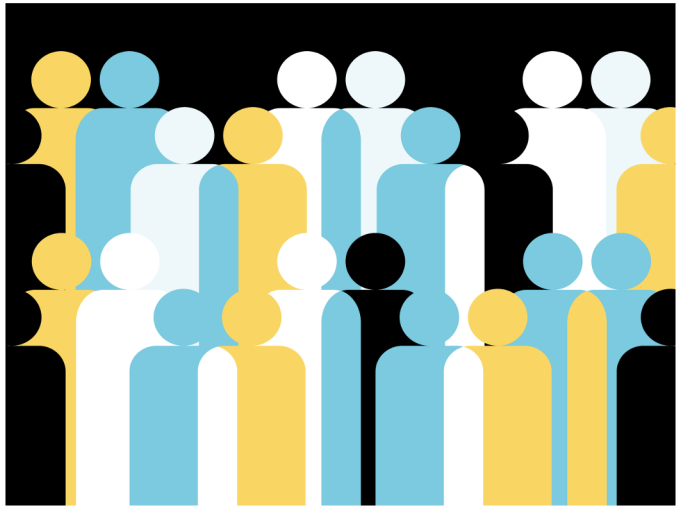
# Community Call

May 2023

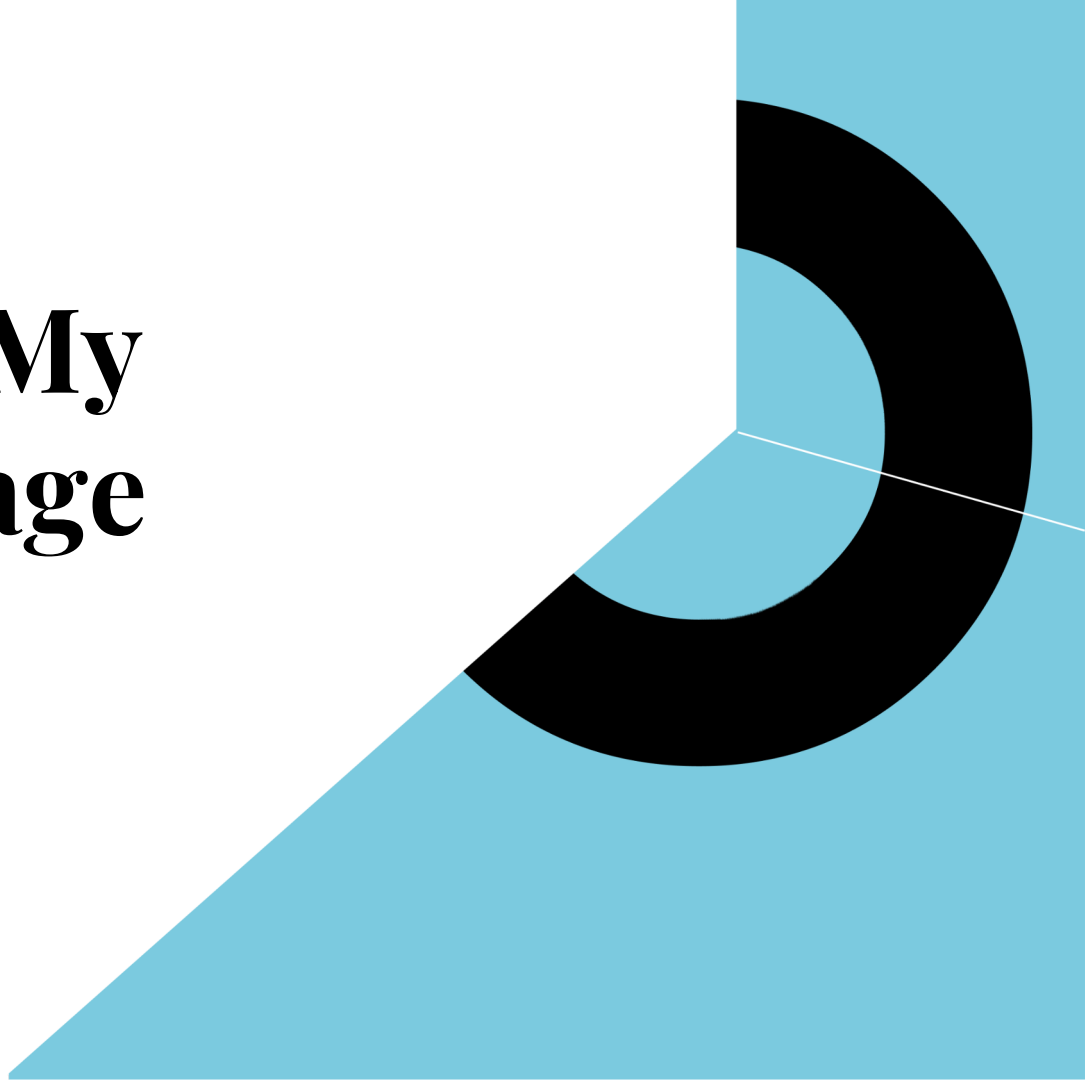


WorkBoard

# Agenda

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

# Introducing My Objectives Page

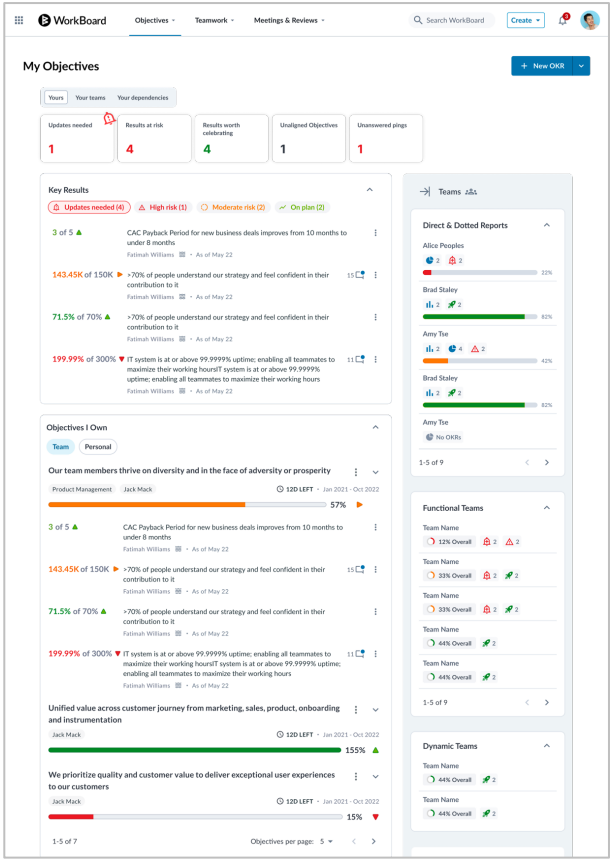


WorkBoard

# 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

## April - May

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

## June

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

