Community Call

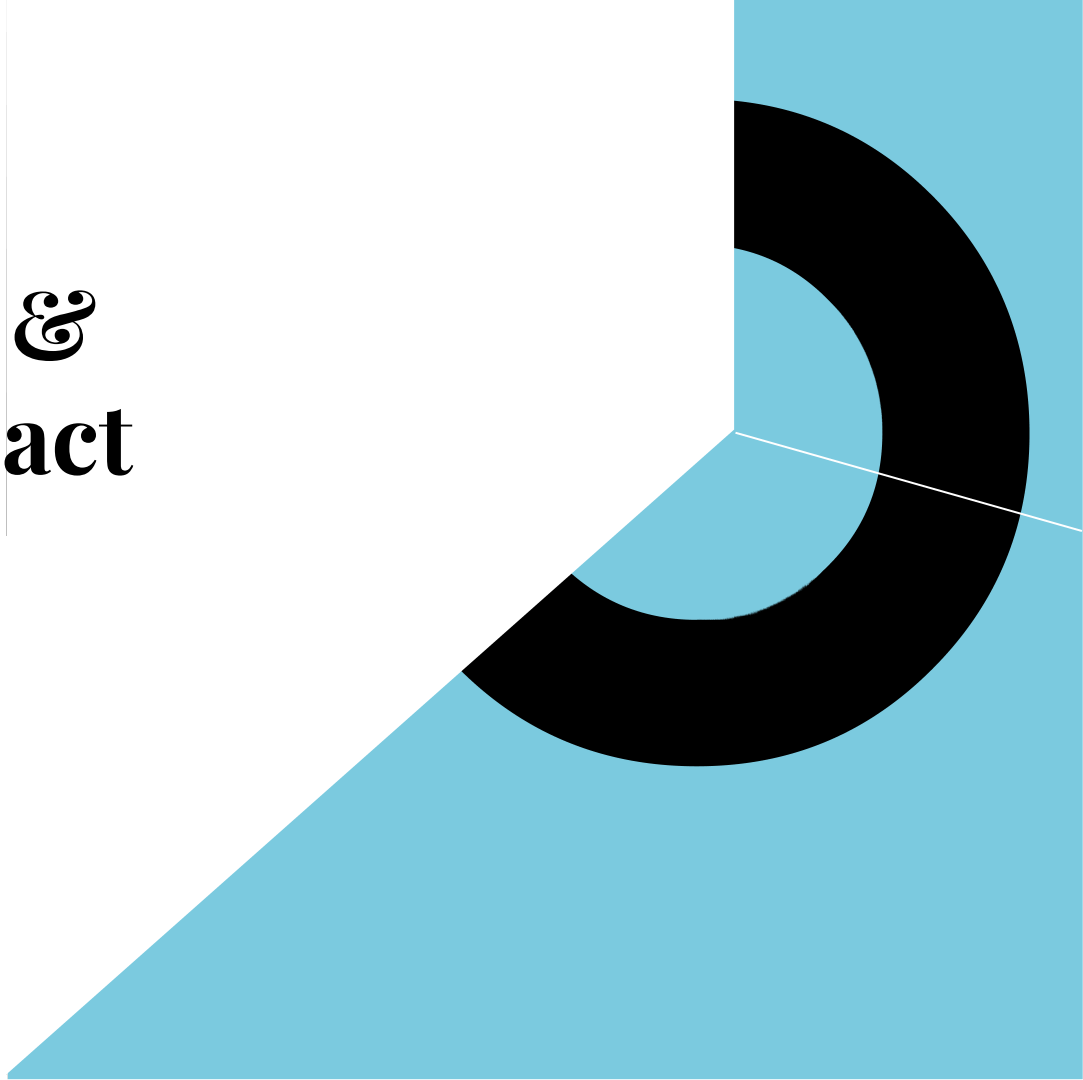
June 2024

WorkBoard

Agenda

- Elevate your team and leadership with the Manager's Lens and Impact Summary
- Easily copy your Scorecard for use in other applications
- New options for filtering and navigating your results
- Schedule Executive Briefs
- Join us at Accelerate 2024!

Manager Lens & Employee Impact



This is what “effective managers” do

- ✓ Translate strategy into priorities for teams
- ✓ Focus resources on strategic priorities
- ✓ Drive genuine business results
- ✓ Adapt to an ever-changing world
- ✓ Manage, measure and report performance
- ✓ Create a culture of accountability
- ✓ Coach team members to good performance

We make these systematically easier

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Great alignment and accountability with effective leadership moves companies forward faster

Better alignment

Regain capacity from 15% of “lost” workforce

Engagement scores in the 90s

Higher accountability

Execute the strategy 6-12 months faster

Decision clarity scores in the 80s

Effective managers

100% vertical and 40% cross-functional alignment

Feedback scores in the 90s

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Managing results is all about managing and coaching people.

Managers are the big lever in performance

Ensuring the strategy is translated to their teams

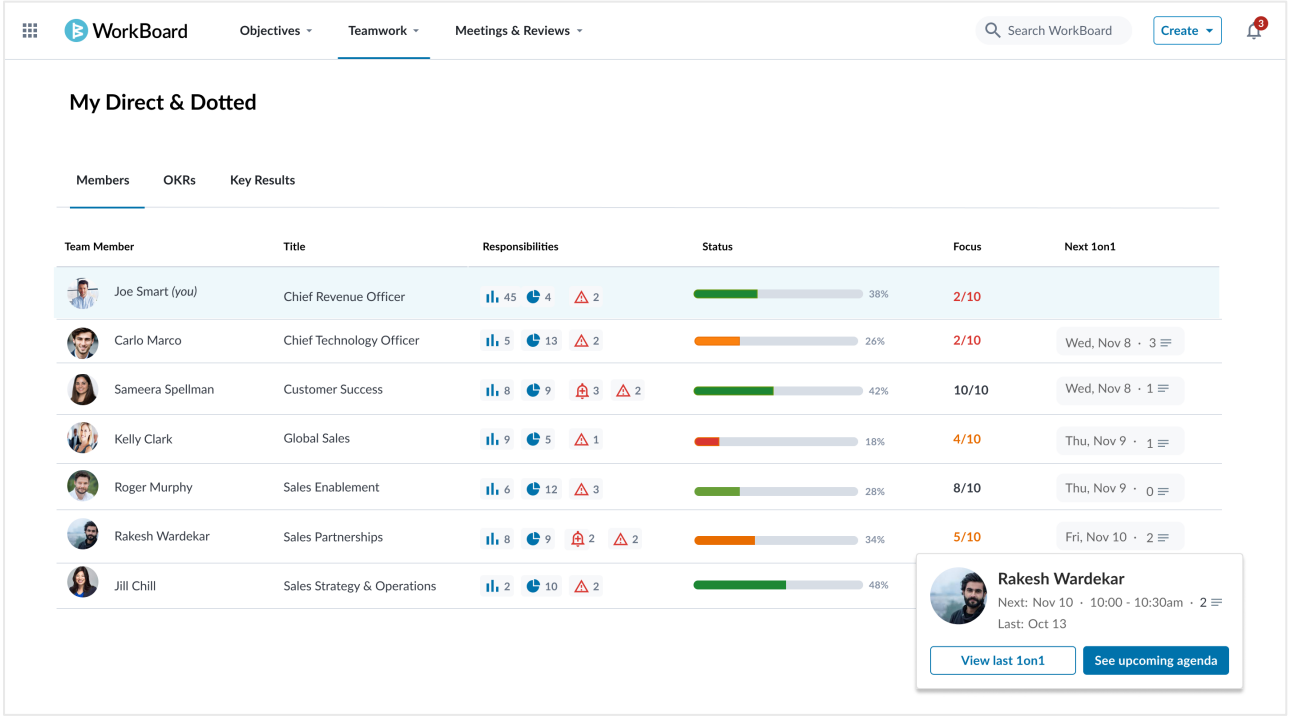
Coaching people to their best contribution to strategy

Enable managers to lead more effectively

Managers have a single view of progress, workload and issues across their directs to spot issues easily and tee up the right conversations faster.

