

WoBo Community Call

January 26, 2017

 workboard

Delight & Details





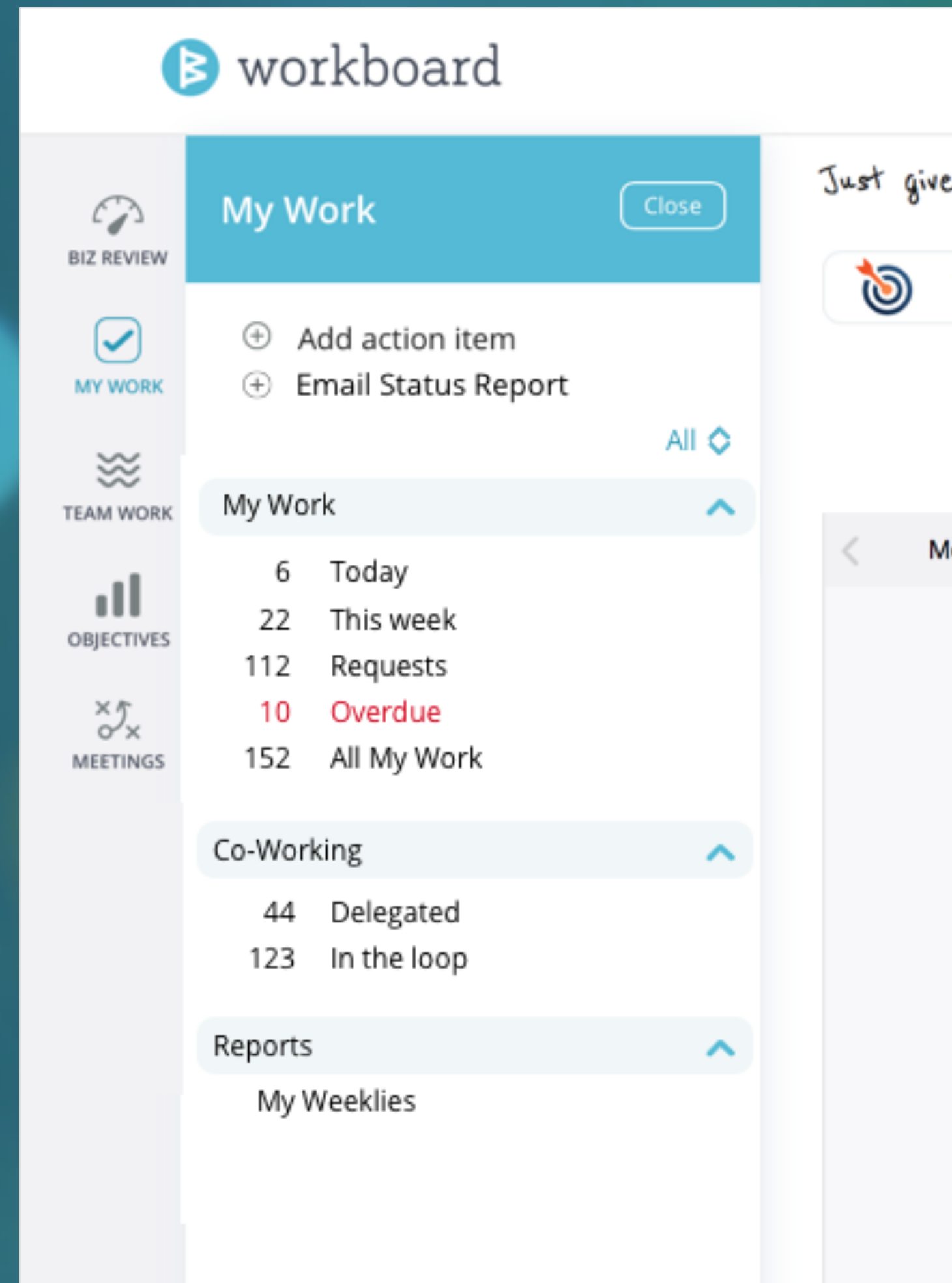
Wave 1 for Valentine's Day

1. Speed
 2. Simplified menu
 3. Team work remodel
 4. Publish business reviews with narrative
 5. Friendlier goal editor
 6. iPad iteration
- ... and 24 nice details (sub actions, dismiss meetings, Biz Review adds)



Simplified Menu & Navigation

- Fewer main menu buttons
- My Work more organized
- Weekly status reports and roster under Team Work
- Org and your reports up top