## July

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

# Let’s take a look…

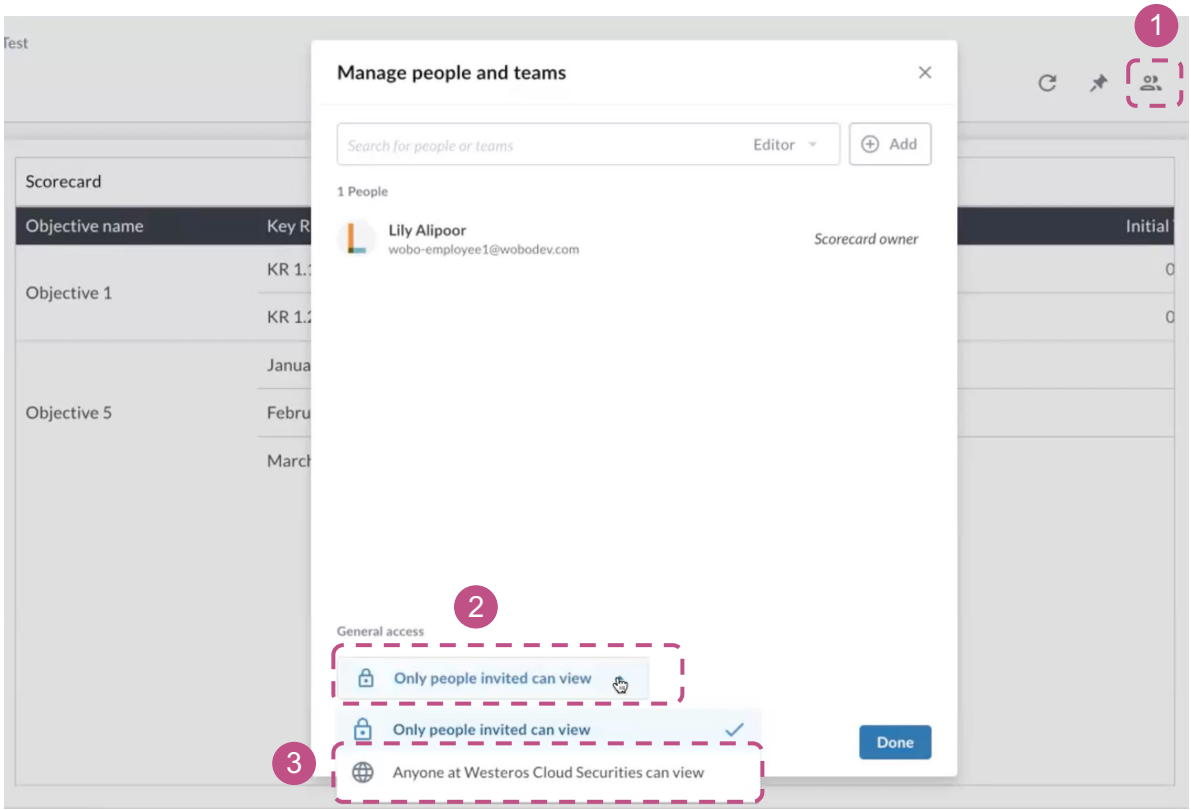
# More Scorecard Delights!

WorkBoard

Available Now!

# 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

WorkBoard

Available Now!

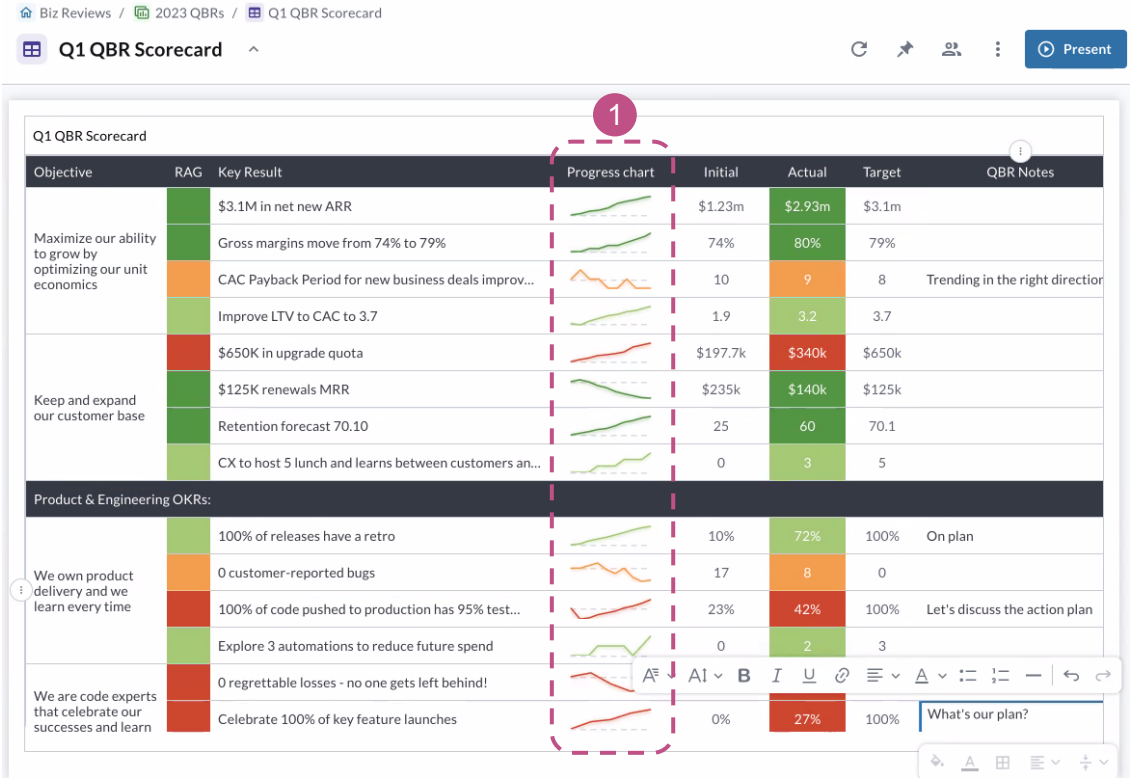
# Monitor Momentum & Progress with the Scorecard Sparkline Field

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!