- Instantly see who is off course and needs your coaching, and on what
- Give kudos to high performing team members!
- Plan your week with a single view of all upcoming team 1on1s

Available now
to all people managers. Access from the “Teamwork” menu in the top navigation.



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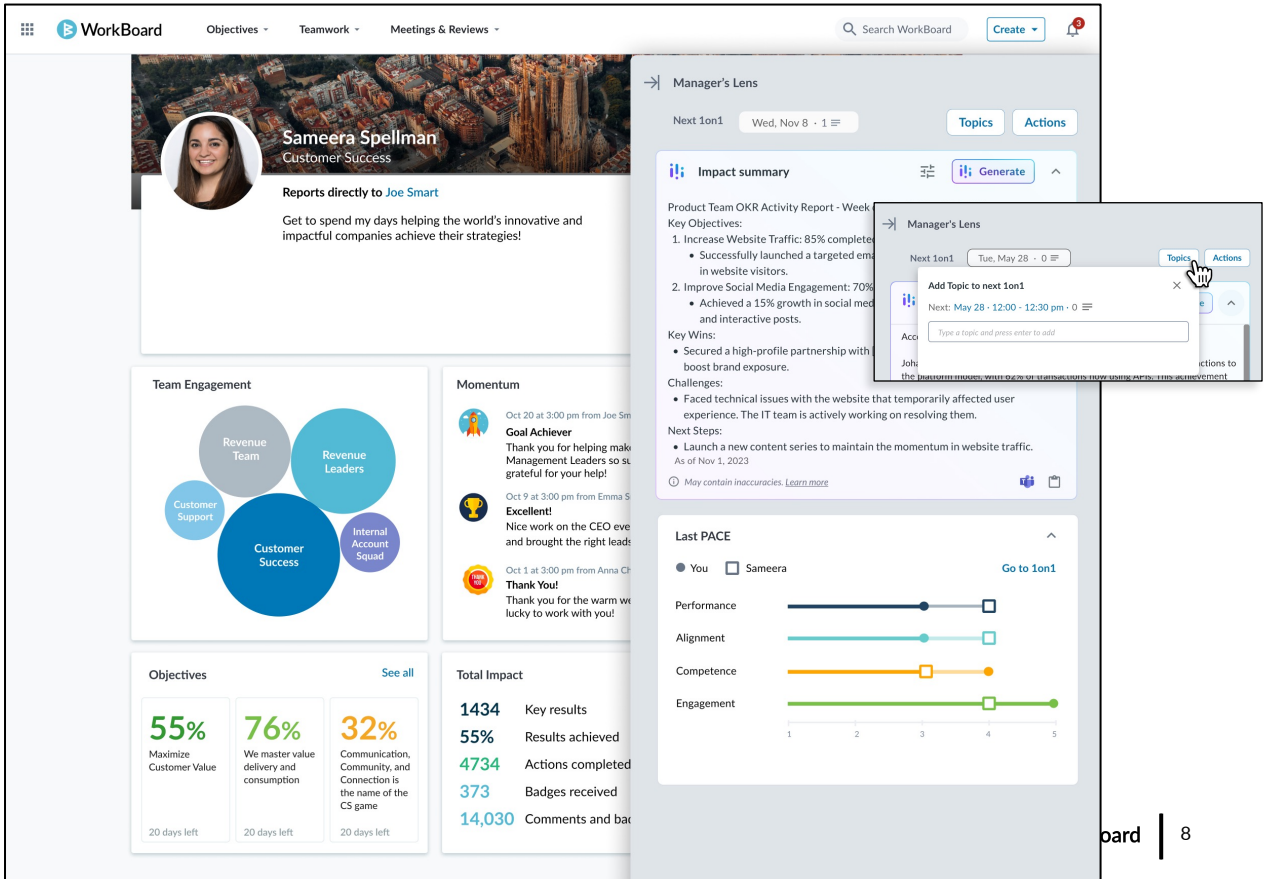
Understand a team member's impact

- The Impact Summary is a new human-in-the-loop AI-generated summary of progress and impact to help managers give more specific feedback and be better prepared for 1on1s.
- Instantly understand employee progress and challenges since the last 1on1, based on their OKRs, actions and comments.
- Quickly add action items and topics to the next 1on1 agenda.
- Quick view of your last PACE conversation to easily spot gaps in perception.

Available now!



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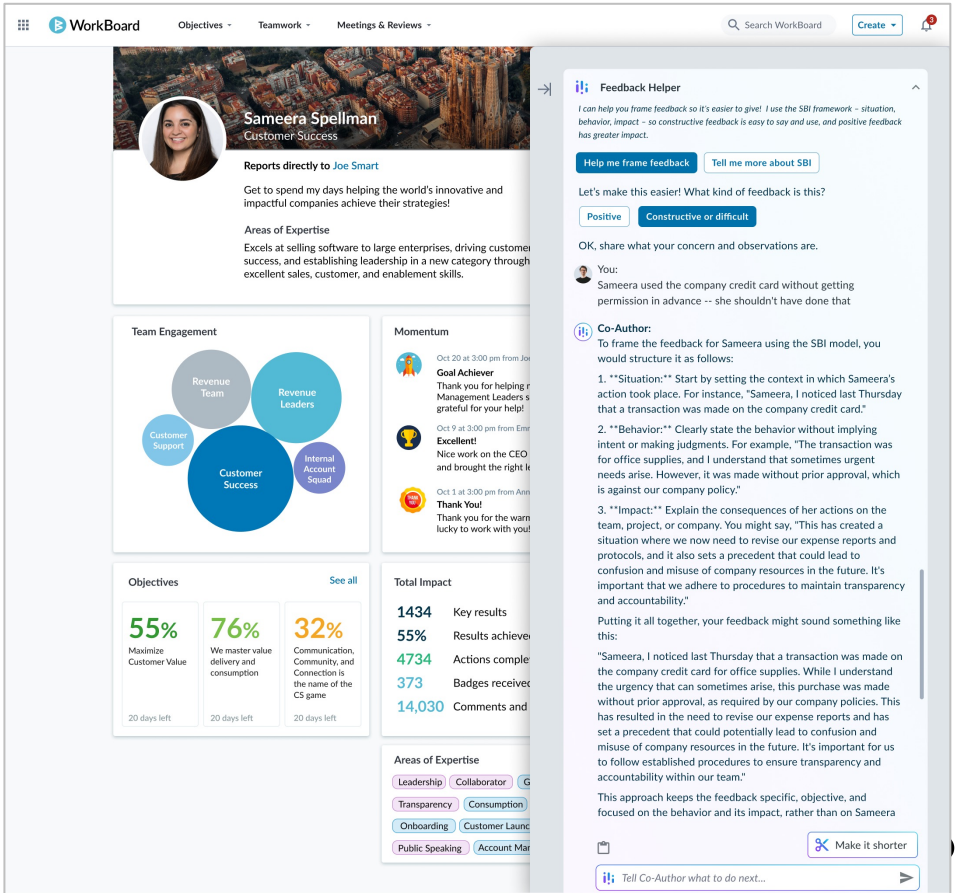
Make hard conversations instantly easier

The Feedback Helper utilizes GenAI to convert employee concerns into Situation-Behavior-Impact format and help team members have hard conversations needed to unblock better outcomes.

