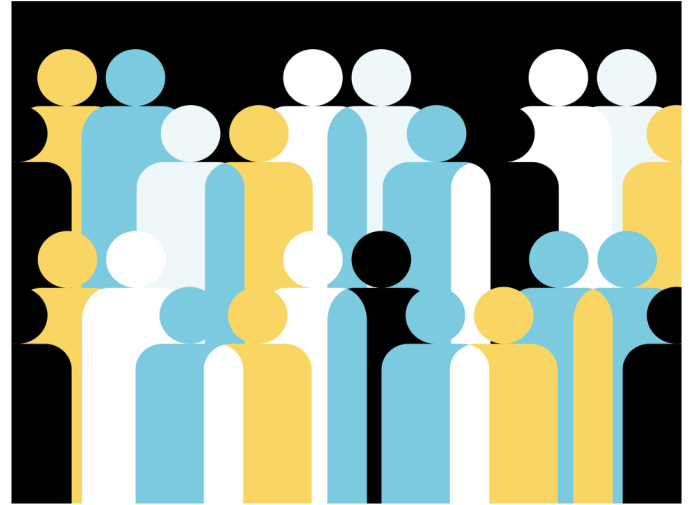


# Community Call

December 2023



# Agenda

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- 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- Close outdated OKRs in bulk for a fresh start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

# 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."

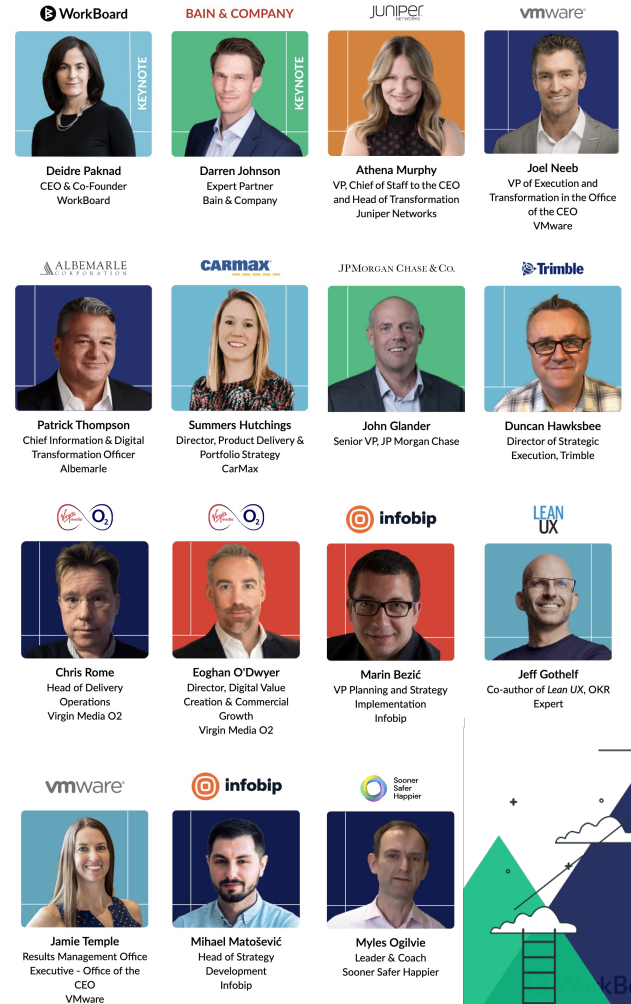
— Molly D., Lytx

"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.

# Your ambitious strategy deserves great execution

# 1

## Fast Transparency

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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

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

# 3

## Higher Velocity

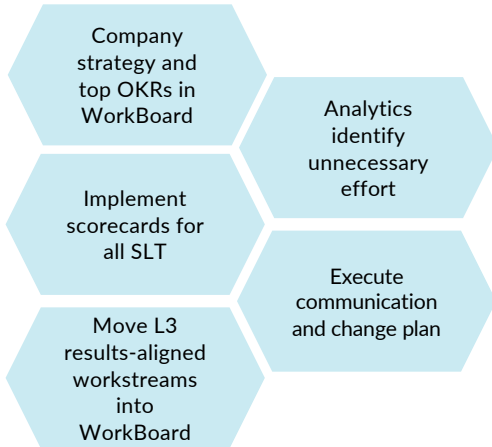
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From strong foundation with fewer x-org collisions, raise cadence of focus and use strategy execution intelligence to accelerate

