



Welcome to the Workboard November Community Call

Topics Today

1. Workboard news!
2. Meeting data points
3. Monday release
4. Rest of 2017
5. DYKs



We've raised another \$9.3M in venture capital
to accelerate growth



*Customer Success
& Consulting*



*Data Science &
Development*



*Sales & Solutions
Team*



*Marketing &
PR/AR*



Meetings

We spend **40% of our time** in meetings

There are **11 million meetings** – a day!

60% of what was discussed in a meeting is **forgotten 14 days later**

“Meeting attendee” isn’t what any of us wanted to be when we grew up so let’s keep working together to make meetings better ...



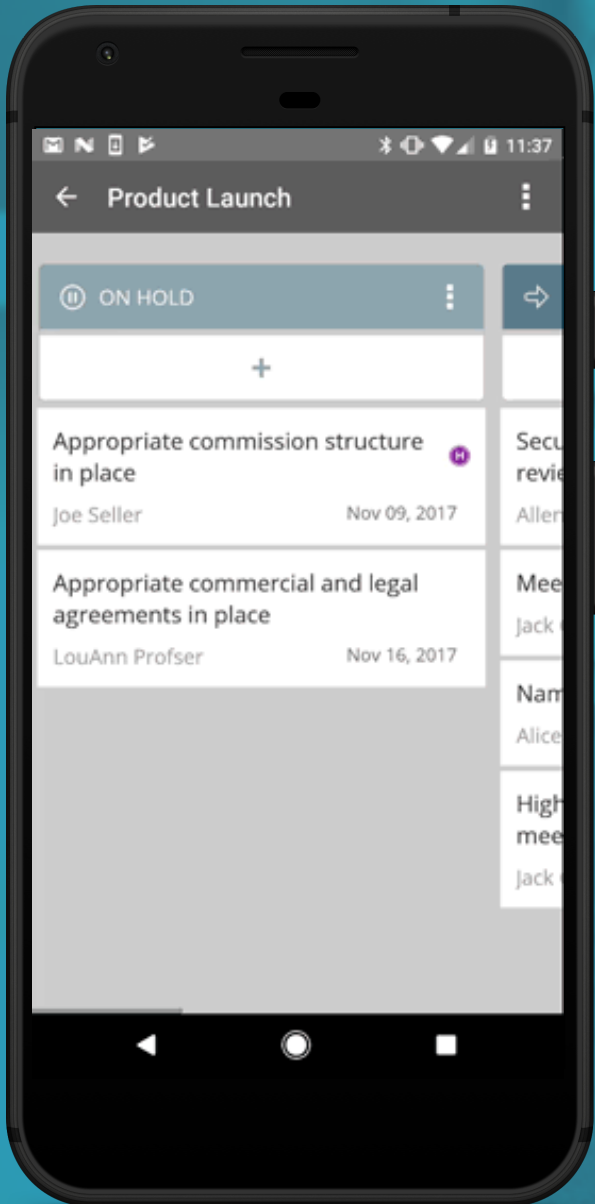
Topics Today

1. Workboard news!
2. Meeting data points
- 3. Monday release**
 - ✓ Agile boards on Android
 - ✓ Multiple Business Review dashboards
 - ✓ Integrated reporting across Jira, Asana, Github
4. Rest of 2017
5. DYKs



Boards on Android

1. Organize a roadmap, customer relationships, development sprints, or any other project with custom boards – add as many columns as you need, track actions by category instead of status
2. Use progress boards to visualize and update project status from planning to completion
3. Drag and drop actions between or within columns



Multiple, Shared Running Business Reviews



CREATE MULTIPLE BIZ REVIEWS

Organize several RBRs for different parts of the business, product line or organization.



INVITE OTHERS TO CONTRIBUTE

Allow others to publish items to a single RBR – use for huddles, management reviews or group dashboards.



GLOBAL BUSINESS REVIEWS

Set up one or more RBRs that are global – visible to everyone in your part of the organization.



SELECTIVELY SHARE AN RBR

Share one or more of your RBRs with select individuals; decide whether they are viewers or editors.



CHOOSE WHAT TO INCLUDE

Select specific action items to include on shared RBRs. Show just KRAs, just objectives, or just workstreams to customize for a unique dashboard or report – a fast way to create a custom report



- BIZ REVIEW
- MY WORK
- TEAM WORK
- OBJECTIVES
- MEETINGS

Biz Review Close

+ Add RBR

My Running Business Reviews

- Personal RBR
- NA Employee Retention
- Onboarding and Enablement

RBRs shared with me

- Strategic Priority: Foster Employee Growth**
Cynthia Andros
- Strategic Priority: Diversity and Inclusion
Cynthia Andros
- Strategic Priority: Build Manager Effectiveness
Cynthia Andros

Strategic Priority: Foster Employee Growth

Cynthia Andros 58

<p>36 ▲ of 111</p> <p>All team members learn 3 new skills this quarter</p>	<p>46% ♥ of 100%</p> <p>All team members observe product usage in the field at least once</p>	<p>6 ▲ of 8</p> <p>App dev squads move to Agile methodology</p>	<p>8 ▲ of 12</p> <p>Host weekly lunch n' learn series</p>	<p>7 ▶ of 10</p> <p>10 team members present on a growth topic to another org</p>
<p>62% ▶ of 100%</p> <p>100% of surveyed employees agree that managers treat learning as a priority</p>	<p>1 ▲ of 3</p> <p>Host 3 regional forums this quarter for cross-department training</p>	<p>76% ▶ of 100%</p> <p>Launch a shared learning portal for all employees</p>		

