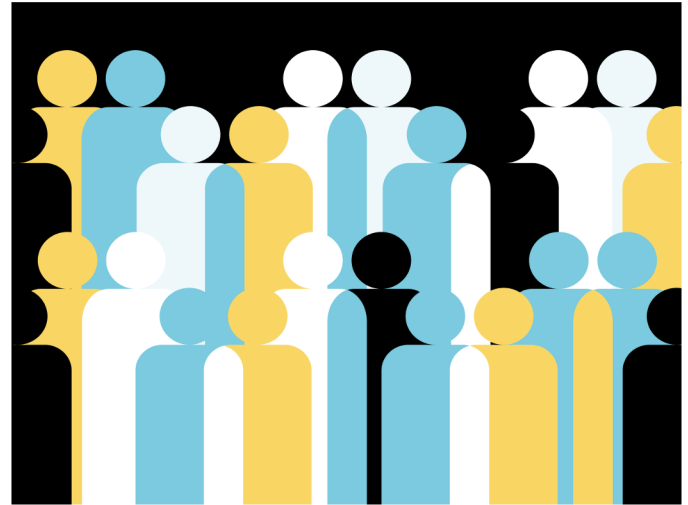


# Community Call

January 2024



# Agenda

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- Intelligent Enterprise Platform – what's here and what's next!
- Scorecard improvements
- Action Item updates
- Deepening your expertise

# Intelligent Enterprise Platform



# The WorkBoard Intelligent Enterprise platform

## Radically simplify alignment to mobilize on strategy faster

Better, faster alignment –

- No learning curve to great OKRs - everyone is expert at measuring drivers (lead) and outcomes (lag)
- Surface x-functional dependencies automatically and transparently

## Accelerate decisions to deliver value more profitably

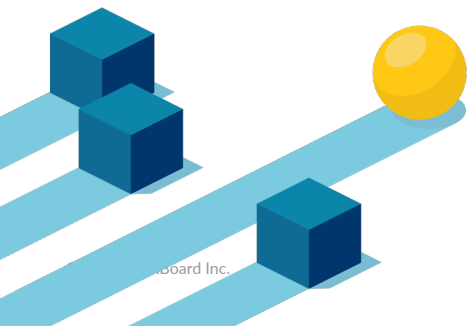
Synthesize the facts instantly –

- Get Executive Briefs without meeting
- Distill execution situations instantly
- Get suggested discussion topics and actions with the facts (Q1)

## Improve everyone's intelligence and efficiency to outperform

Operational excellence as a pattern –

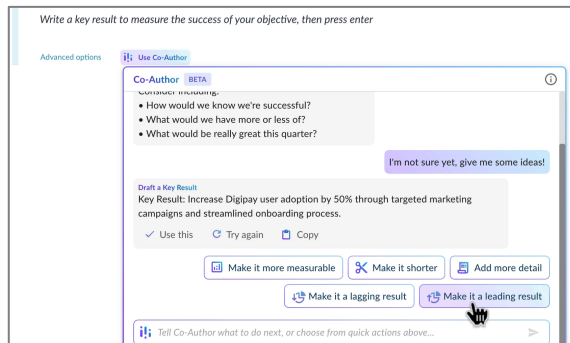
- Roll up learnings, roll down objectives (Q1-2)
- Get the right scorecard at the right cadence
- Assess-to-improve operational excellence and effectiveness (Q2)



# We've already tackled some of the biggest strategy execution problems:

Biggest challenge...

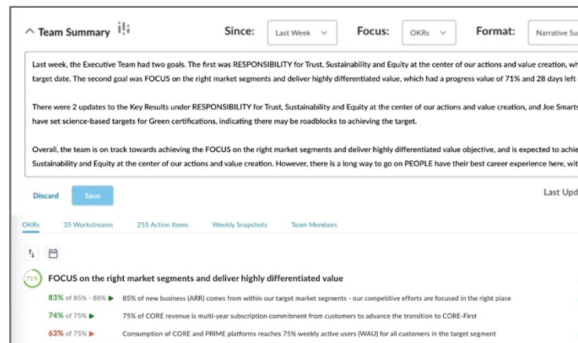
Aligning on outcomes



Generate draft OKRS

Biggest time sink...

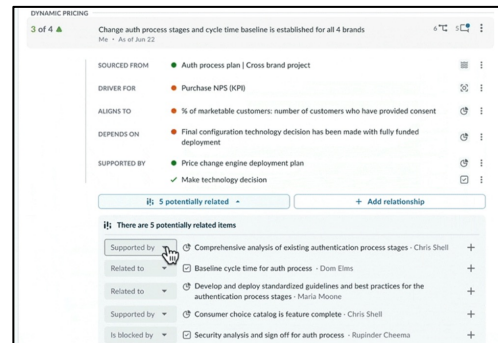
Internal status meetings



Generate status briefings

Hardest collaboration hurdles...

