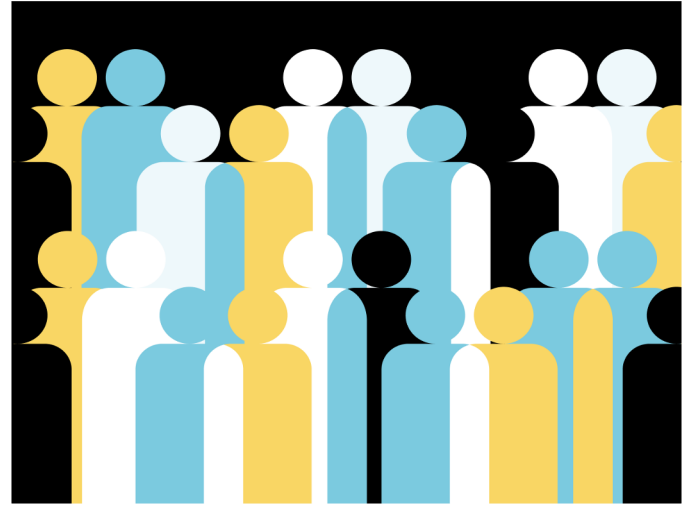


Community Call

September 2023



Agenda

- Maximize your strategy execution advantage
- Driving with headlights
- Simple Scorecards to up your game
- Using Co-Author to set great objectives and key results – available now for all!
- Join the conversation in real life
- Deepening your expertise

“What is the strategy and are we executing on it?” shouldn’t be hard questions

Accountability for outcomes and actions

Are we achieving what we intended thus far?

Where are the issues and roadblocks that need attention?

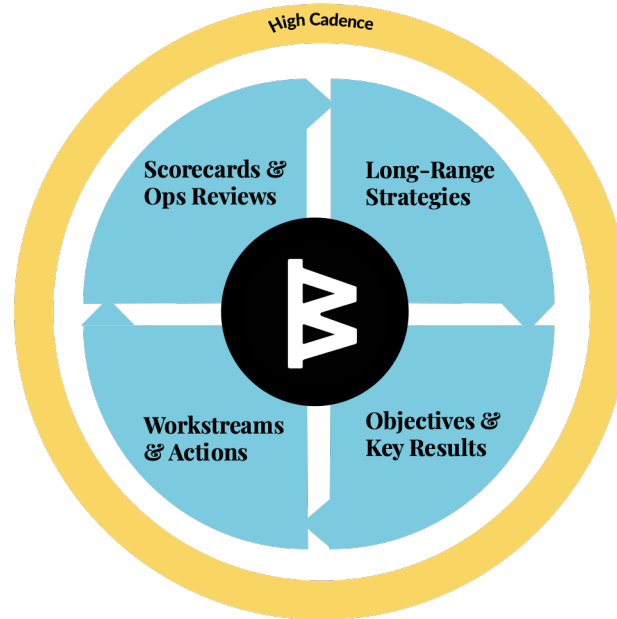
What is working and why?

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 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?

The pace you need to compete

Are we moving fast enough to win our race?

Do we get information fast enough to control our destiny?

Increasing your strategy execution advantage requires a higher level of maturity

	Fractured	Emerging	Optimizing	Best in Class
Defining the Strategy	Undifferentiated, unclear	Pillars are articulated but lack differentiation or clear outcomes	Differentiated and defined but not visible or available beyond leadership team	Clear and differentiated with aligned BU and product strategies; visible to everyone
Driving its Execution	Low alignment, no measurement or narrative driven	Vertical alignment; lagging metrics	Vertical and cross-functional alignment; lagging metrics	High alignment cross-functionally and vertically on leading measures
Creating Accountability	Slow cadence; quarterly business reviews limited to VP+	Monthly results data and business reviews, lengthy meetings limited to VP+	Bi-monthly results data, scorecards and business reviews are online	Fast cycle time with weekly results online with remediation action for all risks to leading measures

Maximize your strategy execution advantage

Defining our Strategies

Years in the future

Our ambition for unique value and bold outcomes in 3-5 years

Where we will play (segments, markets)

How we will win (by doing what differently)