Better Clues

More obvious filter, 0 clicks to see

Alert that action is private

Own your time -- it's all you have to give. 🧑

Target Hit! From Carl, Nov 22 ✓ 66 Total Done

57 Filters ▼ Bulk Change ▼

Action Item	My Sort	Effort	Priority	Confidence Rating	Status	Due	Status
+ Type a new action item here and hit Enter to save it...							
Secure executive sponsorship		■ ■ ■			Doing	Jan 03	🕒
Internal Support app		■ ■ ■		R	Mobile Enablement	Jan 06	🕒
Microsoft integration		■ ■ ■		A	OneKikasko POC	Jan 04	🕒
OneKikaso API reference		■ ■ ■	🎯	G	OneKikasko POC	Jan 06	🕒
s from business stakeholders		■ ■ ■		G	Payroll System	Jan 06	🕒
stor Day -- what do we need?		■ ■ ■		G	Personal Stream	Jan 05	🕒
lockers		■ ■ ■		G	Personal Stream	Jan 06	🕒

You haven't selected a public workstream — this will be sent as a private request unless you select a group workstream.

private

Created on Jan 03, 2017 by Rocio Calero

Deidre Private Request Due Jan 05, 2017 Doing Normal Easy Green

Notes 0/0 Subactions 0 Files Tags 0 Comments 1 In The Loop

A B I U S Size Format

Start typing notes, documentation, outlines, plans, strategies, lists, instructions, stories...

Add a comment

Comment



Team Work Remodel

- Better dashboards
- Open/close all trays on nav
- Publish with a narrative
- Add working groups
- Team admin can manage workstream permissions

Now under Team Work:

- Team roster
- Weekly snapshots

The screenshot displays the 'workboard' interface. On the left, a navigation sidebar includes sections for 'BIZ REVIEW', 'MY WORK', 'TEAM WORK', 'OBJECTIVES', and 'MEETINGS'. The 'TEAM WORK' section is expanded to show 'Information Technology & Services' with a list of team members and their roles, such as 'Time to Innovate Program', 'Innovation Behaviors Training', and 'Leader Development Training'. A 'Close' button is visible next to the 'Team Work' header.

The main content area is titled 'Information Technology & Services - All Workstreams' and features a bar chart comparing 'Doing' (blue) and 'Risks' (red) across various workstreams. Below the chart is a table of workstream details:

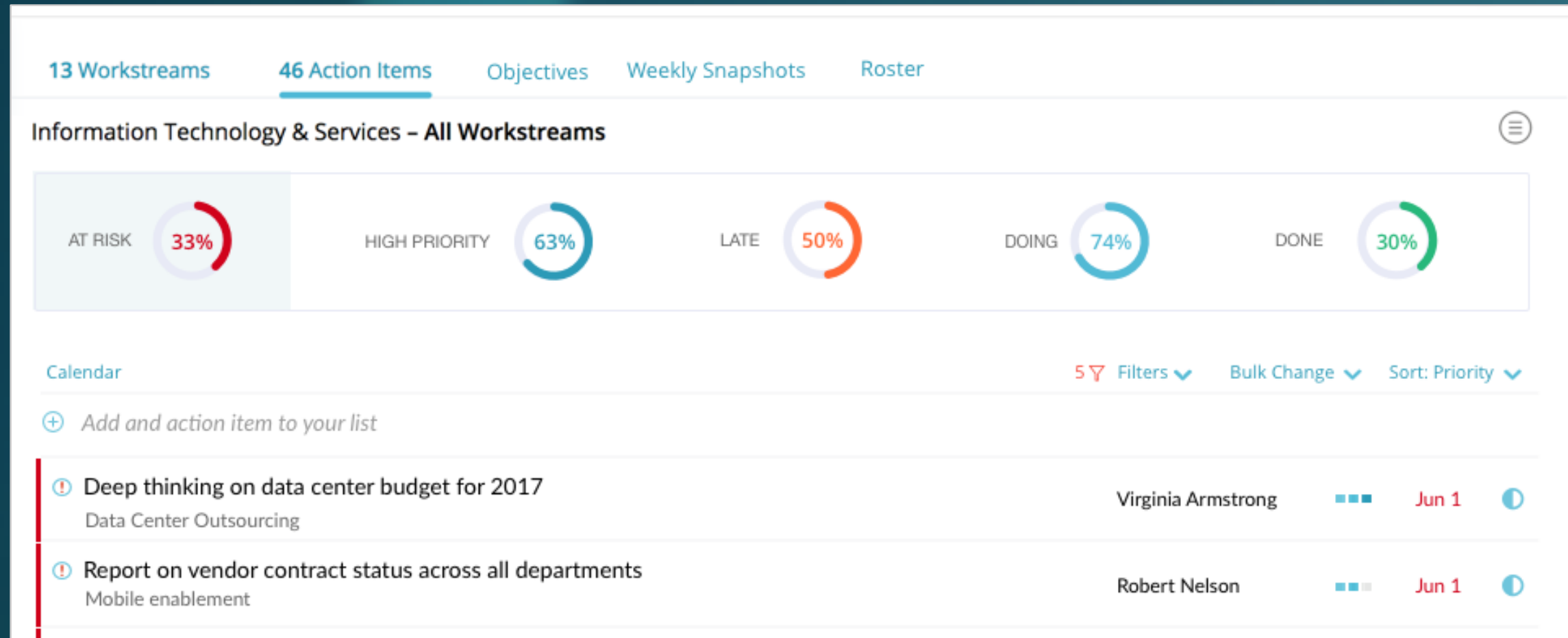
Workstream	Manager	Progress (%)	Risks (R)	Issues (I)	Tasks (D)	Status	Priority	Deadline
Global eCommerce Sales	Carl Chagoyan	63%	12	4	34	STEADY	P	Dec 31
SaaS offering and delivery	Jonathan Hu	74%	3	5	12	SLOW	P	No date
Security and Compliance	Jonathan Hu	33%	4	0	23	STEADY	P2	No date
Selling and merchandising	Emma Smith	65%	0	0	34	STEADY	P2	Dec 31
Operational excellence	Carl Chagoyan	50%	5	0	27	RISK	P2	Dec 31