Draft and refine either positive or constructive feedback to use as a starting point for your next discussion.

Available soon!



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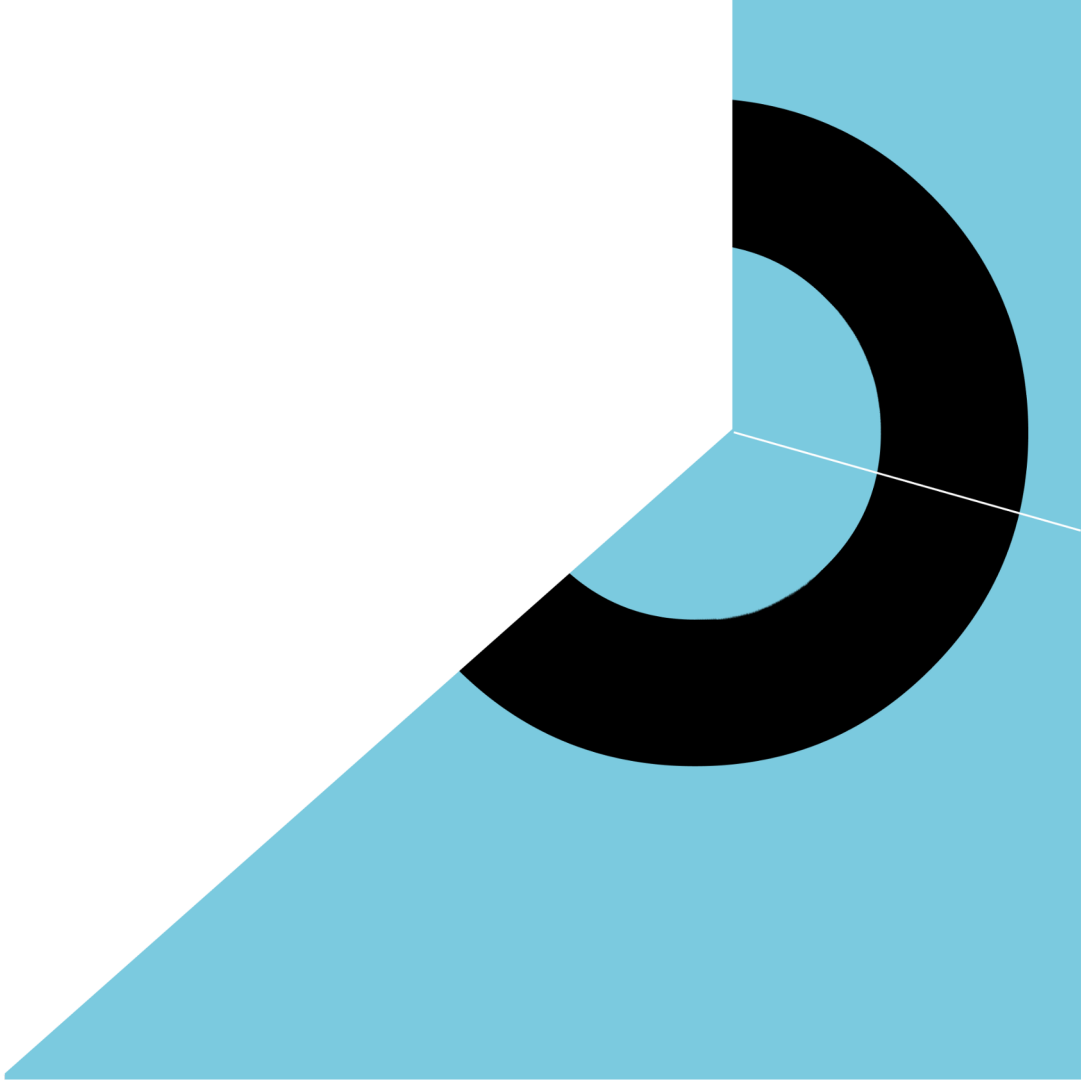
Scorecards



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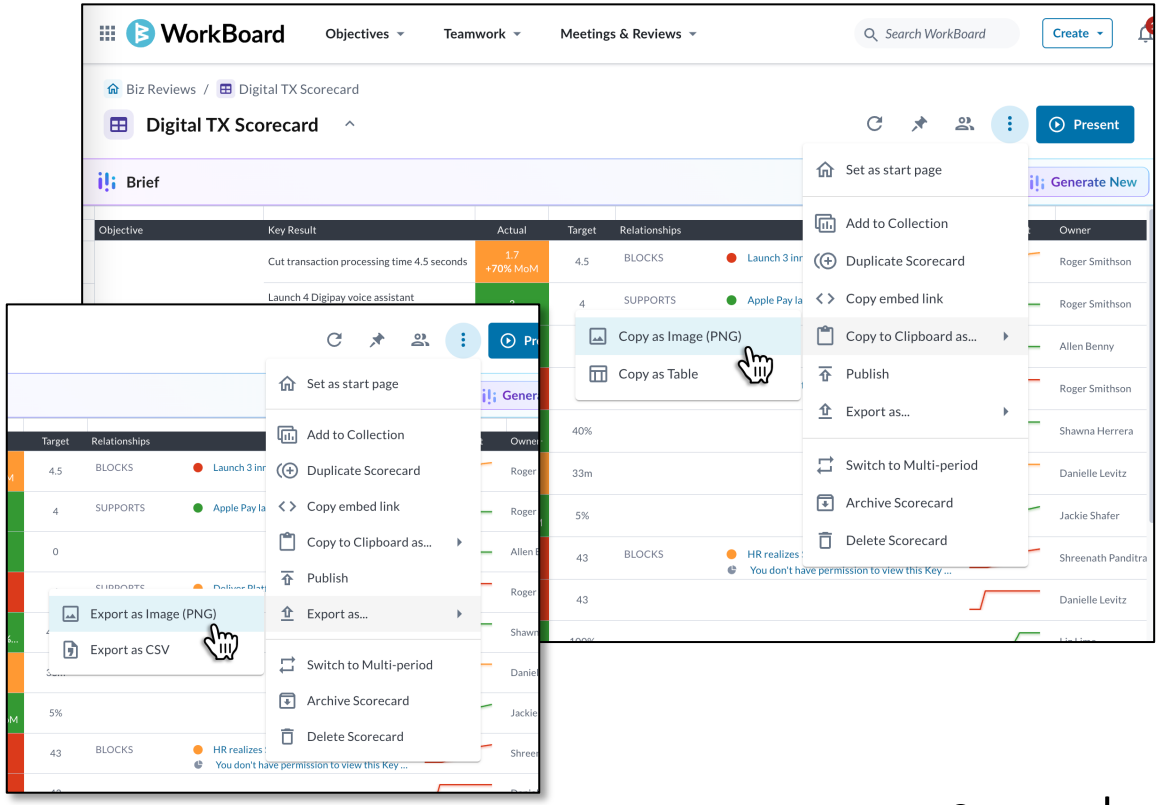
Easily capture and share a snapshot of your Scorecard

- Copy your scorecard to the clipboard as a png image and paste it directly into a Powerpoint slide or other application.
- Export your scorecard as an image to save it for use later.