WorkBoard

Coming in June

# 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.

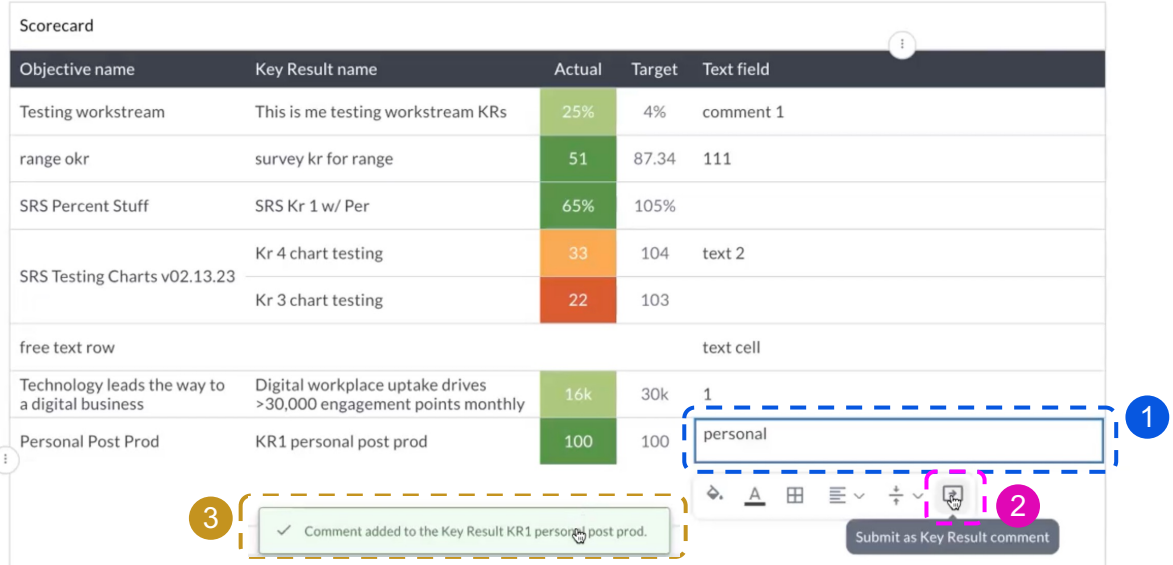
## How to use:

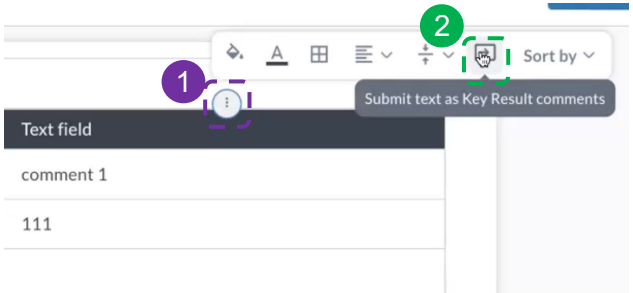
### Single Cell

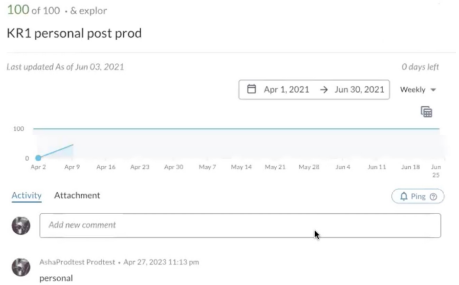
1. Select any Free Text Field Cell
2. Click Submit as Key Result comment
3. Click Confirmation Message to Verify in KR

### Entire Column in one action

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



Coming in June

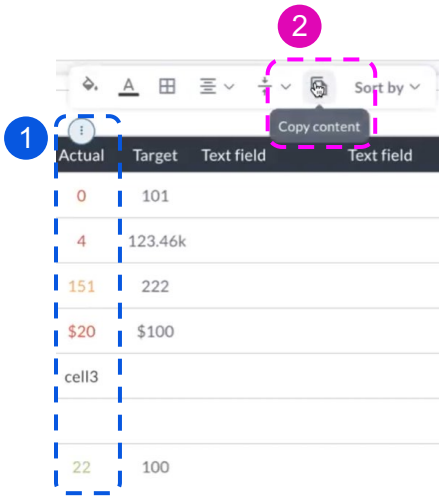
# Copy any Scorecard Column to Paste Values in Free Text Field

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.

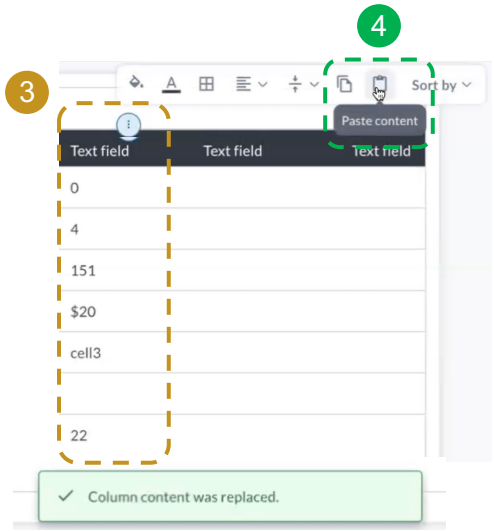
How to use:

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!

WorkBoard

# Let’s take a look…

# Brainstorming & Team Retros with Canvases

WorkBoard

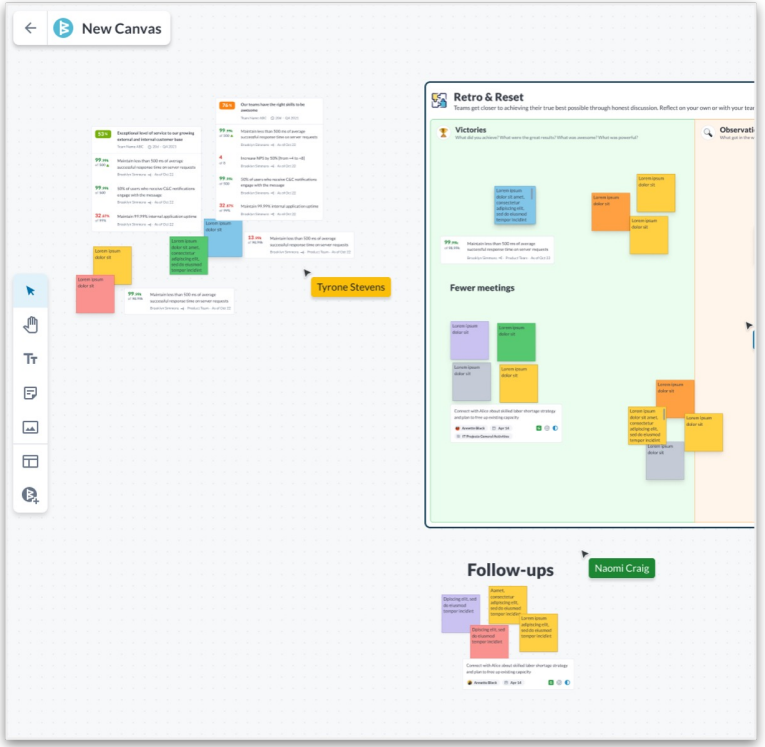
Available Now!

