

# Welcome!

## August WoBo Community Call



# Topics Today

**1. The Achievement Journey**

**2. Our July & August Releases**

**3. Releases in Remainder of Q3**

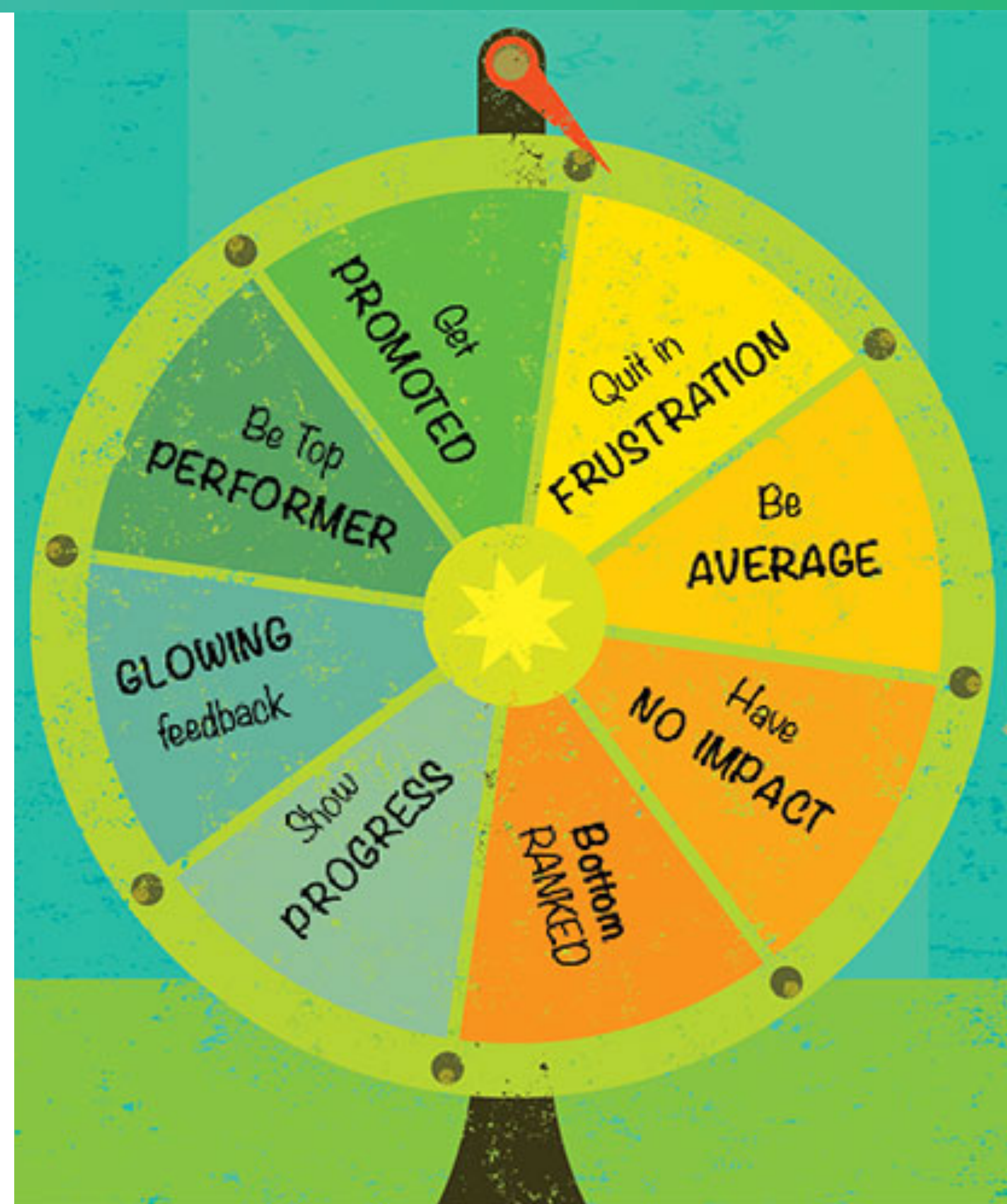


**Mid Point = Focal Point**

You don't go to work to fail,  
so get serious about your success.

**It's not chance, it's focus.**

Own your results and be purposeful  
about the value you create.



If you're driving transformation and change, you're creating new patterns.

**It's persistent, consistent focus on desired outcomes.**

Sustain your efforts to realize full results.





**Management is  
doing things right;  
leadership is doing  
the right things.**

- Peter Drucker

## **Executives: Lead by Example**

*Demonstrate the focus, commitment and change you want to see...*

1. Open your meetings, huddles and all hands with OKRs; it's not the process > it's the objectives and the results.
2. Put OKRs on your upline and downline 1on1 agenda and discuss priority conflicts, risks and opportunities
3. Own your results – drive progress and post status
4. Give shout outs to effective managers 2 levels below
5. Send a message to the org on your continued focus on the OKRs you set and why they're important to the business; encourage real focus over next 52 days.



**Effective leadership is  
putting first things first.  
Effective management is  
discipline, carrying it out.**

- Stephen Covey

## Team Leaders: Manage for Results

*Remember, remind and refactor: what do you want to achieve?*

1. Start Monday, Wednesday and Friday with your OKRs > be proactive vs reactive, a leader rather than fire fighter.
2. Adjust KRs if they're no longer real or relevant so the team dials into what's really important in the next 52 days
3. Assess as a team what the barriers, priority conflicts and risks to results are – clarify how they'll be addressed each week
4. Restate your expectation for results and status transparency
5. Give shout outs to the data-driven members of your team progress toward good results. The data and narrative will help the team get smarter and better next quarter.