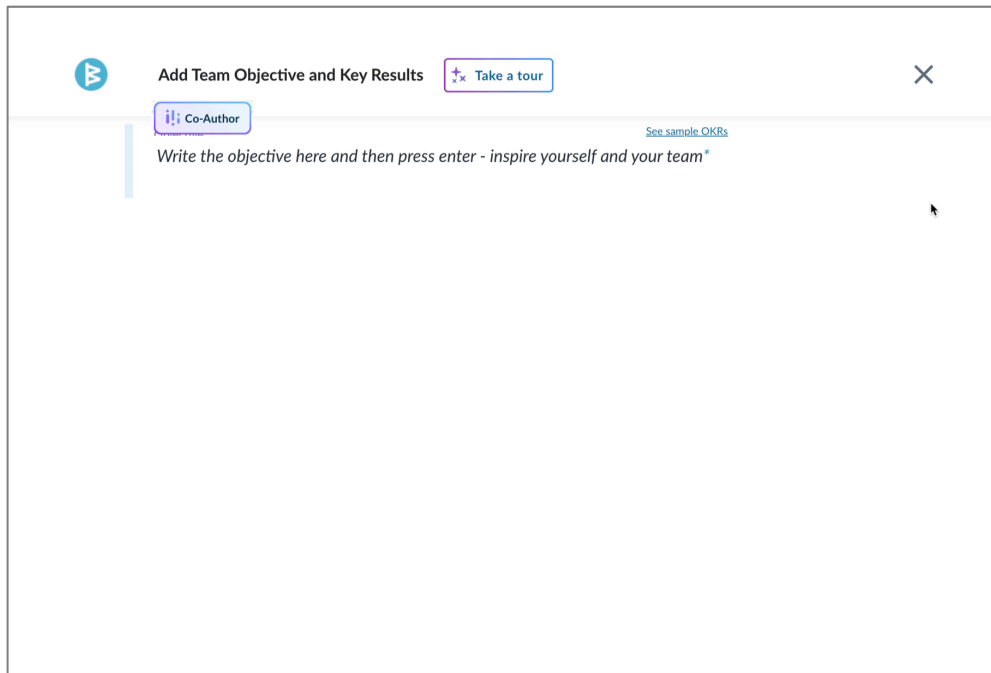
Transparency, dependencies, time zones, and language barriers



Identify dependencies

# Set better OKRs 10x faster

- 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!



Co-Author does *incredibly fast* what humans do *frustratingly slow*.

**Eliminates the 4 common frustrations entirely ...**

1. Being unfamiliar with the syntax of objectives and key results
2. Getting hung up on how to phrase their intentions, so the discussion takes too long
3. Struggling to define measurable *outcomes* instead of listing their tasks and activity
4. Identifying dependencies and coordinating outcomes with other teams

**... while enabling more fruitful and efficient team conversations**

# Generate and share a weekly summary of team progress in under 2 minutes

- 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 application interface. At the top, there's a navigation bar with 'WorkBoard' logo, 'Objectives', 'Teamwork', and 'Meetings & Reviews' tabs. A search bar and a 'Create' button are on the right. Below the navigation bar, the main content area shows a 'Team Summary' for 'Company ELT' (Jack CEO/Mack) for the period '15 Nov - 22 Nov 2023'. The summary is presented in a light blue box with a 'Publish' button and a 'Generate New' button. The summary text includes:

Based on the data provided, here is a high-level executive update report focusing on the key highlights and areas needing attention:

**Economics Objective:**  
Good progress improving Lifetime Value to Customer Acquisition Cost ratio through SEO, but may not see full benefits until next quarter. Gross margins are on track to hit target of 79% by year end.

**Focus Objective:**  
85% of new customer bookings are coming from target segments - pipeline looks strong. However, revenue retention of target customers needs additional focus to hit 85% target. Key renewals coming up that can help close gap.

**Customer Objective:**  
Team successfully pulled together to address revenue retention challenges this quarter. Uptime fluctuations over past weeks remain a concern.

**People Objective:**  
Hiring velocity risks falling behind target for the year based on a key departure. Need to ensure remaining teams stay on track.

**ESG Objective:**  
Supplier emissions reductions efforts are lagging - only 40% have set science-based targets to date. Business ethics framework completion is delayed.

