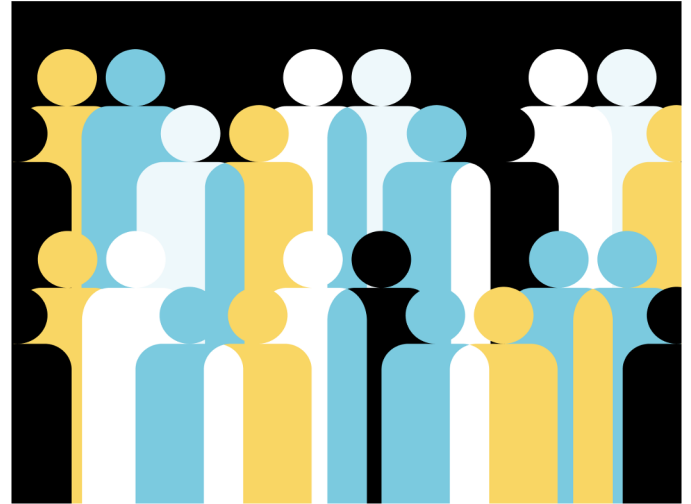


Community Call

February 2024



Agenda

- Scorecard and Biz Review Summaries
- Smart Executive Briefings
- Relationship maps
- Scorecard improvements
- Deepening your expertise

Scorecard and Biz Review Summaries

Generate Scorecard or Business Review briefs in under 2 minutes

- Highlight accomplishments or changes on Scorecards and Biz Reviews since the prior review or team meeting
- Customize the tone to match the intended audience
- Publish to Microsoft Teams with one click

WorkBoard Objectives Teamwork Meetings & Reviews

Prod and Tech Leadership Q2 QBR
Owner: Jack CEO/Mack

Summary | Feb 19, 2024 - Feb 26, 2024

OKRs + Workstreams | Last Week | Narrative Summary

Here is a professional briefing for the executive focused on key results and action items:

Launch the new thing that will delight our customers Key Result:
No progress has been made on signing up new customers or expanding regional availability within 120 days of launch. Suggest reviewing capabilities and value proposition to drive customer acquisition.

Optimize investments and company resources Key Results:
Good progress on July and June cost takeouts, but more opportunity in other months. RPA rollout for HR and visa/passport intake steps stalled in several countries - recommend addressing administrative blocks. LTV/CAC ratio and product life cycle metrics show some improvement but need additional effort.

Technology leads the way to a digital business Key Results:
On track for shift to cloud computing and realizing RPA savings. AI use cases and strategic analysis progressing slower than backlog results strong.

Foster a culture of ambition and creativity Key Results:

Co-Author summaries may contain inaccuracies

Our 2025 Strategy

Technology 2025 Strategy (IT'25)

Q2 Prospect

Focus

Condition coming 2-3 region lead

The digital

FY Q2 Objectives

93%

41%

92%

Digital & Tech Headlight Metrics

4.67% of 5%
Shift another 5% of our non-mfg workload to cloud.

321 of 458
Every IT employee has a 5 year professional growth.

12 of 18
Decrease from 2

WorkBoard Objectives Teamwork Meetings & Reviews

Innovation Scorecard

Summary | Feb 19, 2024 - Feb 26, 2024

Last Week | Bullet Point Summary | Narrative Summary | Custom Format

Here is a summary of the key results and action items from the OKR data:

- On the key result "Reduce Scope 1 and 2 emissions from 35M metric tons to 32M metric tons", progress is only at 23.87% due to operational issues at several facilities. Additional focus is needed here.
- Good progress on deploying G-AI implementations to CORE products and having them in beta customer hands. On track to complete deployment to remaining products by end of quarter.
- 75% subscription revenue target for CORE and PRIME is on track to be achieved by end of quarter. Team is executing well towards this key result.
- For the 75% WAU target for CORE and PRIME, confidence is high for achieving this in Q3 but additional resources may be needed to counter seasonal dips in engagement. Key actions underway to investigate core user usage patterns.