What must be true to win and what risk factors we must remove or overcome

Driving their Execution

This year and this quarter

Capabilities and products we must build or optimize *this year* to win in 3-5 years

Results we must achieve *this quarter* to propel us to win (and de-risk winning) in 3-5 years

Actions we must take *this quarter* to achieve those results

Creating Accountability

This week and today

How we drive *weekly* focus and accountability for the outcomes we need now to win

Cadence we will measure to know if we are winning or must course correct

Cross-org transparency and interlock intervals needed to drive certainty that we win

Unified Platform & Data

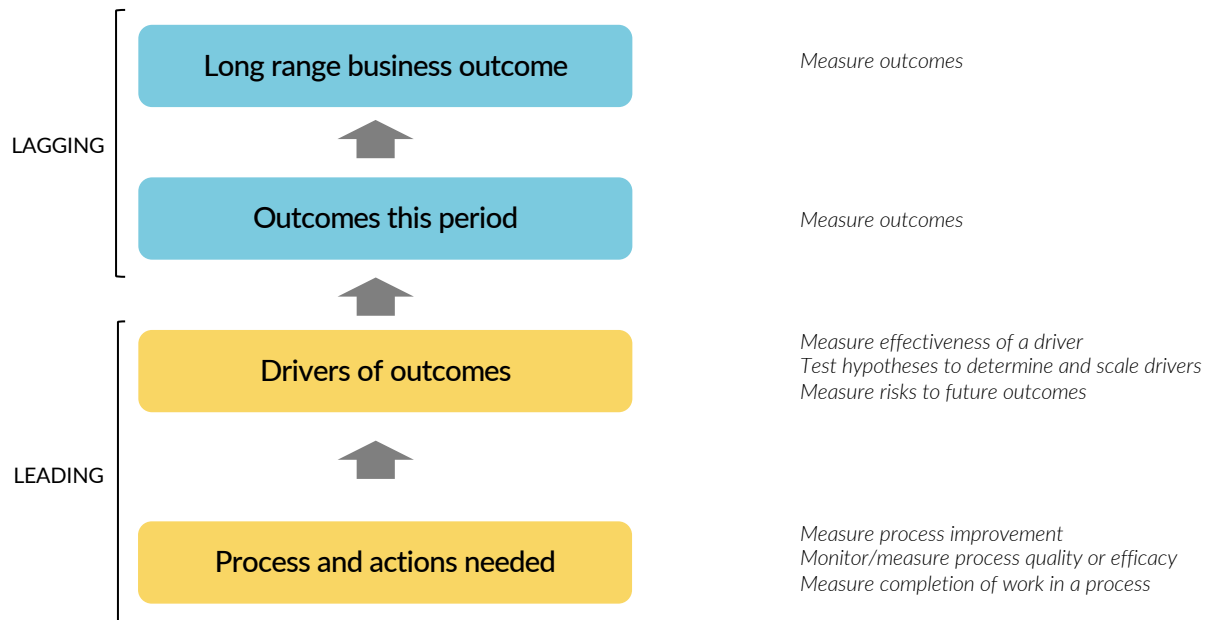
Long range strategies

Annual OKRs
Quarterly OKRs
Workstreams & projects

Measurement cadence
Scorecards
Biz and ops reviews

Driving with headlights

Get better visibility and predictability with far less effort



Align your actions to your outcomes

- Source your leading indicators from workstream in WorkBoard
- Align the workstreams to the outcomes your driving so you can see the connection between the work and results

The screenshot displays the WorkBoard interface for a 'Strategic Use Cases' project. The dashboard includes a top navigation bar with 'Objectives', 'Teamwork', and 'Meetings & Reviews' tabs. Below this, the project title 'Strategic Use Cases' is followed by 'Company ELT'. A progress bar shows 72% completion. The dashboard is organized into columns representing different workstreams: 'Use Cases' (12 items), 'CX Implementation' (9 items), 'Sales Enablement' (7 items), 'Roadmap' (2 items), and 'Marketing Implementation'. Each workstream column contains a list of tasks with details such as the task description, assignee, due date, and status. For example, in the 'Use Cases' column, a task 'Write new copy for the Product page...' is assigned to Manny Admina with a due date of Mar 6, 2023. The interface also features a search bar, a 'Create' button, and a notification bell icon.