# 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.




WorkBoard

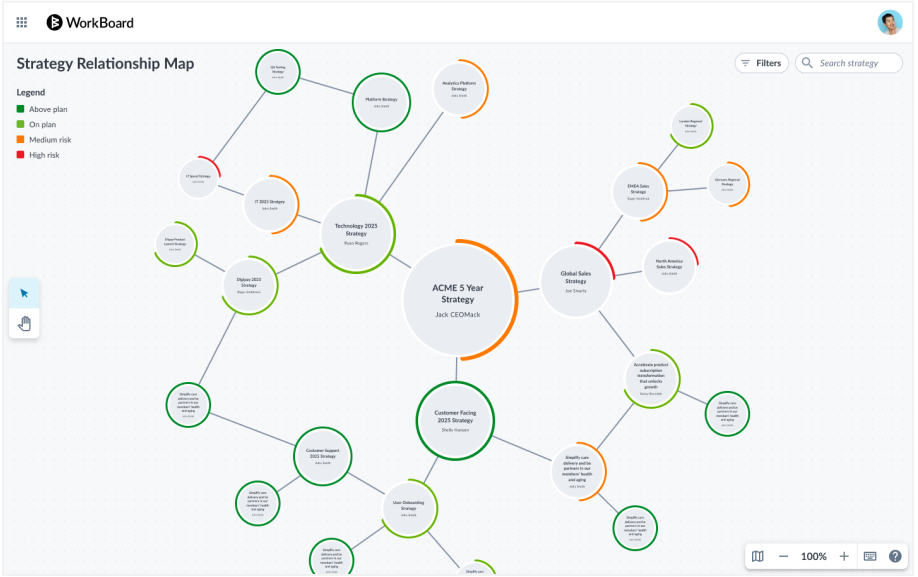
# Let’s take a look…

# Long Range Strategy Relationship Map

WorkBoard

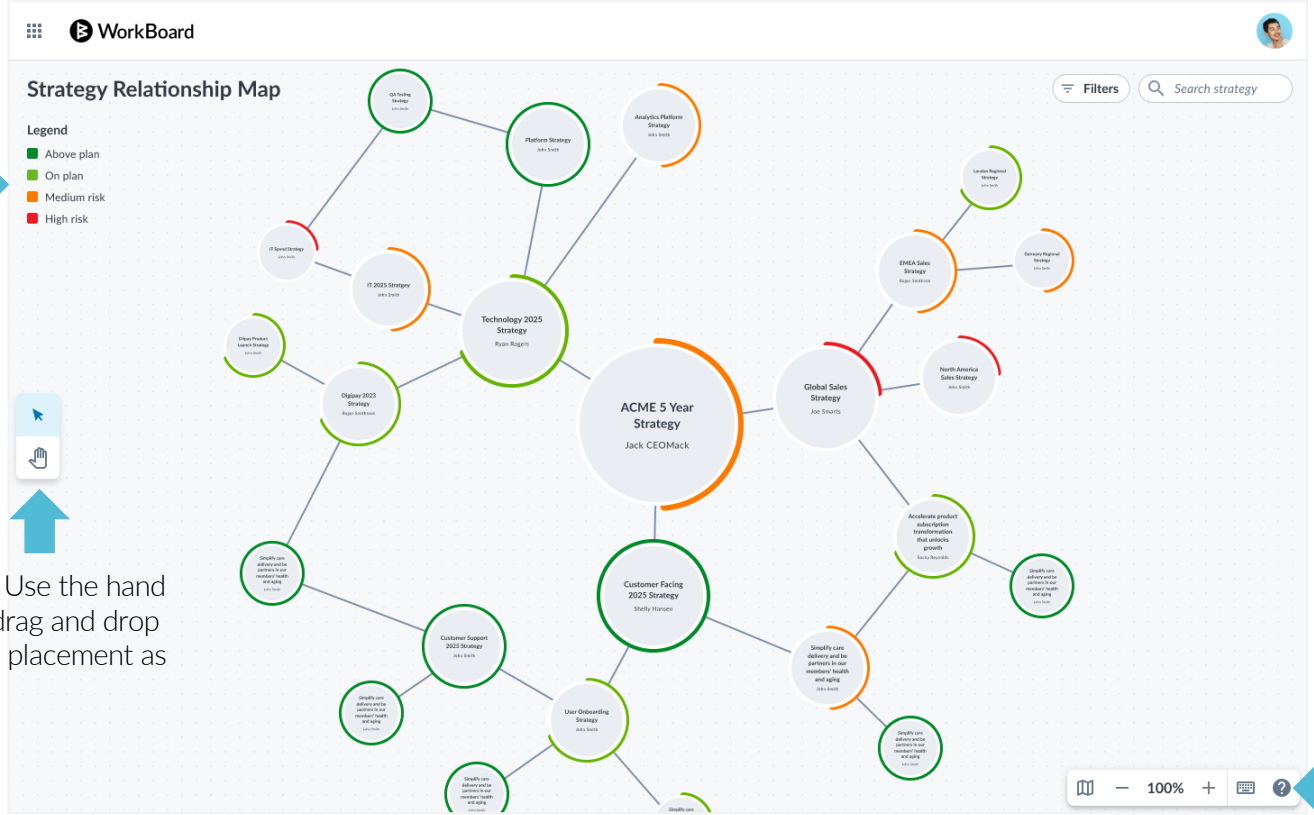
# Strategies Across the Enterprise, Connected.