Co-Author summaries may contain inaccuracies

Publish | Generate New

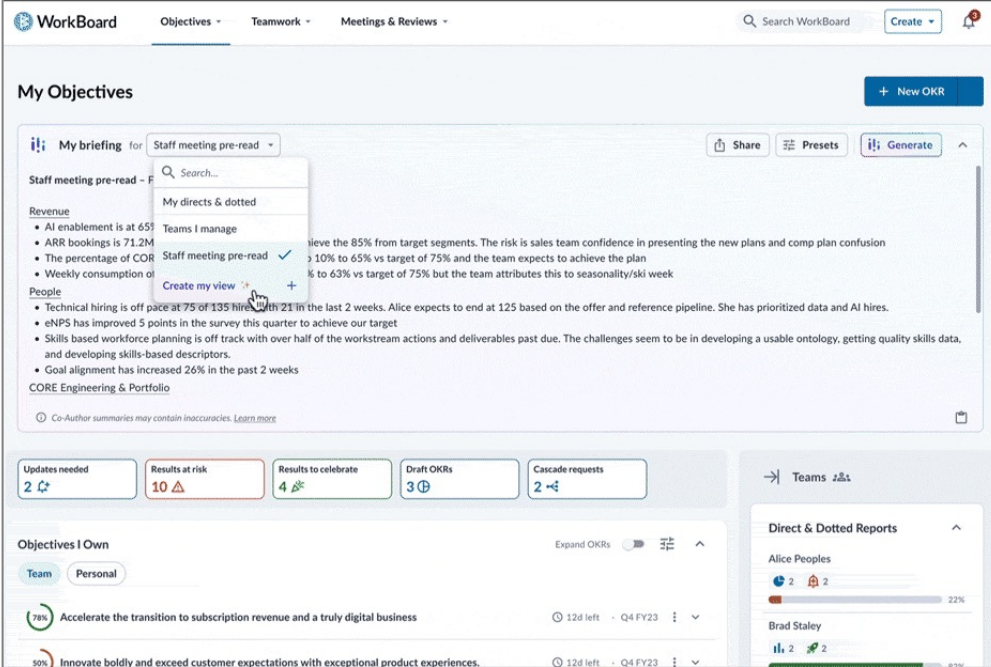
Key Results	Actual	Target	Trend	Narrative	Owner
Consumption of CORE and PRIME platforms reaches 75% weekly active users (WAU) for all customers in the target segment	66%	75%		Will be difficult to get the lift from this plateau to 75% given the drag we have from LaCa customer use cases	Barry Bosser
75% of CORE revenue is multi-year subscription commitment from customers to advance the transition to CORE-First	69%	75%		We are executing well - will end the quarter on target	Amanda Dinero
The first implementations of G-AI are deployed in 3 CORE family products and in beta customer hands this quarter	2	2		We are ready to launch G-AI to our remaining CORE products by EOQ. Just waiting on final testing.	Barry Bosser
Cloud Agnosticism strategy agreed upon by all				We'll have everyone on board shortly and closed out at our ELT meeting.	

Smart Executive Briefings



Get to smart decisions 5x faster with automated briefings!

- No more waiting for the meeting or chasing progress updates – get the briefing you need when and where you need it.
- Choose the dimensions you want to include – any combination of Strategies, Teams, OKRs, Workstreams, Scorecards, Biz Reviews and more!
- Schedule when and where you want your briefing delivered – MS Teams, Slack, email, or right in WorkBoard.

