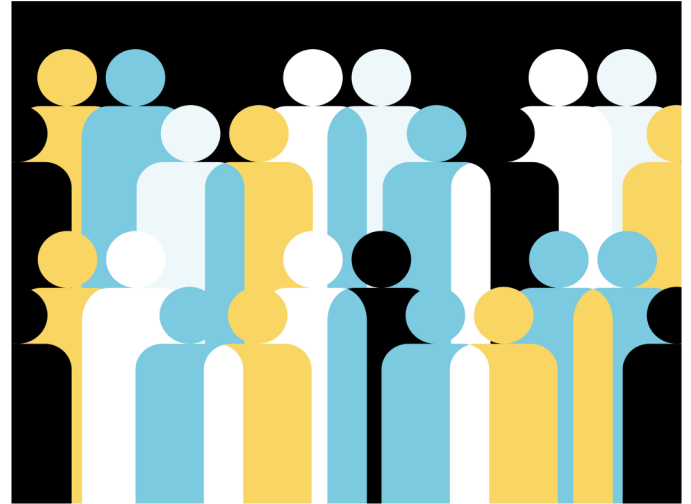


# Community Call

June 2023



# Agenda

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- Using OKRs to drive Strategy Execution
- Connecting long-range strategies and OKRs for alignment
- Sparks from Sixt, Bain, & AstraZeneca from our latest Strategy Execution and Ops regional events
- How to join the conversation IRL