- **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

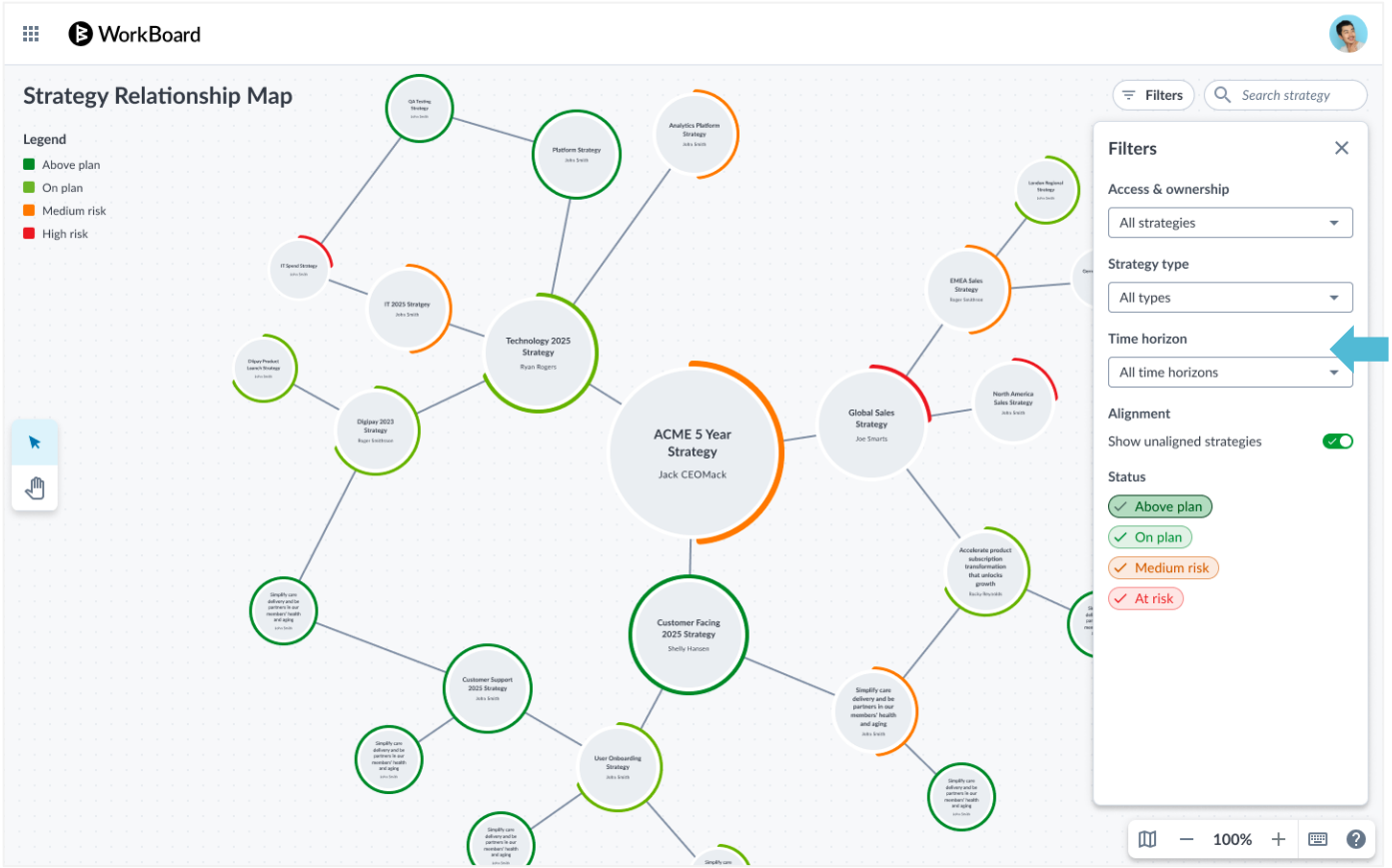



Pro Tip: Use the hand tool to drag and drop strategy placement as needed.

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

WorkBoard

# 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.

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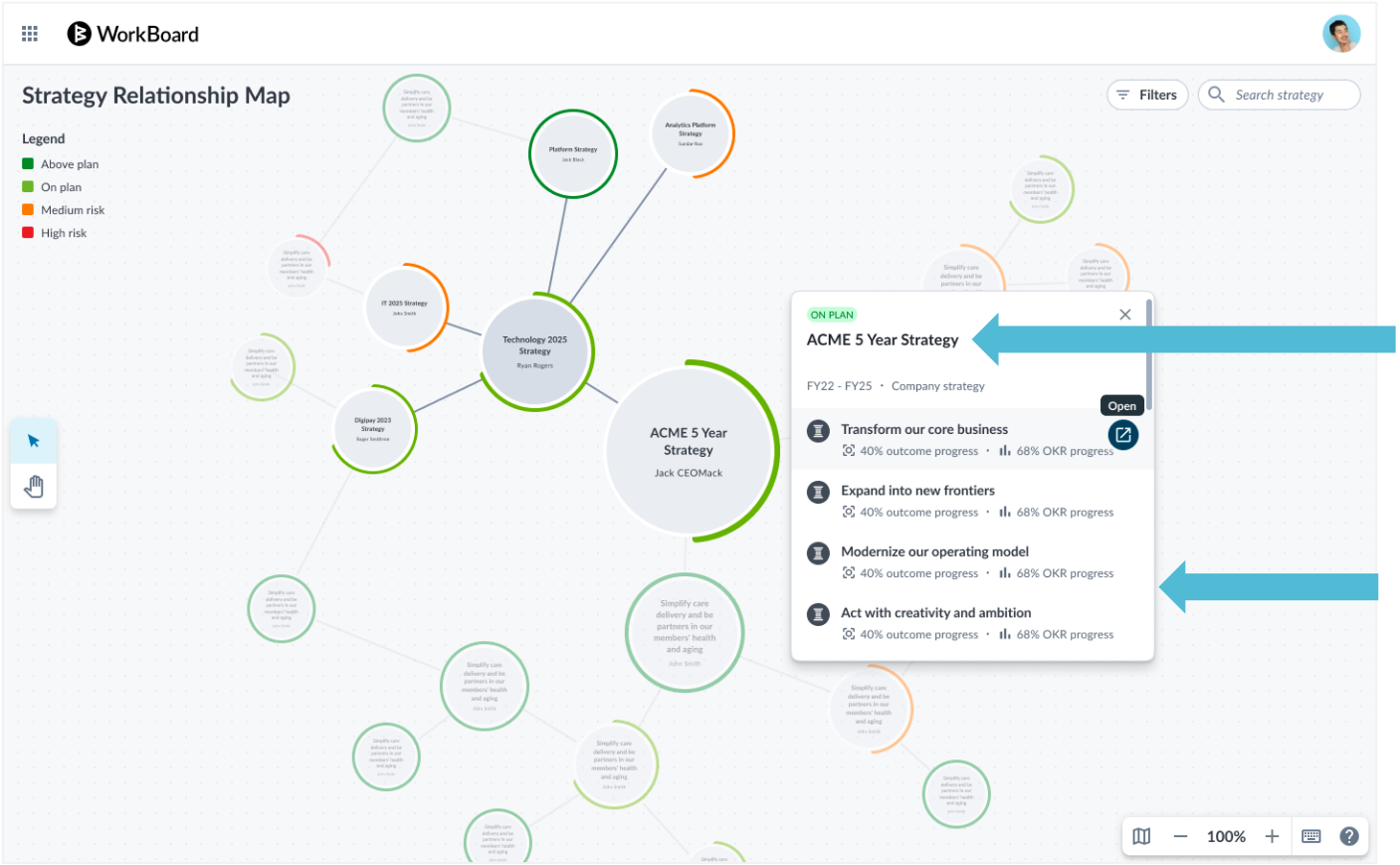
# Drill into the Details of Each Strategy in One-click




