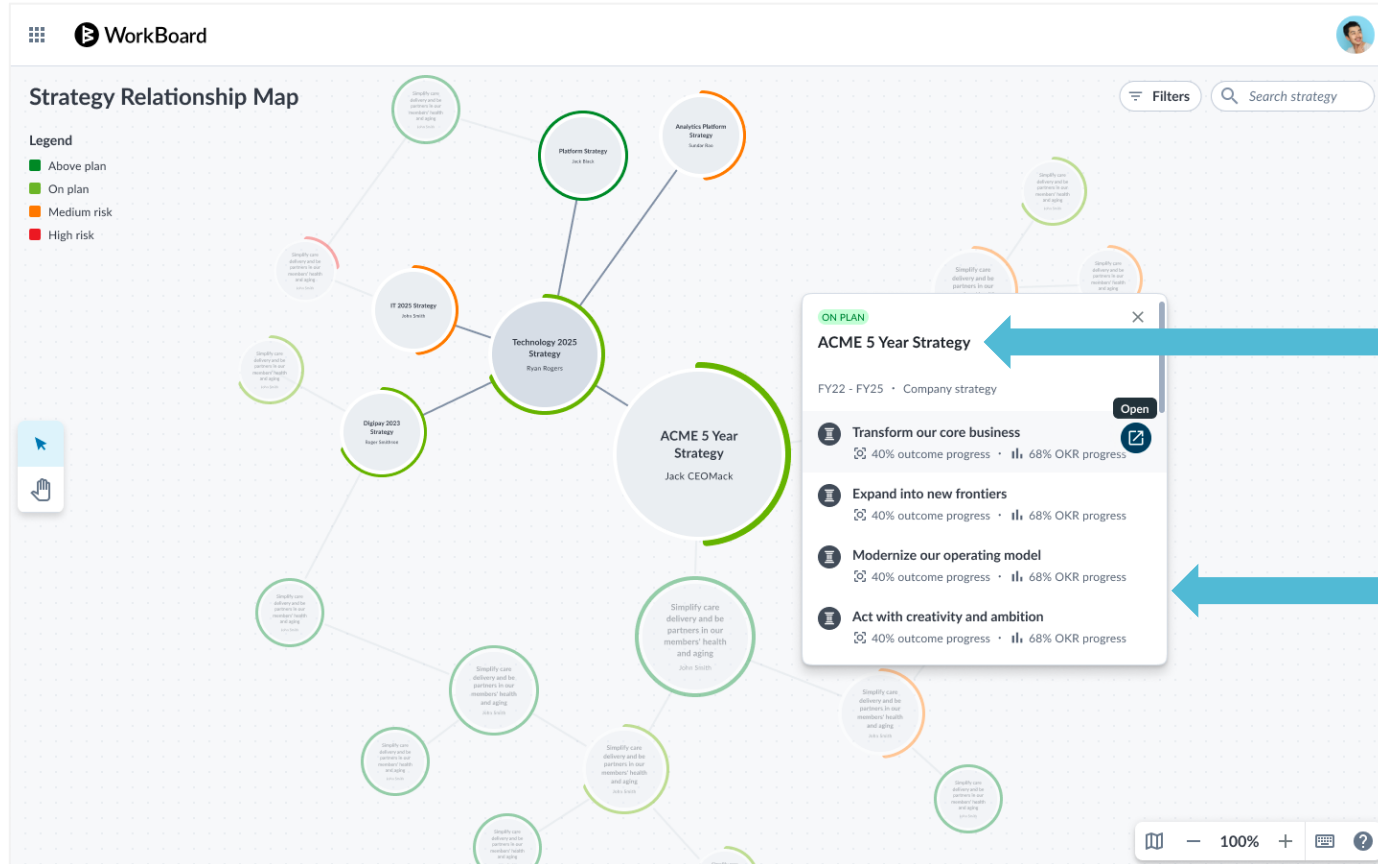
Filtering will highlight the strategies that match your filter criteria

Easily Highlight Strategic Dependencies



Hover on a relevant strategy and the first level of aligned strategies will be highlighted.