OBJECTIVES

- 25%** Keep the focus on learning every week

Executives: Victor Peters

Jim C: Weekly lunch n' learn series starts Oct 3.
- 18%** Prioritize learning and growth in the NA Marketing org

NA Marketing: Mary Cmoso
- 56%** Become a more agile organization

Application Development: Bart Allen
- 43%** Become experts on the customer's experience

UX/UI Development: Jonathan Hu

Emma S: We are looking really good on this one team! *updated All team members observe usage in the field to 72%*

WORKSTREAMS

- 63%** Employee Satisfaction Survey

HR: Carl Chagoyan

2 **R** 4 **X** 34 **D** Dec 31, 2017
- 74%** Implement Agile methodology

Development: Jonathan Hu

3 **R** 5 **X** 12 **D** Dec 31, 2017
- 33%** Q4 Lunch and Learn series

Employee Development: Cynthia Andros

23 **D** Dec 31, 2017



Biz Review

Close

+ Add RBR



My Running Business Reviews

Personal RBR

Global Sales RBR

NA Sales

Q4 Sales

RBRs shared with me

Global Sales

Emma Watson

EMEA Sales

Carl Chagoyan

Marketing RBR

Carl Chagoyan

RBR - Global Sales

Carl Chagoyan

8 👤

Share your RBR



Custom message:

Please view or edit objectives, key results, workstreams and action items to this RBR.

Share with organization

Search by team or person

Samuel Robinson

View Edit X

William Daniels

View Edit X

Brenda Greene

View Edit X

Diane Butler

View Edit X

Walter Lawson

Edit View X

Kevin Castro

View Edit X

Scott Rogers

View Edit X

Share

6 ▲

Comp

on ne

6 ▶

Depl

our ?

OBJ

25

18

56

43

67

98

WOR

63

74%

SaaS offering and delivery

Development: Jonathan Hu

3 R 5 X 12 I Jun 30, 2017

33%

Security and Compliance

Development: Jonathan Hu

23 I Jun 30, 2017

65%

Selling and merchandising

Emma Smith

34 I Jun 30, 2017

50%

Operational excellence

Carl Chagoyan

5 X 27 I Jun 30, 2017

0days

ding time form 180 days

8 ▶ of 35

Recruit core appdev team

T BOX

Close out 5 data centers in Canada

25%

Jonathan Hu

Save \$3 million in dev costs

0.5m

Jonathan Hu

of 3m

Execute 2H16 marketing investment to deliver \$28M in pipeline for 1H17

4m

of 28m

Approve sales offers

Aug 1

Carl Chagoyan

Performance 2

ACTION ITEMS

Approve sales offers

Pipeline Q3 2017: Joshua Stewart

May 14, 2017

Review solutions for downtime fixes

Critical Bugs: Grace Richards

May 14, 2017

Scalability solutions for 1000+ users

Expansion: Walter Russell

May 15, 2017

Approve Marketing branding plan for SaaS offering

Sales efforts: Joyce Bryant

May 24, 2017

Data centers identified for closing in this quarter

Infrastructure: Walter Russell

May 28, 2017



Biz Review

Close

⊕ Add RBR



My Running Business Reviews

Personal RBR

Oil and Gas

Sustainable Energy

Automotive

RBRs shared with me

FinServ

Emma Watson

Telecom

Carl Chagoyan

Food Services

Mary Cmoso

Retail

Mary Cmoso

Insurance

Mary Cmoso

Oil and Gas

Carl Chagoyan

8 👤

\$34m of \$52m

Global revenue

15.8m of 30.3m

BKT total EMEA Revenue

70 of 200

Shareholders from key customers on Indigo beta

75 of 90

K2 pilots in T1 accounts

381.2m of 800m

4x pipeline coverage ratio

\$0.5m of \$3m

Grow K2 services to \$3 million

32.06m of 50m

50 Million in K2 product revenue

76 of 100

100 validated opportunities for K2 in the pipeline

OBJECTIVES

54%

The Quarter We Blow It Up!

NA Sales: Joe Robbins

Joe R: Services for new campaign and analytics support at GMT *updated 50 million in services revenue to 4850000*

69%

Expand EMEA sales by 30% this quarter

EMEA Sales: Audrey Chauvier

57%

Build customer relationships and advocacy to support our market strategy

Marketing: Mary Cmoso

56%

Revenue across BKT line of products

Business Development: Charlie Damon

43%

Set the bar on innovation with K2 and move to the front of the pack

Executive Team: Jack Anderson

Barry B: Added Metlife, Geico and BNY to the beta this week. *updated Customers on K2 beta to 3*

67%

Grow faster than our competitors

Executive Team: Jack Anderson

83%

Make the K2 Launch the most successful in our history!