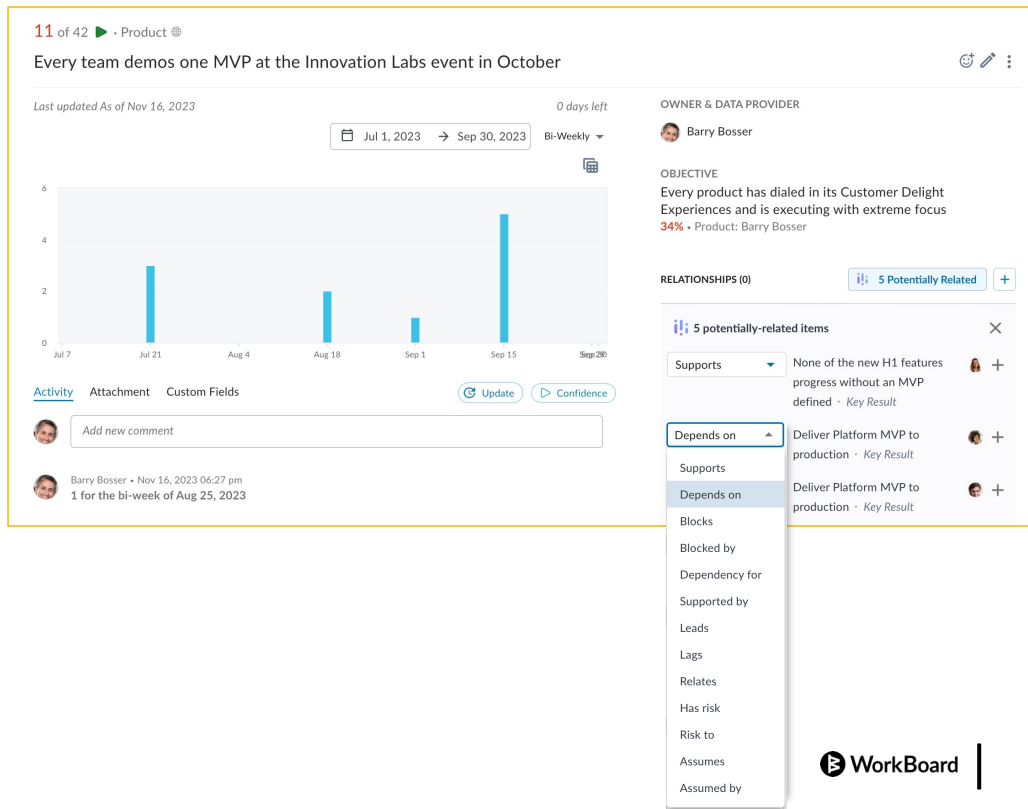
In summary, we have momentum across most areas but need to keep focus on renewals, hiring targets, and sustainability initiatives to close out the year successfully. Let me know if any additional details or recommendations would be helpful.

Below the summary, there's a section for 'OKRs' with a '36 Workstreams' and '262 Action Items' tab. The 'OKRs' tab is selected, showing a list of objectives with progress bars and completion dates. The first objective is 'FOCUS on the right market segments and deliver highly differentiated value' with a 46% completion status. The second objective is '71% of 85%' with a 71% completion status. The third objective is '64% of 75%' with a 64% completion status. The fourth objective is '66% of 75%' with a 66% completion status. The bottom right corner features a 'Only show overdue key results' checkbox and a '14' days left indicator.

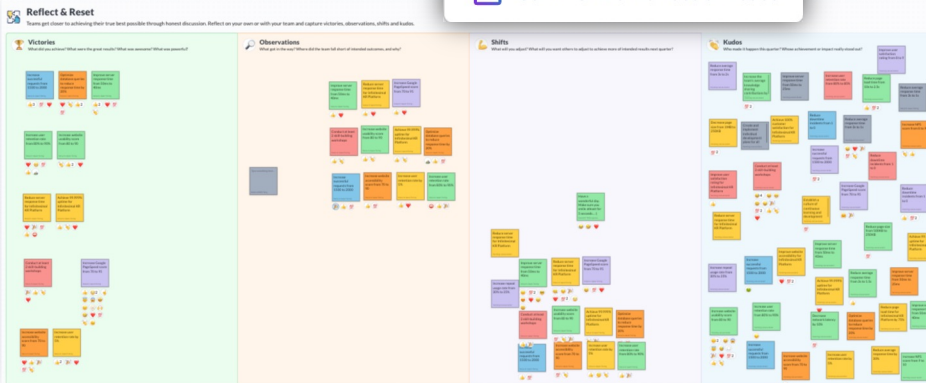
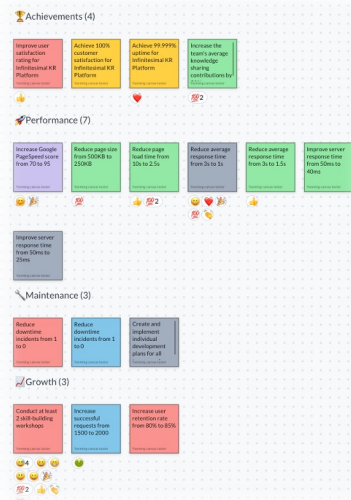
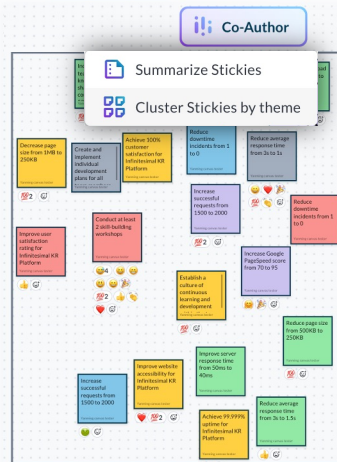


