



We'll get started at about 2 minutes past the hour to give everyone time to join...

April WoBo Community Call

There's nothing quite like succeeding with an awesome team.

Welcome



Topics Today

- 1. Vision snippet**
- 2. Coming in May on Web app, iPhone and Android**
- 3. WoBot ;)**
- 4. June release**





Many organizations communicate and drive their strategic plans in PowerPoint today.

It's brittle, slow, expensive, and opaque.

This is how WoBo users will drive plans in the future.

WoBo, how is Gary doing on the Q2 sales plan?

On target - \$23m in bookings, \$17m in revenue and pipeline is \$183m

How is Marketing doing on the product launch?

Behind plan: Launch is at 47% rather than 60%. Do you want me to add that to the next e-staff meeting agenda?

Yes please add it. What are my other risks?

Engineering is behind plan on to hire 12 engineers and ship MON 12.2.

**Add that to the meeting agenda.
Next question: How am I doing compared to peers?**

**Done.
You're 12% closer to plan than your peers this quarter.**

- Data and context now
- Text conversation May
- Voice conversation Oct

Workboard is to strategy what agile is to development.

FROM **Scale is Power**

Old World: Less dynamic market, slower rate of change, ability to predict longer horizon, top-down org structures

- Opaque: 1,000 hours to get data
- Narratives with few metrics
- Multi-year and annual cycle

TO **Nimble is Power**

New World: Rapid innovation, accelerating market change, advance-by-iteration, dynamic non-hierarchical org structures

- Data driven: 10 seconds to data
- Measurement with narrative
- Quarterly cycle and fast iteration

You're driving the future of business:

Fast and Fuel Efficient

Real Time Radar

Immediate Data to Steer

Assisted Steering and Braking



Topics Today

1. Vision snippet

2. Coming in May on Web app, iPhone and Android

3. WoBot ;)

4. June release





Release May 5th

Huge improvements on Key Results

Workstream spiffs

WoBot beta

Update and Get Key Results Data More Easily

- Left nav alert when KR's due
- Remodeled My Results view
- Easy like Excel but cuter and transparent
- Quick report on key results over time > the data!
- Daily digest includes alert when KR's due and updates
- One list of updates on mobile
- Alignment report is on the alignment page

workboard

Objectives & Key Results Close

BIZ REVIEW

MY WORK

TEAM WORK

OBJECTIVES

MEETINGS

- ⊕ Set team objective
- ⊕ Set individual objective
- 📈 Update KR's
- 📊 My OKRs
- 🇳🇵 Heatmap
- ✂️ Alignment
- 📅 Timeline
- 👥 Engagement

Update Key Results

Increase our agility and ability to invest in the business by moving apps to the cloud
Carl Stevenson: Development

Migrate 20 apps to the cloud	8 of 20 <i>Shows last update</i>	Feb 28	# update
Reduce storage costs	5.25m of 4.2m <i>Totals updates</i>	Feb 22	\$ update
Reduce data migration cycle time to 5 days	10 of 5 <i>Averages updates</i>	Feb 15	# update
Complete inventory of next wave of cloud candidates	0% of 100% <i>Shows last update</i>	Feb 2	% update

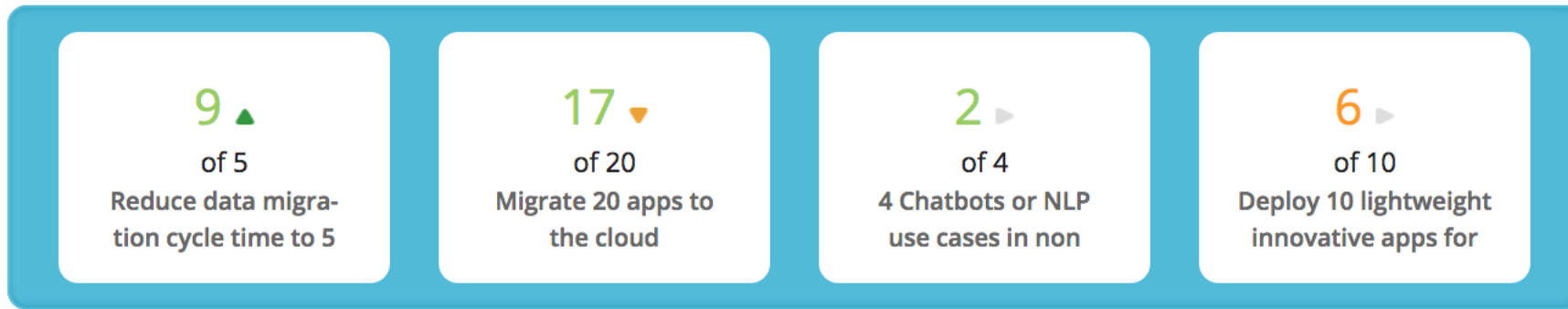
Help simplify employee's day-to-day experience