Marketing: Mary Cmoso

87%

Drive demand and build the sales pipeline

Marketing: Mary Cmoso

HOT BOX

The Quarter We Blow It Up

Joe Robbins

54%

Grow K2 services to \$3 million

Jonathan Hu

0.5m

of 3m

Execute 2H16 marketing investment to deliver \$28M in pipeline for 1H17

4m

of 28m

Approve sales offers

Nov 1

WORKSTREAMS

63%

Global eCommerce Sales

Sales: Carl Chagoyan

2 🔴

4 🔴

34 🔵

Dec 30, 2017



Biz Review

Close

+ Add RBR



My Running Business Reviews



Personal RBR



K2 Dev Squad

Indigo Dev Squad

GoPlatinum Dev Squad



RBRs shared with me

Global Sales

Emma Watson

2017 Product Strategy

Carl Chagoyan

CTO Initiatives

Jan Stevens

K2 Dev Squad

Allen Bart

8 👤

95% ▲

Sprint 22 Completion

5.1 ▲ of 24

Sprint 22 Average Cycle Time (days)

73% ▲

Sprint 23 Completion

3.1 ▲ of 18

Sprint 23 Average Cycle Time (days)

0% ▶

Sprint 24 Completion

0 ▶ of 10

Sprint 24 Average Cycle Time (days)

16 ▲ of 0

Outstanding K2 blocker bugs

97.21% ▶ of 100

Average K2 uptime

OBJECTIVES

65%

Innovate with new K2 features to stay ahead of the pack

Product Development: Steven Rogers

Carl C: Let's discuss moving SFDC integration forward to Spint 27.

25%

Be the most agile team we can be

Product Development: Steven Rogers

56%

Secure, protect and manage data the way our customers expect

Software Development: Carl Chagoyan

ACTION ITEMS

H SFDC Integration

Sprint 28: Joshua Stewart

Dec 22, 2017

H Review solutions for downtime fixes

Critical Bugs: Grace Richards

Oct 31, 2017

M New calendar widget

Sprint 23: Walter Russell

Nov 16, 2017

Feedback tracker on mobile

Sprint 23: Joyce Bryant

Nov 18, 2017



BIZ REVIEW

Biz Review Close



MY WORK

+ Add RBR



TEAM WORK

My Running Business Reviews



OBJECTIVES

- Personal RBR
 - Global Sales RBR
 - NA Sales
 - Q4 Sales



MEETINGS

RBRs shared with me

- Global Sales
Emma Watson
- EMEA Sales
Carl Chagoyan
- Marketing RBR
Carl Chagoyan

RBR - Global Sales 8 👤

Carl Chagoyan

30.44m ▲ of 57.5m Global Revenue	2 ♥ of 10 Have you met with a customer this quarter?	13.08m ▲ of 24.5m BKT total EMEA Revenue	17.36m ▲ of 33m BKT total North America revenue	76 ▶ of 100 100 validated opportunities for K2 in the pipeline
138 ▶ of 150 SQLs	60% ▲ of 100% K2 launch goes according to plan	36.06m ▶ of 52m Increase revenue 10% in Q3	5.3 ▲ of 8 NPS of 8	6 ▼ of 10 10 Evangelist interviews
8 ▲ of 15 New logos in EMEA	4 ♥ of 8 Wins in Insurance segment	42.5m ▲ of 50m 50 million in services revenue	14 ▲ of 24 24 Beta Customers on K2	76 ▶ of 100 100 validated opportunities for K2 in the pipeline
90 ▶ of 125 K2 Demos completed	52 ▲ of 90 K2 Pilots in T1 Accounts			





BIZ REVIEW

Biz Review

Close



MY WORK

+ Add RBR



TEAM WORK

My Running Business Reviews

Personal RBR

Global Sales RBR

NA Sales

Q4 Sales



OBJECTIVES

RBRs shared with me



MEETINGS

Global Sales
Emma Watson

EMEA Sales
Carl Chagoyan

Marketing RBR
Carl Chagoyan

RBR - Global Sales

Carl Chagoyan

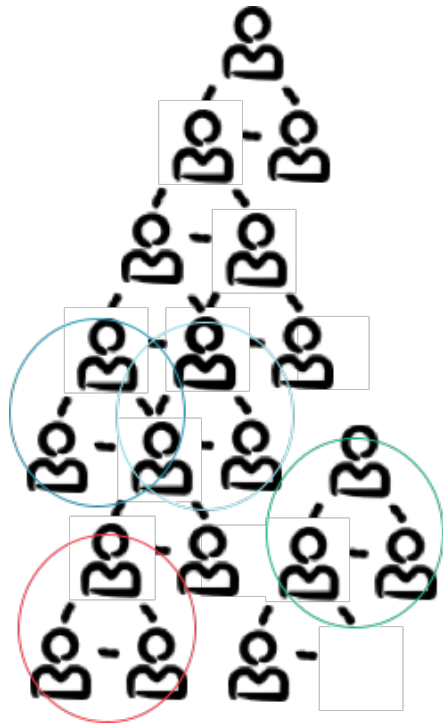
8 👤

OBJECTIVES

- 54%** **The Quarter We Blow It Up!**
NA Sales: Joe Robbins
Joe R: Services for new campaign and analytics support at GMT *updated 50 million in services revenue to 4850000*
- 69%** **Expand EMEA sales by 30% this quarter**
EMEA Sales: Audrey Chauvier
- 57%** **Build customer relationships and advocacy to support our market strategy**
Marketing: Mary Cmoso
- 56%** **Revenue across BKT line of products**
Business Development: Charlie Damon
- 43%** **Set the bar on innovation with K2 and move to the front of the pack**
Executive Team: Jack Anderson
Barry B: Added Metlife, Geico and BNY to the beta this week. *updated Customers on K2 beta to 3*
- 67%** **Grow faster than our competitors**
Executive Team: Jack Anderson
- 83%** **Make the K2 Launch the most successful in our history!**
Marketing: Mary Cmoso
- 87%** **Drive demand and build the sales pipeline**
Marketing: Mary Cmoso



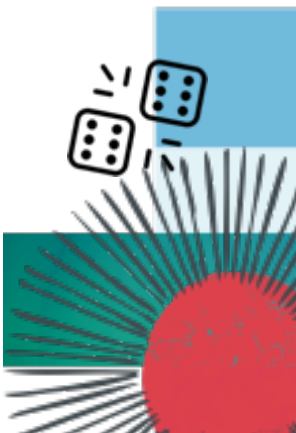
One window to disparate data about work with deeper integration with JIRA, Github, Asana



When teams use different task tool, it's hard to get the full picture and stay aligned on business outcomes ... harder for managers and disconnects work from its strategic value for team members.