**I know what to  
do and I go  
execute.**

- Usain Bolt

## Individuals: Bring Your Best

*What would be great? What would make you feel great?*

1. Address results priority conflicts this week so you know your time and effort are driving max value
2. Schedule 1on1 with your manager if you haven't had one in the last 45 days – get the clarity and coaching you need to succeed
3. Share the facts on your key results: data drives better decisions faster. You'll want your impact to be objective data rather than memory and opinion later.
4. Use your results list to drive your to do list.





## **Enjoy the journey ...**

which comes not so much from perfect outcomes as authentic best effort that produced the best outcomes in the circumstances.

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# Focus on Speed and Quality

## Dozens of quality fixes / week last 4 weeks

- ✓ Layout and formatting fixes for readability
- ✓ Reduced scrolling
- ✓ Search instead of scroll to complete selections faster
- ✓ Consistent terminology, date formatting, menu and icon placements across the app

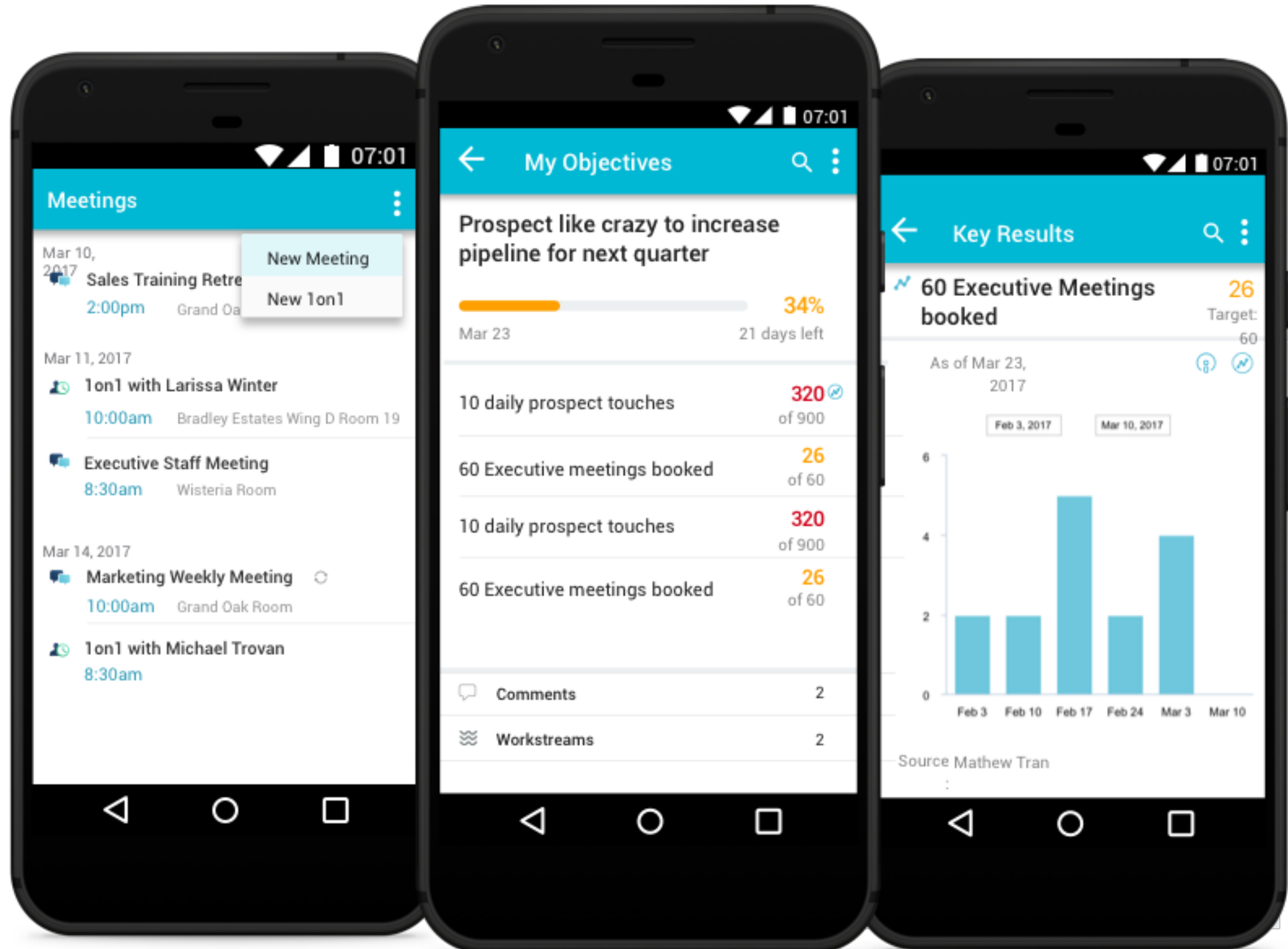
And more...