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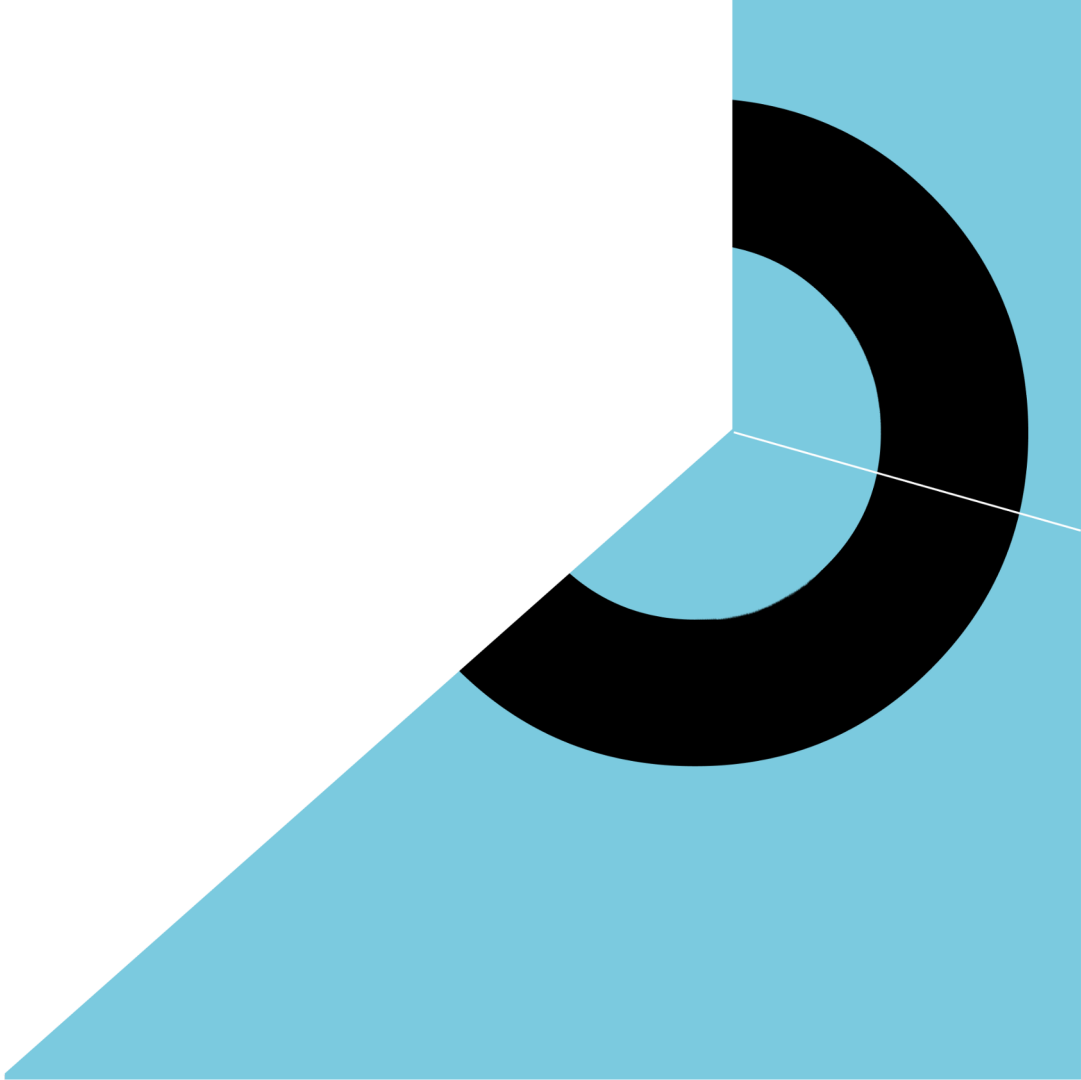
OKRs



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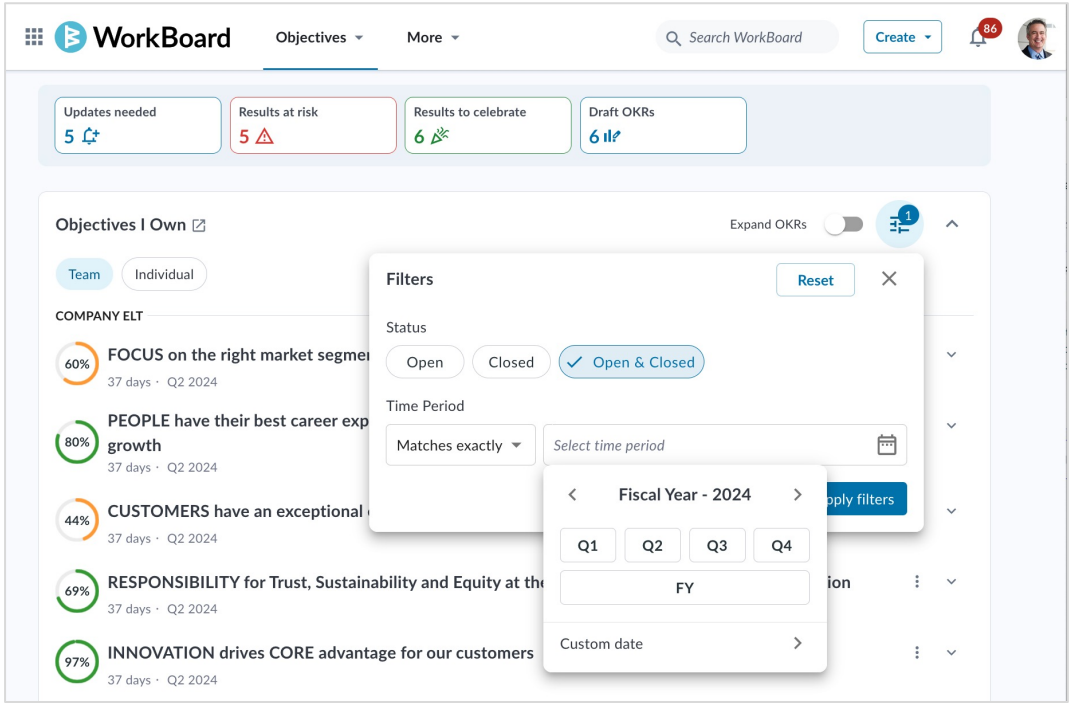
Filters on My OKRs

- Easily narrow your focus to the current quarter results – handy if you're driving Annual OKRs.
- Filters are sticky so your settings will be remembered next time you come to the My Objectives page!