Align your actions to your outcomes


- Tie key result progress directly to execution to feed your key result updates.
- To create workstream based key results, select the WorkBoard workstreams option when creating your key result from “Advanced options.”
- Search for one or more existing workstreams, or create a brand new custom or completion workstream for your project.

Edit Key Result 🗑️

What is the result you want to measure? [See sample OKRs](#)

Create 12 new CMO references and case studies in T1/T2 accounts

Where will the key result data come from?

 **WorkBoard workstreams** ✎ Change data source type

Find existing workstream(s): *

[+ Create new workstream](#)

Selected workstream(s):

CMO Case Studies ✕
Marketing

Measure workstream as: ⓘ

Percentage of action items complete

Total completed action items

Simple Scorecards to up your game

Coming soon: Multi-period scorecards

- Effortlessly collate related Key Results and integrate multiple time periods in a single row to facilitate long-term strategic planning and performance analysis.
- View, manage, and interpret multi-period data without losing the essence of individual KRs.
- If you'd like to join the beta, reach out to your CSM

Operating Metric	3Q FY23 Objective	3Q FY 23 Key Result	FY20 Actual	FY21 Actual	FY23 YTD Actual	FY23 Target	Owner	Latest Key Result Comment
Revenue Bookings (\$FDC)	Our customers are sticky and want to grow with us	Dashboard Total North America Revenue	2.14k	\$9.49m			Joe Smarts	
New Leads / BDR / Day	We make it easier to develop phenomenal marketing assets	100% of our campaigns are focused on Tier 1 and Tier 2 new logos and...	1	6			Harry Porter	
Open Job Recs Closed	The Customer Success team operates at its best	80% participation of engineering and QA for each new feature		0			Maria Cmoso	

Select Scorecard type

Begin by selecting a Scorecard type to suit your needs
Not sure which type to choose? Learn more about [Scorecard Types](#).

Single-period Scorecard
Best for viewing KR progress in a single quarter, or for linked annual and quarterly KRs.

Multi-period Scorecard
Ideal for tracking progress over multiple timeframes by displaying sets of results for each period.

Add Sets

- Revenue Bookings (\$FDC)
5 Time periods
- New Leads / BDR / Day
8 Time periods
- Open Job Recs Closed
5 Time periods
- 100% of 100%
100% of team is certified on activation drivers for v4 playbook
Celeste Collins (Q4 FY20)
- 0 of 6
6 new hires hit their 1st quarter targets
Andrea Williams (Q4 FY21)
- 15% of 30%
30% URM representation at the hiring manager stage
Maria Cmoso (Q4 FY22)
- 54 of 80
80% participation of engineering and QA for each new feature
Inna Marin (Aug 1, 2023 - Oct 31, 2023)
- 0% of 20%
Execute 3 ABM campaigns with prompt engineering skills and Generative AI resulting in 20% increase in target engagement by EOC
Maria Cmoso (Q4 FY23)

Let's build one together!

- Scorecards make it easy to share the status of multiple key results, along with helpful narrative – all in a single view. No more manually copying data, or getting out of sync with the truth.
- Build your scorecard once, customize to your brand, then share and present as often as needed
- Always display real-time key result data to empower your team to make fast, informed business decisions
- Present your scorecard as a meeting dashboard to focus conversations on unblocking obstacles and achieving results

Op Comm Scorecard - P&E					
Priority	Key Result	Actual	Target	Progress Chart	Comments
FOCUS on the right market segments and deliver highly differentiated value	75% of CORE revenue is multi-year subscription commitment	74%	75%		Executing well here - we will end the quarter on target
	Simplified use cases for all CORE offerings have been embedded in sales, marketing and product management by EOQ	78%	80%		Good progress on the roll out - we are on track
	Consumption of CORE platform reaches 75% weekly active users for all target segment customers	63%	75%		@Barry Bosser Please provide context on your confidence that this will be achieved by EOQ
INNOVATION drives CORE advantage for our customers	EU has full feature equivalency with US and we have closed the \$41m deal backlog	\$500k	\$41m		We were able to close Kिकासco with committed equivalency dependent on product delivery
	Cloud Agnosticism strategy agreed upon by all portfolio leaders	15%	100%		
	Energy efficiency strategy in place to drive a 20% cost advantage for customers	35%	100%		We have to resolve several hurdles to finalize the strategy - WIP
	The first implementations of G-AI are deployed in 3 CORE family products	1	3		
RESPONSIBILITY for Trust, Sustainability and Equity at the center of	Reduce Scope 1 and 2 emissions from 35M to 32M metric tons	33.5m	32m		We had some anomalies in Chennai operations and data
	We are ready to start carbon neutral certification by EOQ	65%	100%		Controls are in place and physical improvements have been