Now, bring it all together in Workboard:

- ✓ Pull Jira, GitHub, or Asana data and work status automatically
- ✓ Choose continuous or one time pull
- ✓ Decide what to include (issues, tickets, stories, tasks, projects) and how much detail (items or stats like completion % or count)
- ✓ Epic level integration with Jira.
- ✓ Use on RBRs, metric and key results, capacity planning, execution dashboards and meeting agendas



- BIZ REVIEW
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All Workstreams Executive Team

8 Workstreams 23 Action Items 2 Objectives Weekly Snapshots Roster

Sort: A to Z

Timeline

- Publish
- Give a badge
- Edit team name
- Import workstream
- Leave team
- Delete team


63%	Global eCommerce Sales Carl Chagoyan	⚡ 12 R 4 ⌚ 34 D	STEADY	RISK ▼	P1	Jan 1, 2017
74%	SaaS offering and delivery Jonathan Hu	⚡ 3 R 5 ⌚ 12 D	FAST	OK ▶	P1	Start
33%	Security and Compliance Jonathan Hu	⚡ 4 R 23 D	STEADY	GOOD ▼	P2	Jan 1, 2017 - May 15, 2017
50%	Operational excellence Carl Chagoyan	⚡ 25 D	STEADY	RISK ▼	P2	Start - Jun 30, 2017
35%	2017 Budget Emma Smith	⚡ 4 R 5 ⌚ 11 D	FAST	GOOD ▼	P2	May 1, 2017 - End
66%	K2 Release Tracking Github Import: K2 Releases	⚡ 0 D	STEADY	GOOD ▼	P1	Start - End


- BIZ REVIEW
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Workstream Import



Where do you want to import from?

 Jira

 GitHub

 Asana

Workstream Import



Allow Workboard to access your Jira's account

Base URL (required)
Enter public Jira URL (with https:// and trailing slash). Might be a subdomain like https://example.jira.com/ or a custom domain like https://example.com/.

Username (required)
Try username first, if doesn't work, try email with '@' and 'domain name'.

Password (required)

Yes, Continue

Workstream Import



Where do you want to import from?

Jira GitHub Asana

Select which component you want to map to

Story Epic **Project**



Select which component you want to import from:

Story

Epic

Project

Select which projects you want imported



Jira



Workboard

- Argent - Android
- Argent - iOS
- Argent - desktop
- Indigo 3 - Android
- Indigo 3 - desktop
- Indigo 3 - iOS
- Sapphire beta development
- Umber 7 QA
- Viridian

Create a new workstream in Workboard

Argent Feature Release Tracking

- Sync Tasks (action items)

Syncing Tasks will pull tasks from Jira and convert them to action items in workboard

- Argent - Android
- Argent - iOS
- Argent - desktop
- Indigo 3 - Android
- Indigo 3 - desktop
- Indigo 3 - iOS
- Sapphire beta development
- Umber 7 QA
- Viridian

Create a new workstream in Workboard

Argent Feature Release Tracking

-
- Sync Tasks (action items)
Syncing Tasks will pull tasks from Jira and convert them to action items in workboard

Owner Mapping

Specify ownership of action items to be mapped between JIRA and Workboard

David Allen	➔	Dave Allen	▼
Roger Smith	➔	Roger Smith	▼
Samantha Thompson	➔	Samantha Thompson	▼

Import

Argent Feature Release Tracking Executive Team

- BIZ REVIEW
- MY WORK
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Mar 1, 2017 - [Set Date](#) STEADY ▶ RISK ▼ P2 0 R 0 ⏸ 4 👤 0 👤 48%

- Board** 12 List 2 Objectives 12 Activity Files

BACKLOG		
1-click reports	Carl Chagoyan	Jun 13 '17
Date customization	Grace Ryan	Jun 14 '17
AND/OR segmentation	Christopher Rivera	No date
trendline comparison graphs	Thomas Woods	No date

NEXT		
Amazon RDS connector	Carl Chagoyan	Jun 13, 2017
Custom access roles	Grace Ryan	Jun 14, 2017
Responsive embedding	Christopher Rivera	Jun 17, 2017

IN PROGRESS		
SFDC integration	Raymond Howell	No date
drag-and-drop interface on mobile editor	James Ward	Jun 14, 2017
google font integration	Janice Larson	No date
upgrade to V2 function library	Raymond Howell	No date
Implement new UI for end-user portal	Raymond Howell	No date
SSO integration	Raymond Howell	Jun 18, 2017
Android app redesign launch	James Ward	Jun 18, 2017

DONE		
Distribu	Grace Ry	No date
Cart integration	Thomas Woods	Jun 14, 2017
Custom palette for graphs	Karen Hamilton	No date
Export to Excel	Jonathan Williamson	No date
New search filtering options	Richard Long	No date
Export to PDF	Joseph Douglas	No date