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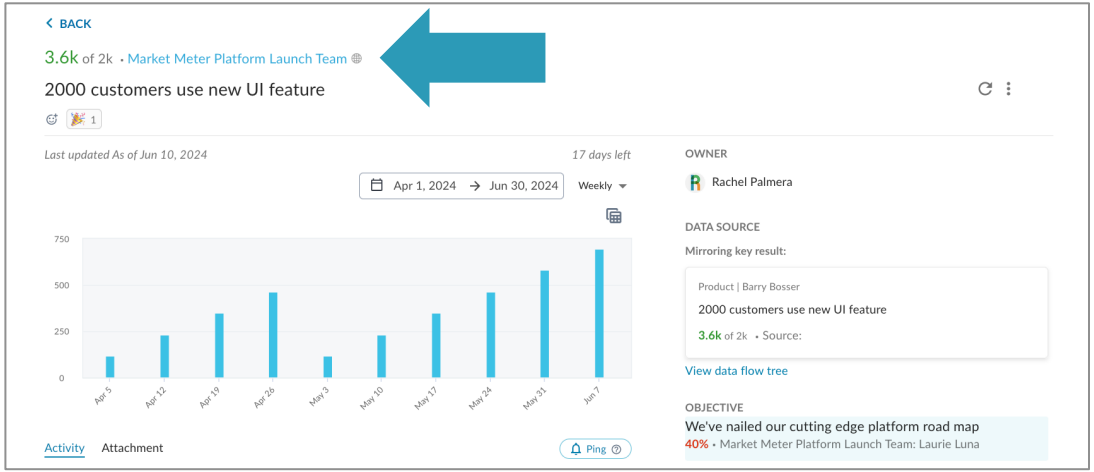
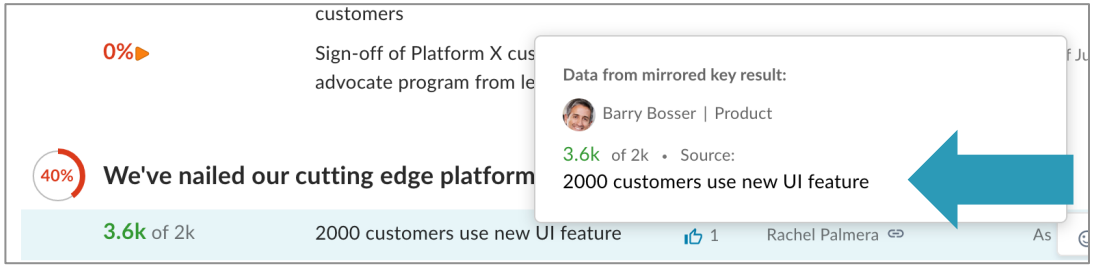
Navigate key result details more easily

- Click the team name on the KR Details page to navigate to the team
- Hover over mirrored or rolled-up key results and click the source results to open their details.





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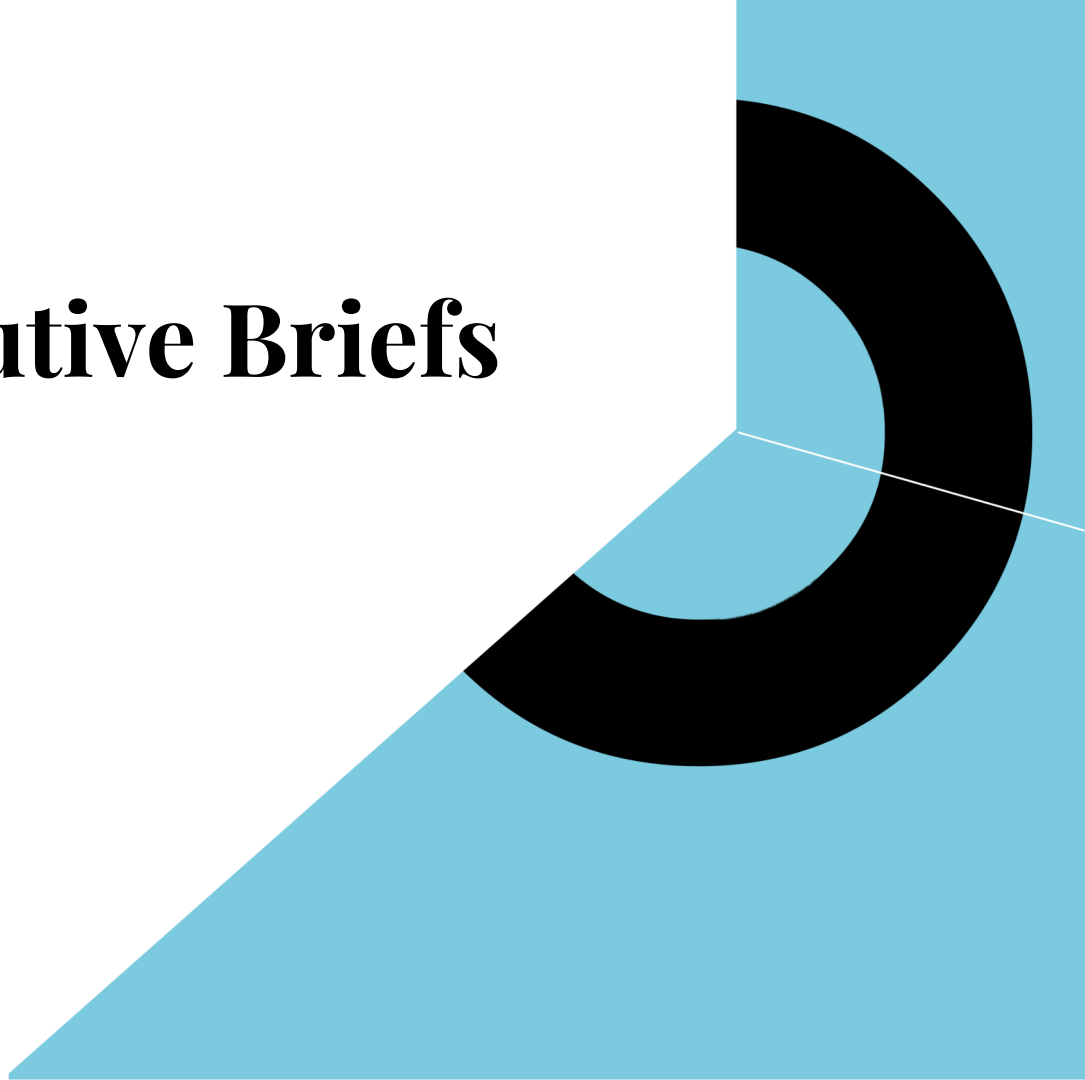
Schedule Executive Briefs



