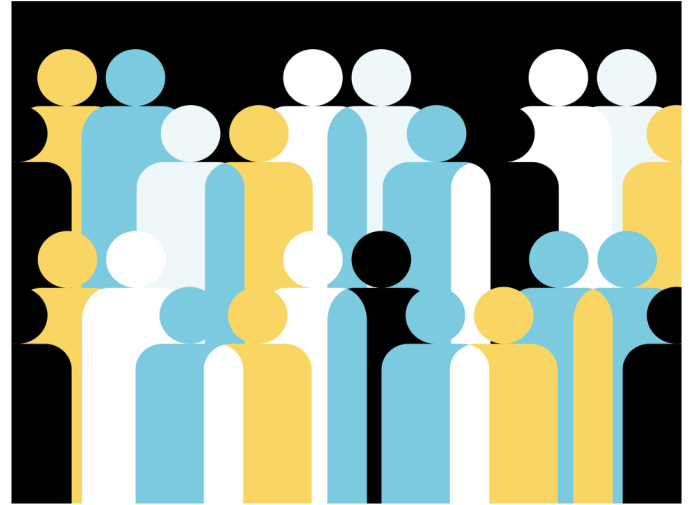# Community Call

December 2023

WorkBoard

Agenda

- Highlights from Accelerate 2023

- Intelligent Enterprise Platform

- Improve cross-functional alignment with key result relationships

- Track results across time periods with multi-period scorecards

- Close outdated OKRs in bulk for a fresh start

- Deepening your expertise

WorkBoard

The strategy execution brain trust met in London and Arizona this Fall at the Accelerate Conference ™

"Great event, very professional and execution was excellent. I would love more events like this in the UK!"
— Kaspars J., Ford Motor Company

"I walked away with so many insights that are actionable, and I'm excited to go back and figure out where we will put them into practice."
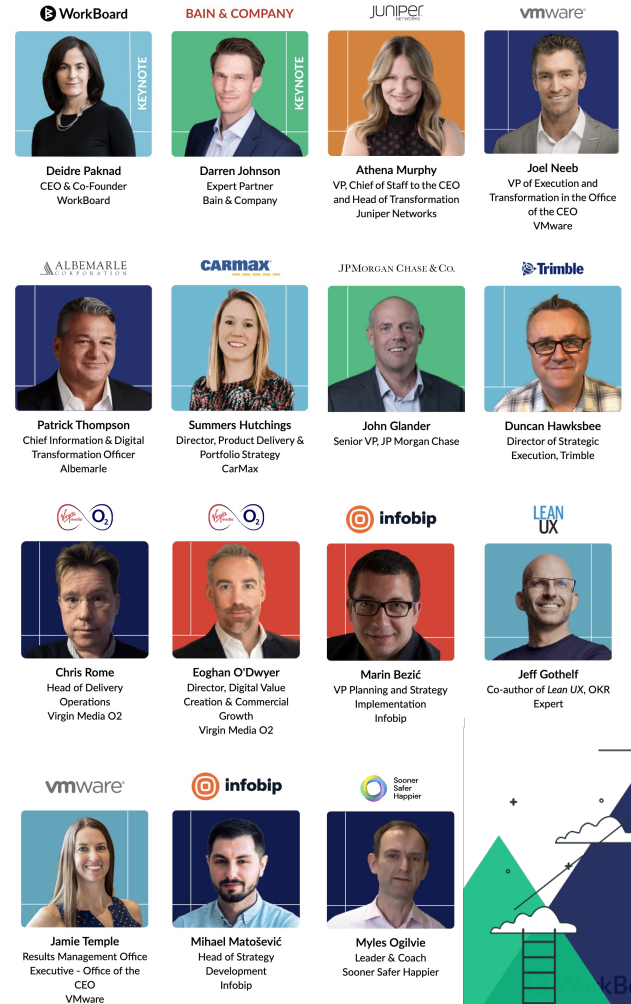— Molly D., Lytx

"Fantastic event, right balance of case studies and pros. Very well organized."
— Kiran N., L&G Retail

"I'll definitely be going back to my leadership talking about how we bring generative AI into our 2024 planning."
— Stefanie W., UnitedHealth Group

Key takeaways to bring to your organization

Do a reset   **>**   **Just as we reset our strategy,
we refine our approach to strategy execution**