# Strategy Execution is the Thing

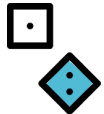
# The forces at work in enterprise



**Unrelenting pace of change**



**Competition from diverse sources**



**Sustained macro uncertainty**



**New resource and capital constraints**



# These change how leaders think about strategy and its execution

## **Unrelenting pace of change**

Pace of value creation is slower than markets

*Must eliminate organization lethargy and latency*

## **Competition from diverse sources**

Inside out and insular are failure modes

*Outcomes for customers must be center of gravity*

## **Sustained macro uncertainty**

Lack of agility can have catastrophic consequences

*Must have agility to iterate on priorities and mobilize*

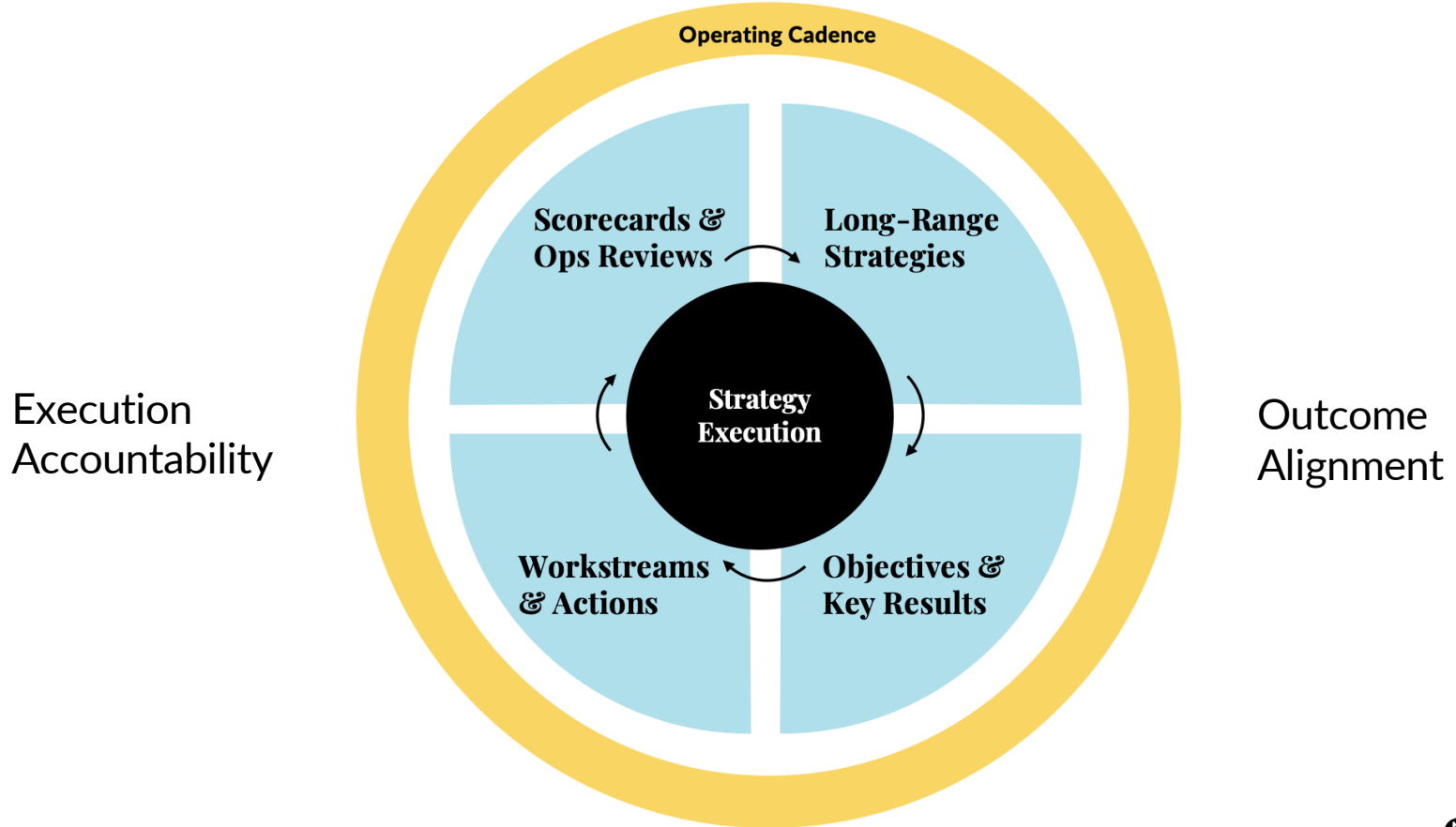
## **Resource and capital constraints**

Profitability is more important but more elusive

*Must execute more profitably and more predictably*

**Companies must execute bold strategies faster with fewer resources in more challenging dynamics**

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# How well and fast you can answer these questions determines how predictable and profitable strategy execution is at your organization

Are we moving fast enough to win our race?

Do we get information fast enough to control our destiny?