# Gain lasting competitive advantage

## More Transparency

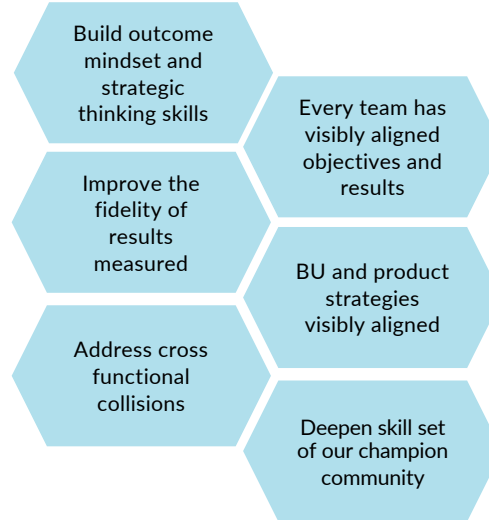
Start with a “value inventory” – where teams are actually focused today – as a basis for optimizing capacity and results



Structural

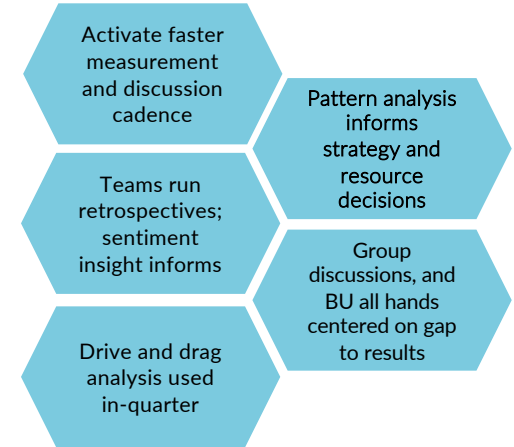
## Better Alignment

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



## Higher Velocity

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



Strategic

# Intelligent Enterprise Platform



# 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

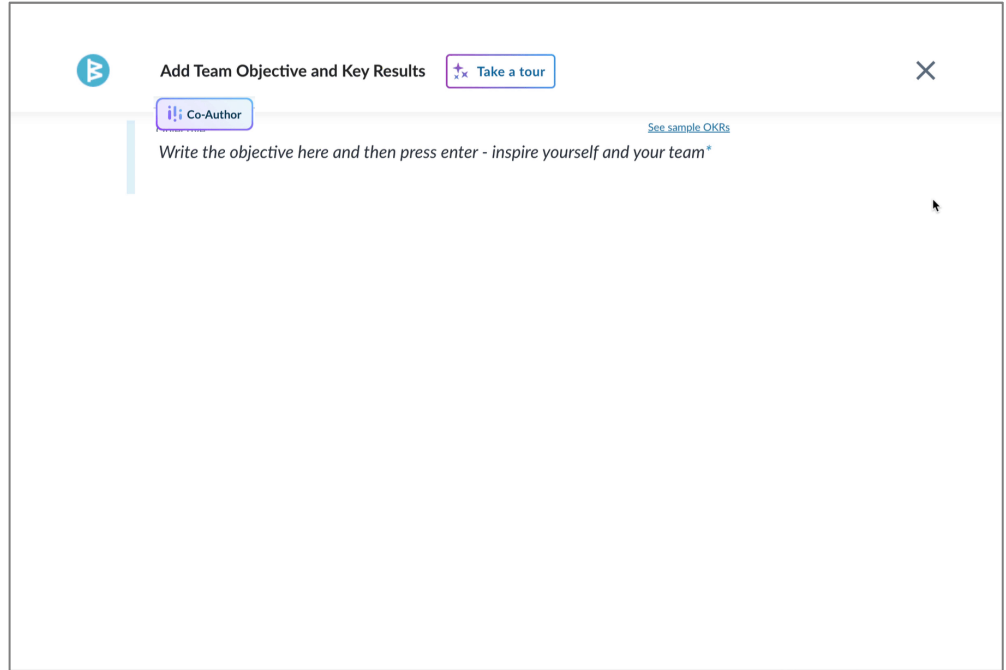


# Now the WorkBoard Intelligent Enterprise platform transforms your strategy execution data into smart insights using GenAI so you can now...