The tool   **>**   **System of record or source of truth**

Do OKRs   **>**   **Align on outcomes, clarify how we will measure success**

Apologies   **>**   **Benchmark what has improved,
show the roadmap to more value.**

WorkBoard

Your ambitious strategy deserves great execution

1

Fast Transparency

Start with a more digital view of OKRs to assess where teams are focused today as a foundation for optimizing capacity and results

2

Better Alignment

From the transparency foundation, increase both functional and cross functional alignment on the prime divers of strategy
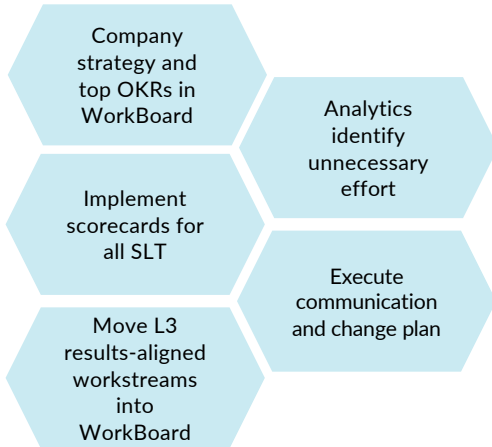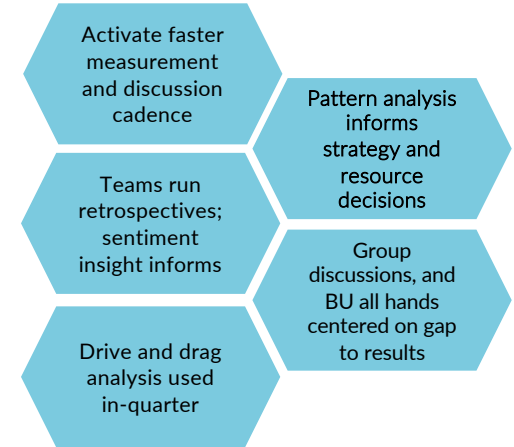
3

Higher Velocity

From strong foundation with fewer x-org collisions, raise cadence of focus and use strategy execution intelligence to accelerate

Gain lasting competitive advantage

More Transparency

Start with a "value inventory" – where teams are actually focused today – as a basis for optimizing capacity and results

- Company strategy and top OKRs in WorkBoard
- Analytics identify unnecessary effort
- Implement scorecards for all SLT
- Execute communication and change plan
- Move L3 results-aligned workstreams into WorkBoard

Better Alignment

From the transparency foundation, increase both functional and cross functional alignment on the prime drivers of strategy

- Build outcome mindset and strategic thinking skills
- Every team has visibly aligned objectives and results
- Improve the fidelity of results measured
- BU and product strategies visibly aligned
- Address cross functional collisions
- Deepen skill set of our champion community

Higher Velocity

From strong foundation with fewer x-org collisions, raise cadence of focus and use strategy execution intelligence to accelerate

- Activate faster measurement and discussion cadence
- Pattern analysis informs strategy and resource decisions
- Teams run retrospectives; sentiment insight informs
- Group discussions, and BU all hands centered on gap to results
- Drive and drag analysis used in-quarter

Structural

Strategic

Intelligent Enterprise Platform

WorkBoard

We help enterprises execute strategy faster and actively engage people in its achievement

WorkBoard

EXECUTIVES setting strategy and mobilizing people to achieve it

MANAGERS translating strategy, driving focus and accountability

FRONT LINE TEAMS executing on the most important outcomes

Now the WorkBoard Intelligent Enterprise platform transforms your strategy execution data into smart insights using GenAI so you can now...

1. Align on OKRs faster and more effectively including the leading and lagging measures. It's 10x easier!

2. Generate executive briefs on scorecards and business reviews with suggested discussion topics based on actual performance and learning so you get to the smartest decision 5x faster

3. Summarize team progress and share it over Teams in less than 2 minutes so everyone's on the same page

4. Collate observations from retros so no team learns the same lesson twice and the whole org learns

WorkBoard

Co-Author: Set better OKRs faster on the OKR Wizard

- Suggest Objectives and Key Results based on your OKRs and strategy

- Iterate on Key Results so they're better measures

- Transform tasks to outcomes, and lagging to leading measures instantly

- Go from 4 hours to 1 hour to set great objectives and results!