## Accountability for outcomes and actions

Are we achieving what we intended thus far?

Where are the issues and roadblocks that need attention?

What is working and why?

## Actions needed to achieve results

Are we focused on the work that drives those outcomes?

... or work that competes with them?

Is the work progressing as expected?



## The strategy you want to achieve

How do we win in the long-run?

What big or transformative goals are we pursuing?

Do we need to revisit the long-range outcomes we've set?

## Strategy elements and results needed this year

Is everyone really aligned on the strategy?

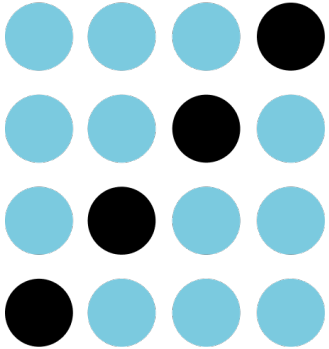
What progress do we expect to make this quarter and how is it measured?

Do disparate team and department efforts add up to *company* results?

# Gaining strategy execution advantage is simple, but not easy

- 1 Align on results
- 2 Tie outcomes to actions
- 3 Tighten the discussion cadence
- 4 Tell people WHY

# 1 Align on results near term that propel you to long term outcomes



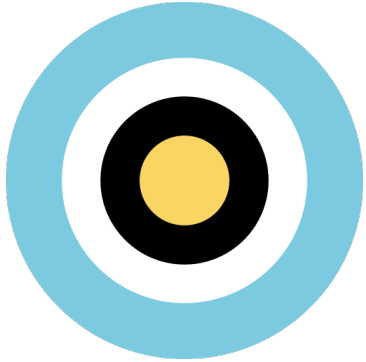
- ✓ If the strategy is about platform value or increasing wallet share, then aligning *across* the org is crucial
- ✓ Break the silos rather than reinforce them → align on strategy, not hierarchy
- ✓ Use OKRs for the *drivers* of long-term outcomes → predictability