Aligning on Outcomes Faster with Co-Author

How can you use Co-Author?

- Available as you are setting your team objectives and results in canvas

The screenshot displays the WorkBoard interface with two main sections: 'Review Past OKRs' and 'Draft Next OKRs'.

Review Past OKRs

Progress	Objective	Author	Due Date
100%	A predictable, measurable release productive forces that lives up to enterprise customers' expectations	Rimpal Hazarika	Q2 2024
89% of 80	Before each weekly release, release success criteria should be >= 80%	Rimpal Hazarika	As of Jul 28, 2023
243 of 317	[KPI] incoming bugs from production	Rimpal Hazarika	As of Aug 08, 2023
100% of 100%	By the end of the quarter, every squad must execute 100% of the last 60 days of hotspot test cases before each release by impact areas	Rimpal Hazarika	As of Jul 10, 2023
68%	We own it as a well oiled machine	Product and Engineering (Barrel Surfers)	Q3 2024
15% of 100%	Finalize the product long range strategy and present at one of the all-hands meetings	Lelia Alappur	As of Aug 02, 2023
100% of 100%	Ensure that every squad publishes well-defined APIs in Swagger for all "new implementations", with a compliance rate of at least 90% for the entire quarter.	Gaurav Nigam	As of Jul 21, 2023
80% of 100%	Leading: 95% of all new projects will go through technical design review	Daryoush Paknadi	As of Jul 24, 2023

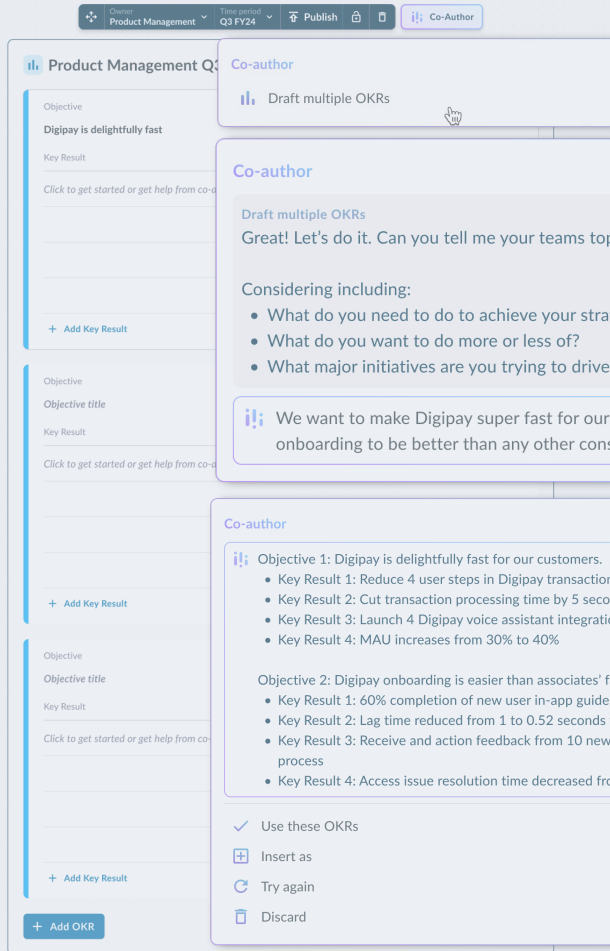
Discussion & Ideas

Four sticky notes are shown, each with the text 'Type something here...' and the name 'Devire Paknadi' at the bottom. The notes are colored blue, purple, light purple, and yellow.