Add Team Objective and Key Results   Take a tour

Co-Author

See sample OKRs

*Write the objective here and then press enter - inspire yourself and your team**

WorkBoard
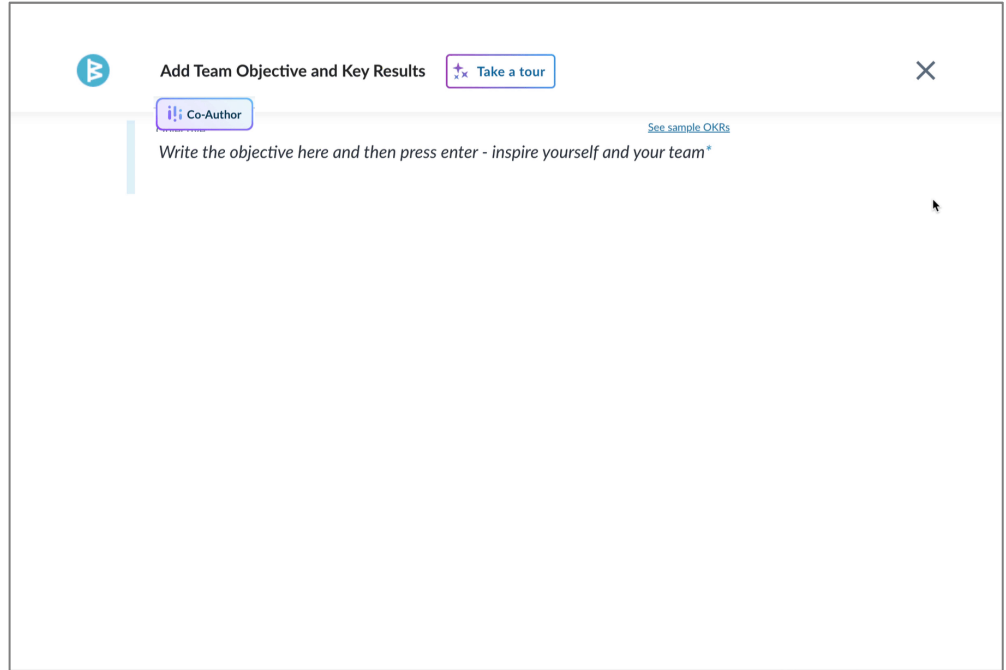
Automatically generate a weekly summary of team progress

- Instantly show where the team is on track and highlight problem areas

- With one click, share the report with the team, management, or the org on Microsoft Teams

Co-Author: **Summarize Reflect & Reset** sessions to accelerate learning and iteration

Co-Author: Cluster and Summarize Sticky Notes to spend more time *prioritizing* and less time *organizing*
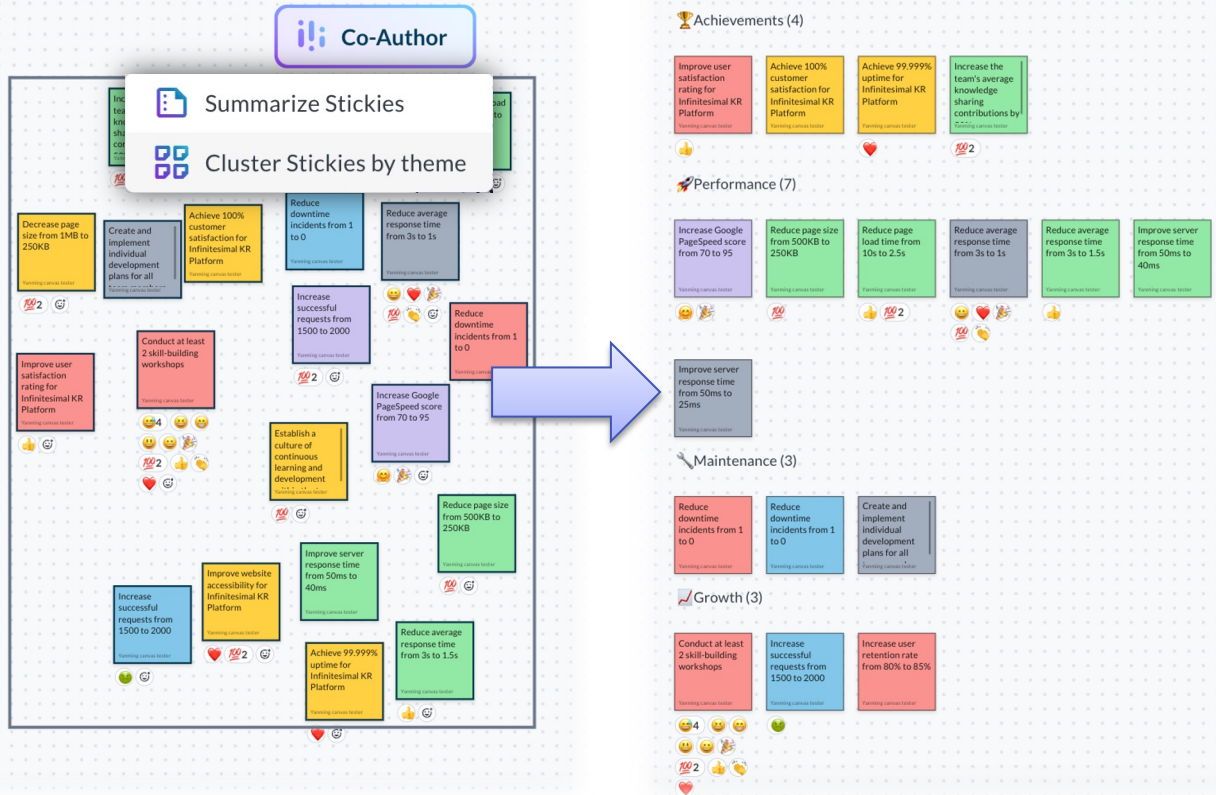
Take your team from ***brainstorm*** to ***next steps*** faster than ever before