Carl Stevenson: Development

Complete major milestones to go live on new payroll system this quarter	8 of 20 <i>Shows last update</i>	Feb 28	# update
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.	90% <i>Totals updates</i>	Feb 22	% update
Add 2 new features to managerial self service	0% <i>Totals updates</i>	Feb 2	% update

Enable our LOB teams to be effective anywhere and everywhere with key apps

Results Watchlist



My OKRs

Dependencies

Results I Contribute

Update 8

Increase our agility and ability to invest in the business by moving apps to the cloud

Carl Stevenson: Development

26 days left

Migrate 20 apps to the cloud	8 of 20 <i>Shows last update</i>	As of Feb 28	
Reduce storage costs	5.25m of 4.2m <i>Totals updates</i>	As of Feb 22	
Reduce data migration cycle time to 5 days	10 of 5 <i>Averages updates</i>	As of Feb 15	
Complete inventory of next wave of cloud candidates	0% of 100% <i>Shows last update</i>	As of Feb 2	

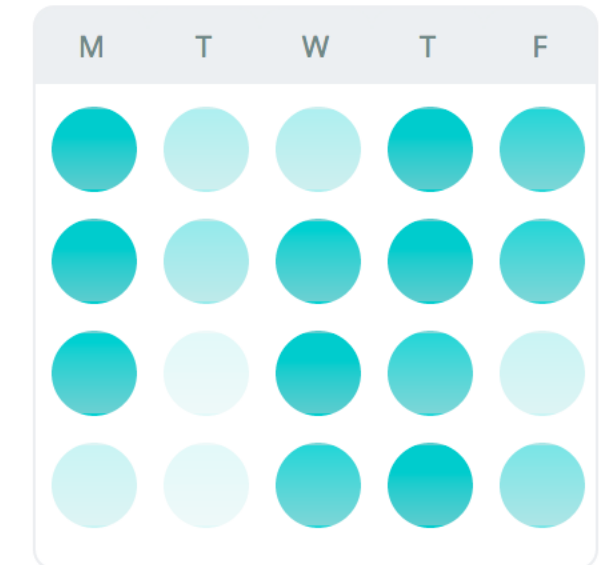
Enable our LOB teams to be effective anywhere and everywhere with key apps

Carl Stevenson: Development

26 days left

Mobile enable our 10 top apps	3 of 10 <i>Shows last update</i>	As of Feb 15	
Deploy 10 lightweight innovative apps for our North America front office	65% of 2 <i>Totals updates</i>	As of Feb 2	

OKR Focus



Legend



Target Hit!

Vinny Vendor updated [Renegotiate contracts](#) to 9



Vinny Vendor commented on [Slash vendor costs](#): "IBM"



Vinny Vendor commented on [Slash vendor costs](#): "CA"



Update Key Results

Increase our agility and ability to invest in the business by moving apps to the cloud

26 days left

Carl Stevenson: Development

Migrate 20 apps to the cloud

8 of 20

Shows last update

Feb 28

update

Add narrative



Reduce storage costs

5.25m of 4.2m

Totals updates

Feb 22

\$ update

Add narrative



Reduce data migration cycle time to 5 days

10 of 5

Averages updates

Feb 15

update

Add narrative



Complete inventory of next wave of cloud candidates

0% of 100%

Shows last update

Feb 2

% update

Add narrative



Help simplify employee's day-to-day experience

26 days left

Carl Stevenson: Development

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

8 of 20

Shows last update

Feb 28

update

Add narrative



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.