Drill into the Details of Each Strategy in One-click



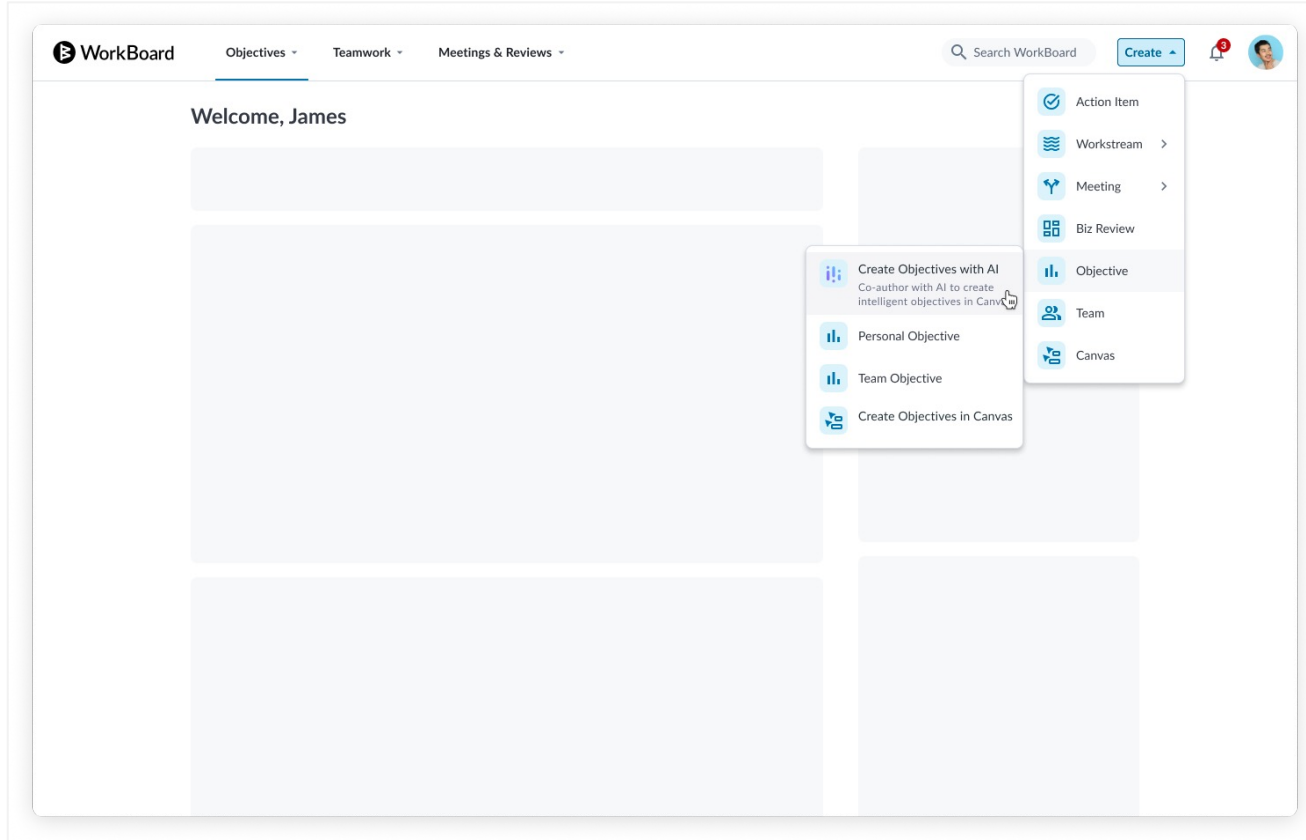
Click on the strategy name itself to open the strategy details

Click on a strategy to open an overview of pillar and OKR progress

WorkBoard Co-Author Sneak Peek



Access Co-Author from your Existing Creation Flow



Co-author Multiple draft OKRs Aligned to Your Upline

The screenshot displays the WorkBoard OKR management interface. On the left, the 'Upline OKRs' section for 'Executive Team OKRs Q4 2021' shows three OKR cards. Each card has a score (94%, 89%, and 58% respectively) and a list of four key results with their current progress (e.g., 99.99%, 4 of 8, 99.99%, and 32.87%).