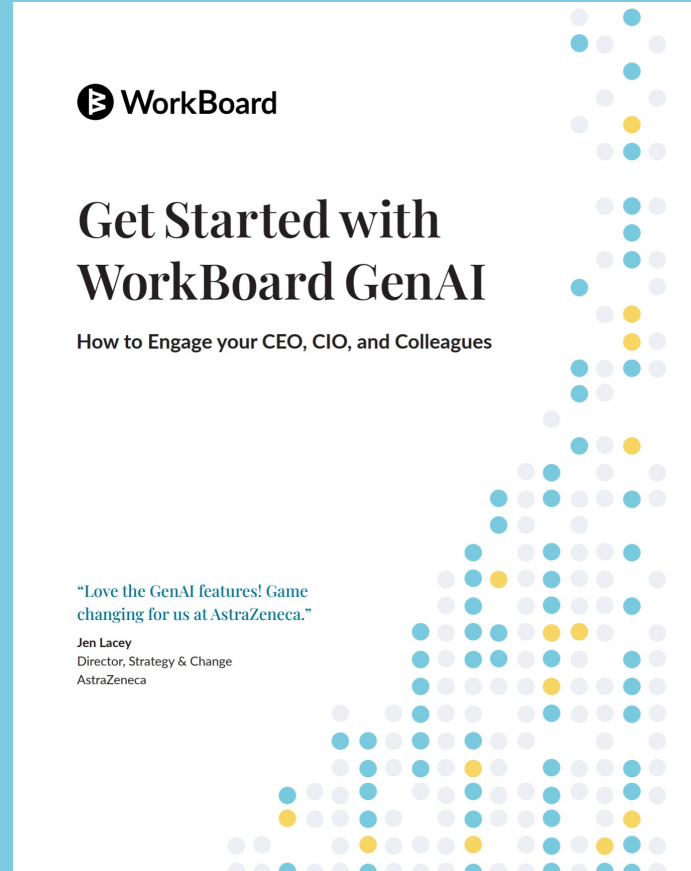



The screenshot displays the WorkBoard interface. At the top, there are navigation tabs for 'Objectives', 'Teamwork', and 'Meetings & Reviews'. A search bar and a 'Create' button are also visible. The main section is titled 'My Objectives' and includes a '+ New OKR' button. Below this, there is a search bar and a dropdown menu for 'My briefing for Staff meeting pre-read'. The dropdown menu is open, showing a search bar and several options: 'My directs & dotted', 'Teams I manage', 'Staff meeting pre-read' (which is selected with a checkmark), and 'Create my view'. Below the dropdown, there is a list of 'Revenue' items and a 'People' section. The 'Revenue' section includes items like 'AI enablement is at 65%', 'ARR bookings is 71.2M', 'The percentage of COR', and 'Weekly consumption of'. The 'People' section includes items like 'Technical hiring is off pace at 75% of 135 hires with 21 in the last 2 weeks', 'eNPS has improved 5 points in the survey this quarter to achieve our target', 'Skills based workforce planning is off track with over half of the workstream actions and deliverables past due', and 'Goal alignment has increased 26% in the past 2 weeks'. Below the main content, there are several status boxes: 'Updates needed 2', 'Results at risk 10', 'Results to celebrate 4', 'Draft OKRs 3', and 'Cascade requests 2'. On the right side, there is a 'Teams' section with a 'Direct & Dotted Reports' dropdown menu. The bottom of the page shows 'Objectives I Own' with two objectives: 'Accelerate the transition to subscription revenue and a truly digital business' and 'Innovate boldly and exceed customer expectations with exceptional product experiences'.

Executive Briefings are an Intelligent Enterprise feature

Learn more about Intelligent Enterprise!

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

The image shows the cover of a 'Get Started with WorkBoard GenAI' guide. The cover is white with a blue and yellow dot pattern on the right side. At the top left is the WorkBoard logo. The title 'Get Started with WorkBoard GenAI' is in a large, bold, black serif font. Below the title is the subtitle 'How to Engage your CEO, CIO, and Colleagues' in a smaller, black sans-serif font. At the bottom left, there is a quote: 'Love the GenAI features! Game changing for us at AstraZeneca.' followed by the name 'Jen Lacey', her title 'Director, Strategy & Change', and the company 'AstraZeneca'.