90%

Totals updates

Feb 22

% update

Add narrative





Increase our agility and ability to invest in the business by moving apps to the cloud

Carl Stevenson : Information Technology & Services



May 31, 2017

35 days left



- [Key Results](#)
- [Aligns](#)
- [Workstreams](#)
- [Notes](#)
- [Comments](#)

17 of 20 Migrate 20 apps to the cloud

5.25m of 4.5m Reduce storage costs

9 of 5 Reduce data migration cycle time to 5 days

39% Complete inventory of next wave of cloud candidates

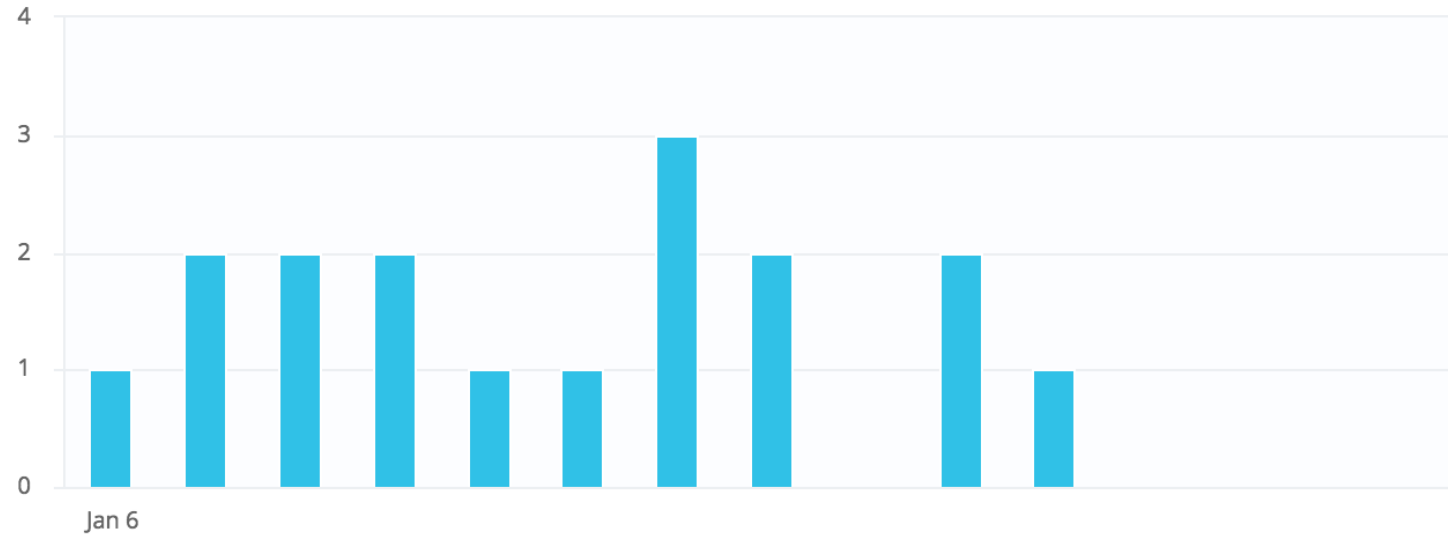
Migrate 20 apps to the cloud

As of Mar 15, 2017

17 of 20

01/05/17 - 04/20/17

Weekly



[Results Detail](#)

Source: Percy Jones

[Update](#) [Add to Watchlist](#)

RESULTS DETAIL AS OF MAR 20, 2017



17
of 20








Migrate 20 apps to the cloud

Weekly percentage (shows last update)

For objective: Increase our agility and ability to invest in the business by moving apps to the cloud

For period: Jan 1, 2017 to Mar 31, 2017

Update

Date	Update	Narrative
Mar 31	4	 The team powered through and finalized migrations of MarketMail, ER Analytics, Healthtips, and ProFinance apps 🎆 <i>Samuel White</i> 👍 2
Mar 17	5	  Migration of all eCMS Add On Applications completed in this last cycle — there were 3 change requests from the customer that put us behind schedule, but Jim and Matt jumped in from other projects and helped us push these through in a tight revised timeframe! <i>Samuel White</i> 👍 3
Feb 3	1	 Patient Predictor migration was implemented and tested <i>Samuel White</i> 👍+
Jan 20	2	 Migrated eCMS and Helpdesk to the cloud <i>Lisa Sorenson</i>
Jan 13	2	 <i>Samuel White</i> 👍+
Jan 6	3	 <i>Samuel White</i> 👍+

- Set team objective
- Set individual objective

- My OKRs
- Heatmap
- Alignment
- Timeline
- Engagement

Objectives & Key Results ?