# Improve cross-functional alignment and identify related effort with key result relationships

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



# Collate observations from retros so no team learns the same lesson twice



## 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 60ms, 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!

# Next, we're tackling big opportunities to outperform

- ✓ 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**.
- ✓ Suggest **discussion topics** and the next course of action
- ✓ Bubble up **distilled learnings** and kudos so teams and the organization are smarter
- ✓ Simplify **strategy research** and planning
- ✓ Give **managers facts and coaching** to operate at their best
- ✓ Give **team members perspective** on their impact to operate at their best



# Generate executive briefs so you get to the **smartest decision 5x faster**

- Highlight accomplishments or changes on Scorecards and Biz Reviews since the prior review or team meeting
- Customize the tone to match the intended audience

**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 inspiring

Regenerate Insert in 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 wves 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

**Key Results**

Search by name, owner, team or tag

- \$2.93m of \$3.1m Lily Alipoor
- 80% of 79% Gross margins move fr Lily Alipoor
- 9 of 8 CAC Payback Period f deals improves from 1 Lily Alipoor
- 53% We own product delive time Executive Team | Quarte
- 8 of 0 0 customer-reported t Lily Alipoor
- 42% of 100% 100% of code pushed i 95% test coverage Lily Alipoor
- 2 of 3 Explore 3 automations spend Lily Alipoor

# Briefings get even smarter this quarter

1. Status summary for a specific Biz Review
2. Status summary for a specific scorecard
3. My scheduled briefings

Select any combination of

- Objectives
- Key Results
- Teams
- Strategy pillars
- Workstreams and actions
- Scorecards
- Biz Reviews
- Meetings

Name your brief

Create multiple briefings

Schedule it or on demand

All in one place

Suggested topics and actions in the briefing

The screenshot displays the WorkBoard interface. At the top, there's a navigation bar with 'WorkBoard' logo, tabs for 'Objectives', 'Teamwork', and 'Meetings & Reviews', a search bar, and a 'Create' button. The main content area is titled 'Status Briefing as of Dec 14'. It contains three sections of text: 'Company OKRs', 'Transformation Workstreams', and 'Product Acme OKRs'. Below the text are two input fields: one for asking questions and another for generating a new summary. The bottom section, titled 'Objectives', shows a list of five objectives with their progress percentages and status indicators. The objectives are: 'INNOVATION drives core advantage for our customers' (49%, Results at risk), 'PEOPLE have their best career experience here with equal access to opportunities for impact and growth' (39%, Results to celebrate), 'RESPONSIBILITY for Trust, Sustainability and Equity at the center of our actions and value creation' (50%, Draft OKRs), 'FOCUS on the right market segments and deliver highly differentiated value' (13%, Results at risk), and 'CUSTOMERS have an exceptional experience with our products and our people' (74%, Results to celebrate). Each objective has a '12 days left' timer and a 'Q4 FY23' label.

WorkBoard

Objectives Teamwork Meetings & Reviews

Search WorkBoard Create

Status Briefing as of Dec 14

Company OKRs – overall progress as expected with the exception of the cost take out result. Mike indicates it will fall short of plan by 20%. Last week, revenue moved from \$198M to \$239M progressing nicely toward target. Value journey work is generating expansion opportunities, exceeding the target.

Transformation Workstreams – more than half of the planned work is late as of this week, with most of the actions belonging to Sumit and Jorge. With about 20% complete and the delays, more focus is needed to execute as planned. Elisa noted that there are vendor delays in 3 areas that compromise the team's ability to cutover as expected; the savings impact could be as much as \$38M

Product Acme OKRs – the team made major progress last week and shipped 3 modules. The feedback cycle is progressing, and they've achieved 48% of their milestones. Kevin notes that the dependencies that were blockers have now been resolved.