On the right, the 'Draft OKRs' section for 'Product Management Q3 FY24 OKRs' shows three draft OKR cards. Each card has an objective and a key result field. A 'Co-author' tooltip is visible over the 'Draft multiple OKRs' button, indicating the ability to co-author multiple draft OKRs.

At the bottom of the Draft OKRs section, there is a '+ Add OKR' button.

Input your Teams Top Priorities to Improve Drafts

Upline OKRs

Executive Team OKRs Q4 2021

34% Our teams have the right skills to be awesome
Team Name ABC | Q4 2021 - Q4 2021

- 99.9%** Maintain less than 500 ms of average successful response time on server requests of 500
Brooklyn Simmons -4 - As of Oct 22
- 4** of 8 Increase NPS by 50% (from +4 to +8)
Brooklyn Simmons -4 - As of Oct 22
- 99.9%** 50% of users who receive C&C notifications engage with the message
Brooklyn Simmons -4 - As of Oct 22
- 32.87%** Maintain 99.99% internal application uptime of 99%
Brooklyn Simmons -4 - As of Oct 22

89% Our teams have the right skills to be awesome
Team Name ABC | Q4 2021 - Q4 2021

- 99.9%** Maintain less than 500 ms of average successful response time on server requests of 500
Brooklyn Simmons -4 - As of Oct 22
- 4** of 8 Increase NPS by 50% (from +4 to +8)
Brooklyn Simmons -4 - As of Oct 22
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Brooklyn Simmons -4 - As of Oct 22
- 32.87%** Maintain 99.99% internal application uptime of 99%
Brooklyn Simmons -4 - As of Oct 22

58% Our teams have the right skills to be awesome
Team Name ABC | Q4 2021 - Q4 2021

- 99.9%** Maintain less than 500 ms of average successful response time on server requests of 500
Brooklyn Simmons -4 - As of Oct 22
- 4** of 8 Increase NPS by 50% (from +4 to +8)
Brooklyn Simmons -4 - As of Oct 22
- 99.9%** 50% of users who receive C&C notifications engage with the message
Brooklyn Simmons -4 - As of Oct 22
- 32.87%** Maintain 99.99% internal application uptime of 99%
Brooklyn Simmons -4 - As of Oct 22

Draft OKRs

Product Management Q3 FY24 OKRs

Objective
Digipay is delightfully fast

Key Result

Click to get started or get help from co-author

+ Add Key Result

Objective
Objective title

Key Result

Click to get started or get help from co-author

+ Add Key Result

Objective
Objective title

Key Result

Click to get started or get help from co-author

+ Add Key Result

+ Add OKR

Co-author

Draft multiple OKRs

Great! Let's do it. Can you tell me your teams top priorities?

Considering including:

- What do you need to do to achieve your strategy?
- What do you want to do more or less of?
- What major initiatives are you trying to drive?

We want to make Digipay super fast for our users and enhance our onboarding to be better than any other consumer applications.