**Drivers** are **changes or behaviors** or customers' that *cause* the outcomes we seek

Sometimes we are certain about the drivers, sometimes we have a hypothesis for the behaviors that cause outcomes

**Your KRs should bias to how to DRIVE outcomes, not DOCUMENT them**

## 2 Tie the results to the actions needed to achieve them



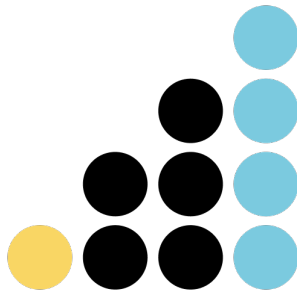
- ✓ If there are no actions, there are no outcomes
- ✓ We are aligning our *time and effort* to our strategy
- ✓ Workstreams in WoBo, Jira or other project tools  
*What must get done?*



Outcomes are *where* we are going,  
drivers and actions are *how* we get there.

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### 3 Tighten the discussion cadence to improve focus and accountability

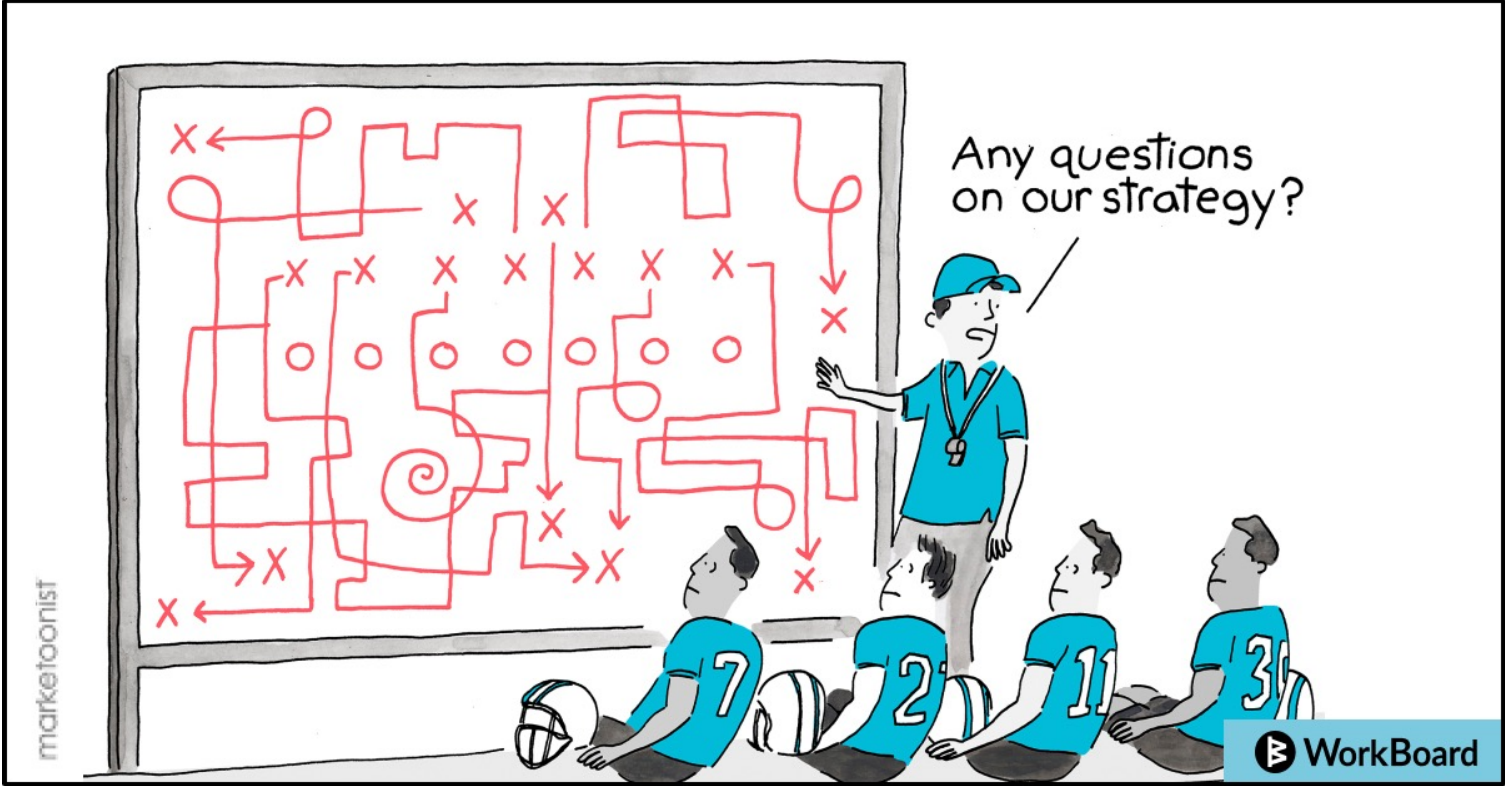
- 
- A decorative graphic consisting of a grid of colored circles. The top row has one light blue circle. The second row has two circles: one black and one light blue. The third row has three circles: one black, one black, and one light blue. The bottom row has four circles: one yellow, one black, one black, and one light blue.
- ✓ Right people, right data – 1on1s, staff, and x-f reviews
  - ✓ Pace to rate of change, tolerance for drift and your ability to recover
  - ✓ Use discussions to identify x-f dependencies and disconnects quickly
  - ✓ Use scorecards and biz reviews for “right data” and action every red