Ask a different question about the objectives, teams, and workstreams you're interested in...

Generate new summary

Objectives

COMPANY ELT

10 Results at risk 4 Results to celebrate 3 Draft OKRs

49% INNOVATION drives core advantage for our customers 12 days left Q4 FY23

39% PEOPLE have their best career experience here with equal access to opportunities for impact and growth 12 days left Q4 FY23

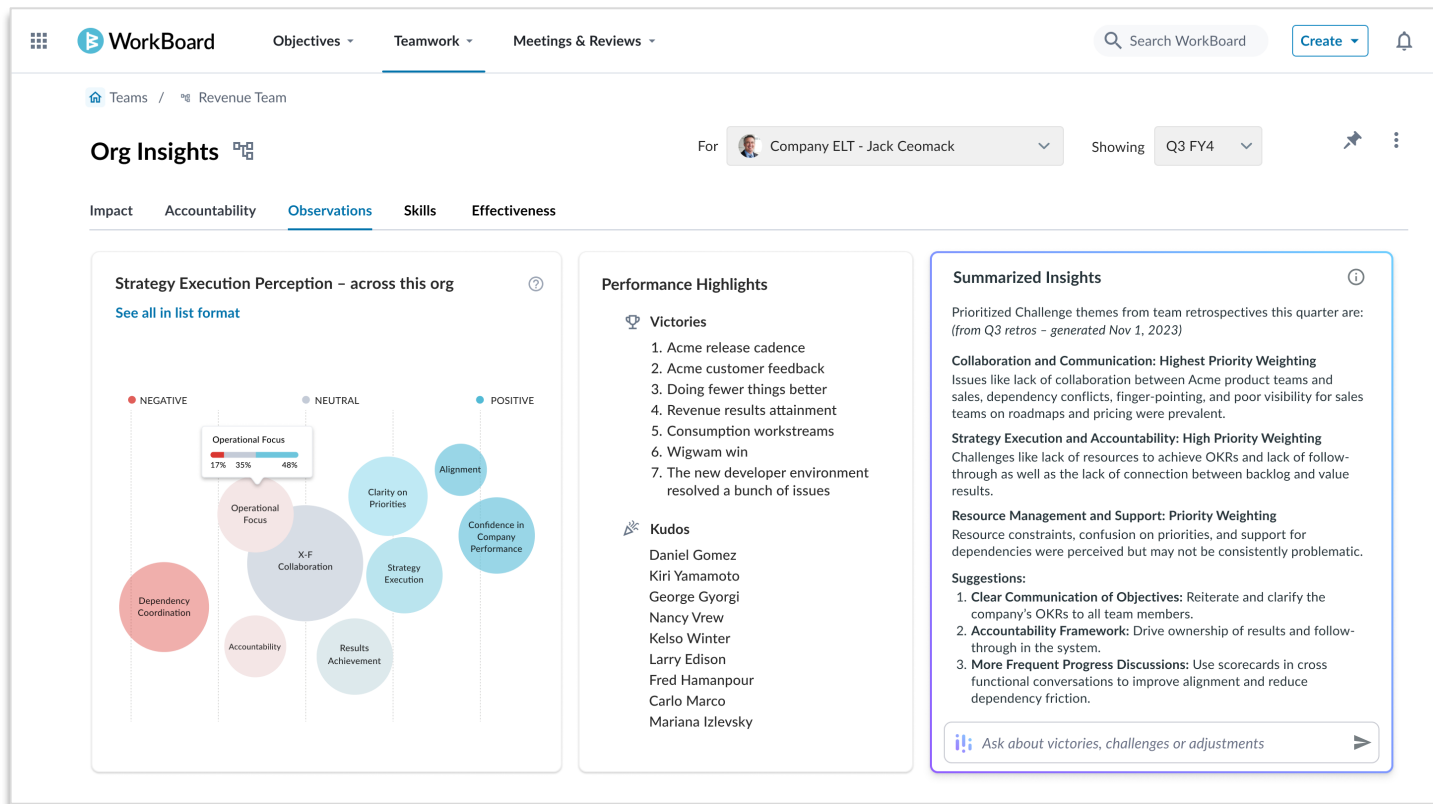
50% RESPONSIBILITY for Trust, Sustainability and Equity at the center of our actions and value creation 12 days left Q4 FY23

13% FOCUS on the right market segments and deliver highly differentiated value 12 days left Q4 FY23

74% CUSTOMERS have an exceptional experience with our products and our people 12 days left Q4 FY23