A context menu is open on the right side of the chart, offering actions: Publish, Give a badge, Edit team name, Leave team, and Delete team.

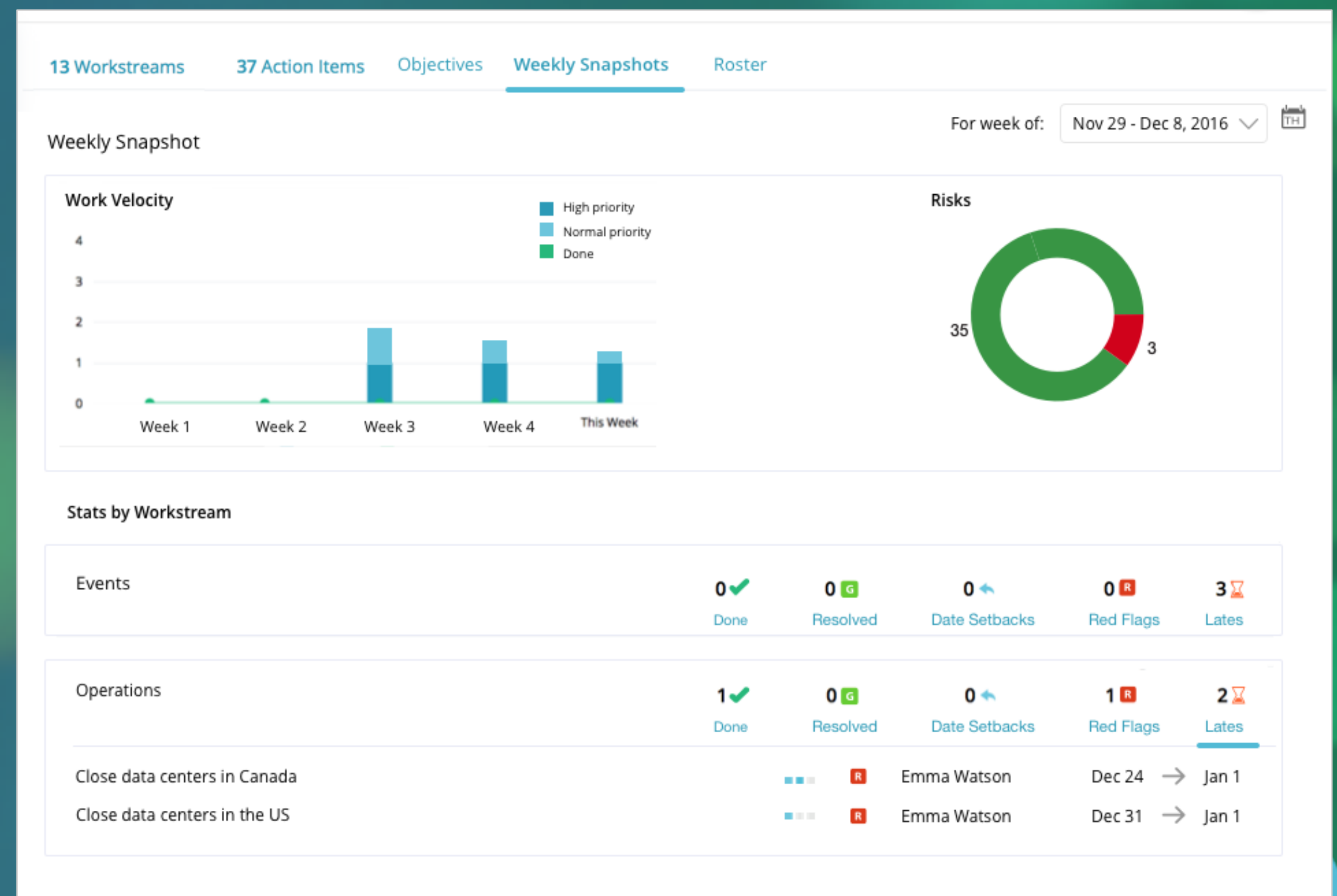


Team Work Remodel

Stats are quick filters that cut across all workstreams



Weekly snapshots easier to access and use



Publish Business Reviews & Reports

Curate then publish business reviews with your narrative

Running Business Review

Published by Emma Stone on Nov 30, 2016

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.

Send via email ✕

Enter one or more email addresses separated by commas

Send

OKRs

- 25% Improve economic and operational efficiency
Executives: Victor VP
- 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
Leila M: We are looking really good on this one team! 😊

HOT BOX

12% <small>of 100%</small>	Close out 5 data centers in US - West and East coast <small>Jonathan Hu</small>	▮▮▮
23% <small>of 100%</small>	Close out 5 data centers in EU <small>Jonathan Hu</small>	▮▮▮
25% <small>of 100%</small>	Close out 5 data centers in Canada <small>Jonathan Hu</small>	▮▮▮
0.5m <small>of 3m</small>	Save \$3 million in dev costs <small>Jonathan Hu</small>	📈
1 Alignment	Carl Chagoyan	👤
2 Performance		
Aug 1	Approve sales offers	🔄
Aug 1	Call Tom in AP regarding Key Ventures	🔄
Sep 30	Research competitor offers	🔄
Sep 12	Follow up with Sarah at Gartner	🔄

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WORKSTREAMS

- 63% Global eCommerce Sales
Carl Chagoyan 12 R 4 X 34 👤
- 74% SaaS offering and delivery
Jonathan Hu 3 R 5 X 12 👤
- 33% Security and Compliance
Jonathan Hu 4 R 23 👤



Goals & Better Goal Editor Experience

- Align first
- Objective visible every step of creation
- Less complexity creating KRs and metrics
- Better survey options

Cancel 1 Objectives 2 Results 3 Dependencies Next X

Write your objective here — inspire yourself

For which team(s)? ?

Add a narrative (optional):

Start date:

End date:

This objective aligns to:

Share with management and:

- This team
- Direct and dotted line reports
- Internal people
- My network (including external collaborators)