View by : Organization Objective Full Report



Enter a person or team name or an objective

[TEAM NAME OR PERSON NAME] - FULL ALIGNMENT REPORT

All ^

44% Increase our agility and ability to invest in the business by moving apps to the cloud

Carl Stevenson: Org Mar 31 '17

- 8 of 20 Migrate 20 apps to the cloud
- 5.25m of 4.2m Reduce storage costs
- 10 of 5 Reduce data migration cycle time to 5 days
- 0% Complete inventory of next wave of cloud candidates

60% Help simplify employee's day-to-day experience

Carl Stevenson: Org Mar 31 '17

- 8 of 20 Complete major milestones to go live on new payroll system this quarter
- 90% Re-launch the benefits self service portal
- 0% of 2 Add 2 new features to managerial self service

65% Enable our LOB teams to be effective anywhere and everywhere with key apps

Sam Security: CISO Mar 31 '17

- 6 of 10 Deploy 10 lightweight innovative apps for our North America front office
- 3 of 10 Mobile enable our 10 top apps

0% Enrollments in our 5 Certification Programs

Sam Security: CISO Mar 31 '17

60% Start an employee university

Arnold App: Application Development & Services Mar 31 '17


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

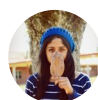
Workboard Daily Digest

Hi Rocio, here are your notifications for Apr 03, 2017



Focus on the good

 You have 8 key results to update [Update Now](#)



Victoria changed the due date of [Budget for Marketing Q3](#)
Due date added: April 04 2017

7:34am



Victoria Program commented on [Increase our agility and ability to invest in the business by moving apps to the cloud:](#)

9:00am

"@Suzanne @Vinny The team is working on identifying the next batch of candidates for migration. In the process we have identified 4 applications for retirement. Should we aim to have an internal check point and sign off on these this quarter?"



Victoria Program updated [Slash vendor costs](#) to 9k

9:56am



Victoria got an 'Excellent' from Vinny for [Slash vendor costs](#).

10:00am



Vinny Vendor commented on [Slash vendor costs](#).
"@susan - Can you send me the latest on this?"

2:30pm



Vinny [Slash vendor costs](#).