Instantly summarize Biz Reviews or Scorecards

- Highlight accomplishments or changes since the prior review or team meeting

- Customize the tone to match the intended audience

That means every stakeholders can start 2024 with speed and ease!

EXECUTIVES setting strategy and mobilizing people to achieve it

Dramatically easier way to align on strategic outcomes, anticipate and address dependencies, and assess progress and risks so efforts are driving peak value

MANAGERS translating strategy, driving focus and accountability

Be a more effective, efficient leader with fast and savvy OKRs, effortless visibility on teams' issues and dependencies, and automated progress communications

FRONT LINE TEAMS executing on the most important outcomes

Get aligned on OKRs fast and efficiently, detect dependencies and see their status automatically, organize the team's key retro points with AI

WorkBoard

And we're just getting started!
Next year, expect to benefit from...

- Conversational UI anywhere

- TL;DR and suggested actions

- Prep for 1on1s with impact and skills summaries

- And so much more!

Improving Cross-Functional Alignment

WorkBoard

Improve cross-functional alignment and identify related effort with key result relationships
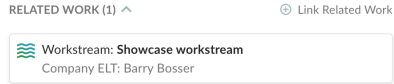
- Embedded AI suggests related key results

- Indicate the type of relationship between the two results - whether as a support, blocker, or dependency

- Enables teams to know who to collaborate with

- Prevents collisions and surprises that undercut team and company outcomes
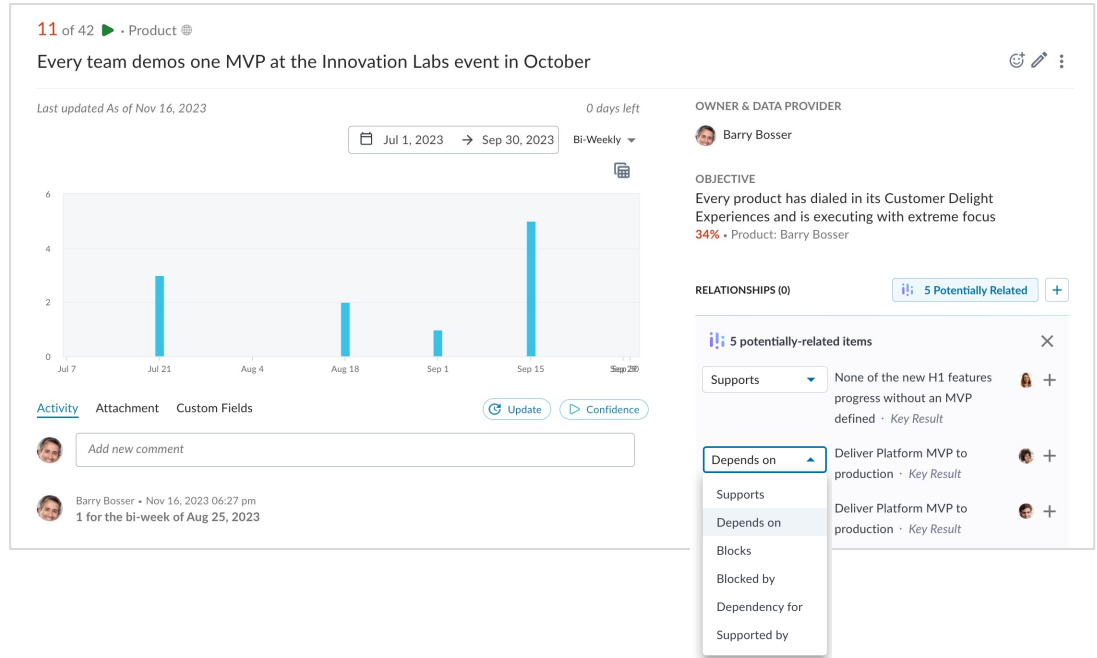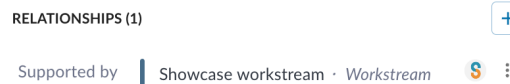
Transition of Prior Data