 WorkBoard

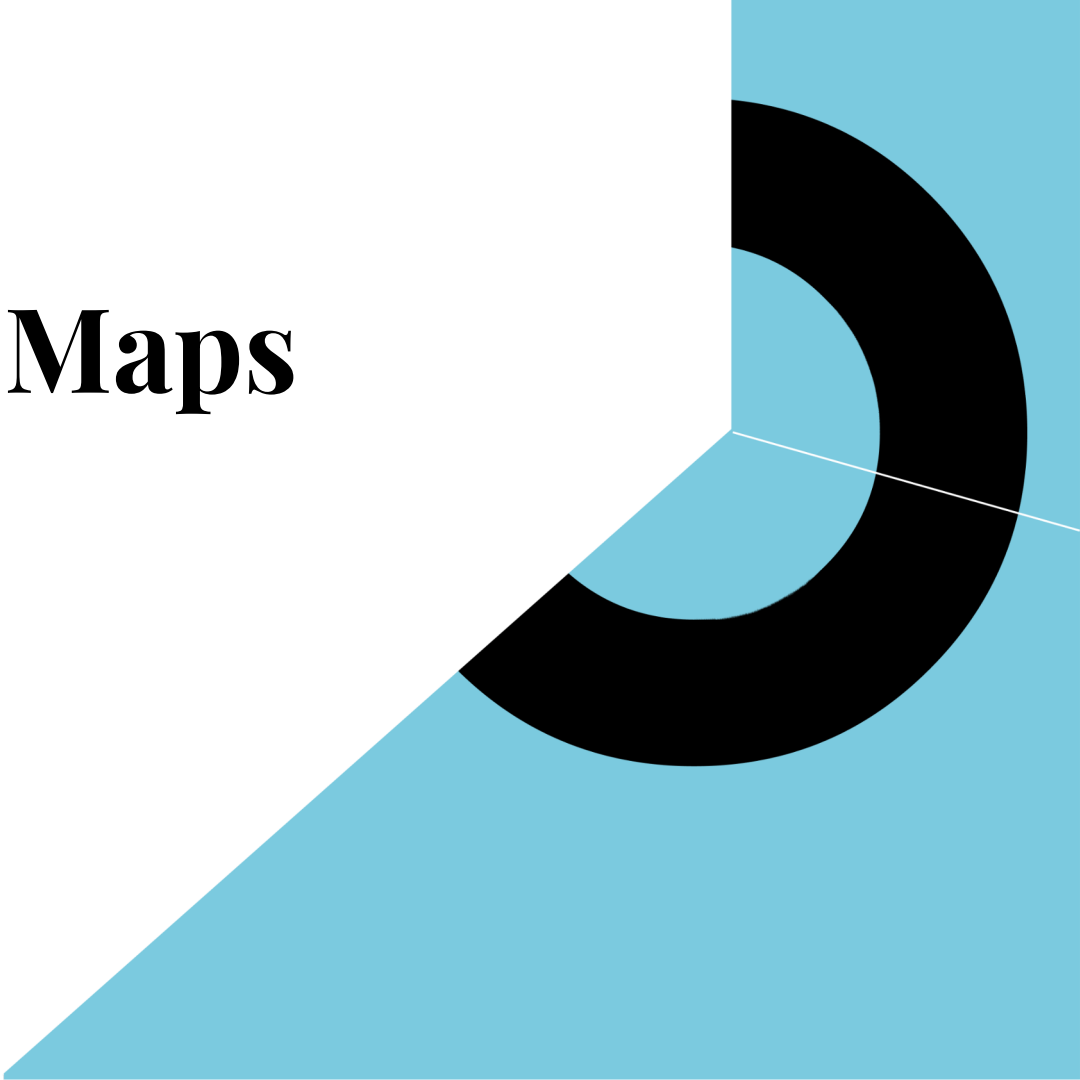
Get Started with WorkBoard GenAI

How to Engage your CEO, CIO, and Colleagues

“Love the GenAI features! Game changing for us at AstraZeneca.”