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

# 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!



# 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

The screenshot displays the WorkBoard interface for the Executive Team. At the top, there are navigation tabs for Objectives, Teamwork, and Meetings & Reviews. A search bar and a 'Create' button are also visible. The main content area shows the 'Executive Team' summary for Lily Alipoor. The summary is generated for the 'Last Week' and is in 'Narrative Summary' format. The text of the summary is as follows:

Last week, the Executive Team had two goals. The first was RESPONSIBILITY for Trust, Sustainability and Equity at the center of our actions and value creation, which had a progress value of 48% and 28 days left until the target date. The second goal was FOCUS on the right market segments and deliver highly differentiated value, which had a progress value of 71% and 28 days left until the target date.

There were 2 updates to the Key Results under RESPONSIBILITY for Trust, Sustainability and Equity at the center of our actions and value creation, and Joe Smarts raised a red confidence flag on 70% of Tier 1 Suppliers have set science-based targets for Green certifications, indicating there may be roadblocks to achieving the target.

Overall, the team is on track towards achieving the FOCUS on the right market segments and deliver highly differentiated value objective, and is expected to achieve at least 69% of their target for RESPONSIBILITY for Trust, Sustainability and Equity at the center of our actions and value creation. However, there is a long way to go on PEOPLE have their best career experience here, with 22% progress and only 28 days remaining.

At the bottom of the summary, there are 'Discard' and 'Save' buttons. The 'Save' button is highlighted in blue. To the right, it says 'Last Updated at: 2023-09-15T20:48:26.000Z by Workboard AI'. Below the summary, there are tabs for 'OKRs', '2 Workstreams', '3 Action Items', 'Weekly Snapshots', and 'Team Members'. At the bottom right, there is a checkbox for 'Only show overdue key results' and a 'Help' button.

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

Co-Author

Summarize Reflect & Reset

**Reflect & Reset**  
Teams get closer to achieving their true best possible through honest discussion. Reflect on your own or with your team and capture victories, observations, shifts and kudos.