Add or Edit your Aligned, Personalized Draft OKRs

The screenshot displays the WorkBoard OKR management interface. On the left, under 'Upline OKRs', there are three OKR cards for 'Executive Team OKRs Q4 2021'. Each card shows a progress percentage (34%, 89%, and 58%), an objective, and three key results with their respective completion percentages. On the right, under 'Draft OKRs', there are three draft OKR cards for 'Product Management Q3 FY24'. The top draft card is expanded, showing a 'Co-author' dialog box. This dialog box contains two objectives and their associated key results. The first objective is 'Digipay is delightfully fast' with four key results: reducing user steps, cutting transaction time, launching voice assistant integrations, and increasing MAU. The second objective is 'Digipay onboarding is easier than associates' favorite consumer applications' with four key results: 60% completion of new user guides, reduced lag time, feedback from new users, and decreased access issue resolution time. Below the dialog box are three radio buttons: 'Use these OKRs' (checked), 'Insert as', and 'Try again'. A 'Discard' button is also present.

Upline OKRs

Executive Team OKRs Q4 2021

34% Our teams have the right skills to be awesome
Team Name: ABC | Q3 2024 | Q4 2021

- 99.9%** Maintain less than 500 ms of average successful response time on server requests
Brooklyn Simmons - 4 - As of Oct 22
- 4** of 8 Increase NPS by 50% (from +4 to +8)
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Brooklyn Simmons - 4 - As of Oct 22
- 32.87%** Maintain 99.99% internal application uptime
Brooklyn Simmons - 4 - As of Oct 22

89% Our teams have the right skills to be awesome
Team Name: ABC | Q3 2024 | Q4 2021

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Brooklyn Simmons - 4 - As of Oct 22

58% Our teams have the right skills to be awesome
Team Name: ABC | Q3 2024 | Q4 2021

- 99.9%** Maintain less than 500 ms of average successful response time on server requests
Brooklyn Simmons - 4 - As of Oct 22
- 4** of 8 Increase NPS by 50% (from +4 to +8)
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- 99.9%** 50% of users who receive C&C notifications engage with the message
Brooklyn Simmons - 4 - As of Oct 22
- 32.87%** Maintain 99.99% internal application uptime
Brooklyn Simmons - 4 - As of Oct 22

Draft OKRs

Product Management Q3 FY24 OKRs

Co-author

Objective 1: Digipay is delightfully fast for our customers.

- Key Result 1: Reduce 4 user steps in Digipay transaction flow
- Key Result 2: Cut transaction processing time by 5 seconds
- Key Result 3: Launch 4 Digipay voice assistant integrations
- Key Result 4: MAU increases from 30% to 40%

Objective 2: Digipay onboarding is easier than associates' favorite consumer applications

- Key Result 1: 60% completion of new user in-app guides
- Key Result 2: Lag time reduced from 1 to 0.52 seconds for customer access sites
- Key Result 3: Receive and action feedback from 10 new users to improve account creation process
- Key Result 4: Access issue resolution time decreased from 2 hours to 1 hour

Use these OKRs

Insert as

Try again




Discard

+ Add OKR


Uplevel your OKR Quality with Outcome Mindset™ Coaching Tips




Objective DRAFT

Digipay is delightfully fast


   Co-Author


Make Digipay transaction flow faster




Co-author 

-  Make it more measurable
-  Make it longer
-  Make it shorter

[+ Add Key Result](#)

Co-author 

 Reduce 4 user steps in Digipay transaction flow

- Use this Key Result
-  Insert as
-  Try again
-  Discard

WorkBoard Co-Author Timeline

June

- Complete development of co-author MVP (OKRs) – *In Progress*
- Alpha testing of MVP

August

- ~Early August, beta testing of MVP with customers

October

- ~ *Accelerate US (23-25 October) preview of the end to end AI powered strategy execution stack*

July

- Sign-up for beta opens to customers
- Kick-offs with early walkthroughs for interested beta customers

September

- ~Early September, Co-Author GA to all customers



Strategy Execution

DESERT RETREAT

October 23-25, 2023 | Scottsdale AZ

REGISTER NOW



At the Andaz Scottsdale Resort...



The 7th edition of the Accelerate Conference TM

Keynotes:

Strategy Execution in the AI Era | OKRs and the next-gen Management System



Customer Speaker Sessions include:



+ **Small group conversations**, on specific topics to improve KR integrity, creating user group and Chief of Staff role in the operating cadence.