2:57pm

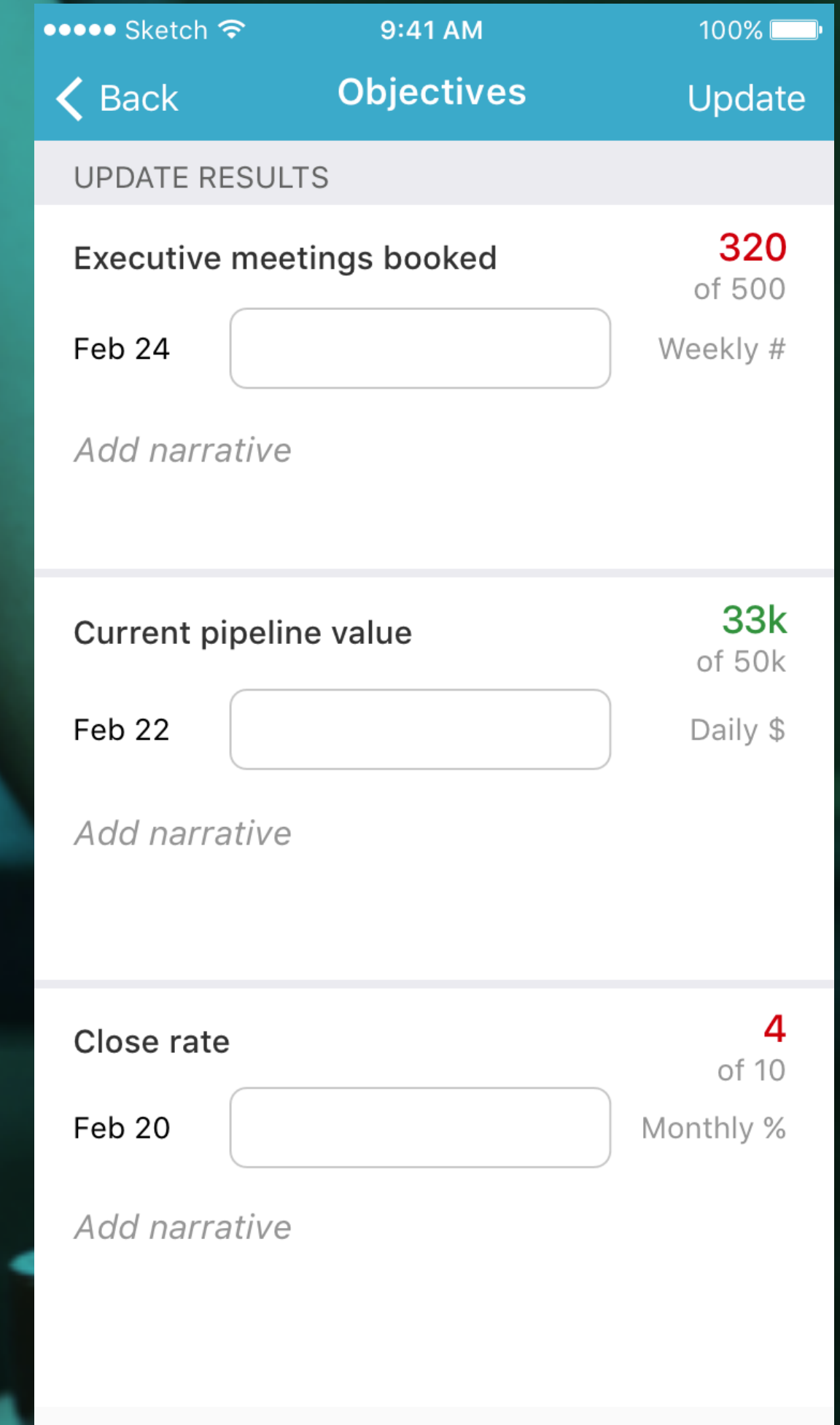
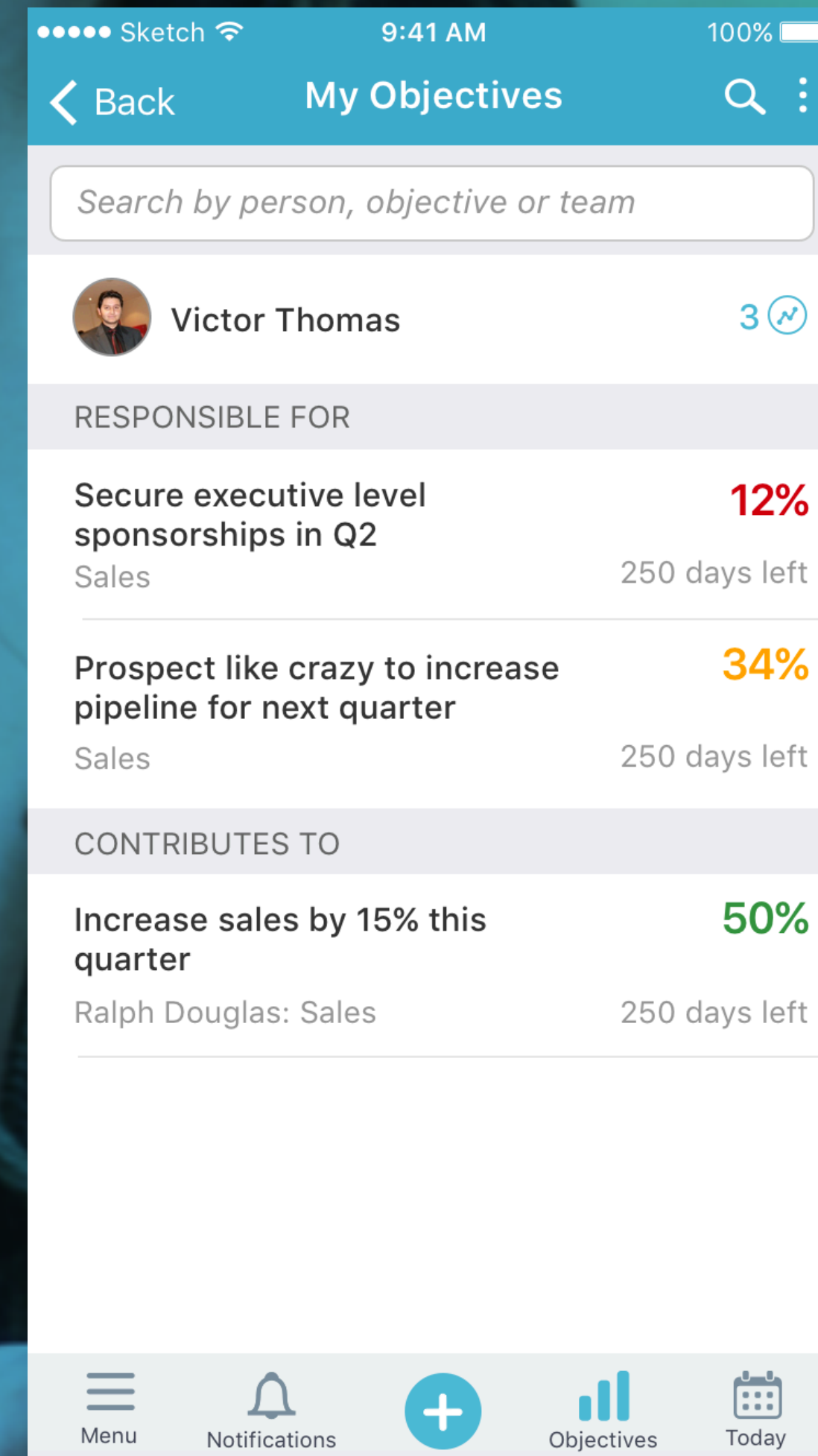