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

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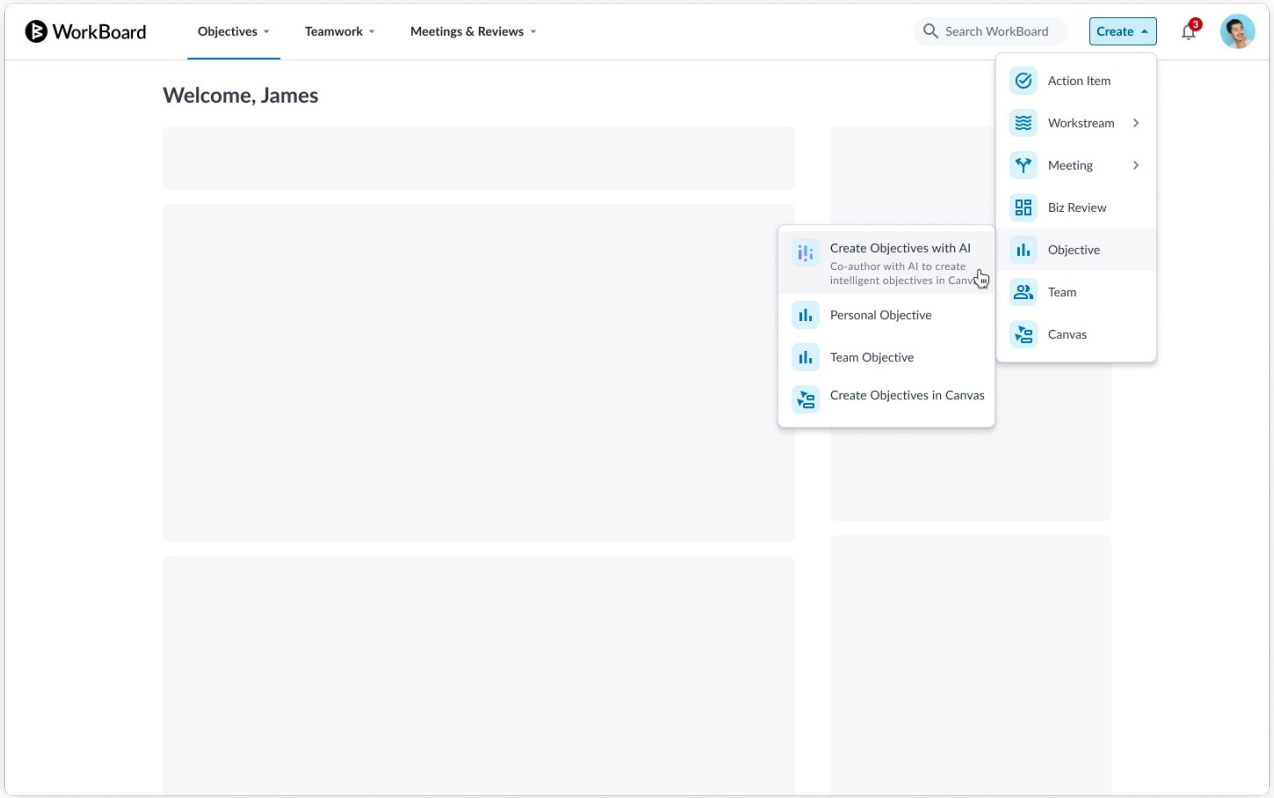
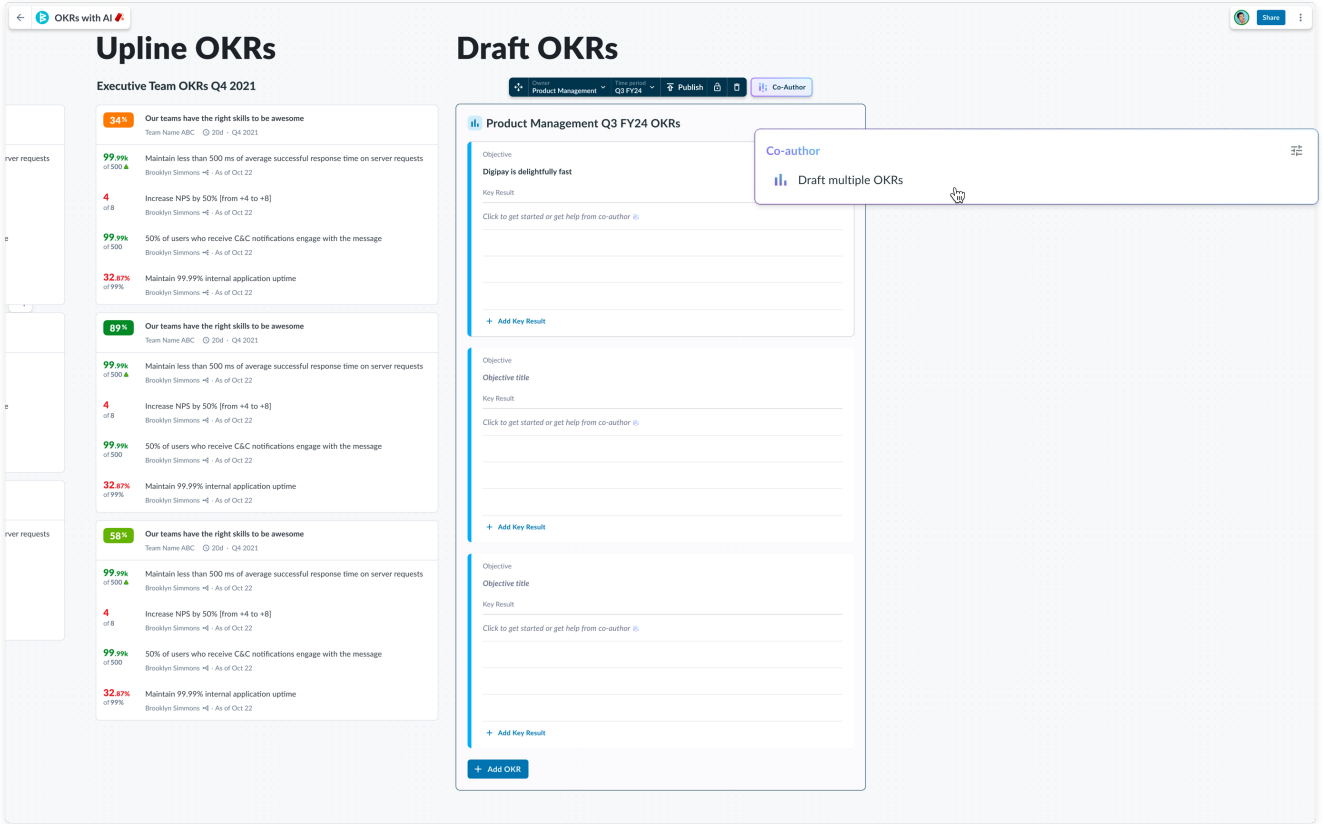
# Access Co-Author from your Existing Creation Flow