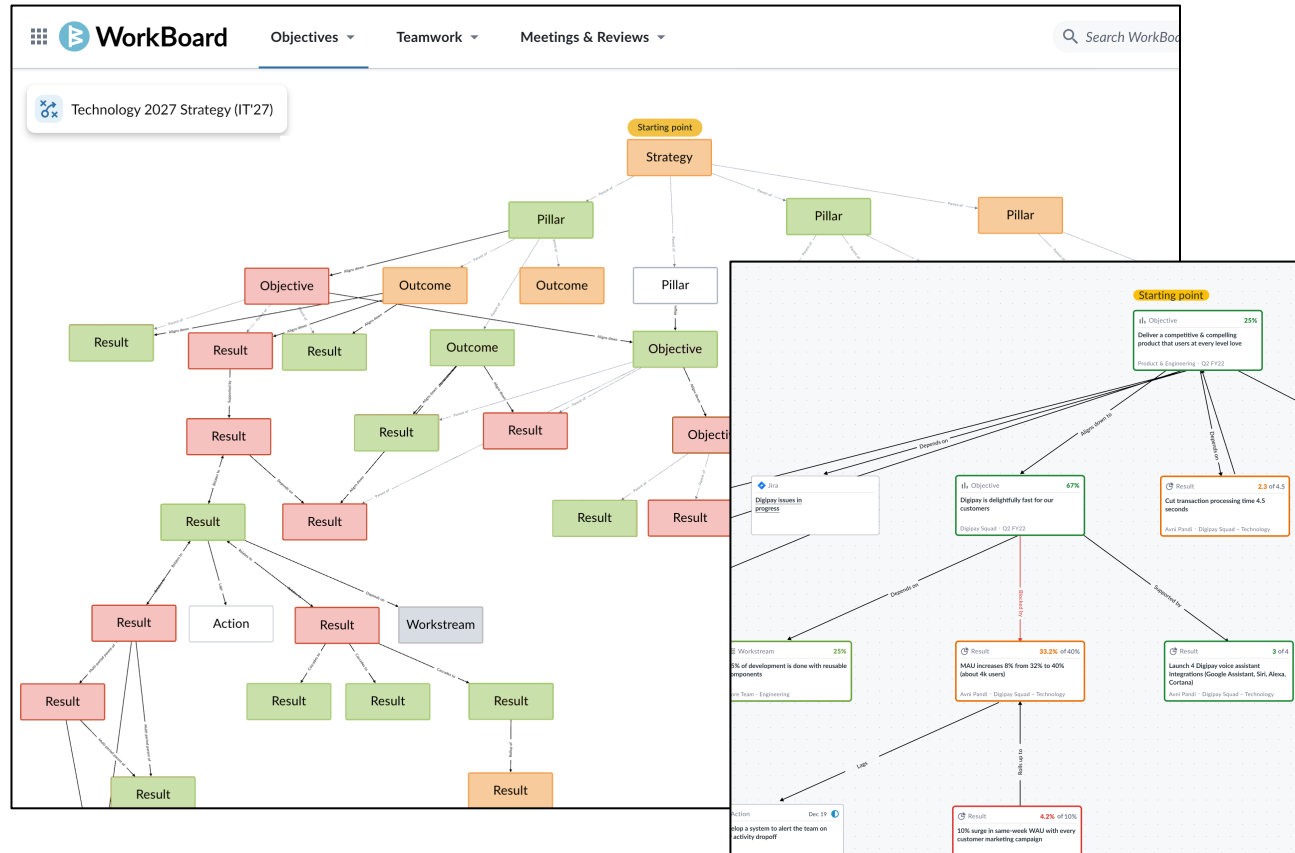
Jen Lacey
Director, Strategy & Change
AstraZeneca