**Victories**  
What did you achieve? What were the great results? What was awesome? What was proud?

**Observations**  
What did you notice? Where did the team fall short or miss? What did you observe, and why?

**Shifts**  
What did you adjust? What did you learn others to adjust to achieve more of intended outcomes next quarter?

**Kudos**  
Who made a difference this quarter? Where an achievement or impact truly stood out?



## Co-Author Summary:

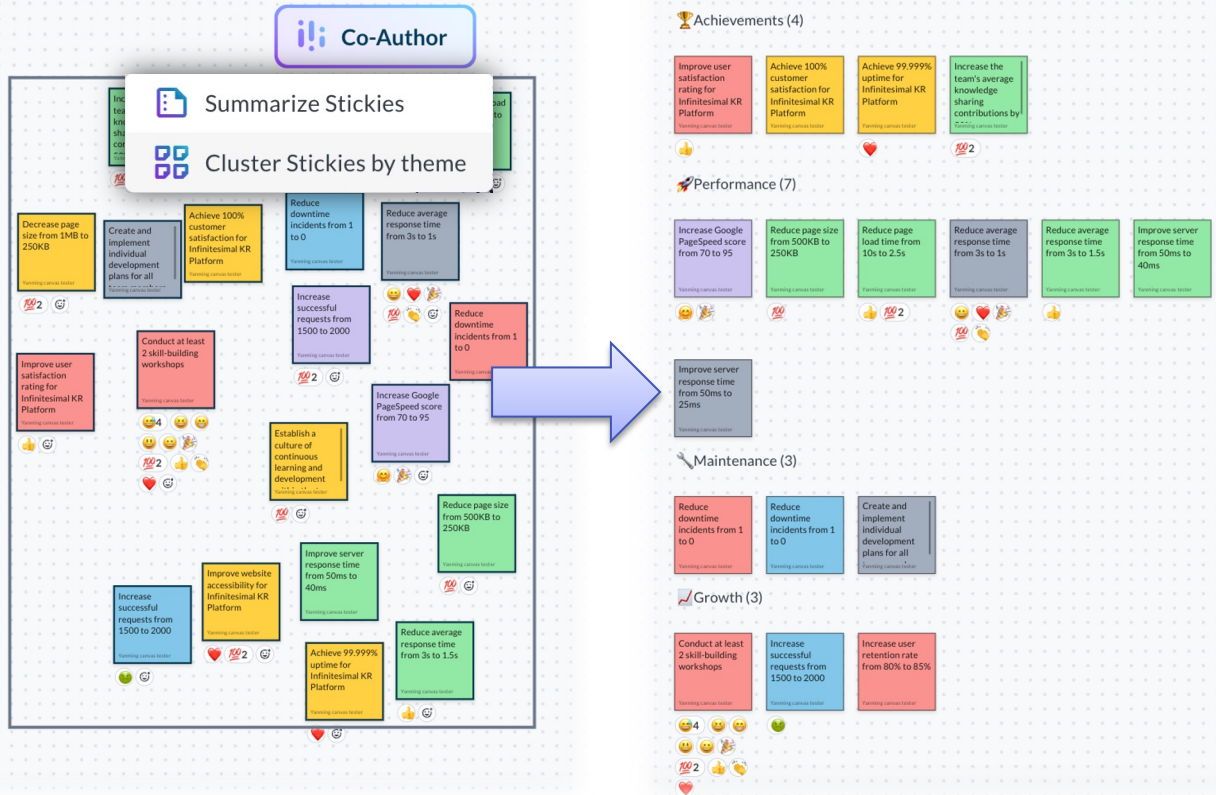
**Victories:**  
We've had a fantastic quarter, achieving numerous victories that have propelled us forward. We improved server response time from 50ms to 40ms, which has significantly enhanced the user experience. Our increased user retention rate from 80% to 90% has led to a more loyal customer base. Overall, our hard work and dedication have paid off, and we couldn't be more thrilled with the results!

**Observations:**  
We've made some significant observations this quarter that have helped us identify areas for improvement. Achieving 99.999% uptime for Infinitesimal KR Platform has been a significant win for us. We increased website accessibility score from 70 to 90, making our platform more inclusive for all users. Finally, we increased successful requests from 1500 to 2000, which is a significant step towards achieving our goals.

**Shifts:**  
This quarter, we have some fantastic ideas for team shifts that will help us improve our processes and better serve our customers. We can increase Google PageSpeed score from 70 to 95, which will significantly enhance website performance. We can conduct at least two skill-building workshops that will help our team members grow and develop. Finally, we can increase user retention rate by 5% by providing excellent customer service and support.

**Kudos:**  
We have some incredible shout-outs to celebrate this quarter! Our team member who increased successful requests from 1500 to 2000 deserves recognition for their hard work and dedication. Another team member who improved website accessibility for Infinitesimal KR Platform has made our platform more inclusive for all users. A team member who increased NPS score from 9 to 10 has shown a commitment to customer satisfaction. Finally, a team member who achieved 99.999% uptime for Infinitesimal KR Platform has helped ensure our customers have constant access to our services. Congratulations to all of our team members on their fantastic achievements!

# 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

The screenshot displays a 'Co-Author Summary' dialog box over a scorecard table. The table has columns for 'Result', 'Initial', and 'Actual'. The dialog box contains a summary of key results and settings for generating a scorecard.

Result	Initial	Actual
K in ide quota	\$197.7k	\$340k
K renewals	\$235k	\$140k
tion ast 70.10	25	60
4 in net ARR	\$1.23m	\$2.93m
i margins from 74%	74%	80%
Payback d for new ess deals wes from onths to...	10	9
omer- ted bugs	17	8
.of code d to ction has...	23%	42%
re 3 nations to e future...	0	2

**Co-Author Summary**

For the objective "Maximize our ability to grow by optimizing our unit economics," we are on track with our key results. We have achieved \$1.23m in net new ARR out of a target of \$3.1m. Our gross margins have improved from 74% to 79%, as desired. Additionally, our CAC Payback Period for new business deals is trending in the right direction, improving from 10 months to under 8 months.