- ↑ Publish
- 🔄 Sync with JIRA
- 🎨 Board Themes
- 👤 User Permissions
- 🔄 Manage Workstream Lifecycle
- ➕ Add Workstream to...
- ⏸ Move BACKLOG



Set the bar on innovation with key apps and move to the front of the pack

Jack Ceomack : Executive Team



Dec 31, 2017
54 days left



- Key Results
- Workstreams
- Comments

30% Argent - release 20 key features this quarter

62% Indigo - release 15 key features this quarter

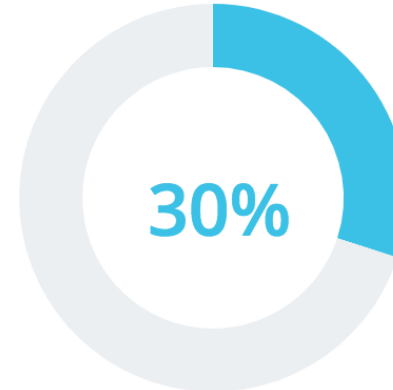
43% Sapphire - release 10 key features this quarter

50% Viridian - release 20 key features this quarter

Argent - release 20 key features this quarter

As of Nov 07, 2017

30% Completed



Source: Argent Feature Release Tracking

Follow



Biz Review

Close

+ Add RBR



My Running Business Reviews



Global Innovation Initiative



Global Sales RBR

Q4 Revenue

Q4 Sales



RBRs shared with me

Global Sales

John Watson

EMEA Sales

Ilim Chazovan

Marketing RBR

Emma Cmoso

RBR - Global Innovation Initiative

Carl Ceomack

8

62% ▲ of 100%

Indigo - Release 15 key features this quarter

2 ▼ of 10

L6 beta program participants from key verticals

50% ▲ of 100%

Viridian - release 20 key features this quarter

30% ▲ of 100%

Argent - release 20 key features this quarter

43% ▶ of 100%

Sapphire - release 10 key features this quarter

58% ▶ of 100%

K2 launch goes according to plan

4 ▲ of 10

Innovation opportunities identified in NA Marketing

7 ▶ of 10

Innovation opportunities identified in NA Customer Success

9 ▲ of 10

Innovation opportunities identified in NA Product

6 ▼ of 10

Innovation opportunities identified in EMEA Sales

8 ▲ of 15

Innovation opportunities identified in Mobile App Development

14 ▲ of 24

24 Beta Customers on K2

90 ▶ of 125

K2 Demos completed

52 ▲ of 90

K2 Pilots in T1 Accounts

Meeting: Product Team Weekly Huddle

Nov 09 at 2:00pm 00:11 Count up End Meeting Description



ADD: Objective Key Result Workstream Action Item Attachment

Topics for Discussion	
<i>Type to add a topic</i>	
📊 Argent Feature Release Tracking <small>Roger Jones : Development</small>	Ok ▶ 30% <small>Added by Ana R</small>
💬 Should we add more Android developers to the Argent squad? <small>Ana Rodrigues 04:29 pm Nov 07</small>	
📊 Release K2 with zero blocker bugs now <small>Development : Roger Jones</small>	50% <small>Added by Ana R</small>

Takeaways and Notes
<i>Type to add takeaways</i>
👉 We'll temporarily reassign 2 Android developers from K2, L6 squads to help roll out the new UI <small>Ana Rodrigues 04:30 pm Nov 07</small>
● We need to reprioritize delivery on mobile app features to stay ahead of the competition. Each team will review their current backlog and update priorities by Monday. <small>Ana Rodrigues 04:32 pm Nov 07</small>

Topics Today

1. Workboard news!
2. Meeting data points
3. Monday release
4. Rest of 2017
5. DYKs





For the holidays

1. Personalize your boards
2. Compare results and display on RBR
3. Notification improvements
4. Show some love
5. Another quality and performance sweep



Dev Team Candidates Information Technology & Services

Carl C. Mar 1, 2017 - [Set Date](#) ☰

Board View 20 List View 2 Objectives 12 Feed Files

27 Filters ▾

Mar 1, 2017 - [Set Date](#)

PACE: **STEADY** ▶

HEALTH: **RISK** ▼

PRIORITY: **P2**

3 R 6 X 5 ! 8 👤



☰ Timeline

BACLOG	
+	
HealthTips app !	Jun 13 '17
Carl Chagoyan	
Help Desk solutions — feature/function survey	Jun 14 '17
Grace Ryan	
Identify areas of improvement we are seeking	Jun 17 '17
Christopher Rivera	
Inventory and profiles for all Finance apps	Jun 23 '17
Thomas Woods	
Follow up on eCMS migration	Jun 14 '17
Joseph Douglas	
Data visualization and warehousing	Jun 18 '17
Raymond Howell	
Deep dive on app quality	Jun 23 '17
James Ward	

NEXT	
+	
Inventory and profiles for all Legal apps !	Jun 13 '17
Carl Chagoyan	
Runbook for data and app migration	Jun 14 '17
Grace Ryan	
Review the candidate contract	Jun 17 '17
Christopher Rivera	

FOCUSING ON NOW	
+	
Review final candidate pool !	Jun 13 '17
Raymond Howell	
Reach out to vendor on the specs !	Jun 14 '17
James Ward	
Assess features and scalability of analytics apps	Jun 14 '17
Janice Larson	
Catalog the best-of-breed apps	Jun 16 '17
Raymond Howell	
Identify commercial cloud options !	Jun 17 '17
Raymond Howell	