Existing Relationships	New Relationships
Related Work: Workstreams, Actions Items, Jira links and URLs	All prior items that were linked as related work will show as elements that "**support**" the key result

RELATED WORK (1) ⌃   ⊕ Link Related Work

≋ Workstream: **Showcase workstream**
   Company ELT: Barry Bosser

RELATIONSHIPS (1)   ⊞

Supported by | Showcase workstream · *Workstream*   S ⋮

- -

Key Result Dependencies set from the OKR Wizard

ALIGNMENT

▪ Depends on 2 key results
View alignment tree

F Filipe Costa · Product
Validate Q3 roadmap features with our best Analytics and most unhappy Analytics customers
12 of 10 · Source: Jamie B. Johnson

Irina Marin · Dynamics Engineering
Complete 7 stories for Analytics Tool 1.3.1
0 of 7 · Source: Irina Marin

Manny Admina · IT Transformation
Operationalize the use of product analytics for setting & managing product development goals, and close the...
76% of 100% · Source: Manny Admina

- **Prior dependencies** will now show as part of the relationship element
- **Setting relationships** will initially be from the key result details page
- The alignment tree will be temporarily deprecated. *A more holistic view of it to come in Q4 that incorporates* **all relationships** *(~Q4)*

Note: The data flow tree showcasing cascade, mirrors, and roll-ups will not be impacted.

Track results across time periods

WorkBoard

Run Annual Reviews with multi-period scorecards

Build key result & KPI Dashboards across time periods:

- Create Quarter-over-Quarter KR reviews with a few clicks

- Include both Annual & Quarterly KRs

- Create sharable Result Sets to track KRs over time

Create a Multi-period Scorecard in 3 Steps

1 Create **Result Sets** As **Scorecard Rows**

2 Add **Key Results** to **Result Sets** – Include both Annual and Quarterly KRs

3 Choose the **Time Period** to control **Column data**

Each Multi-Period Scorecard Row is a Result Set connecting KRs across time periods