Vinny reassigned [Budget for Marketing Q3](#) from Vinny to Victoria

4:30pm

Objectives on Mobile, You at Your Best

- Android late May, refreshed look on iPhone
- More KR types and cues on what to update
- Alert and one page to update all key results in one click and pass
- Add narrative to the update
- Search for people to see their objectives



Living the Team Dream

- Indented sub actions
- Bulk change sub actions
- More obvious team summary page

Board spiffs

- From board, move the entire backlog to another stream
- Visual cue for sub-action items
- Workstream stats on board view
- More options on hamburger menu
- Boards on mobile (yes!!)
- Attributes on detail view easier to see

The screenshot displays a project management interface. On the left is a vertical navigation sidebar with icons for 'BIZ REVIEW', 'MY WORK', 'TEAM WORK', 'OBJECTIVES', and 'MEETINGS'. The main content area is titled 'K2 Launch' and includes a summary card with 'HEALTH RISK', 'END', 'PACE SLOW', and a 'COMPLETION 15%' progress bar. Below this is a 'Calendar' section with a table of action items.

Action Item	Effort	Priority	Rating
+ Type a new action item here and hit Enter to save it...			
Q3 Budget proposal	■ ■ ■		A
☞ Connect with Tim at BigPharma to finalize proposal	■ ■ ■		C
☞ Complete Feature checklist	■ ■ ■	🕒	C
☞ Q2 Budget Closing	■ ■ ■	🚨	C
Announcement for strategic partners	■ ■ ■		C
Outline our strategy	■ ■ ■		C
Copy for 3.0 press release	■ ■ ■		C

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 ▾

63%
STEADY ▶
RISK ▼
P2
3 **R**
6
5 **D**
32
8 👤 ▾

☰ Timeline

BACKLOG ⏸	
+	
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	

IN PROGRESS 🕒	
+	
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 ` !	Jun 1 '17
Carl Chagoyan	
Deploy PatientPredictor at AWS !	Jun 23 '17
Carl Chagoyan	
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

MY WORK

TEAM WORK

OBJECTIVES

MEETINGS

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

63% STEADY ▶ RISK ▼ P2 3 R 6 ⏰ 5 D 32 ✓ 8 👤

- Hide Subactions
- Highlight my items

Done items for days

BACKLOG		
HealthTips app	Carl Chagoyan	Jun 13 '17
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IN PROGRESS		
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- BIZ REVIEW
- MY WORK
- TEAM WORK
- OBJECTIVES
- MEETINGS

Dev Team Candidates Information Technology & Services

- Publish
- Move Backlog
- Board settings

BACKLOG	
Hire an Agile coach Carl Chagoyan	Jun 13 '17
Homar Gratson Resume Grace Ryan	Jun 14 '17
Elizabeth Romero Resume Christopher Rivera	Jun 17 '17
Jeremy Young Resume Thomas Woods	Jun 23 '17

NEXT	
Hire an Agile coach Carl Chagoyan	Jun 13 '17
Homar Gratson Resume Grace Ryan	Jun 14 '17
Elizabeth Romero Resume Christopher Rivera	Jun 17 '17

IN PROGRESS	
Hire an Agile coach Raymond Howell	Jun 13 '17
Emma Wallace Resume James Ward	Jun 14 '17
Amy Hart Resume Janice Larson	Jun 14 '17
Dennis Gibson Resume Raymond Howell	Jun 16 '17
Product owners identified for the B2B products Raymond Howell	Jun 17 '17
Douglas Baker Resume Raymond Howell	Jun 18 '17
Sharon Reynolds Resume James Ward	Jun 23 '17
Kyle Walsh Resume James Ward	Jun 23 '17