# Co-author Multiple draft OKRs Aligned to Your Upline

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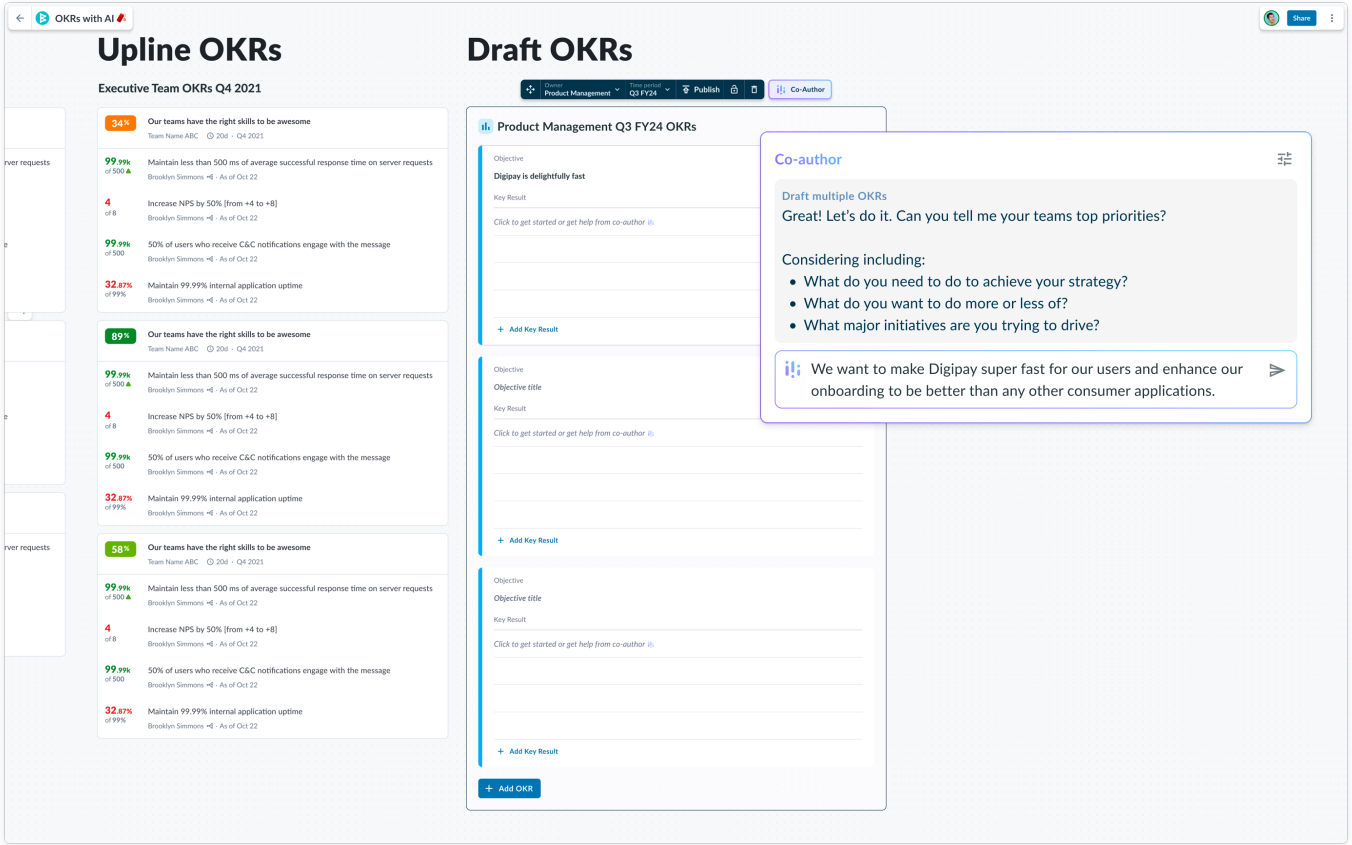
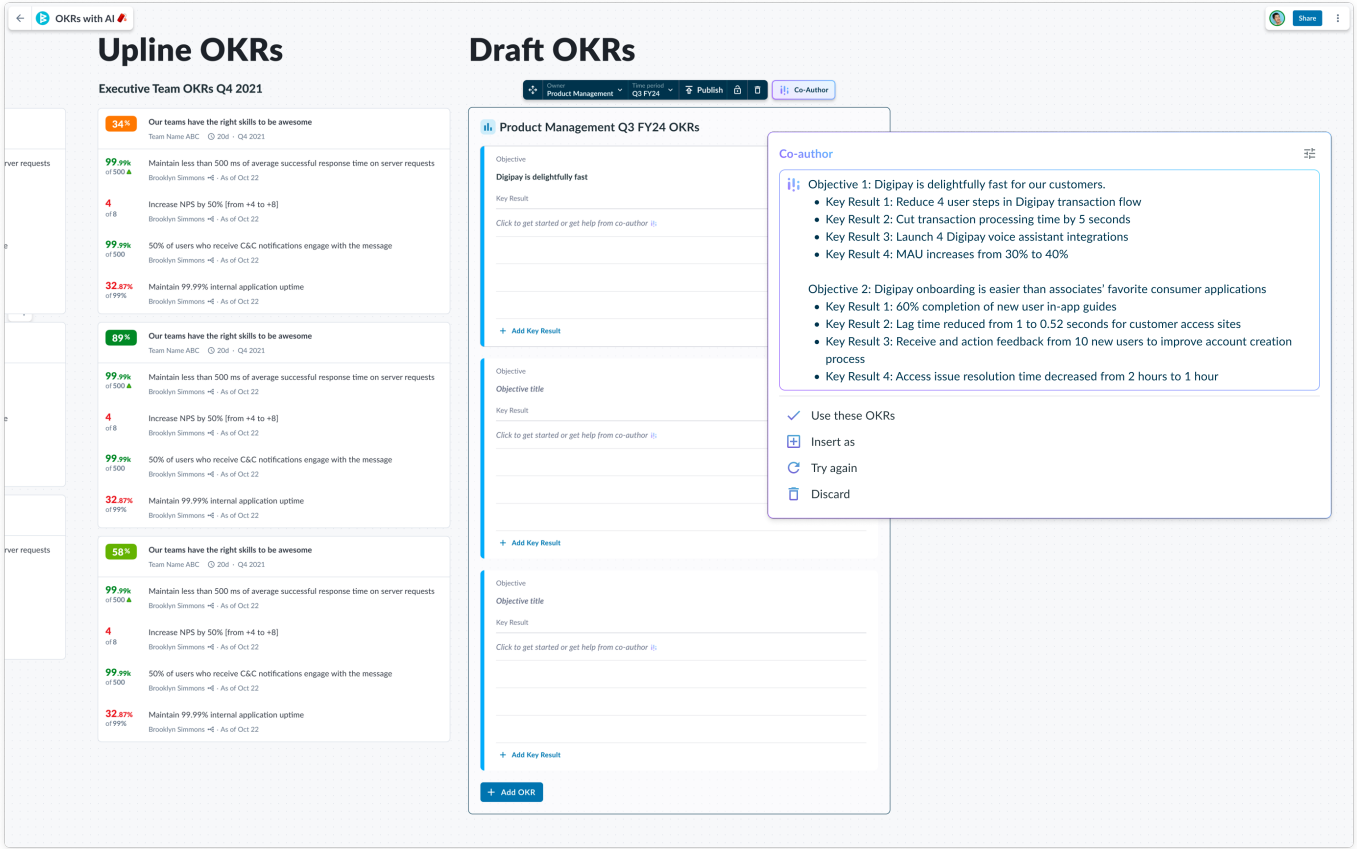
# Input your Teams Top Priorities to Improve Drafts