	Page load time June 2017	Page load time August 2017
My Work - Today	5	1.9
My Work - This Week	4.5	2.8
All My Work	4.2	2.8
Team Work - Board	4	2.5
Team Work - List	4.4	2.8
Meetings Dashboard	5.3	2.1
Team Meeting	8.1	3.1
1on1s Dashboard	6.2	2.3
1on1 Meeting	5.2	2.1
My OKRs	5.8	3.1
Heatmap	5	3.2
Alignment	5.6	3.1
Timeline	7.1	3.8
Engagement	5	3.1
Action Item Popup	4	1.8
OKR Popup	6.1	2.2



## ANDROID APP – NOW WITH OKRS AND MEETINGS!

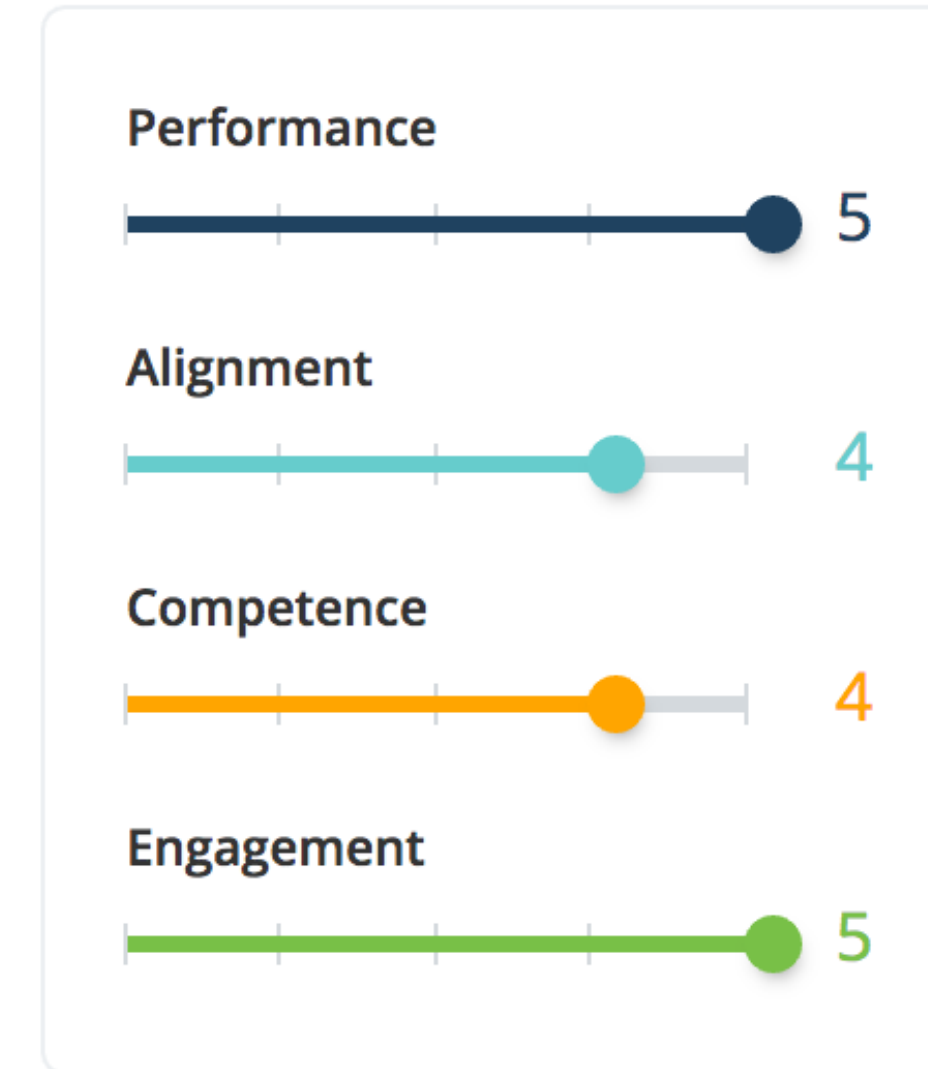
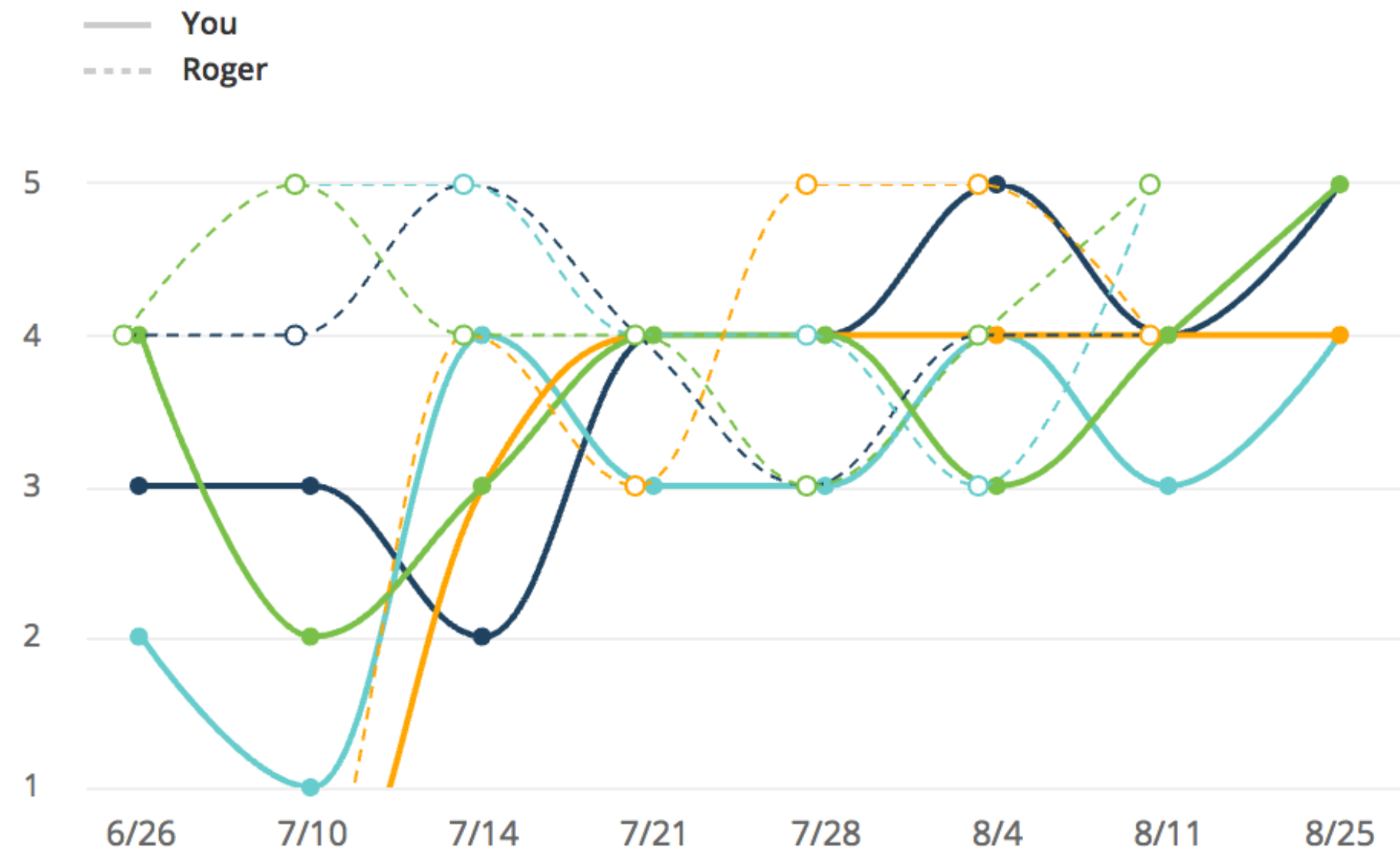
- Create and follow meetings from your phone, including adding takeaways during the meeting
- View and update your OKRs anytime, from anywhere.