DONE	
Distribute SAFE training knowledge Grace Ryan	Jun 1 '17
Homar Gratson Resume Thomas Woods	Jun 23 '17
Distribute SAFE training knowledge Karen Hamilton	Jun 1 '17
Homar Gratson Resume Jonathan Williamson	Jun 23 '17
Hire an Agile coach Richard Long	Jun 13 '17
Homar Gratson Resume Joseph Douglas	Jun 14 '17

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

Dev Team Candidates Information Technology & Services



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

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Hire an Agile coach Richard Long	Jun 13 '17
Homar Gratson Resume Joseph Douglas	Jun 14 '17

Move Backlog Column

Move all items in BACKLOG column to:

Cancel
Move

Dev Team Candidates Information Technology & Services



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

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Jeremy Young Resume Thomas Woods	Jun 16 '17
Identified for the B2B Richard Long	Jun 17 '17
Homar Gratson Resume Jonathan Williamson	Jun 18 '17
Thomas Woods Resume Thomas Woods	Jun 23 '17
Thomas Woods Resume Thomas Woods	Jun 23 '17

DONE	Done
Distribute SAFE training knowledge Grace Ryan	Jun 1 '17
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Distribute SAFE training knowledge Karen Hamilton	Jun 1 '17
Homar Gratson Resume Jonathan Williamson	Jun 23 '17
Hire an Agile coach Richard Long	Jun 13 '17
Homar Gratson Resume Joseph Douglas	Jun 14 '17

Move Backlog Column

Move all items in backlog column to:

- Front Office Apps
 - Team Workstream
- Hardware Vendor Management
 - Server Price Book
 - Server Reference Architecture
 - Team Workstream
- HR IS
 - Benefits
 - Recruiting
- Information Governance
 - Team Workstream

Swipe. See.

Sketch 9:41 AM 100%

< Back Cloud Application...

BACKLOG

+

HealthTips app	!
Carl Chagoyan	Mar 10, 2017
Help Desk solutions - feature/function survey	
Grace Ryan	Mar 14, 2017
Identify areas of improvement we are seeking	
Christopher Rivera	Mar 17, 2017
Inventory and profiles for all Finance apps	
Thomas Woods	Mar 20, 2017
Follow up on eCMS migration	
Joseph Douglas	Mar 22, 2017
Data visualization and warehousing	
Raymond Howell	Mar 22, 2017
Deep dive on app quality	
James Ward	Mar 30, 2017

NEXT

Invent
Carl Ch
Runbo
Grace
Review
Christo



Topics Today

1. **Vision snippet**
2. **Coming in May on Web app, iPhone and Android**
3. **WoBot ;)**
4. **June release**



The WoBot Beta in May

AI-enabled (built with deep learning) conversational interaction with WoBo

Understands the WoBo entities and their relationships

- Ask about your objectives, workstreams and actions
- Ask about other people's OKRs, workstreams or actions
- Ask for some humor or inspiration

The screenshot shows a chat window for a user named @wobo2, who is active. The chat history includes:

- csmythe** (11:44 PM): "How am I doing on my OKRs?"
- WoBo APP** (11:44 PM): "Here is a quick snap shot-"
 - Develop innovative mobile technologies to wow our (internal) customers - 75%**
Mar 31, Set by- Chris
 - Rock the agile transformation - 72%**
Mar 31, Set by- Chris
- csmythe** (11:45 PM): "Jane Anderson, how is she doing on her objectives?"
- WoBo APP** (11:45 PM): "Jane Anderson is doing good, Jane Anderson's average goal progress is 71%, do you want to see the snapshot?"
- csmythe** (11:45 PM): "Not right now, thanks. What are my risks?"
- WoBo APP** (11:45 PM):
 - ✓ Assess features, scalability and price of analytics apps
Chris
 - ✓ Catalog the best-of-breed apps KP uses for patient services
Chris
 - 📈 Recruit core appdev team for internal app dev - 9 of 20
App Development

At the bottom of the chat, there are buttons for "Update result", "KR history", and "Add to watchlist".

Topics Today

1. **Vision snippet**
2. **Coming in May on Web app, iPhone and Android**
3. **WoBot ;)**
4. **June release**



Coming in June ...

1. Performance optimization
2. Timeline and Gantt charts
3. Easier cascades and dynamic results roll ups
4. Cool new board interactions
5. If we can't cancel the meeting, improve it ...