+ **Get hands on with the newest WorkBoard capabilities** and learn how to take fullest advantage for the platform from other customers and WorkBoard product team.

Save your seat now at workboard.com/accelerate2023/



The 7th edition of the Accelerate Conference™

Andaz Scottsdale Resort - Very limited capacity

23-25 October 2023

Early-bird pricing through June 30th

\$199 Individuals

\$249 Bring a peer (2 tickets)

Pricing July 1st onward – *Based on availability*

\$299 Individuals

\$449 Bring a peer (2 tickets)

Save your seat now at workboard.com/accelerate2023/



Upcoming Courses



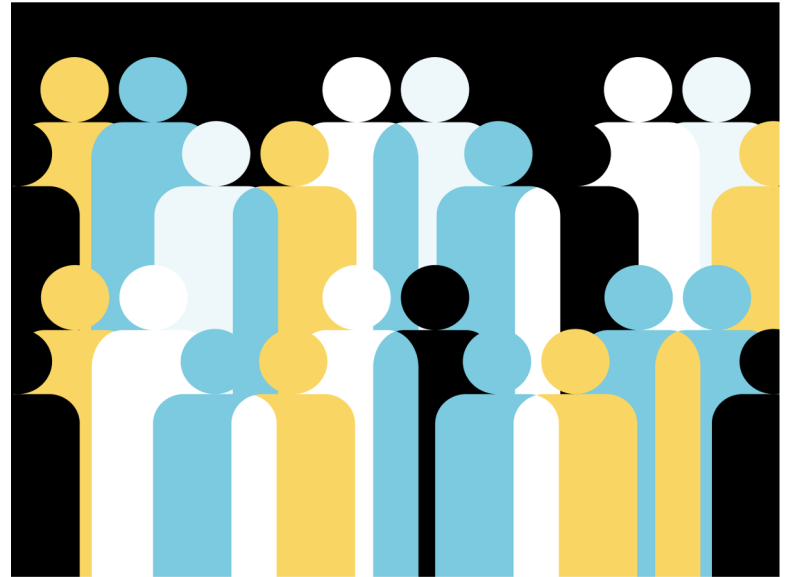
Class	Description	Dates	How to Sign Up
Level 2 OKR Coach Certification	For experienced OKR Coaches: Take the next step on your journey as a key influencer helping to mature your organization's OKR program.	<ul style="list-style-type: none">● July 17/19 at 8am PT	learn.workboard.com
Product and Engineering teams: Maximizing Product Value and Outcomes	Learn how to use OKRs to drive focus on what matters most for the product roadmap and business value realization.	<ul style="list-style-type: none">● June 14 at 10am PT	learn.workboard.com
Outcome Method Mindset	Learn about OKRs and the Outcome Mindset in 1 hour	<ul style="list-style-type: none">● June 7 at 1pm PT● June 14 at 6am PT	learn.workboard.com
OKR Fast Pass Course	Build your OKR expertise in 3 hours	<ul style="list-style-type: none">● June 8 at 8am PT	learn.workboard.com
OKR Coach Certification	Become a certified OKR coach	<ul style="list-style-type: none">● June 1st at 1pm PT● June 6/8 at 1pm PT● June 13/15 at 1pm PT● June 20/22 at 8am PT & 9am CET	learn.workboard.com
Long Range Strategy and Outcomes	Explore the intersection of long-range strategy and near-term OKRs, and the importance of connecting the two to drive fast and focused execution	<ul style="list-style-type: none">● July 19 - 8:30-11:00am Pacific● August 30 - 8:30-11:00am Pacific	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">● Fall cohort to be announced soon	workboard.com/rme-certification

Community Calls: Save the Date(s)!

Our next Community Call is June 28.

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

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



What are you curious about?





Thank you

See you next time!