- Apply to objective and all key metrics

Previous

Cancel



Objectives



Results



Dependencies

Next



A differentiated, SaaS-led portfolio that delights our customers

Next add key results and success metrics for this objective. What do you want to measure?

Basic Count or Percentage
Measure a basic count or percentage of something

Roll Up Metrics
Roll up or total other metrics

Measure Work
Measure work in one or more workstreams

Survey People
Get and display data or answers from many people

Source from Jira
Roll up and display data from Jira

Roll Up Goals
Roll up and display other goals in this goal

Source from Asana
Roll up and display data from Asana



Previous

Cancel



Objectives



Results



Dependencies

Next



A differentiated, SaaS-led portfolio that delights our customers

Key Results

What is your result or metric?

Updates will come from:

Carl Competent

Measure as a:

- # Number
- \$ Currency
- % Percentage

Exclude from goal progress

Cancel

Save Result



Previous

Cancel



Objectives



Results

3

Dependencies

Done



A differentiated, SaaS-led portfolio that delights our customers

Key Results

Dynamic scorecard from aligned objectives

Reduce storage costs by 25%

Close data centers in Canada

Enterprise expansion bookings of \$300k

Have you improved your process this week?

Last step! Identify dependencies on others' objectives and workstreams.

What are the dependencies?

Search for an objective or its owner

Are there workstreams related to achieving this goal?

Search by goal name or goal owner

[+ Create new workstream](#)





Delight Wave 2

Detail refinements on RBR, meetings, action item lists

More reporting options: OKR categories, mix/match, narratives

Include team members in engagement stats

Common/global metrics and data sources

iPhone and Android refresh

More bots and conversations



**ASK MORE
QUESTIONS**



Got Goals?

Watch the OKR Refresh webinar if you missed it.

Time spent getting clarity is an accelerant of success; time lost from lack of it can never be recovered.



**Thank you for letting us
contribute to your success!**