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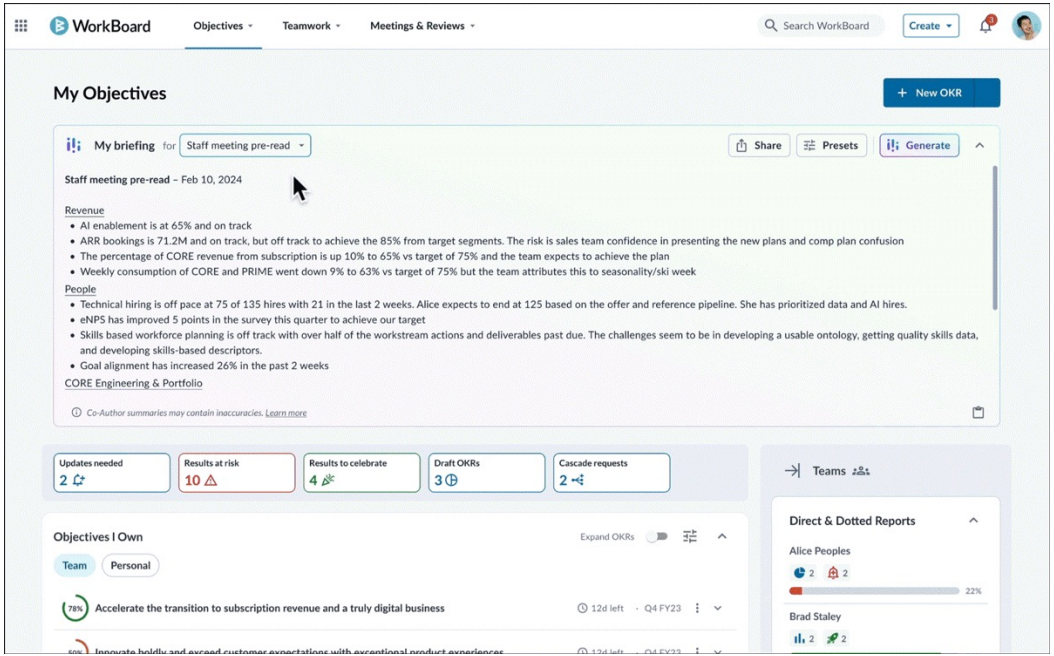
Get the briefing you need when you need it – without meeting

- Choose the dimensions you want to include – any combination of Teams, Objectives, Key Results or Workstreams.
- Schedule your draft briefing and optionally get it right in your inbox.
- Pro tip: Create briefs as first drafts of status reports or weekly team meeting pre-reads – refine the message as needed, then share with the team in one click!

Coming soon: Include Scorecards and Biz Reviews in your draft briefing, subscribe other users to a brief via email, and schedule briefings to be automatically delivered to MS Teams or Slack.



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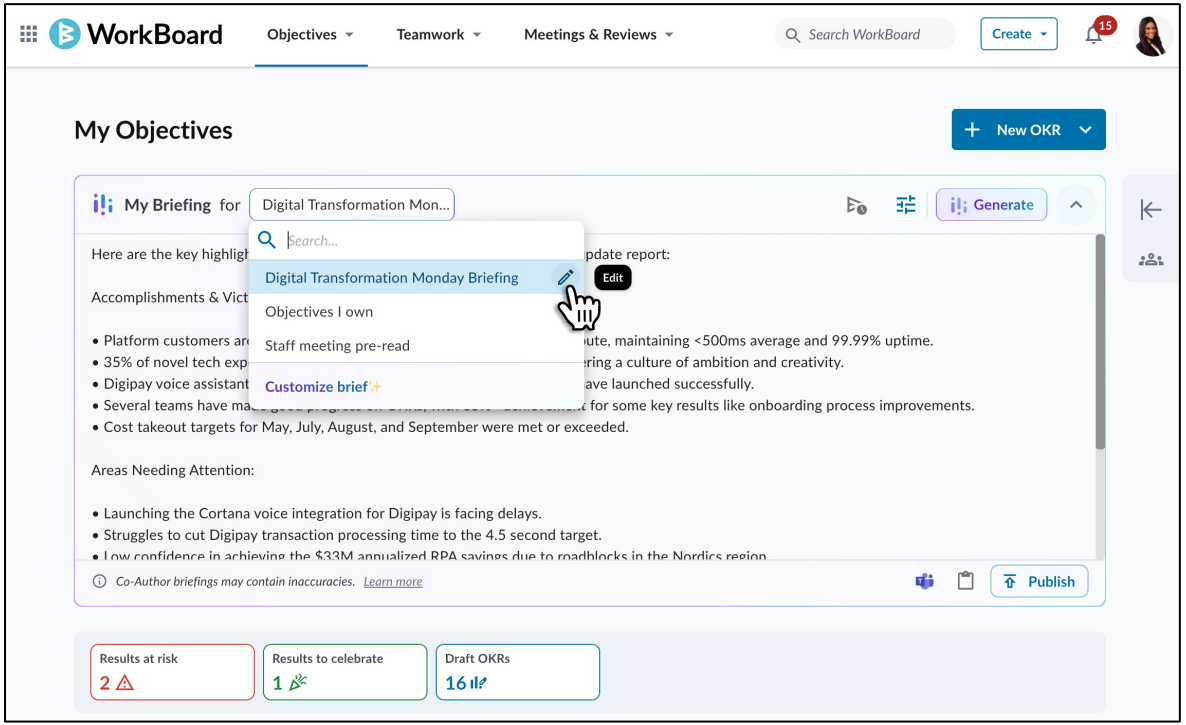
Customize individual briefs for all your needs

- Have **multiple briefs** for various reviews, meetings, and rituals, each scheduled to be delivered at the most opportune time.
- Click the pencil from the dropdown to modify what's included in your brief, or when you receive it.