Bubble up  
distilled  
learnings and  
kudos so teams  
and the  
organization are  
smarter

Simplify strategy  
research and  
planning



# Help managers and team members operate at their best

Prep for 1on1s with impact and skills summaries:

- Give managers facts and coaching on topics for discussion
- Give team members perspective on their impact

The screenshot displays the WorkBoard interface. At the top, navigation tabs include 'Objectives', 'Teamwork', and 'Meetings & Reviews'. A search bar and a 'Create' button are on the right. The main content area features a profile for Sameera Spellman, a Customer Success manager, with a photo and a background image of a city. Below the profile, there's a section for 'Reports directly to Joe Smart' and 'Areas of Expertise'. A 'Team Engagement' diagram shows four overlapping circles: Revenue Team, Revenue Leaders, Customer Support, and Internal Account Squad, all centered around Customer Success. Below this, 'Objectives' are listed with progress bars: 55% for Customer Value, 76% for value delivery, and 32% for communications. A 'Total Impact' section shows metrics like 1434 key results, 55% results achieved, 4734 actions completed, 373 badges received, and 14,030 comments. The 'Manager's Lens' sidebar on the right provides a detailed view of the manager's performance, including an 'Impact Summary' with a suggestion to give kudos, an 'Effectiveness' section, a 'Last PACE' section, and a 'Skills Summary' listing various competencies.

WorkBoard

Objectives Teamwork Meetings & Reviews

Search WorkBoard Create

Manager's Lens

Next 1on1 Wed, Nov 8 - 1

Kudos Actions Topics

Impact

Impact Summary

In the past 2 weeks, Sameera has closed 2 OKRs and set her Q4 OKRs. She did well on her renewals target but came in 15% below. She created 71 action items in the past 2 weeks and has completed 66, most in the value journey workflow.

Suggestion: Give Sameera kudos and discuss how much work is on her plate.

Effectiveness

Last PACE

Skills Summary

Customer Lifecycle Management: Customer Success Management

Sales Proficiency: Sales Enablement, Account Management,

Consultative Selling

Data Analysis: Metrics and Data Analysis

Teaching: Training and Coaching

Financial Acumen: Revenue Operations

Change Leadership: Change Management

Strategic Agility: Strategic Planning

Project Management: Program Management

Results Driven: Sales Focused

As of Nov 1, 2023

Team Engagement

Revenue Team Revenue Leaders Customer Support Internal Account Squad Customer Success

Objectives

55% Maximize Customer Value 20 days left

76% We master value delivery and consumption 20 days left

32% Communications, Community, and Connection is the name of the CS game 20 days left

Total Impact

1434 Key results

55% Results achieved

4734 Actions completed

373 Badges received

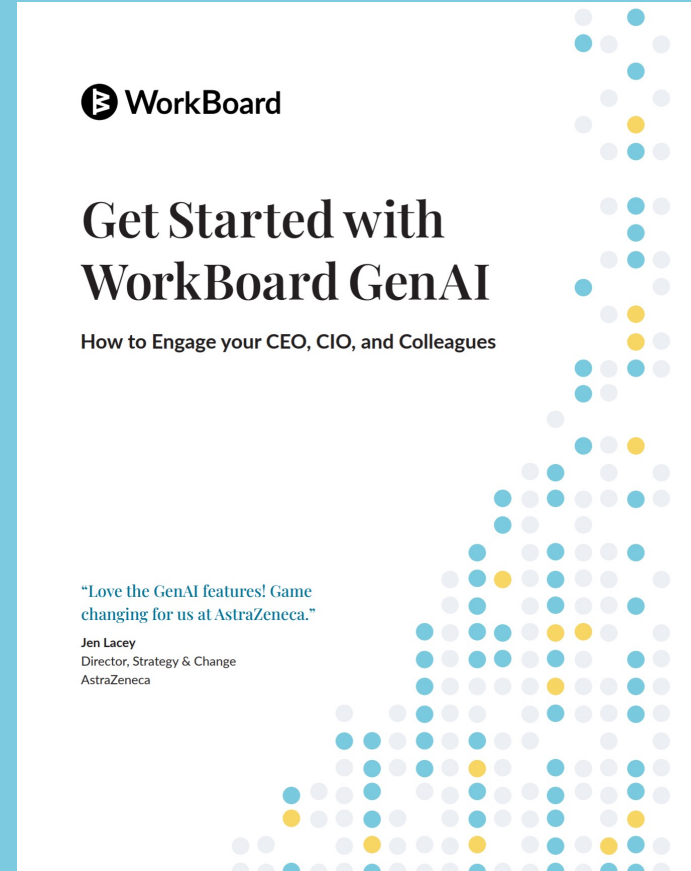
14,030 Comments and badges

Areas of Expertise

Leadership Collaborator Generalist

# Ready to get started with Intelligent Enterprise?

- ✓ Get the engagement guide for tips on starting the discussion with stakeholders in your organization.
- ✓ Discuss next steps with your account team.