DONE	
+	
Deploy GCV at AWS !	Jun 1 '17
Grace Ryan	
Deploy PatientPredictor at AWS !	Jun 23 '17
Thomas Woods	
Double check the last candidate contract terms	Jun 1 '17
Karen Hamilton	
Draft contract by June 23	Jun 23 '17
Jonathan Williamson	
Draft list of cloud transition candidate apps	Jun 13 '17
Richard Long	



- BIZ REVIEW
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Board Settings



Choose a background color



Or enter a color

hex value

Choose an image as a background



Change column header color

Column name 1



Column name 2



Column name 3



Column name 4



Or enter a color

hex value

Save

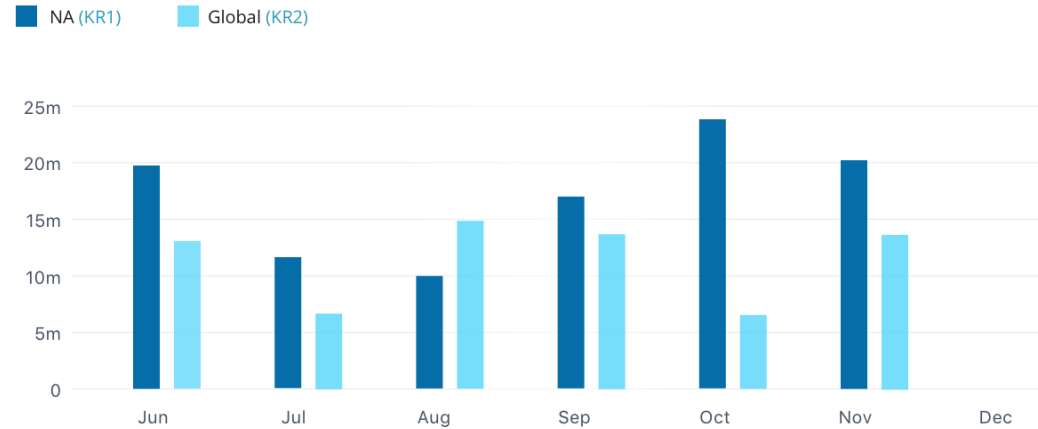


RBR - Global Sales

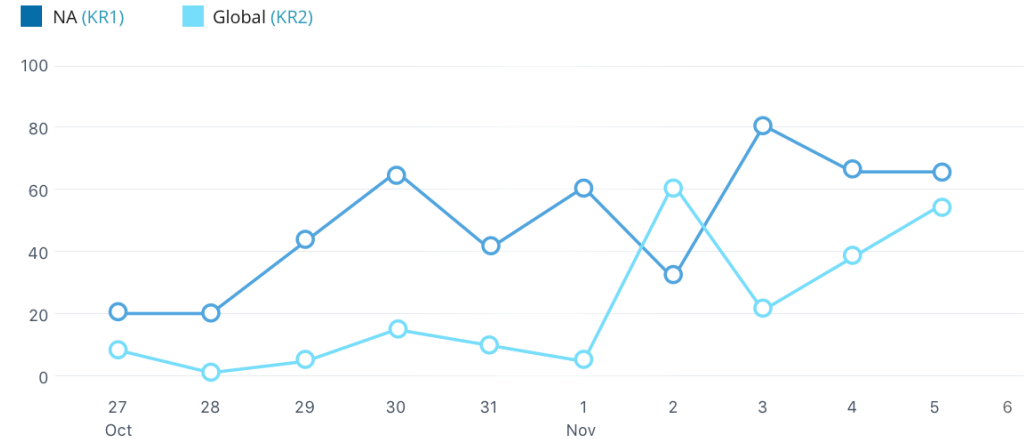
Carl Chagoyan

7 👤

North America vs Global Sales



Product daily usage NA vs Global



6 ▲ of 10

Complete major milestones to go live on new payroll system this quarter

6% ♥ of 30%

Improve customer retention by 30%

20% ▲ of 100%

Close 10 data centers in the US

80 ▲ of 180days

Reduce onboarding time form 180 days to 100

8 ▶ of 35

Recruit core appdev team

OBJECTIVES

- 25%** Transform hiring experience for hiring managers and candidates in North America
Executives: Victor VP
Carl C: We may need to adjust for losses on Q2, lets discuss.
- 18%** Improve the customer experience to improve satisfaction, cross sales and retention
Innovative Applications: Carl Chagoyan
- 56%** Secure, protect and manage data the way our customers expect
Software Development: Carl Chagoyan
- 43%** Shed our legacy infrastructure to lower costs
Infrastructure: Jonathan Hu
Emma S: We are looking really good on this one team! - updated Gross Profit to 530.69
- 67%** Streamline the process and provide expert timely legal services to the business

HOT BOX

- 33%** Improve economic and operational efficiency
Executives: Victor VP
- 33%** Improve the customer experience to improve satisfaction, cross sales and retention
Innovative Applications: Carl Chagoyan
- 6** Zero P1 Bugs by EOQ
Software Development
of 10
- 63%** Global eCommerce Sales
Carl Chagoyan
- Approve sales offers