Draft Next OKRs

The interface shows a form for drafting new OKRs. At the top, it says 'Objective 5: Key Results' and 'Coauthor BETA'. The form includes a text input for the objective: 'Write your team's aspirational intent, or use AI to get inspired!'. Below this, there are sections for 'Key Results' with a text input: 'Write a best-possible, measurable outcome.' and an 'Add Key Result' button. The interface is clean and modern, with a light blue and white color scheme.

Draft OKRs



Objectives & Key Results Cycle

CURRENT PROCESS FRICTION & OPPORTUNITIES

Teams face a cold start problem when trying to set OKRs – they can't distinguish actions from results they should create.

It is time consuming and difficult to shift gears to think about outcomes when setting OKRs is 4x a year exercise with only 4 learning opportunities each year.

Debate on priorities is invaluable but can be impeded by the time it takes to articulate priorities as measurable outcomes worthy of debate.



WoBo Co-Author

DIRECTION & CAPABILITIES

Collapse the time to draft OKRs that articulate intent as aspirational and measurable results in OKR syntax.

Aligned and informed drafts incorporate learnings from past results, and upline and leadership priorities.

Improve the quality of user created OKRs with suggestions informed by Outcome Mindset Method™ best practices that give every team the benefit of an OKR coach in the room.

Teams get to execution faster by having more time to debate trade-offs and action plans from co-authored drafts rather than debating and fine-tuning language.

Set Faster, Better OKRs

Co-author OKRs using prior and upline OKRs and the team's retro

- Intelligence from team's past OKRs and retrospective
- Informed by upline OKRs and organization strategy
- Iterative experience helps teams get clarity > 20x faster and leave with measurable outcomes

The screenshot displays the WorkBoard interface, divided into two main sections: "Review Past OKRs" and "Draft Next OKRs".

Review Past OKRs: This section shows a grid of OKR cards. Each card includes a progress indicator (percentage), a title, a description, and a due date. For example, one card shows "A predictable, measurable release productive forces that lives up to enterprise customers' expectations" with a 100% progress indicator and a due date of Q2 2024. Another card shows "We own it as a well oiled machine" with a 65% progress indicator and a due date of Q2 2024. Below the grid is a "Discussion & Ideas" section with four colored sticky notes (blue, purple, purple, yellow) for collaborative input.

Draft Next OKRs: This section shows a form for creating a new OKR. It includes a "Coauthor" dropdown menu, a "Draft an Objective" field, and a "Suggest Key Results for this Objective" field. Below the form are three "Add Key Result" buttons. The interface also shows a "Publish OKRs" button and a "Q3 FY24" filter.

Setting OKRs with Co-Author

Before your session

Just Getting Started with OKRs

- Ask the team to add their thoughts on what you should measure to the Canvas

Teams familiar with OKRs

- Run a team retro ahead of your session and have a conversation about shifts to incorporate in the next OKR period

During your Session

Just Getting Started with OKRs

- Ask the Co-Author for suggested results to help get started.

Teams familiar with OKRs

- Ask the Co-Author to help refine the team's brainstorm notes into more inspirational, shorter or more measurable key results

Next set of GenAI capabilities



We are announcing our next set of gen-AI capabilities

- Video

Join the Conversation



Special hotel
rates available
until Oct 2

WorkBoard
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Conference #7

Strategy Execution

DESERT RETREAT

October 23-25, 2023 | Scottsdale AZ

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Deidre Paknad
CEO & Co-Founder
WorkBoard

BAIN & COMPANY



Darren Johnson
Expert Partner
Bain & Company

CARMAX



Summers Hutchings
Director, Product Delivery &
Portfolio Strategy
CarMax

intel



Mary Brett
Senior Director, OKR Execution
and Culture
Intel

JUNIPER



Athena Murphy
VP, Chief of Staff to the CEO
and Head of Transformation
Juniper Networks

vmware



Joel Neeb
VP of Execution and
Transformation in the Office of
the CEO
VMware

Strategy Execution in the AI Era

Deidre Paknad, CEO and Co-Founder, WorkBoard

OKRs and the Next-Gen Management System

Darren Johnson, Expert Partner, Bain & Company

Accelerating Innovation and Transformation with OKRs

Joel Neeb, VP Execution and Transformation - Office of the CEO,
VMware

Evolution of OKRs at Intel

Mary Brett, Senior Director, OKR Execution and Culture, Intel

Building a Strategy Execution Program at Scale and Speed

Summers Hutchings, Director, Product Delivery & Portfolio Strategy,
CarMax

Driving with Headlights – Using Leading & Lagging

Measures to Improve Business Outcomes

Athena Murphy, VP of Business Execution & Transformation-Chief of
Staff to CEO, Juniper Networks