# Scorecard improvements



# Highlight a row to make presentation and discussion seamless

<div> <span>WorkBoard</span> </div> <div> <span>Objectives ▾</span> <span>Teamwork ▾</span> <span>Meetings &amp; Reviews ▾</span> </div> <div> <input type="text" value="Search WorkBoard"/> </div>									
<div> <span>Biz Reviews / Op Comm Scorecard - P&amp;E</span> </div> <div> <span>Op Comm Scorecard - P&amp;E</span> </div>									
Priority	Key Results	Owner	Initial value	Current Progress	Target	Actual ↓	Risk	Comments	
RESPONSIBILITY for Trust, Sustainability and Equity at the...	Reduce Scope 1 and 2 emissions from 35M metric tons to 32M metric tons	Bob Cross	35m		32m	34.28m	Low		
FOCUS on the right market segments and deliver highly differentiated value	Consumption of CORE and PRIME platforms reaches 75% weekly active users (WAU) for all customers in the target segment	Barry Bosser	65%		75%	63%	Medium	Making progress	
INNOVATION drives CORE advantage for our customers	Cloud Agnosticism strategy agreed upon by all portfolio leaders	Jack CEOmack	0%		100%	78%	Medium		
FOCUS on the right market segments and deliver highly differentiated value	75% of CORE revenue is multi-year subscription commitment from customers to advance the transition to CORE-First	Amanda Dinero	55%		75%	64%	High	@Jack CEOmack can you add y update?	
INNOVATION drives CORE advantage for our customers	The first implementations of G-AI are deployed in 3 CORE family products and in beta customer hands this quarter	Barry Bosser	0		2	1	Medium	Additional Capacity confirmed with @Manny Admina	
INNOVATION drives CORE advantage for our customers	Energy efficiency strategy in place PowerPro & CORE product families for how we will drive a 20% cost advantage for customers by EOY	Maria Cmoso	0		90	31	Medium	@Maria Cmoso @Jack CEOmack Let ensure we have time to meet on this - it extremely important for us to drive this.	
INNOVATION drives CORE advantage for our customers	LaCa has full PowerPro feature equivalency with US and we have closed the \$41m deal backlog pending in the region	Barry Bosser	\$0		\$41m	\$19.45m	Medium		
RESPONSIBILITY for Trust, Sustainability and Equity at the...	We are ready to start carbon neutral certification by EOQ and auditors are confirmed for week 1...	Bob Cross	0%		100%	23%	Low		

# Action Item Refresh

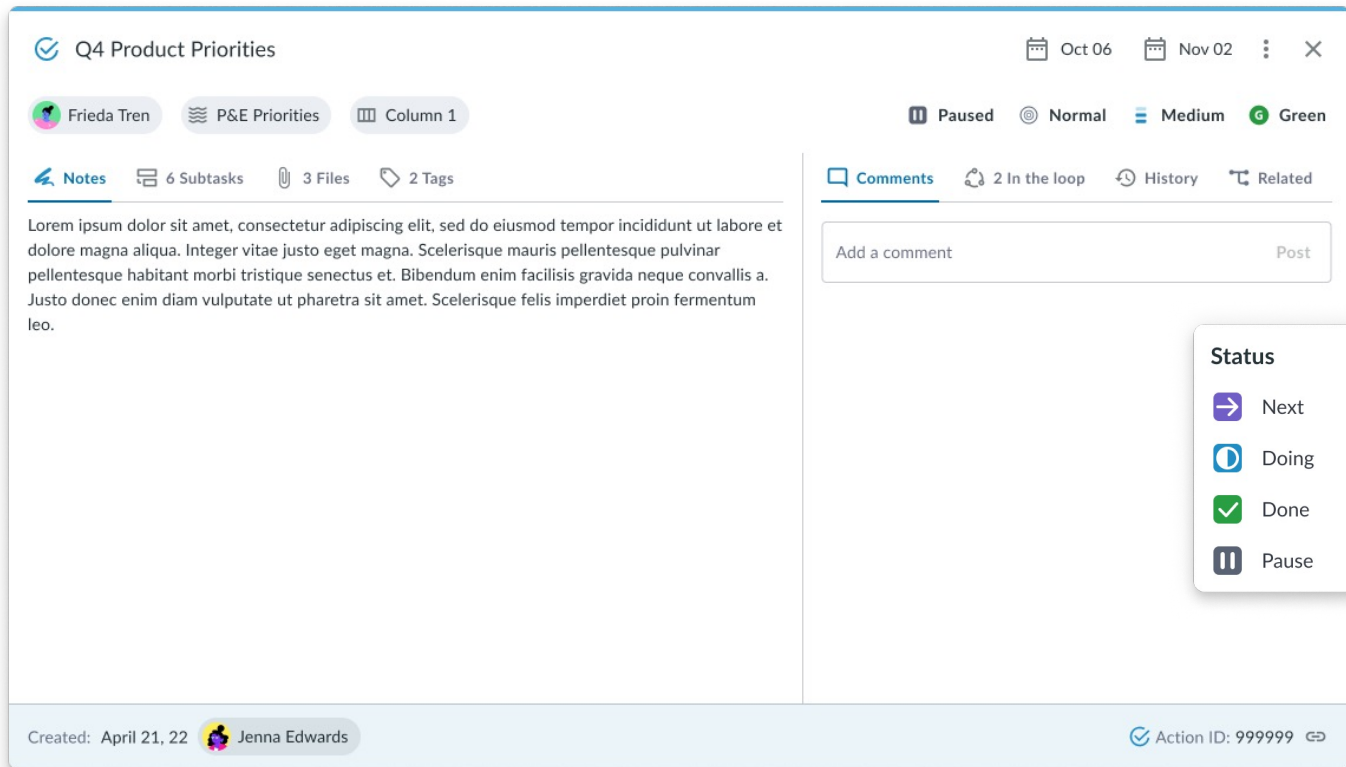
# “Action Items” are being renamed “Actions”