Product Launch Executive Team

Oct 01, 2017 - Nov 17, 2017

HEALTH: GOOD ▲

PACE: FAST ▲

PRIORITY: P1

1 📄 10 🗄️ 4 📌 12 👤

Board View | 6 List View | Recent Activity | 6 Objectives | Files

ON HOLD

+

- Appropriate commission structure in place
Joe Seller Sep 25, 2017
- Appropriate commercial and legal agreements in place
LouAnn Profser Sep 19, 2017

UP NEXT

+

- Meet with Mary and discuss v.09
Jack Ceomack Oct 20, 2017
- Name of request for beth
Alice Peoples Oct 18, 2017
- High level talking points for the meeting with Steve
Jack Ceomack Oct 07, 2017
- Secure the quotes from Aaron and review the choice of customers
Allen Bart Sep 26, 2017

IN PROGRESS

+

- Sales training on new products
Jack Ceomack Oct 17, 2017
- Hand over materials to marketing to initiate press release cycle for K2 launch
Mary Cmoso Oct 05, 2017
- Channel pricing strategy in place
Frank Finacle Oct 02, 2017
- Roll out channel in place
Barry Bosser Sep 12, 2017

All Notifications | Mentions | Delete All ⚙️

- 3 changes were made to [This is the quarter we blow it up!](#)
- 23m ago
 "Great progress team!" Please take a look at the attached and let me know if I'm far off and if anything needs to be adjusted for Q4...
 ❤️ 💬 🗑️
 - 24m ago
 Dany Finch change the status from doing to done.
 ❤️ 💬 🗑️
 - 24m ago
 Joe commented: "Added Chevron, UnionBank and Aetna"
 ❤️ 💬 🗑️
 - 1d ago
 Target Hit! You updated [Increase revenue 10% in Q4 to 59m](#)
 ❤️ 💬 🗑️
 - 2d ago
 Joe commented on [This is the quarter we blow it up!](#) "Added Chevron, UnionBank and Aetna"
 ❤️ 1 💬 🗑️

Define sales training playbook



Product Launch Executive Team

Oct 01, 2017 - Nov 17, 2017 HEALTH: GOOD ▲ PACE: FAST ▲ PRIORITY: P1 1 📄 10 🗄️ 4 👤 12 👤

Board View 6 List View Recent Activity 6 Objectives Files

ON HOLD

- Appropriate commission structure in place
Joe Seller Sep 25, 2017
- Appropriate commercial and legal agreements in place
LouAnn Profser Sep 19, 2017

UP NEXT

- Meet with Mary and discuss v.09
Jack Ceomack Oct 20, 2017
- Name of request for beth
Alice Peoples Oct 18, 2017
- High level talking points for the meeting with Steve
Jack Ceomack Oct 07, 2017
- Secure the quotes from Aaron and review the choice of customers
Allen Bart Sep 26, 2017

IN PROGRESS

- Sales training on new products
Jack Ceomack Oct 17, 2017
- Hand over materials to marketing to initiate press release cycle for K2 launch
Mary Cmoso Oct 05, 2017
- Channel pricing strategy in place
Frank Finacle Oct 02, 2017
- Roll out channel in place
Barry Bosser Sep 12, 2017

All Notifications Mentions Delete All ⚙️

3 changes were made to blow it up!

23m ago
"Great progress and let me know adjusted for Q4."

24m ago
Dany Finch change the status from doing to done.

24m ago
Joe commented: "Added Chevron, UnionBank and Aetna"

1d ago
Target Hit! You updated Increase revenue 10% in Q4 to 59m

2d ago
Joe commented on This is the quarter we blow it up! "Added Chevron, UnionBank and Aetna"

Define sales training playbook

☑️ Thread Notifications

Show notifications for:

- ☑️ Action Items
- ☑️ Objectives and KR's
- ☑️ Meetings
- ☑️ Badges



All Notifications

Mentions

Delete All



20m ago

Joe commented on [This is the quarter we blow it up!](#)
"Added GMT, Allstate and Metlife"



1



Ring in the new year

- 1. Refresh of the WoBo experience in January**
2. Enhancements to managing team bandwidth
3. More ways to compare, analyze and share result data
4. Customize cards – types, fields and automation
5. Public workstreams: share once with everyone in the org
6. More flexible heirarchy of action items: convert actions to subactions and vice-versa



Topics Today

1. Workboard news!
2. Meeting data points
3. Monday release
4. Rest of 2017
5. DYKs



3 DYKs

Making your day a little easier.




Create a recurring agenda for a recurring meeting or add individual topics to another meeting