Reuse & Share Result Sets across the Organization

1 Share any Result Set with your analytics community

2 Share **Result Set** with Users, Teams or entire Organization

3 Search for existing Result Sets to reuse on next Scorecard
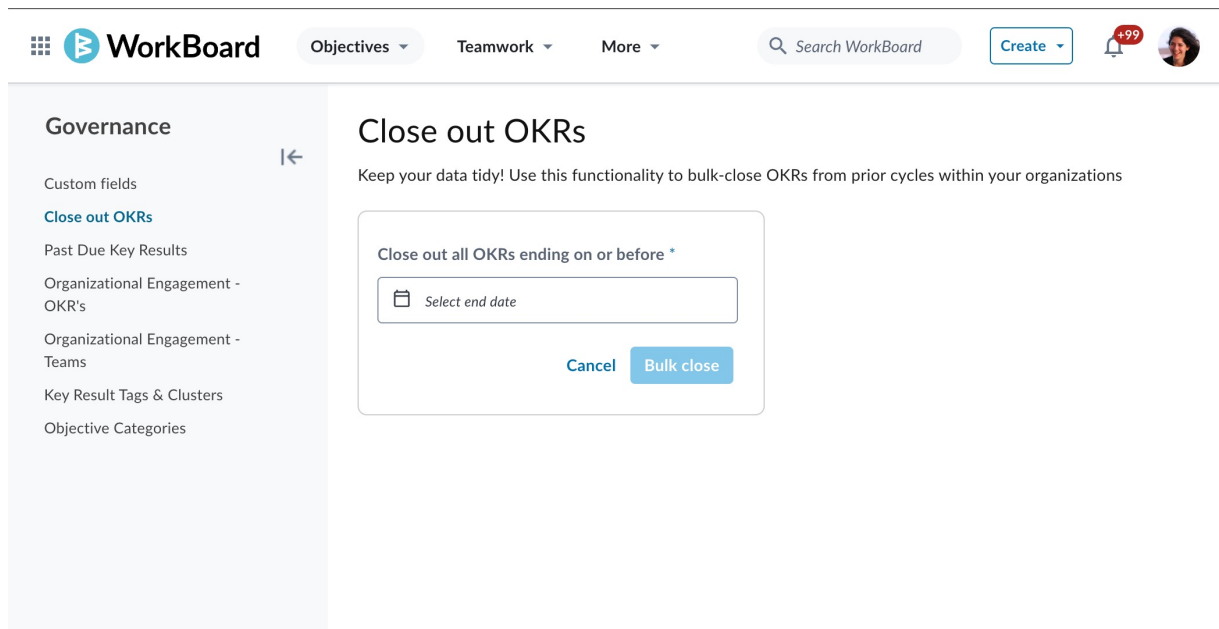

Result Sets can link KR data across **years**: build once & extend with new KRs

Close Outdated OKRs in Bulk

WorkBoard

Start 2024 with a clean slate

- Easily close OKRs from prior time periods to keep your heatmap, team OKR pages, and other organization OKR views tidy.

- Admins with the governance role can now close all OKRs that ended before a specific date with one click.

Join the Conversation

WorkBoard

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.	● Dec 18/20 at 8am PT	learn.workboard.com
Outcome Method Mindset	Learn about OKRs and the Outcome Mindset in 1 hour	● Dec 13 at 6am PT	learn.workboard.com
OKR Fast Pass Course	Build your OKR expertise in 3 hours	● Dec 6 at 8am PT	learn.workboard.com
OKR Coach Certification	Become a certified OKR coach	● Dec 19/21 at 1pm PT	learn.workboard.com
WorkBoard Pro	Learn the full power of the WorkBoard application and how to apply it in your organization.	● Dec 19/21 at 8am PT ● Jan 16/17 at 8am PT ● Feb 20/21 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.	● Winter cohort begins Feb. 2	workboard.com/rme-certification

WorkBoard

Community Call: Save the Date(s)!

In 2024, we will continue having monthly community calls on the last Wednesday of the month.

Our next Community Call is January 31.

Make sure to [sign up now](#) so you don't miss it!

WorkBoard
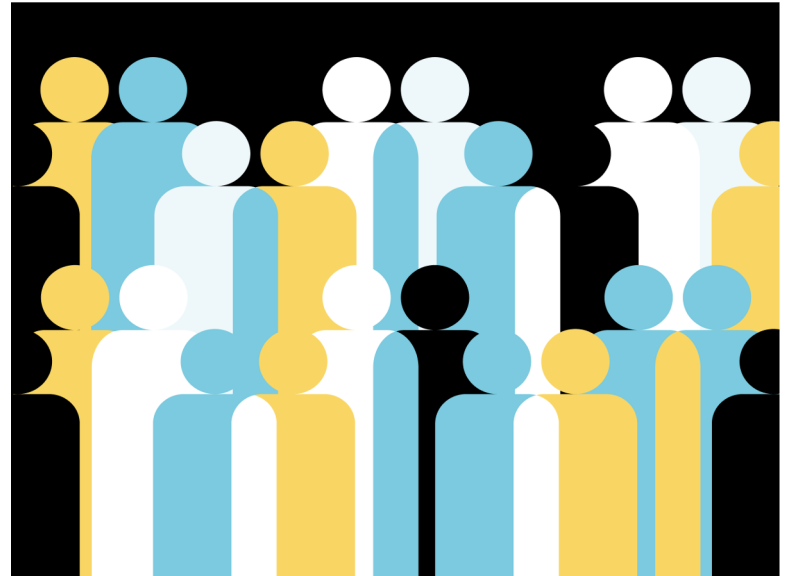
What are You Curious About?

WorkBoard

Thank you

See you next time!