## 4 Tell people **WHY** strategy execution is important to the company and **HOW** to participate in its achievement



- ✓ This is the second greatest failure mode in “OKR programs”
- ✓ The OKR process is not “the why”: We are not executing a process, we are executing the company strategy
- ✓ The OKR acronym obscures and undermines the purpose

# Don't let your strategy get lost in translation

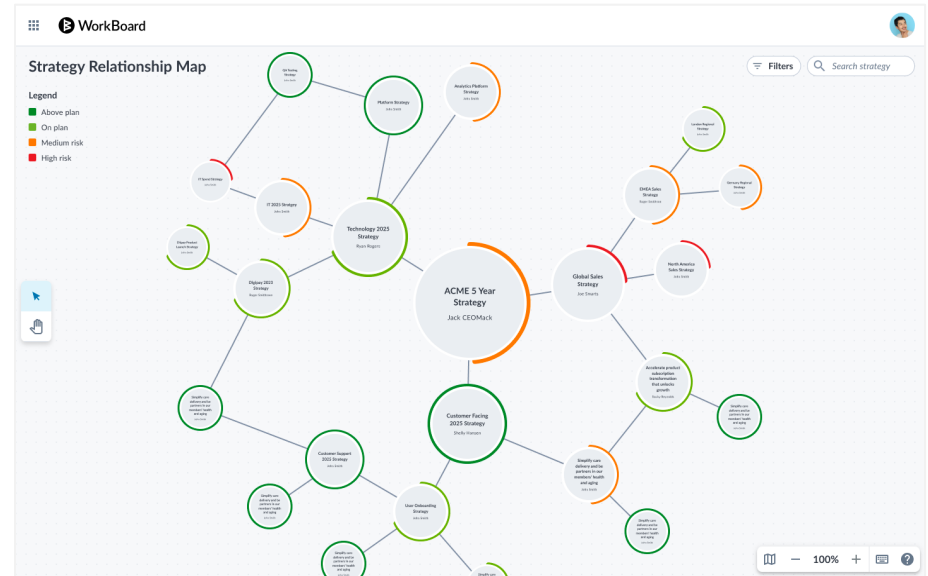


# Connecting Long-Range Strategy to OKRs



# 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!

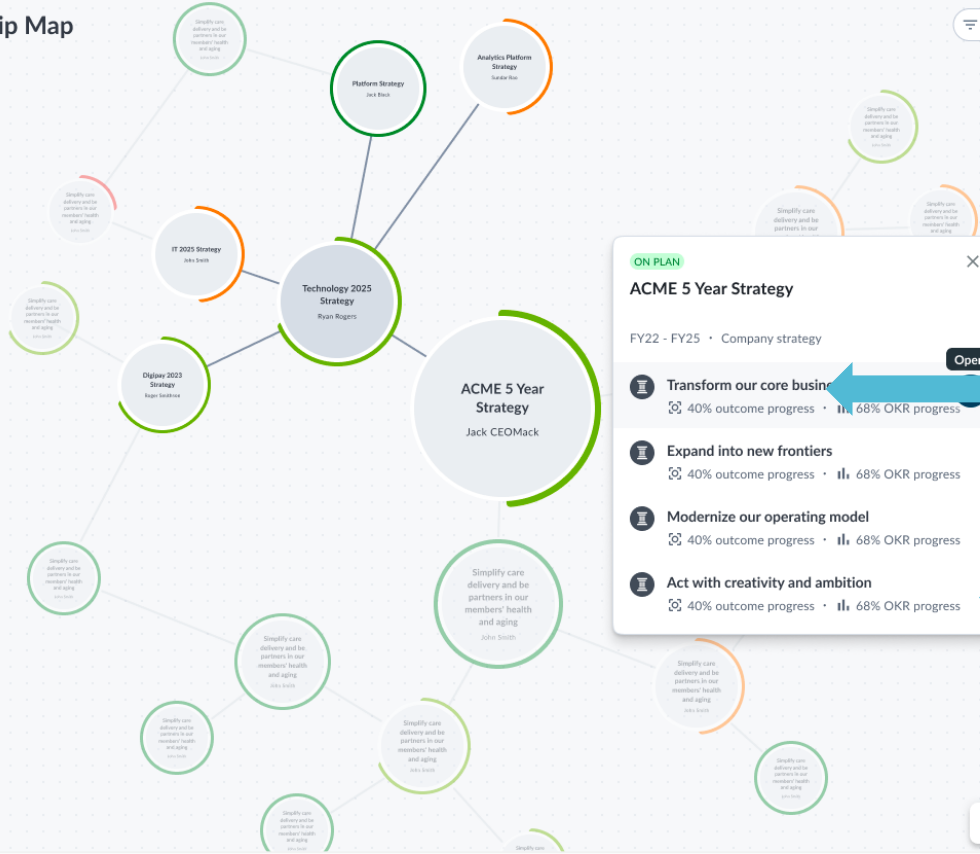




# Strategy Relationship Map

- Legend
- Above plan
  - On plan
  - Medium risk
  - High risk

Filters Search strategy



**ON PLAN**

### ACME 5 Year Strategy

FY22 - FY25 · Company strategy

**Transform our core business**  
40% outcome progress · 68% OKR progress

**Expand into new frontiers**  
40% outcome progress · 68% OKR progress

**Modernize our operating model**  
40% outcome progress · 68% OKR progress

**Act with creativity and ambition**  
40% outcome progress · 68% OKR progress

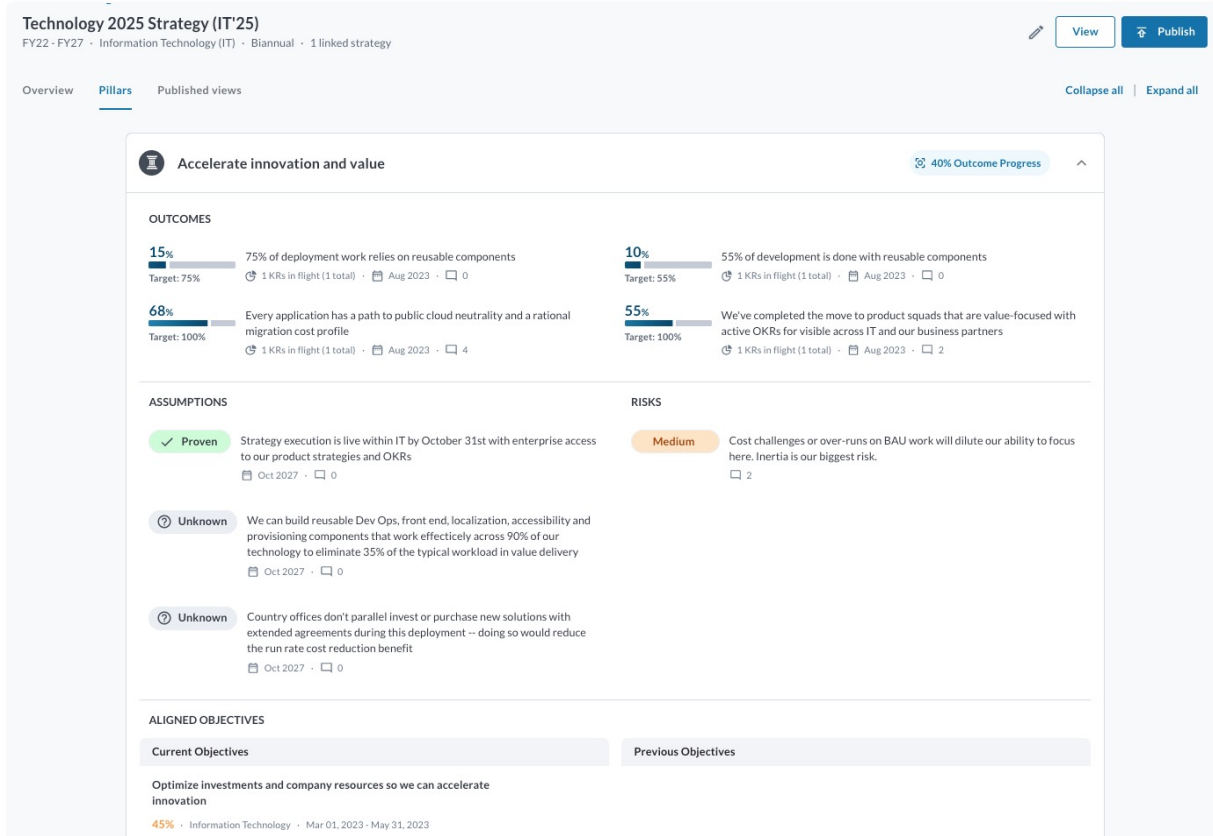
Click on the strategy name itself to open the strategy details

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

100%

# Align quarterly Objectives across the organization to strategic pillars

See key results in flight that connect to important outcomes



Update status of assumptions and risks over time



# Instantly see current progress on Objectives feeding into strategic pillars

The screenshot displays a WorkBoard interface for an objective. At the top, the objective text is "CUSTOMERS have an exceptional experience with our products and our people", followed by the creator "Jack CEOMack: Company ELT" and a green progress bar at 63%. A deadline of "Jun 30, 2023" with "14 days left" is shown in the top right. Below the objective, a navigation bar includes "Key Results", "Aligns", "Strategy", "Workstreams", "Comments", and "History". A "Focus: Customer" tag is visible on the right. The main content area states "Objective is linked to the following pillars:" and lists one pillar: "Expand into New Frontiers" with the subtext "Strategy: Acme 5 year strategy". At the bottom left, the entity "COMPANY ELT" is shown. At the bottom right, a "Target Hit!" notification indicates "Jack CEOMack updated Every".