Relationship Maps



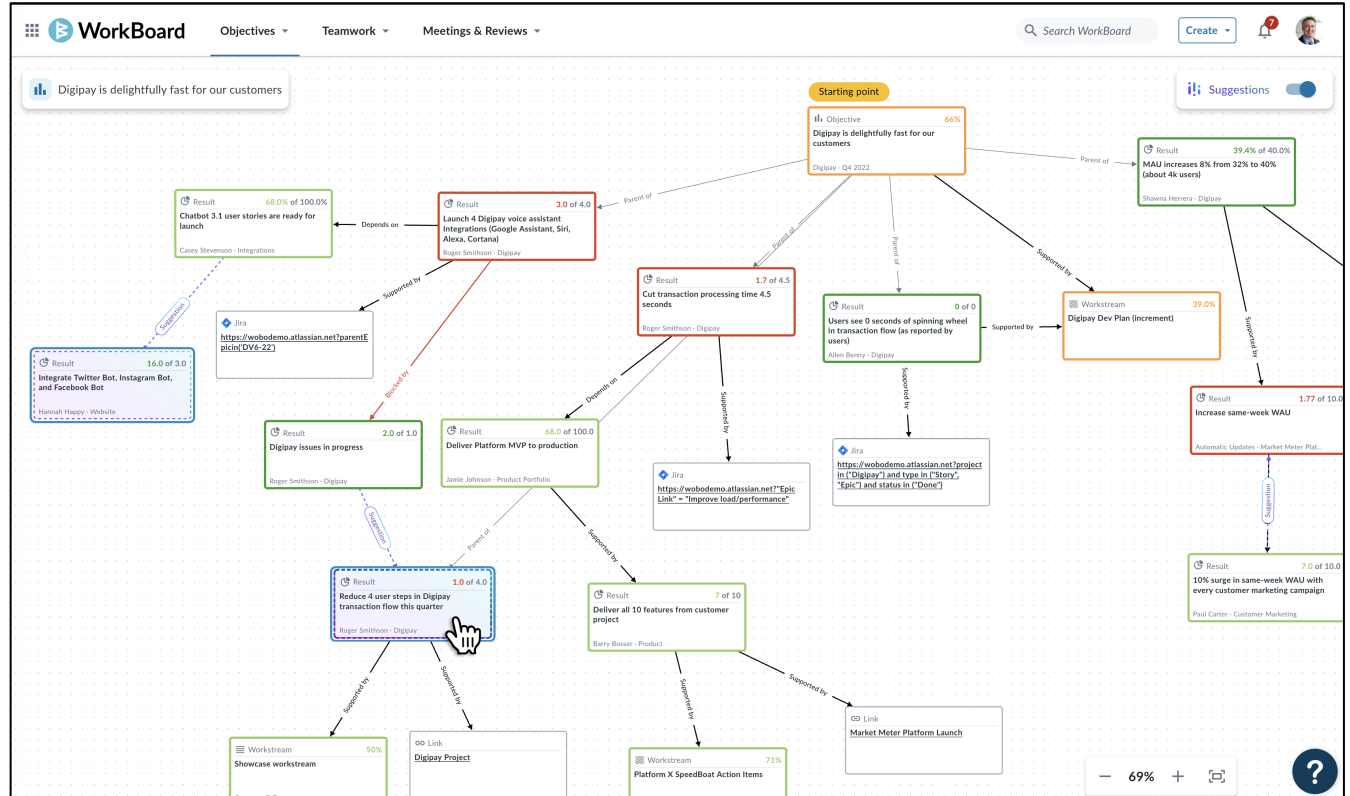
Easily visualize dependencies and risks to the strategy

- See a full relationship map identifying dependencies, risks and connections across all layers of the organization
- Instantly spot potential risks to the strategy or its execution
- Click directly into the details of any item you have access to view



Align 10x faster with smart suggestions

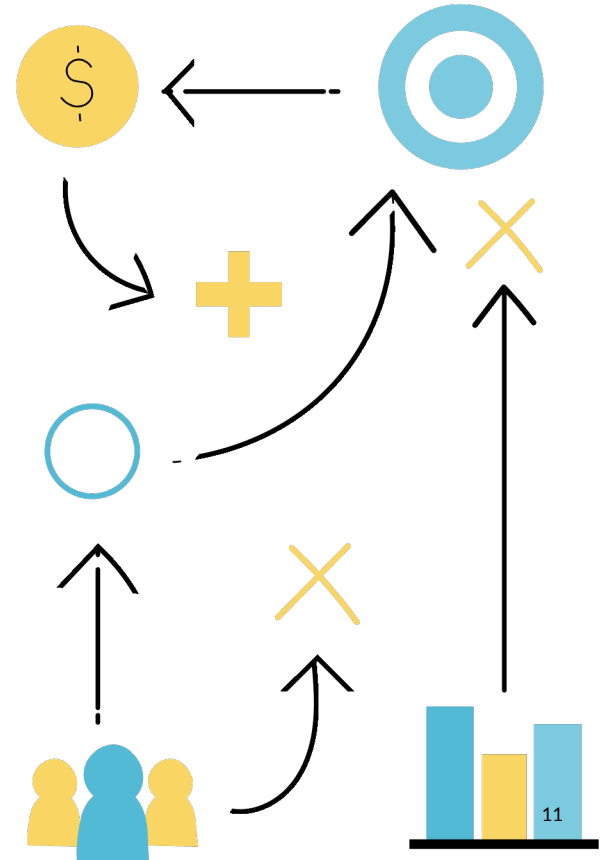
- Leverage WorkBoard's embedded AI to uncover hidden dependencies and risks