# Add or Edit your Aligned, Personalized Draft OKRs

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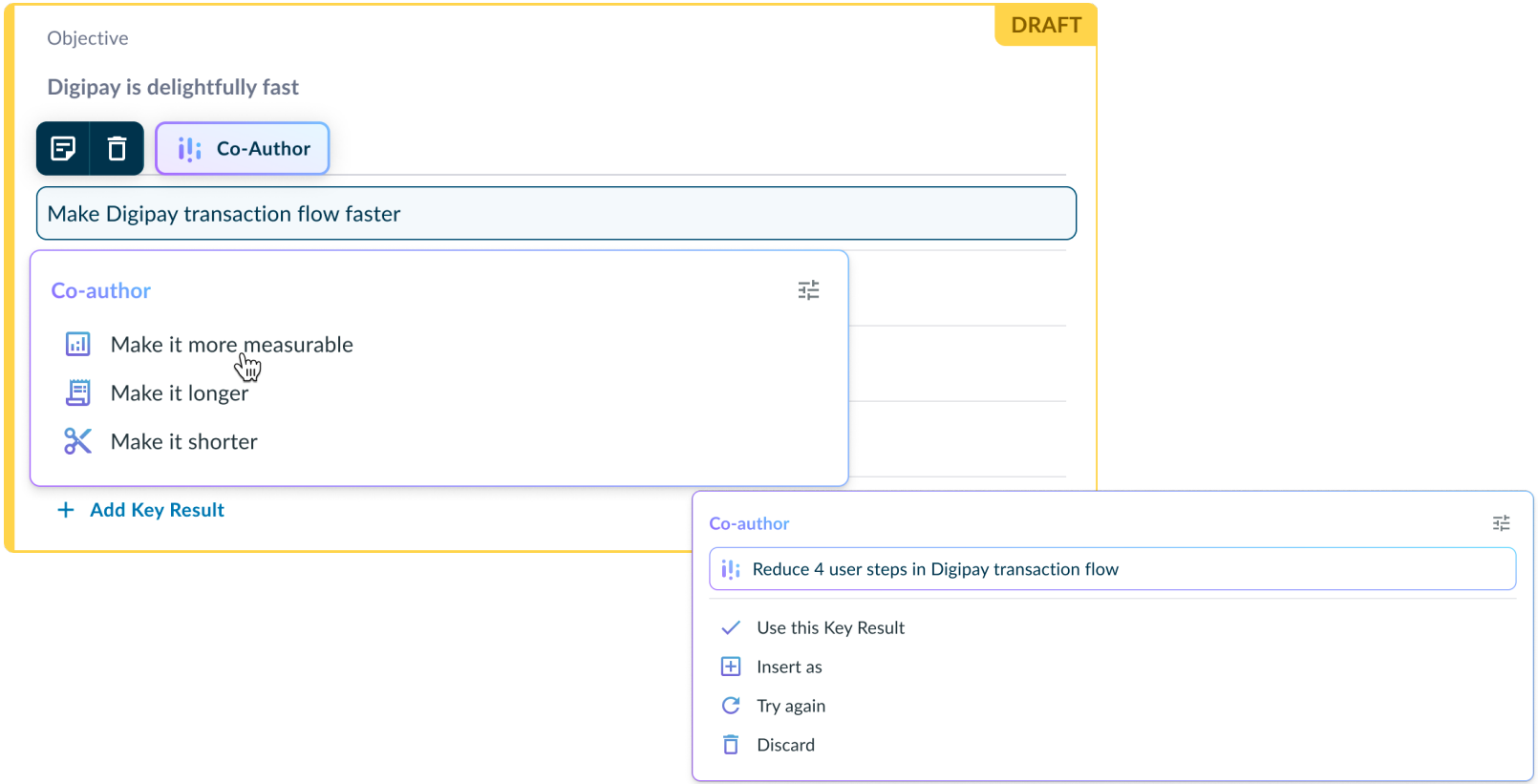
# Uplevel your OKR Quality with Outcome Mindset™ Coaching Tips

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# WorkBoard Co-Author Timeline

## June

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

## July

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

## August

- **~Early August, beta testing of MVP with customers**

## September

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

## October

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

WorkBoard Accelerate Conference #7

# Strategy Execution

## DESERT RETREAT

October 23-25, 2023 | Scottsdale AZ

REGISTER NOW

# At the Andaz Scottsdale Resort...

# The 7th edition of the Accelerate Conference ™

Keynotes:

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

WorkBoard BAIN & COMPANY

Customer Speaker Sessions include:

vmware ALBEMARLE® JUNIPER NETWORKS

+ **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. | • 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. | • June 14 at 10am PT | learn.workboard.com |
| **Outcome Method Mindset** | Learn about OKRs and the Outcome Mindset in 1 hour | • June 7 at 1pm PT<br>• June 14 at 6am PT | learn.workboard.com |
| **OKR Fast Pass Course** | Build your OKR expertise in 3 hours | • June 8 at 8am PT | learn.workboard.com |
| **OKR Coach Certification** | Become a certified OKR coach | • June 1st at 1pm PT<br>• June 6/8 at 1pm PT<br>• June 13/15 at 1pm PT<br>• 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 | • July 19 - 8:30-11:00am Pacific<br>• 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. | • Fall cohort to be announced soon | workboard.com/rme-certification |

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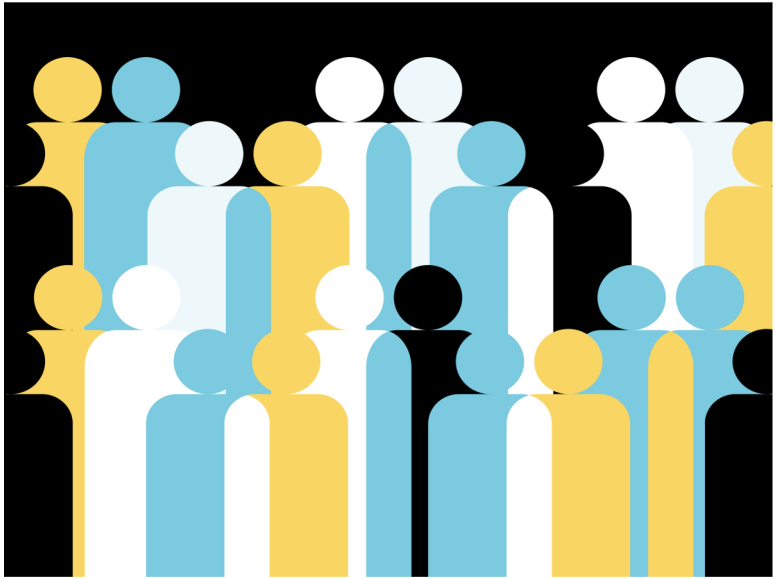
# Community Calls: Save the Date(s)!

**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!