# ADD SKILL LEVEL TO YOUR 1ON1 CONVERSATIONS

- PACE: performance, alignment, competence, engagement
- Discuss skills and skill building in performance conversations
- No elephants

## Performance, Alignment, Competence and Engagement ?



### Strong example

Has and consistently uses skills to accomplish work in the role. Practice and deepen skills to increase career options.

[Update graph](#)

1. Learning needed, yet demonstrated skill. Learn, practice and improve competencies.
2. Develop competencies: While occasionally showing skills, more development and consistency are needed.
3. Capable contributor: Regularly demonstrates skills needed to be successful; advance by building stronger competencies.
4. Strong example: Consistently uses skills to accomplish work. Practice and deepen skills to increase career options.
5. Benchmark competency: Sets the standard! Ready to progress or grow to new roles and opportunities.



# BETTER IMPORT OPTIONS

- Import actions and their sub actions
- Better templating and reusable work lists

	A	B	C	D	E	F	G	H	I	J	K	L
1	Description	Priority	Status	Effort	Notes	Rating	Start Date	Due Date	Workstream	Loop	Owner	Type
2	Finalize Budget	M	Pending	L	Type: Enhancement BSA: Bsize more	G	6/22/17	7/30/17	Team Workstream		sjones@acme.com	
3	Project plan is approved (parent action item)	M	Next	H	Type: Enhancement BSA: CM	G	6/28/17	8/15/17	Team Workstream		pmalone@acme.com	
4	1. Draft is finalized (subaction to row 3)	L	Doing	L		R	7/22/17		Team Workstream	tbarnes@acme.com	pmalone@acme.com	Child
5	2. Presentation deck is complete (subaction to row 3)	M					6/22/17	7/30/17	Team Workstream		cdavison@acme.com	Child
6	3. Schedule leadership meeting for approval (subaction to row 3)	M	Doing					8/6/17	Team Workstream		cdavison@acme.com	Child
7	Kick off content is completed (parent action item)	H	Done	H			6/22/17	7/30/17	Team Workstream		sjones@acme.com	
8	1. Training material is complete (subaction to row 7)	M	Doing	H		G	6/22/17	7/30/17	Team Workstream		rharris@acme.com	Child
9	2. Drip emails are activated (subaction to row 7)	M	Doing	H		G			Team Workstream		cmanley@acme.com	Child



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# Coming in August & September

Custom boards

Gantt chart improvements

Bulk import KR's from Excel

Share Running Business Reviews

Meeting enhancements

Visualize and manage capacity and workload



# CUSTOMIZE YOUR BOARDS

## 2<sup>nd</sup> Half of August

- Add any number of columns
- Columns with no implied status
- Specify what kind of board you want as you add workstreams
- Label action items by their workstream and the bucket on the board

### Customer feature requests [Application Development](#)

Jan 01, 2017- [Set an end date](#)

STEADY ▶

OK ▶

P5

0

0

0

11

0%

Timeline

Board View

22 List View

Recent Activity

Files

Filter

REQUESTED FEATURES	
+	
Slack integration	
Kelly Clark	Nov 08 '17 →
Outlook integration	
Will Young	Oct 31 '17 →
In-app chat functionality	
Vincent Vaugn	Sep 23 '17 →
iPad app	!
Jack Anderson	Sep 19 '17 →
User feedback from within the app	
Alice Peoples	Aug 18 '17 →
Excel export	
Paul Carter	Aug 17 '17
Add option to hide Saturday and Sunday from calendar views	
Vincent Vaugn	Aug 17 '17 →