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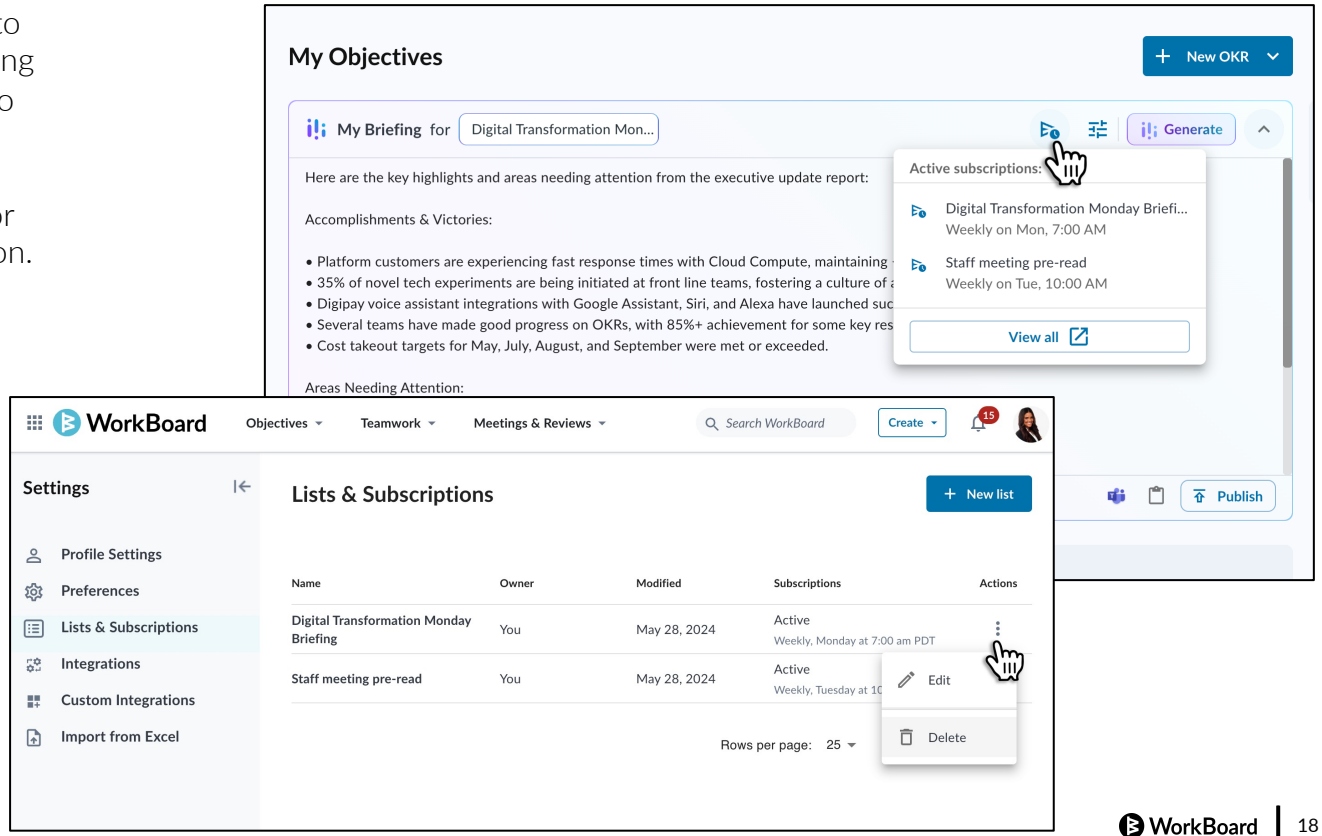
Manage your subscriptions

- Click the paper airplane icon to preview all your current briefing subscriptions. Click View All to access the full list.
- Use the kebab menu to edit or delete any briefing subscription.



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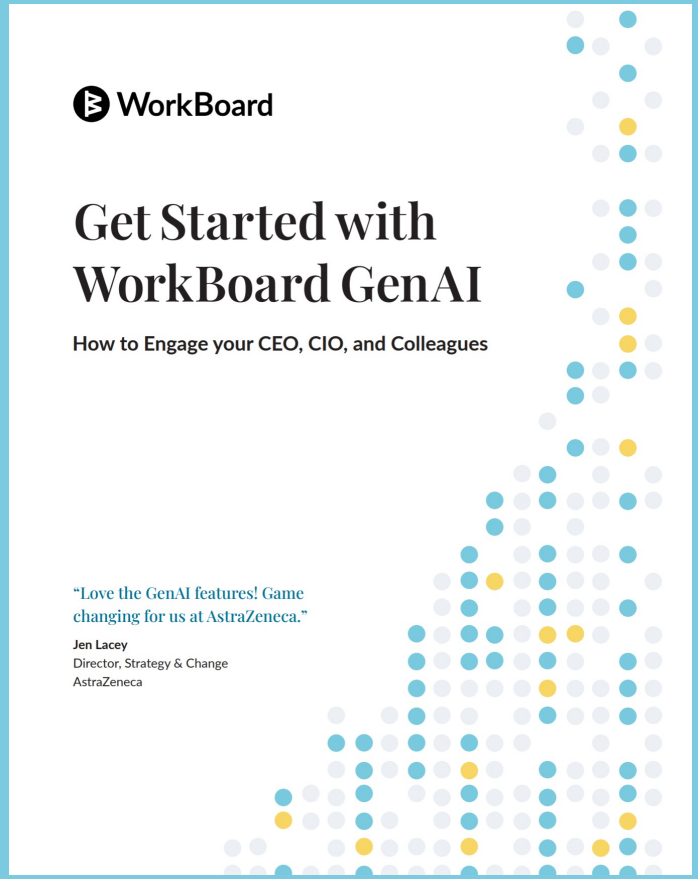
Executive Briefings are an Intelligent Enterprise feature

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.



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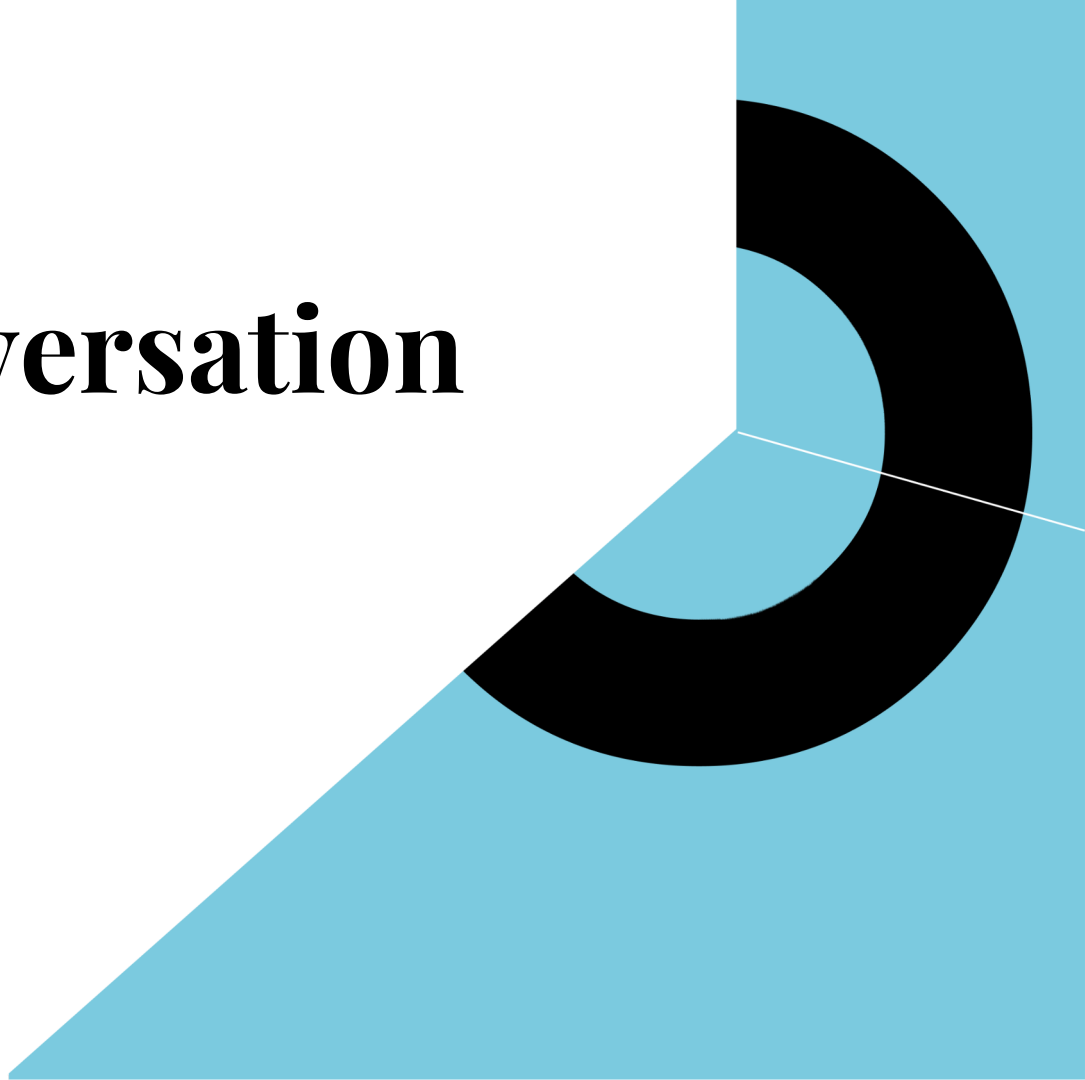
Join the Conversation