Updated UI and status icons

Subactions → Subtasks

No change in behavior or functionality

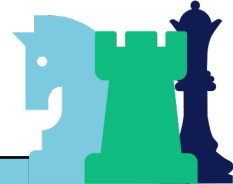
Reduces “AI” acronym confusion



# Join the Conversation



# Upcoming Courses



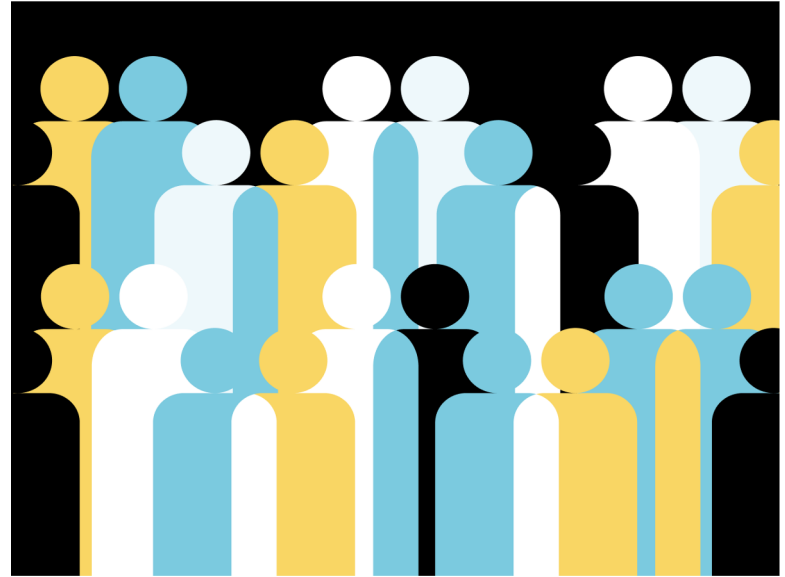
Class	Description	Dates	How to Sign Up
<b>Level 2 OKR Coach Certification</b>	For experienced OKR Coaches: Take the next step on your journey as a key influencer helping to mature your organization's OKR program.	<ul style="list-style-type: none"><li>● Feb 21/22 at 8am PT</li></ul>	<a href="https://learn.workboard.com">learn.workboard.com</a>
<b>Outcome Method Mindset</b>	Learn about OKRs and the Outcome Mindset in 1 hour	<ul style="list-style-type: none"><li>● Feb 7 at 1pm PT</li><li>● Feb 14 at 8am 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>● Feb 7 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>● Feb 6/8 at 1pm PT</li><li>● Feb 13/15 at 1pm PT</li><li>● Feb 20/22 at 1pm PT</li><li>● Feb 21/22 at 1pm CET</li><li>● Feb 27/29 at 8am 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>● 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)!

Our Community Calls are on the last Wednesday of each month.

**Our next Community Call is February 28.**

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



**What are You  
Curious About?**





# Thank you

See you next time!