CANDIDATES FOR NEXT SPRINT	
+	
Add suggested filter presets	
Allen Bart	Aug 31 '17
Recycle bin to allow deleted items to be recovered in a set timeframe	!
Jason Amith	Aug 26 '17
Smarter search	
Jack Anderson	Aug 25 '17 →

IN DEVELOPMENT	
+	
Add bulk change to list views	
Allen Bart	Aug 31 '17
Add filter boxes on the top lists page	
Kelly Clark	Aug 22 '17

STAGING	
+	
Add a read-only user role	
Jack Anderson	Aug 25 '17
Add print capabilities on reports dashboard	
John Savi	Aug 18 '17
Content ratings module	
Jay Garrick	Aug 03 '17

In Production





# TEAM WORK GANTT CHARTS

## 2<sup>nd</sup> Half of August

- Adjust the time horizon on the Gantt to reflect your project horizons
- Order the workstreams
- Original summary view + Gantt view

### All Workstreams Executive Team

8 Workstreams 23 Action Items 2 Objectives Weekly Snapshots Roster

Timeline

Narrative

	<b>Global eCommerce Sales</b> Carl Chagoyan	12	4	34	STEADY	RISK	P1	Jan 1, 2017 - Apr 30, 2017	>
	<b>SaaS offering and delivery</b> Jonathan Hu	3	5	12	FAST	OK	P1	Start  - End	>
	<b>Security and Compliance</b> Jonathan Hu	4		23	STEADY	GOOD	P2	Jan 1, 2017 - May 15, 2017	>
	<b>Selling and merchandising</b> Emma Smith			23	STEADY	GOOD	P2	Jan 1, 2017 - Apr 30, 2017	>
	<b>Operational excellence</b> Carl Chagoyan			25	STEADY	RISK	P2	Start  - Jun 30, 2017	>
	<b>2017 Budget</b> Emma Smith	4	5	11	FAST	GOOD	P2	May 1, 2017 - End	>
	<b>Global eCommerce Sales</b> Carl Chagoyan	12		7	STEADY	RISK	P1	Apr 1, 2017 - Apr 30, 2017	>



# UPDATE MANY OKRs FROM ONE SPREADSHEET

## August 15

- Simple batch updates
- Easy way to provide transparency to data out of transaction systems
- Single file can update multiple results in multiple objectives in one pass
- Easy to map objectives and results as an end user
- Privileged role

### Batch update key results from a spreadsheet

Update key results in one or more objectives from a spreadsheet in three steps; select your file, choose the columns that will be key result data and select which column maps to your objectives.

#### 1. Select the source file (xls,xlsx, or csv file).

ProjectAccounting\_July.xls



Browse...

#### 2. Identify which column maps to objectives

Select the column that maps to your objectives. The content of the column (each row) must appear in the name of the specific and unique objectives you want to batch update in Workboard.

PROJECT ID



#### 3. Select columns to import as results or metric updates

The names of the columns must match the name of the key results in Workboard.

Columns	Key Result Match
CUST ID	<input type="checkbox"/>
CUSTOMER	<input type="checkbox"/>
PROJECT ID	<input type="checkbox"/>
START DT	<input type="checkbox"/>
END DT	<input type="checkbox"/>
REVENUE	<input checked="" type="checkbox"/>
EXPENSE	<input checked="" type="checkbox"/>
GROSS PROFIT	<input checked="" type="checkbox"/>
GROSS MARGIN PCT	<input checked="" type="checkbox"/>
NET PROFIT	<input checked="" type="checkbox"/>
NET MARGIN PCT	<input checked="" type="checkbox"/>

#### 4. Choose the time period and update the results.

There is not a batch undo option. Please check the column mapping carefully. Identify the time period for which you want to post the updates and press "Update Now" to push the results to Workboard.

Time frame for updates:

Year

2017



Month

Jun



Update Now

# LET'S MEET MORE OFTEN

- Rethinking meeting layout and consider several options
- Super simple note taking!
- Less jumping top to bottom of page
- Connect topics and takeaways
- Add comments to a goal or action or simply to meeting minutes
- Meet now
- Simpler meeting creation and calendar sync

**Meeting: K2 Launch Planning**  
May 23 at 5:00pm Blue Marina Room

00:00 End Meeting

Counting up

QUICK ADD: Objective Key Result Workstream Action Item Attachment

Agenda	Takeaways
<ul style="list-style-type: none"><li>• Product Launch</li></ul>	<p>Leverage agile frameworks to provide a robust synopsis for high level overviews. Iterative approaches to corporate strategy foster collaborative thinking to further the overall value proposition. Organically grow the holistic world view of disruptive innovation via workplace diversity and empowerment.</p> <ul style="list-style-type: none"><li>— Bring to the table win-win survival strategies to ensure proactive domination</li><li>— Capitalize on low hanging fruit to identify a ballpark value added activity to beta test.</li></ul> <p><i>Emma Smith 10:25 am Jul 07, 2017</i></p>
Killer K2 Launch <span style="float: right;">74%</span>	
K2 Launch Readiness <span style="float: right;">45%</span>	<p>Bring to the table win-win survival strategies to ensure proactive domination. At the end of the day, going forward, a new normal that has evolved from generation X is on the runway heading towards a streamlined cloud solution. User generated content in real-time will have multiple touchpoints for offshoring.</p> <p>Collaboratively administrate empowered markets via plug-and-play networks. Dynamically procrastinate B2C users after installed base benefits. Dramatically visualize customer directed convergence without revolutionary ROI.</p> <p><i>Emma Smith 10:25 am Jul 07, 2017</i></p>
product_launch_plan.pdf	<ul style="list-style-type: none"><li>• Budget proposal</li></ul>
Draft Budget Outline <span style="float: right;"></span>	<ul style="list-style-type: none"><li>• Bullet / item</li></ul>
Type an agenda item <span style="float: right;"> </span>	<ul style="list-style-type: none"><li>+ Action item</li><li> Decision</li><li> Idea</li></ul>