Interested in early access?

Respond in the chat, or reach out to anyone at WorkBoard if you'd like to be part of the beta programs for:

1. Strategy Execution Map
2. Executive Briefs



Scorecard Updates

New ways to customize your Scorecard

- Add any key result custom field you have permission to view
- Customize date formats
- Bold individual cells to highlight important data
- When you group by Objective, the Team column will also be deduplicated
- New scorecard trays added to Biz Reviews will be full-width by default

The screenshot displays the WorkBoard interface for a scorecard titled "Regional 5 Performance FY25". The main table shows performance metrics across different teams and objectives. A "DATE FORMAT" dropdown menu is open on the right, showing options like DD-MMM-YYYY, MMM-DD-YYYY, and DD-MMM-YYYY (selected). The interface also shows a "Single-period Scorecard" tray with options for Rows (14) and Columns (8), and a "Comments" tray with a search bar and a list of key results.

Team	Objective name	Transformation - Edition 1	Current Progress	Actual	Target	Comments
Company ELT	RESPONSIBILITY for Trust, Sustainability and Equity at the center of our actions and value creation	Reduce Scope 1 and 2 emissions from 35M metric tons to 32M metric tons We are ready to start carbon neutral certification by EQQ and auditors are confirmed for week 1 start...		34.28m 23%	32m 100%	
Digital Supply Chain	Transform our technological infrastructure to enable Supply Chain's profitable growth	Establish 1 Center of Excellence for new infrastructure use and maintenance Eliminate 15% of applications, including unused or irrelevant apps		1 15%	1 15%	
Transformation - Edition 2						
Company ELT	INNOVATION drives CORE advantage for our customers	Cloud Agnosticism strategy agreed upon by all portfolio leaders The first Implementations of G-AI are deployed in 3 CORE family products and in beta customer hands this quarter Energy efficiency strategy in place PowerPro & CORE product families for how we will drive a 20% cost advantage for customers by EOY LaCa has full PowerPro feature equivalency with US and we have closed the \$41m deal backlog pending in the region		78% 1 91 \$19.45m	100% 2 90 \$41m	Additional Cap @Manny Adm @Maria Cmos ensure we have extremely imp
IT Transformation	communication for the...	Define & validate APM's durable, value-based pricing & packaging strategy with pricing research ...		76% 2	100% 4	
BAU - Edition 3						
Company ELT	FOCUS on the right market segments and deliver highly differentiated value	Consumption of CORE and PRIME platforms reaches 75% weekly active users (WALU) for all customers in the target segment 75% of CORE revenue is multi-year subscription commitment from customers to advance the transition to CORE-First		72% 69%	75% 75%	@Laurie Luna to improve this We achieved A

Share Key Result Relationships in Scorecards

- Show key result risks, dependencies, blockers, and more
- Click directly into the details of any related item
- Include all related items, or select specific relationship types to display

The screenshot displays the WorkBoard interface. 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 a 'Business Health Scorecard' with a table of key results and their relationships. The 'Edit OKRs' sidebar on the right allows users to filter and edit the relationships shown in the scorecard.