Breakout Sessions, WorkBoard GenAI Demos, and Facilitated Networking

Meet your strategy execution peers, learn from industry experts, and participate in main stage and breakout sessions to advance your organization's achievements and your own.

Save your seat now at
workboard.com/accelerate2023

...More speakers to be announced!



The 7th Edition of the Accelerate Conference TM

Andaz Scottsdale Resort - Very limited capacity

23-25 October 2023

Pricing July 1st onward – Based on availability

\$299 Individuals

\$449 Bring a peer (2 tickets)

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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.



Upcoming Courses



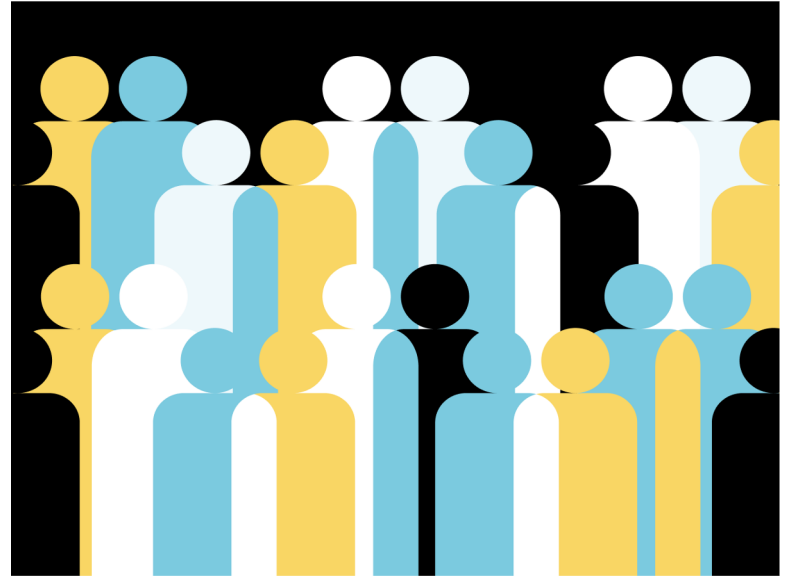
Class	Description	Dates	How to Sign Up
Level 2 OKR Coach Certification	For experienced OKR Coaches: Take the next step on your journey as a key influencer helping to mature your organization's OKR program.	<ul style="list-style-type: none">● Oct 16/18 at 8am PT	learn.workboard.com
Outcome Method Mindset	Learn about OKRs and the Outcome Mindset in 1 hour	<ul style="list-style-type: none">● Oct 4 at 1pm PT● Oct 11 at 6am PT	learn.workboard.com
OKR Fast Pass Course	Build your OKR expertise in 3 hours	<ul style="list-style-type: none">● Oct 4 at 8am PT	learn.workboard.com
OKR Coach Certification	Become a certified OKR coach	<ul style="list-style-type: none">● Oct 3/5 at 8am PT● Oct 10/12 at 8am PT● Oct 17/19 at 1pm PT / 9am CET	learn.workboard.com
WorkBoard Pro	Learn the full power of the WorkBoard application and how to apply it in your organization.	<ul style="list-style-type: none">● Oct 18/19 at 8am PT	learn.workboard.com
Results Management Leader Certification	Learn how to lead your organizations alignment, accountability, and OKR operating cycle to ensure you achieve strategy faster.	<ul style="list-style-type: none">● Fall cohort begins October 17	workboard.com/rme-certification

Community Calls: Save the Date(s)!

Our next Community Call is October 25.

Make sure to [sign up](#) for all our monthly 2023 calls so you don't miss a single one!

- 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 setting with blue and orange seating. The background is a dark blue arrow pointing right, with an orange border on the right side.



Thank you

See you next time!