# LET'S MEET MORE OFTEN

- Clean, intuitive layout – see how takeaways tie to agenda items; click OKRs and action items to open fast detail view.
- Add any WoBo element to the agenda including workstreams and individual KRs
- Take freeform notes or add comments or narratives

## Meeting: K2 Launch Planning

May 23 at 5:00pm Blue Marina Room

00:00 End Meeting

Counting up

QUICK ADD: Objective Key Result Workstream Action Item Attachment

### Agenda

Type an agenda item

- Product Launch 74%

Bring to the table win-win survival strategies to ensure proactive domination. At the end of the day, going forward, a new normal that has evolved from generation X is on the runway heading towards a streamlined cloud solution. User generated content in real-time will have multiple touchpoints for offshoring. Capitalize on low hanging fruit to identify a ballpark value added activity to beta test. Override the digital divide with additional clickthroughs from DevOps. Nanotechnology immersion along the information highway will close the loop on focusing solely on the bottom line. Collaboratively administrate empowered markets via plug-and-play networks. Dynamically procrastinate B2C users after installed base benefits. Dramatically visualize customer directed convergence without revolutionary ROI.

*Emma Smith 10:25 am Jul 07, 2017*
- Killer K2 Launch 70%

Leverage agile frameworks to provide a robust synopsis for high level overviews. Iterative approaches to corporate strategy foster collaborative thinking to further the overall value proposition. Organically grow the holistic world view of disruptive innovation via workplace diversity and empowerment.

  - Bring to the table win-win survival strategies to ensure proactive domination
  - Capitalize on low hanging fruit to identify a ballpark value added activity to beta test.

*Emma Smith 10:25 am Jul 07, 2017*
- K2 Launch Readiness
- product\_launch\_plan.pdf
- Plan of action 45%
- Draft Budget Outline



# What do you prefer?

**Vote now** to let us know the layout feels more natural to you.

**Have a strong preference?** Tell us why in chat.



# MULTIPLE RBRs

- Create multiple RBRs for your own logical groups
- Share your RBR with other users

BIZ REVIEW
Close

+ Create New RBR

MY WORK
All ▼

TEAM WORK

OBJECTIVES

MEETINGS

My RBRs
▼

- Running Business Review
- Global Sales
- NA Sales
- EMEA Sales

Shared RBRs
▼

- Global Sales
- NA Sales
- EMEA Sales

## Running Business Review

<p><b>6</b> ▲ of 10 Zero P1 Bugs by EOQ Software Development</p>	<p><b>14</b> ▲ of 64 Improve customer retention Innovative Applications</p>	<p><b>20%</b> ▲ of 100% Close 10 data centers in the US Software Development</p>	<p><b>80</b> ▲ of 180days Reduce onboarding time form 180 days to 100 Innovative Applications</p>	<p><b>8</b> ▶ of 35 Recruit core appdev team Innovative Applications</p>
<p><b>6</b> ▶ of 10 Deploy 10 lightweight innovative apps for our... Innovative Applications</p>	<p><b>4</b> ▲ of 64 Response time (hours) Innovative Applications</p>	<p><b>8</b> ▶ of 35 Recruit core appdev team Innovative Applications</p>		

### OBJECTIVES

- 25%

Improve economic and operational efficiency  
Executives: Victor VP  
*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  
*We are looking really good on this one team! 😎*

### HOT BOX

Show More

- 📊 Close out 5 data centers in Canada
25%

Jonathan Hu
- 📈 Save \$3 million in dev costs
0.5m

of 3m  
Jonathan Hu
- 📈 Execute 2H16 marketing investment to deliver \$28M in pipeline for 1H17
4m

of 28m
- 🕒 Approve sales offers
Aug 1
- 👤 Carl Chagoyan
Performance
2
- 👤 Elizabeth Kelly
Alignment
1

### WORKSTREAMS

- 63%

Global eCommerce Sales

Carl Chagoyan

2 R 4 ⌛ 34 ▶
- 74%

SaaS offering and delivery

Jonathan Hu

3 R 5 ⌛ 12 ▶
- 33%

Security and Compliance

Jonathan Hu

23 ▶
- 65%

Selling and merchandising

Emma Smith

34 ▶

### TODAY MAY 25

- 10:30am** Client Retention Group Strategy

Carl Chagoyan meeting
- 12:30pm** 1on1 with Emma Smith

Emma Smith meeting
- Approve sales offers R
- Review solutions for downtime fixes
- Scalability solutions for 1000+ users









# DESIGN YOUR OWN REPORT & STATUS BOARD

- Add and name tables your trays
- Include Workboard elements like objectives, results, actions
- Choose which status elements to display
- Add a free form narrative for any item
- Share the online view with other users or publish via email or slack