Objective	Key Results	Actual	Target	Relationships
FOCUS on the right market segments	85% of new business (ARR) comes from within our target market segments	76.5%	85%	SUPPORTS BLOCKS DEPENDS ON SUPPORTED BY BLOCKED BY AT RISK FROM <ul style="list-style-type: none">Transform our core business Jack CEOmack% of marketable customers: number of customers who have provided cons...100% of our campaigns are focused on Tier 1 and Tier 2 new logos and cus...Price change engine deployment plan Joe SmartsAction: Sales Playbook Joe SmartsRisk: EMEA Territory Expansion Joe Smarts
We are a lean mean revenue driving machine always winning	\$135M in services revenue	\$62.7M	\$135M	BLOCKED BY AT RISK FROM SUPPORTED BY RELATED TO <ul style="list-style-type: none">Action: Services comp plan rollout Carlo MarcoRisk: EMEA Territory Expansion Joe SmartsLink: dropbox.com/1230lueolrueciwuw Joe SmartsWorkstream: https://www.myworkboard.com/wb/activity/workstreams?id=3309
	\$92M in Tier 1 and Tier 2 upsell sales	\$83M	\$92M	
	New Logo Revenue from Tier 1 customers	\$291M	\$311M	

Available soon

Join the Conversation





Strategy Execution COASTAL RETREAT

Sep 30-Oct 2, 2024 | La Jolla - San Diego, CA

Save the Date!
Registration opens soon.

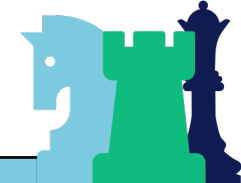


Interested in sharing your journey at Accelerate?

Send me an email at sameera@workboard.com



Upcoming Courses



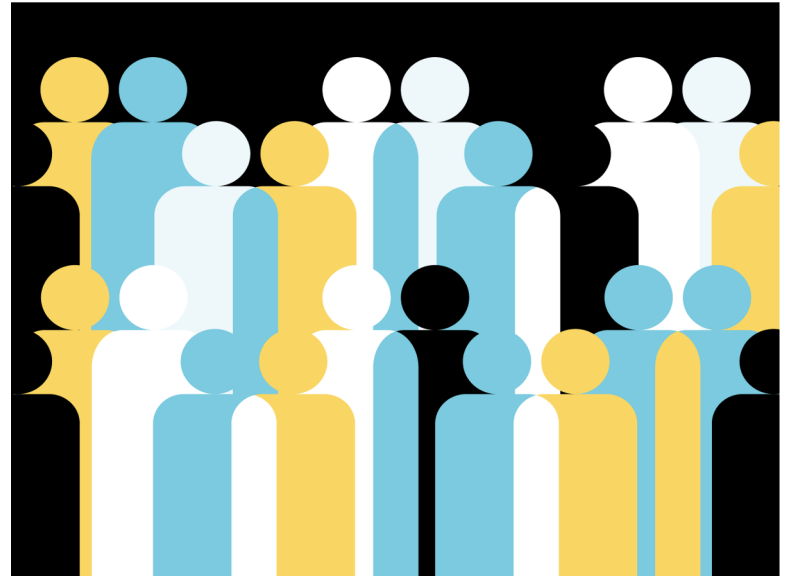
Class	Description	Dates	How to Sign Up
Level 2 OKR Coach Certification	For experienced OKR Coaches: Take the next step on your journey as a key influencer helping to mature your organization's OKR program.	<ul style="list-style-type: none">● Mar 18/20 at 8am PT	learn.workboard.com
Outcome Method Mindset	Learn about OKRs and the Outcome Mindset in 1 hour	<ul style="list-style-type: none">● Mar 6 at 1pm PT● Mar 13 at 8am PT	learn.workboard.com
OKR Fast Pass Course	Build your OKR expertise in 3 hours	<ul style="list-style-type: none">● Mar 6 at 8am PT	learn.workboard.com
OKR Coach Certification	Become a certified OKR coach	<ul style="list-style-type: none">● Mar 5/7 at 8am PT● Mar 12/14 at 1pm CET● Mar 12/14 at 1pm PT● Mar 19/21 at 1pm PT● Mar 26/28 at 8am PT	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">● Mar 19/20 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">● Spring cohort will begin soon	workboard.com/rme-certification

Community Call: Save the Date(s)!

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

**Our next Community Call is
March 27.**

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



**What are You
Curious About?**



Thank you

See you next time!