Meeting: K2 Launch Planning









Blue Marine Room

Nov 02 at 2:00pm 00:01 Count up End Meeting



ADD: Objective Key Result Workstream Action Item Attachment

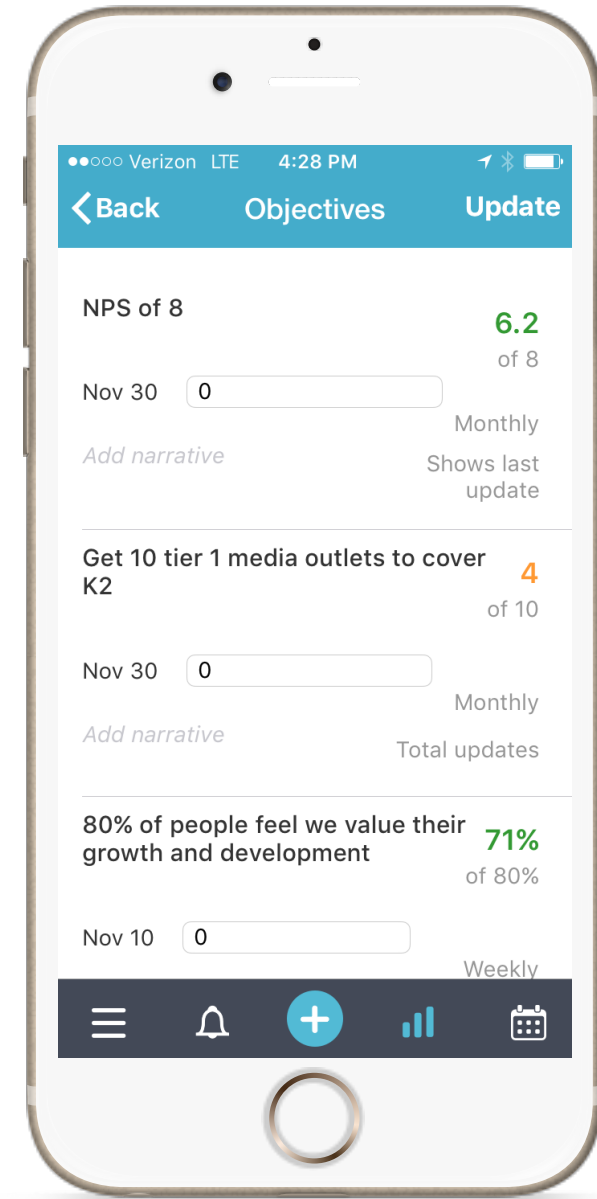
Topics for Discussion	Takeaways and Notes
<p>Type to add a topic</p> <p> Killer K2 Launch 74% Business Operati... : Shelly Hansen <i>Added by Mary C</i></p>	<p>Type to add takeaways</p> <p> General Launch Plan, we will be covering the following areas: - Website & Blog - Social Media & Email Marketing - Pricing - Post launch webinar <i>Mary Cmoso 11:01 am Oct 10</i></p>
<p> Should we revisit the social media budget? <i>Mary Cmoso 03:32 pm Nov 01</i></p>	<p> Pushed to next meeting after we consult with Paul <i>Mary Cmoso 10:48 am Nov 03</i></p> <p> Need to get the budget from finance <i>Mary Cmoso 10:49 am Nov 03</i></p>
<p> Finalize PR schedule Assigned to Mary <i>Mary Cmoso 03:32 pm Nov 01</i></p>	

-  Publish Summary
-  Edit
-  Ping for agenda
-  Add topics to all recurring meetings
-  Remove recurring topics
-  View meetings
-  Past meetings
-  Delete



Save time and share data: Update all of KRs at once from your phone.

Tip: teams get better results when bad facts, missed numbers and narratives are shared



☆ wobot

Messages About



Search



WoBot APP 3:18 PM

Hey there!



mary 3:18 PM

Can I see my results?



WoBot APP 3:18 PM ☆



1.96k of 1500 -- MQLs

Update Result KR History Show Chart

275 of 150 -- SQLs

Update Result KR History Show Chart

52 of 100 -- Customer re-engagement

Update Result KR History Show Chart

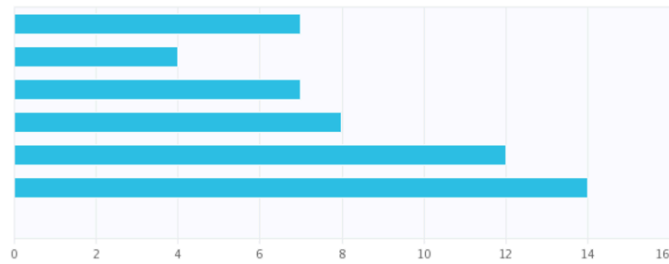


show more show all

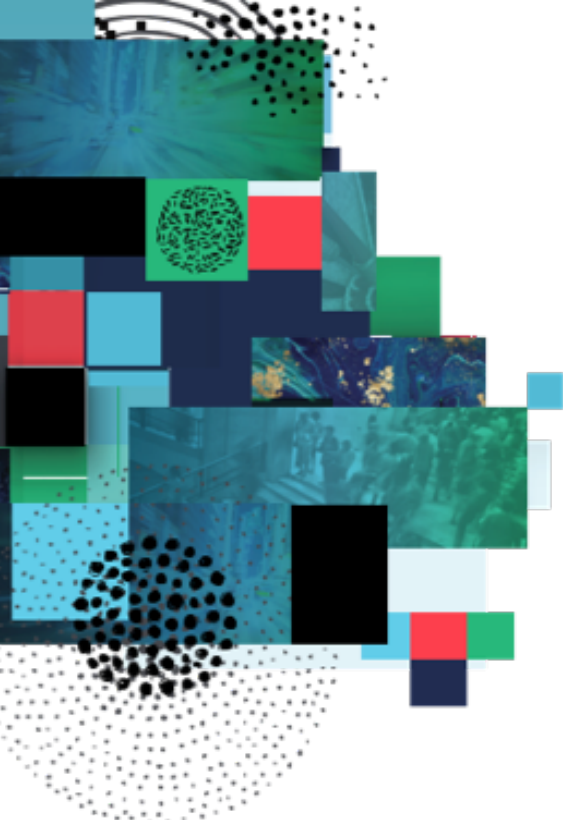
Customer re-engagement

(updated weekly - October 1-November 16 2017)

(3 kB)



Message @wobot



*Thank you for the opportunity to support
your success!*