In terms of Product & Engineering OKRs, we have made progress. We have not received any customer-reported bugs, indicating a successful product delivery. However, only 23% of the code pushed to production has 95% test coverage, below our target of 100%. We also need to explore 3 automations to reduce future spend.

Overall, we have achieved some key results but there are areas that require further attention and improvement.

**Summary settings**

Summary format: Team accomplishments in the past month

Custom options: Make it more inspirin[...]

Regenerate | **Insert in Scorecard**

**Key Results**

- \$2.93m of \$3.1m
- 80% of 79%
- 9 of 8
- 53%
- 8 of 0
- 42% of 100%
- 2 of 3

# 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

# 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!

The screenshot displays the WorkBoard interface for a manager named Sameera Spellman. The interface is organized into several sections:

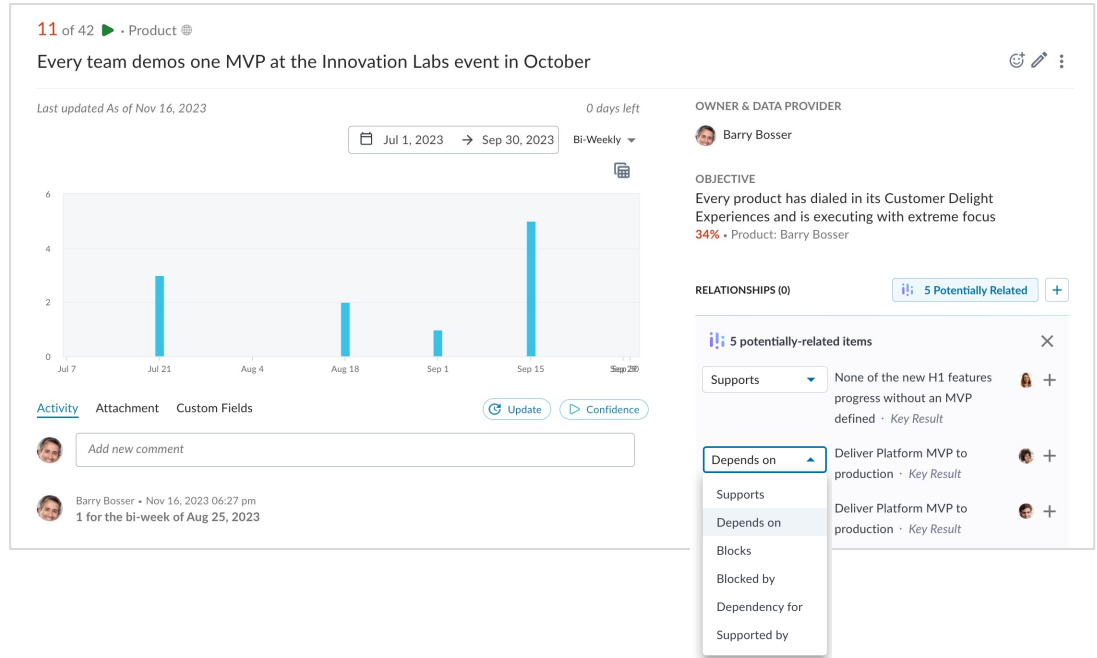
- Manager's Lens:** Shows the manager's profile, name, and a summary of their reports and areas of expertise.
- Team Engagement:** A circular diagram showing the relationship between Revenue Team, Revenue Leaders, Customer Support, Internal Account Squad, and Customer Success.
- Momentum:** A list of recent achievements and thank-you messages from team members.
- Objectives:** Three progress bars showing 55%, 76%, and 32% completion for different goals.
- Total Impact:** A summary of key results, including 1434 key results, 55% results achieved, 4734 actions completed, 373 badges received, and 14,030 comments and badges.
- Areas of Expertise:** A list of skills and competencies such as Leadership, Transparency, Onboarding, and Public Speaking.
- Impact Summary:** A detailed summary of the manager's performance in the past two weeks, including a suggestion to give kudos.