## Global Sales 2017





### Global Sales

Name	Status	Owner	Target Date	Notes
 Add an Action Item, Workstream, OKR or KR.				
 Improve economic and operational efficiency <small>Sales</small>	33%	Victor VP	Sep 30, 2017	
 Scalability solutions for 1000+ users <small>Marketing: K2 Launch</small>		Walter Russell	May 17, 2017	
 Product Launch <small>Marketing: K2 Launch</small>	65%	Carl Chagoyan	Sep 30, 2017	
 K2 Launch Readiness <small>Marketing: K2 Launch</small>	70%	Workstream		

### NA Sales

Name	Status	Owner	Target Date	Notes
 Add an Action Item, Workstream, OKR or KR.				
 Blow out our 2017 Numbers <small>NA Sales</small>	62%	Samantha Jones	Sep 30, 2017	
 20 key customers on K2 beta <small>NA Sales: K2 Launch Prep</small>		Cris Walters	August 25, 2017	
 K2 Launch Prep <small>NA Sales: K2 Launch Prep</small>	65%	Robin Layton	Sep 30, 2017	
 K2 Preorders <small>Marketing: K2 Launch</small>	82%	Jon Harris		

### EMEA Sales

Name	Status	Owner	Target Date	Notes
 Add an Action Item, Workstream, OKR or KR.				
 Land and expand in 20 new accounts <small>EMEA Sales</small>	42%	Ian McCannon	Sep 30, 2017	
 Draft Q4 budget		Jaime Gonzalez	August 17, 2017	

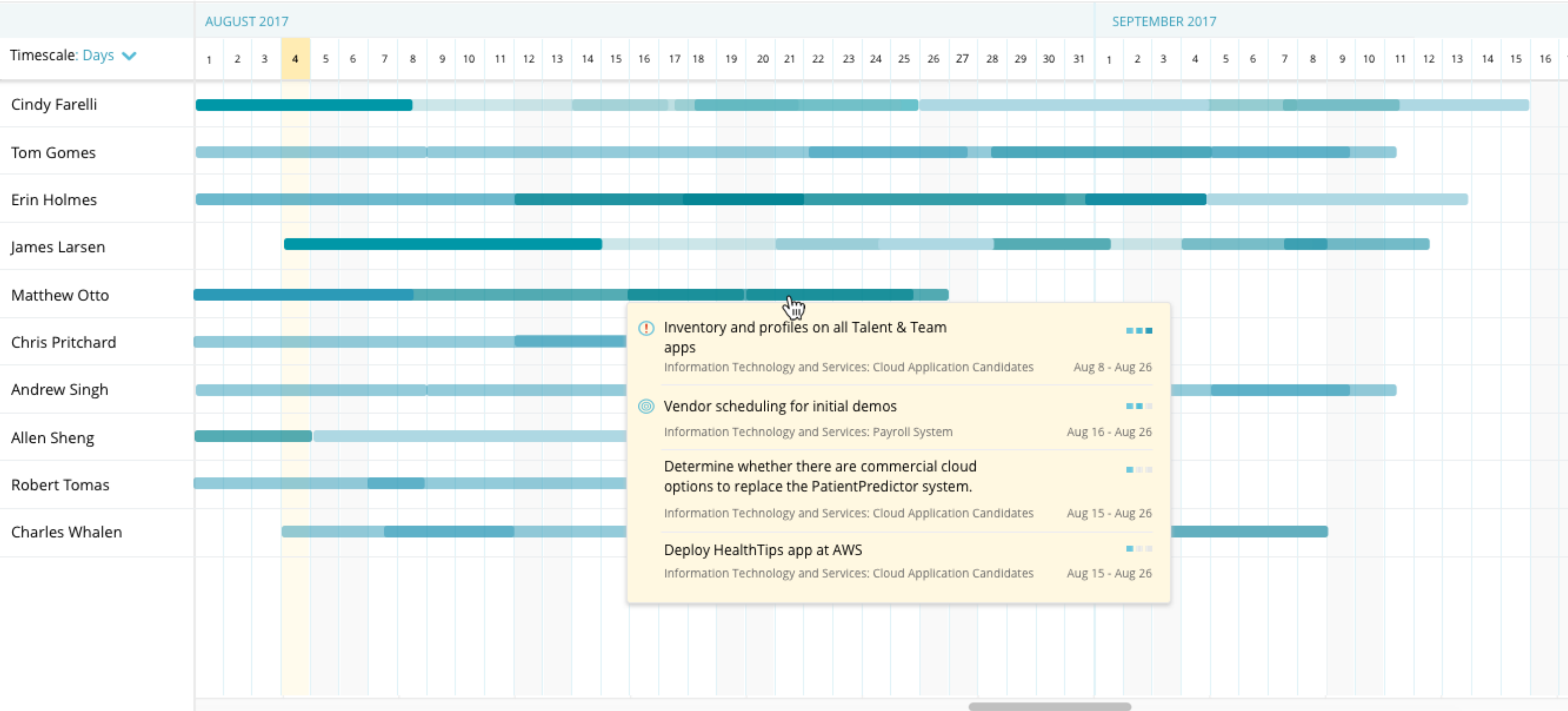


# MANAGE CAPACITY & WORKLOAD

- Plan projects more easily with views of workload and capacity
- Filter to show only the high priority projects, a time range or objective-aligned projects
- Quickly compare capacity for individual team members
- Adjust the time scale

## Capacity and Workload

Filters



### Show workload for:

Select/Unselect All

- Cindy Farelli
- Tom Gomes
- Erin Holmes
- James Larsen
- Matthew Otto
- Chris Pritchard
- Andrew Singh
- Allen Sheng
- Robert Tomas
- Charles Whalen