# Embed strategy into Biz Reviews for focus and transparency

**WorkBoard** Objectives Teamwork Meetings & Reviews

Search WorkBoard Create

Biz Reviews / Product & Technology Leadership MBR

Product & Technology Leadership MBR

Owner: Danielle Levitz

### Our 2025 Strategy

#### Technology 2025 Strategy (IT'25)

- Accelerate innovation and value**
  - We've completed the move to product squads that are value-focused with active OKRs for visible across IT and our business partners
  - Every application has a path to public cloud neutrality and a rational migration cost profile
  - 55% of development is done with reusable components
  - 75% of deployment work relies on reusable components
- Stabilize our environment**
  - Uptime improves 2% across the board (99.98) by June 2023
  - Insurance to reduce IT spend 22%
  - Critical outages cap at 10 per quarter by June 2023
- Operate as a truly digital organization**
  - Mature our data foundation with standardization across data lake, AI, NLP (AI) services, ML, Cpo etc
  - All material business measures are in a digital source system that is the canonical truth (and all Excel trackers/workbooks have been eliminated)
  - Forecast accuracy improves 13% (from 77% to 90%) by December 2024
  - CRM instance consolidation is complete by Summer 2023
  - CRM initiative reduces IT benefit true rate \$1.5B by 2025
- We are one IT Team**
  - All managers have participated in Leading by Coaching program
  - Upskill 1300 IT staff in 6 regions
  - 50% of our teams are stable and cross functional organized around our products

### Q1 Perspective

**Focus**

- Condition Monitoring:** Only live in 1 NA location but anticipating strong momentum in the coming 2-3 weeks that should allow us to hit our target. *Danielle, ask from you to reach out to region leaders to drive urgency*
- The digital workplace uptake is driving more than 30k engagement touchpoints monthly. There's tons of learnings here that can be applied to other areas. Kevin has the lead on that.

### FY Q1 Objectives

- 90%** Foster a culture of ambition and creativity that fuels Acme 2030  
Information Technology, Danielle Levitz
- 43%** Optimize investments and company resources so we can accelerate innovation  
Information Technology, Danielle Levitz
- 87%** Technology leads the way to a digital business  
Information Technology, Danielle Levitz
- 92%** Digital Workplace Strategic Initiative -- New Ways of Working  
Information Technology, Danielle Levitz

### Digital & Tech Headlight Metrics

|  |  |  |
|--|--|--|
| <b>4.58%</b> of 5% ▶<br>Shift another 5% of our non-mfg workload to cloud<br><br>Danielle Levitz | <b>321</b> of 458<br>Every IT employee has a 5 year professional growth plan in place (458 including new projected hires for next quarter)<br><br>Kevin Campbell | <b>12</b> of 10<br>Decrease from 22 to 10 major incidents a year<br><br>Roger Smithson |
|--|--|--|

### Robotic Process Automation - Innovating By Replacing Manual Processes

Manual HR Intake Steps | Manual Visa & Passport Intake Steps

**RPA Progress, Gaps, & Forecast**

- We encountered some issues in several countries that have slowed progress on Visa and Passport RPA - likely to lower the annualized savings by \$11M if we can't resolve, and will have a \$900k cost hit if we delay 1 month
- As of March 1, we had full sign-off from Corporate Legal and each country's legal team
- Target is 43 locations for both processes, and we quickly deployed the HR RPA to all 43!



# Sparks from Our Latest Event





# It's not about OKRs – it's about executing on the strategy

To shift gears from “doing OKRs” to executing on strategy, consider:

- Bias to KRs that **drive** outcomes, not just **documenting** them
- If there are no actions, there are no outcomes
- Accelerate the cadence of conversations to improve execution certainty
- Tell people **WHY** strategy execution is important to the company and **HOW** to participate in its achievement



# Join the Conversation



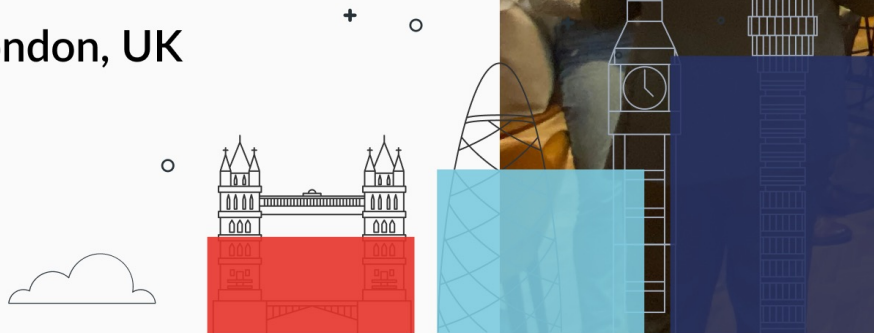




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Speaker Sessions include:



*More speakers will be announced soon!*

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# Strategy Execution

## DESERT RETREAT

October 23-25, 2023 | Scottsdale AZ

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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/](https://workboard.com/accelerate2023/)**



# The 7th edition of the Accelerate Conference <sup>TM</sup>

**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/](https://workboard.com/accelerate2023/)**



# Upcoming Courses



| Class  | Description  | Dates  | How to Sign Up  |
|--|--|--|---|
| <b>Level 2 OKR Coach Certification</b>         | 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"><li>● July 17/19 at 8am PT</li></ul>   | <a href="https://learn.workboard.com">learn.workboard.com</a>                         |
| <b>Outcome Method Mindset</b>                  | Learn about OKRs and the Outcome Mindset in 1 hour   | <ul style="list-style-type: none"><li>● July 12 at 1pm PT</li><li>● July 19 at 6am 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>● July 12 at 8am 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>● July 11/13 at 8am PT</li><li>● July 18/20 at 1pm PT</li><li>● July 18/20 at 9am CET</li><li>● July 25/27 at 8am PT</li></ul> | <a href="https://learn.workboard.com">learn.workboard.com</a>                         |
| <b>WorkBoard Pro</b>                           | Learn the full power of the WorkBoard application and how to apply it in your organization.  | <ul style="list-style-type: none"><li>● July 25/26 at 8am PT</li><li>● Aug 22/23 at 8am PT</li></ul>   | <a href="https://learn.workboard.com">learn.workboard.com</a>                         |
| <b>Long Range Strategy and Outcomes</b>        | 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"><li>● August 30 - 8:30-11:00am Pacific</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>● Fall cohort to be announced soon</li></ul>   | <a href="https://workboard.com/rme-certification">workboard.com/rme-certification</a> |

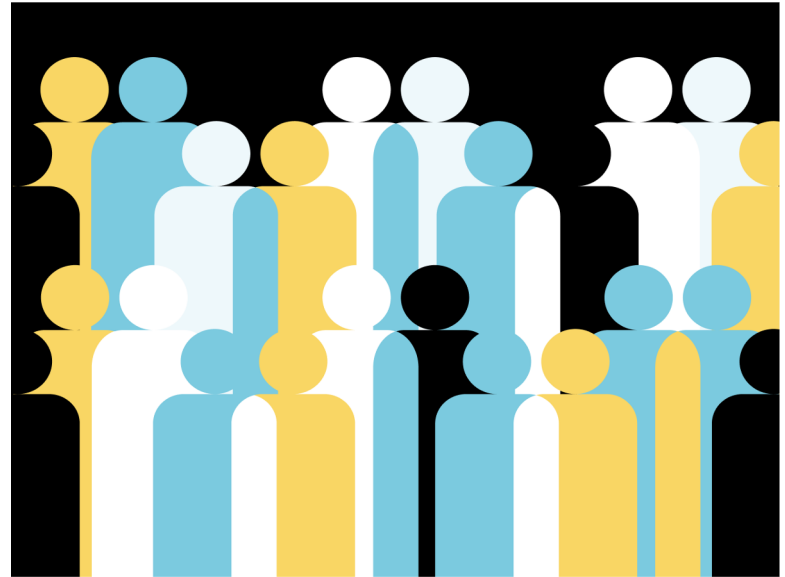


# Community Calls: Save the Date(s)!

## Our next Community Call is July 26.

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

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



# What are You Curious About?



WorkBoard  
**Accelerate**  
Conference #7

**Strategy Execution**  
DESERT RETREAT

October 23-25, 2023 | Scottsdale, AZ

[workboard.com/  
accelerate2023](https://workboard.com/accelerate2023)

The banner features a photograph of a group of people in a modern, outdoor lounge area with blue and orange seating. The text is overlaid on a dark blue background with an orange arrow pointing right.



# Thank you

See you next time!