# Improving Cross- Functional Alignment

# Improve cross-functional alignment and identify related effort with key result relationships

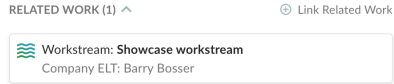
- Embedded AI suggests related key results
- Indicate the type of relationship between the two results - whether as a support, blocker, or dependency
- Enables teams to know who to collaborate with
- Prevents collisions and surprises that undercut team and company outcomes



# Transition of Prior Data

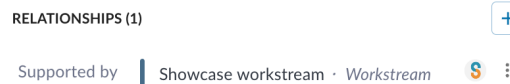
## Existing Relationships

**Related Work:** Workstreams, Actions Items, Jira links and URLs



## New Relationships

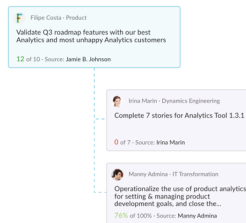
All prior items that were linked as related work will show as elements that **“support”** the key result



## Key Result Dependencies set from the OKR Wizard

ALIGNMENT

■ Depends on 2 key results  
[View alignment tree](#)



- **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

# 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 KR
- Create sharable Result Sets to track KR over time

**WorkBoard** Objectives Teamwork Meetings & Reviews

Core Operating Metrics Multiyear Scorecard

Compare Core Operating Metrics from FY19 to YTD FY23

Operating Metric	3Q FY23 Objective	3Q FY23 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	2.14%	\$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 KR.

**Multi-period Scorecard**

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

**Multi-period Scorecards**

Rows (3) Columns (9)

**Add Sets**

- Revenue Bookings (\$FDC) 5 Time periods Modified Sep 21
- New Leads / BDR / Day 8 Time periods Modified Sep 21
- Open Job Recs Closed 5 Time periods Modified Sep 21

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 Inga Martin (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)

+ Add a free text row

# Create a Multi-period Scorecard in 3 Steps

## 1 Create Result Sets As Scorecard Rows

Multi-period Scorecards

Rows (3) Columns (13)

Add Sets Search + Create

ARR 5 Time periods Modified Dec 7

- 84 of 85 Q1: Q1 85M in ARR Manny Admina Q1FY23
- 96 of 115 120M ARR Manny Admina FY23
- 92 of 96 Q2: Q2 96M in ARR Manny Admina Q2FY23
- 96 of 100 Q3: Q3 100M in ARR Manny Admina Q3FY23
- 96 of 115 Q4: Q4 115M in ARR Manny Admina Q4FY23

Tier 1 Customers 5 Time periods Modified Dec 7

Employee Engagement 5 Time periods Modified Dec 7

+ Add a free text row

## 2 Add Key Results to Result Sets – Include both Annual and Quarterly KR

ARR 5 Time periods Modified Dec 7

Search results by name, owner or team

All time

62% Operating Metrics FY 2023

- 84 of 85 Q1: Q1 85M in ARR Manny Admina Q1FY23
- 96 of 115 120M ARR Manny Admina FY23
- 92 of 96 Q2: Q2 96M in ARR Manny Admina Q2FY23
- 96 of 100 Q3: Q3 100M in ARR Manny Admina Q3FY23
- 96 of 115 Q4: Q4 115M in ARR Manny Admina Q4FY23

## 3 Choose the Time Period to control Column data

Multi-period Scorecards

Rows (4) Columns (6)

Set Name

Objective name Q1FY23

KR name Q1FY23

123 Q1-23 Actual Q1FY23 Current

123 Q2-23 Actual Q2FY23 Current

123 Q3-23 Actual Q3FY23 Current

Q4FY19 mn

Q1FY23

Q2FY23

Q3FY23 ✓

Q4FY23

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

The screenshot shows a result set titled 'ARR' with a '5 Time periods' filter. A 'Share this set' menu is open, displaying options: 'Remove' and 'Archive'. Below the menu, a table of metrics is visible:

Score	Metric	Period
62%	Operating Metrics	FY 2023
84 of 85	Q1: Q1 85M in ARR	Manny Admina Q1FY23
96 of 115	120M ARR	Manny Admina FY23
92 of 96	Q2: Q2 96M in ARR	Manny Admina Q2FY23
96 of 100	Q3: Q3 100M in ARR	Manny Admina Q3FY23
96 of 115	Q4: Q4 115M in ARR	Manny Admina Q4FY23

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

The 'Manage people and teams' dialog box shows a search bar and a list of four people:

- Jack CEOMack (wobo-Jack@wobodemo.com) - Scorecard owner
- Gerald Smith (wobo-Gerald@wobodemo.com) - Editor
- Jackie Shafer (leila+jackienewna@workboard.com) - Editor
- Johnny Jackson (wobo-Johnny@wobodemo.com) - Editor

At the bottom, the 'General access' section shows a dropdown menu with three options: 'Only people invited can view' (selected), 'Only people invited can view' (checked), and 'Anyone in the organization can view'.

**3** Search for existing Result Sets to reuse on next Scorecard

The 'Multi-period Scorecards' interface shows a search bar with 'rev' entered. Below the search bar, a list of result sets is displayed:

- Renewal Revenue (Steve Boogar · 0 time period · Modified Oct 30)
- APJ Revenue (Steve Boogar · 7 time periods · Modified Oct 19)
- MQLs (3 Time periods · Modified Oct 10)

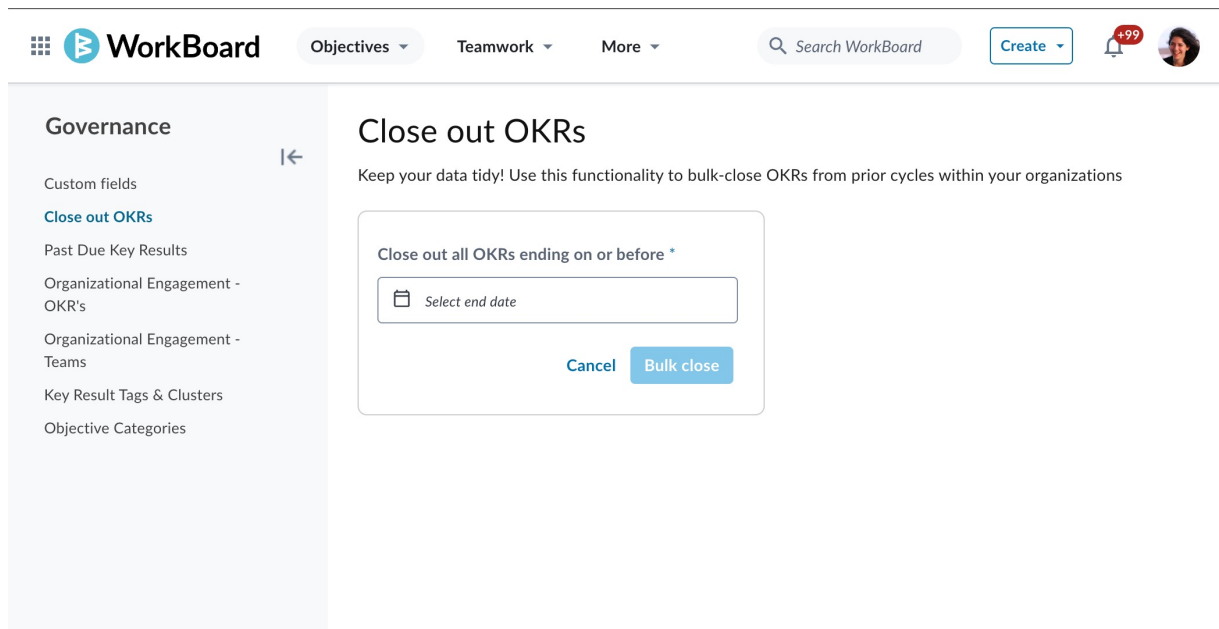
**Result Sets can link KR data across years: build once & extend with new KRs**