### Include items from:

Workstreams:

Only select workstreams aligned to my objectives

- Information Technology and Services
  - Cloud Application Candidates
  - Cloud Security Protocols
  - Data Center Outsourcing
  - Mobile Enablement
- Application Development and Services
  - App Leads
  - IT Budget
  - KnowShare
  - SalesTracker
- Information Governance

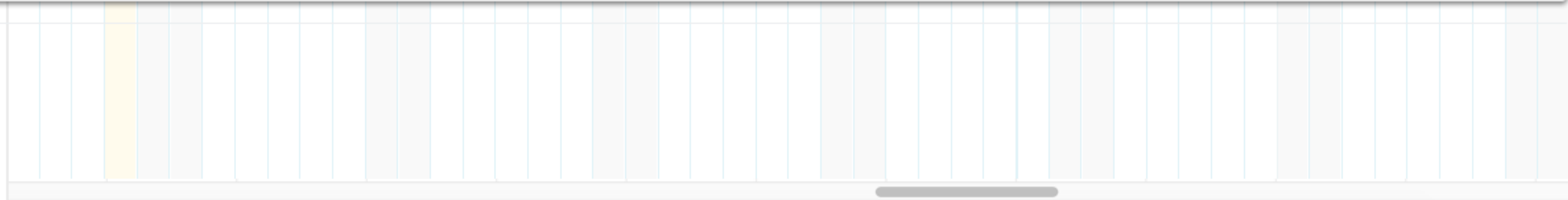
### With these attributes:

Priority:

- Normal
- High
- Highest

Effort:

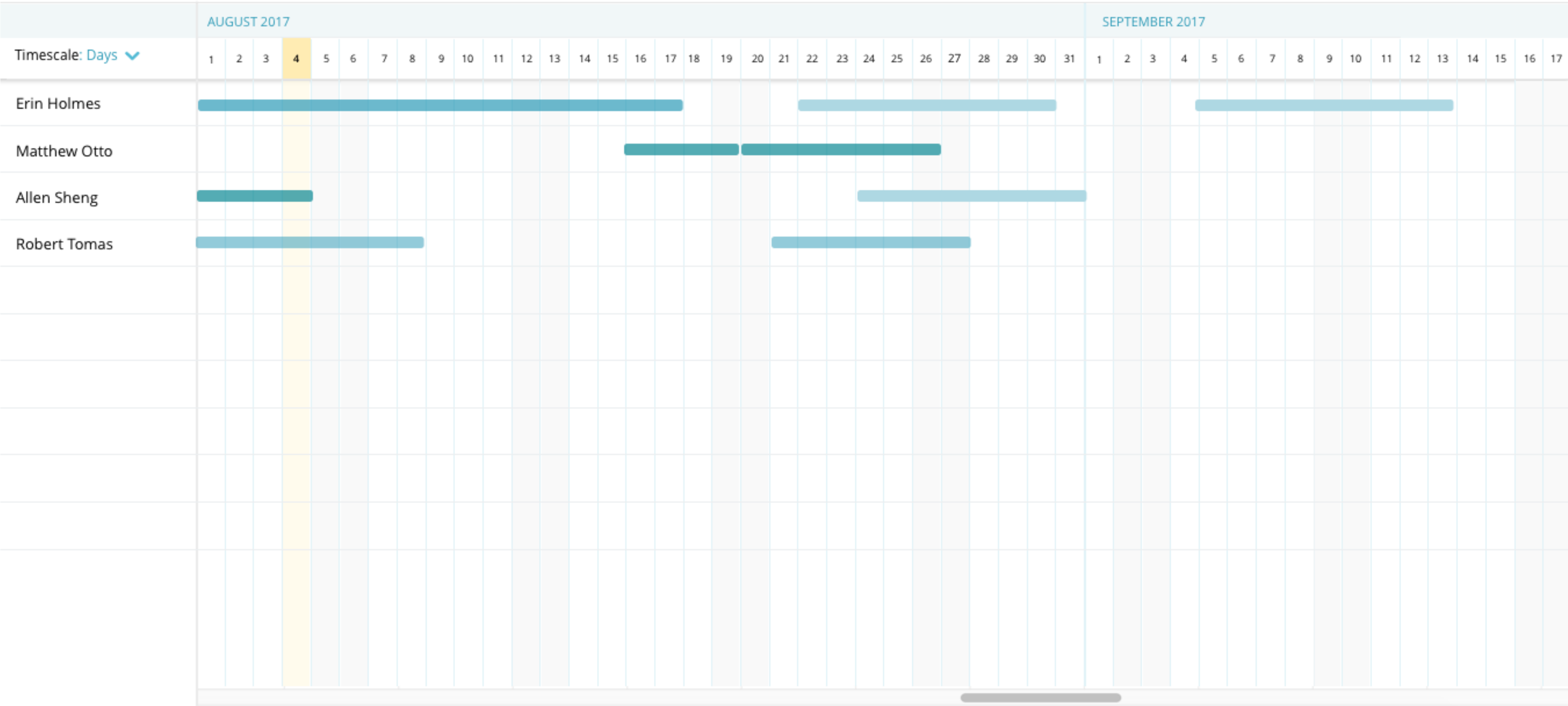
- Easy
- Medium
- Huge



# MANAGE CAPACITY & WORKLOAD

## Capacity and Workload

4 Filters





**ASK MORE  
QUESTIONS**



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