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WorkBoard Accelerate

Strategy Execution

COASTAL RETREAT

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

Early Bird rates end June 30th!
Register now and save:
workboard.com/accelerate2024

Join Us

Accelerate is the world's largest strategy execution & OKR conference. Accelerate 2024 will be the most exciting yet, featuring tailor-made programming aimed at uniting a vibrant community of OKR and strategy execution leaders.

Early-bird pricing through June 30th
$499 Individuals
$799 Bring a peer (2 tickets)

Agenda at a glance

Monday, September 30

2:00 PM - 4:00 PM	**Pre-conference WorkBoard Labs**
4:30 PM - 7:00 PM	**Check In & Welcome reception** *Meet, mingle and enjoy a meal with peers and the WorkBoard leadership team! Check in and receive your conference materials.*

Tuesday, October 1

8:00 AM - 9:00 PM	**Full day agenda** *Including optional morning activity, all meals & evening reception*

Wednesday, October 2

9:00 AM - 2:00 PM	**Half-day agenda** *Including breakfast and lunch*
2:00 PM - 4:00 PM	**Post event networking**

Intimate Conversations

Join very small group conversations on specific topics like tactics to improve KR integrity, creating a user group, chiefs of staff role in operating cadence, using OKR coaches, building a new-hire onramp to OKRs and WorkBoard.

Ideal for Executives & Strategy Execution Leaders

Whether you lead a business, drive the strategy or spearhead strategy operations, this is a one-of-a-kind opportunity to learn and benchmark with peers. As you face a trifecta of imperatives — transformation, growth, and efficiency — the wisdom of this crowd can help you break through.

Typical Attendee Titles

- CEO
- President
- Chief Digital Officer
- Chief Operations Officer
- Chief Strategy Officer
- Chief Transformation Officer
- SVP Strategy
- SVP, Product
- VP, Efficiency
- VP, Execution & Transformation
- VP, Strategy
- Chief of Staff
- Sr, Director, Innovation & Agile
- Sr. Director, Strategic Operations
- Director, Strategy Execution
- Director, Corporate Strategy
- Director, Results Management Office
- Director, Strategy & Planning
- Innovation Portfolio Director

2024 Confirmed Speakers

Deidre Paknad
Founder and CEO,
WorkBoard

Brad Surak
Vice President, Digital
Aviation Solutions, Boeing

Beth Dawson
Director, Strategy Deployment
Strategic Initiative, Mars

Ivy Grant
SVP, Corporate Strategy
& Operations, Twilio

Erik Huddleston
Chief Executive Officer,
Aprimo

2023 Speakers

Darren Johnson
Expert Partner

Patrick Thompson
Chief Information &
Transformation Officer

Summers Hutchings
Director, Product Delivery &
Portfolio Strategy

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

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

John Glander
Senior Vice President

Duncan Hawksbee
Director of Strategic Execution

Don’t miss this coastal retreat! It’s the perfect place to reflect, learn and make real connections with your peers.

Immerse yourself in the warm glow of Southern California sunshine at the newly reimagined Estancia La Jolla Hotel & Spa, a AAA Four Diamond Hotel Centrally located in the heart of La Jolla, San Diego's premier seaside village.

We’ve arranged a special rate of $289/ night for Accelerate attendees from September 29 - October 2.

You truly know how to take care of your guests. Thank you so much!
— Mike Limanni, IBM

Great event, great content, great venue, great food! Awesome conversations with other attendees

— Duncan Hawksbee, Trimble

Great balance between speakers, breakouts and networking. Wouldn't change a thing!

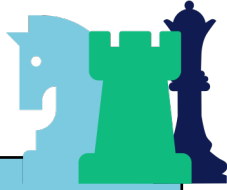
— Bridget Guerrero, ViaSat

REGISTER NOW AT www.workboard.com/accelerate2024

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.	• July 22/24 at 8am PT	learn.workboard.com
Outcome Method Mindset	Learn about OKRs and the Outcome Mindset in 1 hour	• July 10 at 8am PT • July 17 at 1pm PT	learn.workboard.com
OKR Fast Pass Course	Build your OKR expertise in 3 hours	• July 17 at 8am PT	learn.workboard.com
OKR Coach Certification	Become a certified OKR coach	• July 9/11 at 1pm PT • July 16/18 at 1pm PT • July 23/25 at 1pm CET • July 23/25 at 8am PT	learn.workboard.com
WorkBoard Pro	Learn the full power of the WorkBoard application and how to apply it in your organization.	• July dates TBD	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.	• Fall cohort begins Sept. 10!	workboard.com/rme-certification

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Community Call: Save the Date(s)!

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

Our next Community Call is July 31.

Make sure to sign up so you don't miss it!

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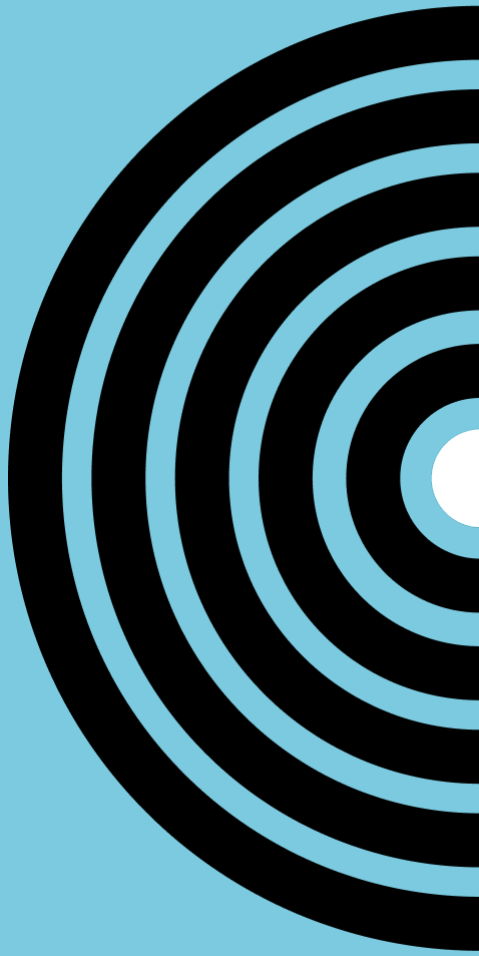
What are You Curious About?

Thank you

See you next time!



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