# Close Outdated OKRs in Bulk



# 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.



The screenshot displays the WorkBoard user interface. At the top, there is a navigation bar with the WorkBoard logo, menu items for 'Objectives', 'Teamwork', and 'More', a search bar labeled 'Search WorkBoard', a 'Create' button, and a notification bell with '+99' and a user profile picture. On the left, a 'Governance' sidebar lists various organizational views, with 'Close out OKRs' highlighted in blue. The main content area is titled 'Close out OKRs' and includes the instruction: 'Keep your data tidy! Use this functionality to bulk-close OKRs from prior cycles within your organizations'. A modal dialog box is open, containing the text 'Close out all OKRs ending on or before \*', a date selection field with a calendar icon and the placeholder 'Select end date', and two buttons: 'Cancel' and 'Bulk close'.

# Join the Conversation



# Upcoming Courses



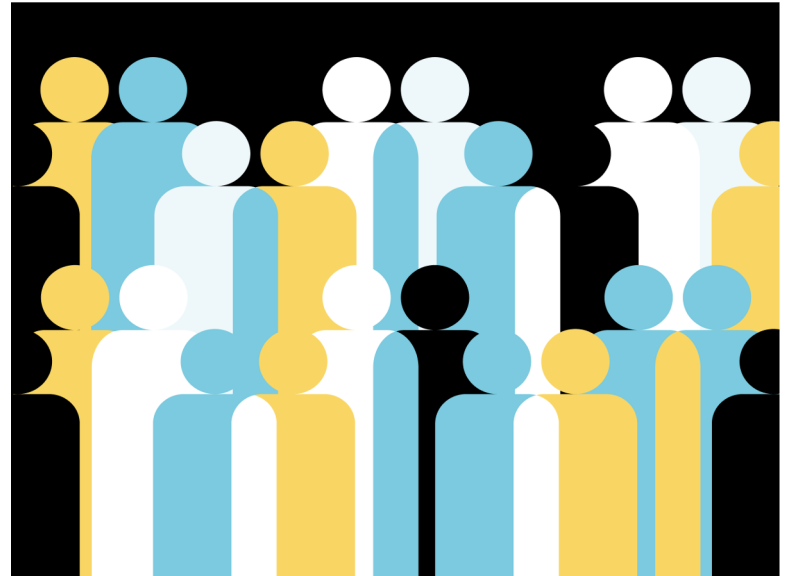
Class	Description	Dates	How to Sign Up
<b>Level 2 OKR Coach Certification</b>	For experienced OKR Coaches: Take the next step on your journey as a key influencer helping to mature your organization's OKR program.	<ul style="list-style-type: none"><li>● Dec 18/20 at 8am PT</li></ul>	<a href="https://learn.workboard.com">learn.workboard.com</a>
<b>Outcome Method Mindset</b>	Learn about OKRs and the Outcome Mindset in 1 hour	<ul style="list-style-type: none"><li>● Dec 13 at 6am PT</li></ul>	<a href="https://learn.workboard.com">learn.workboard.com</a>
<b>OKR Fast Pass Course</b>	Build your OKR expertise in 3 hours	<ul style="list-style-type: none"><li>● Dec 6 at 8am PT</li></ul>	<a href="https://learn.workboard.com">learn.workboard.com</a>
<b>OKR Coach Certification</b>	Become a certified OKR coach	<ul style="list-style-type: none"><li>● Dec 19/21 at 1pm PT</li></ul>	<a href="https://learn.workboard.com">learn.workboard.com</a>
<b>WorkBoard Pro</b>	Learn the full power of the WorkBoard application and how to apply it in your organization.	<ul style="list-style-type: none"><li>● Dec 19/21 at 8am PT</li><li>● Jan 16/17 at 8am PT</li><li>● Feb 20/21 at 8am PT</li></ul>	<a href="https://learn.workboard.com">learn.workboard.com</a>
<b>Results Management Leader Certification</b>	Learn how to lead your organizations alignment, accountability, and OKR operating cycle to ensure you achieve strategy faster.	<ul style="list-style-type: none"><li>● Winter cohort begins Feb. 2</li></ul>	<a href="https://workboard.com/rme-certification">workboard.com/rme-certification</a>

# 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!



**What are You  
Curious About?**





# Thank you

See you next time!