Cloud Application Candidates Information Technology & Services

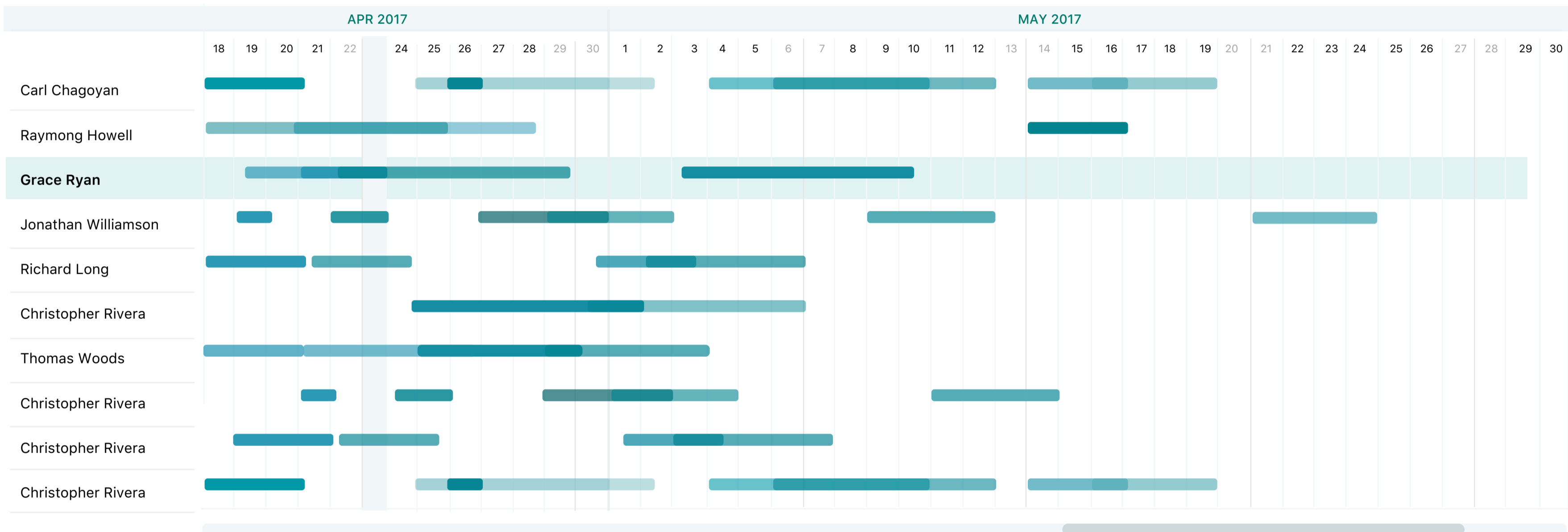
Carl C. Mar 1, 2017 - [Set Date](#) 


Board View 20 List View 2 Objectives 12 Feed Files


27 Filters 


63% STEADY ▶ RISK ▼ P2 3  6  5  32  8 


 Timeline









- HealthTips app**  Carl Chagoyan Jun 13 '17
- Help Desk solutions — feature/function survey** Grace Ryan Jun 14 '17
- Identify areas of improvement we are seeking** Christopher Rivera Jun 17 '17
- Inventory and profiles for all Finance apps**

NEXT 

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

- Review final candidate pool**  Raymond Howell Jun 13 '17
- Reach out to vendor on the specs**  James Ward Jun 14 '17
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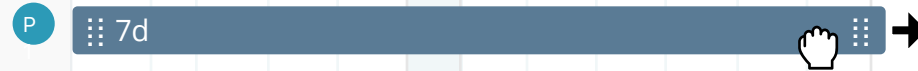
All Workstreams Executive Team

8 Workstreams | 23 Action Items | 2 Objectives | Weekly Snapshots | Roster

APR 2017

MAY 2017

63% Global eCommerce Sales for new products
Carl C.



STEADY 12 R 4 34

74% SaaS offering and delivery
Jonathan H.



FAST 3 R 5 12

33% Security and Compliance
Jonathan H.



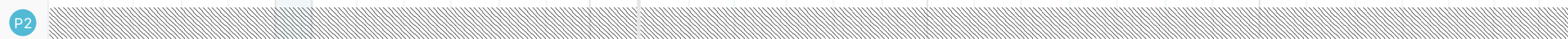
STEADY 4 R 23

65% Global Sales - Selling and merchandising for Release 2.0
Emma S.



STEADY 3 R 5 23

50% Operational excellence
Carl C.



FAST 3 R 25

66% Global eCommerce Sales
Carl C.



STEADY 7 R 11



**ASK MORE
QUESTIONS**



**We take delight in helping you be successful ...
let us know how we can help more.**

