



# 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



# Great alignment and accountability with effective leadership moves companies forward faster

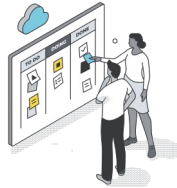
## Better alignment



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

# 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.

The screenshot displays the WorkBoard interface for a manager's direct reports. The top navigation includes 'Objectives', 'Teamwork', and 'Meetings & Reviews'. The main section is titled 'My Direct & Dotted' and has tabs for 'Members', 'OKRs', and 'Key Results'. A table lists team members with their titles, responsibilities, status, focus, and next 1on1. A tooltip for Rakesh Wardekar is shown, providing details on his next 1on1 and last activity.

Team Member	Title	Responsibilities	Status	Focus	Next 1on1
Joe Smart (you)	Chief Revenue Officer	45 tasks, 4 completed, 2 issues	38% progress	2/10	
Carlo Marco	Chief Technology Officer	5 tasks, 13 completed, 2 issues	26% progress	2/10	Wed, Nov 8 · 3 ☰
Sameera Spellman	Customer Success	8 tasks, 9 completed, 3 issues, 2 alerts	42% progress	10/10	Wed, Nov 8 · 1 ☰
Kelly Clark	Global Sales	9 tasks, 5 completed, 1 issue	18% progress	4/10	Thu, Nov 9 · 1 ☰
Roger Murphy	Sales Enablement	6 tasks, 12 completed, 3 issues	28% progress	8/10	Thu, Nov 9 · 0 ☰
Rakesh Wardekar	Sales Partnerships	8 tasks, 9 completed, 2 issues, 2 alerts	34% progress	5/10	Fri, Nov 10 · 2 ☰
Jill Chill	Sales Strategy & Operations	2 tasks, 10 completed, 2 issues	48% progress		

**Rakesh Wardekar**  
Next: Nov 10 · 10:00 - 10:30am · 2 ☰  
Last: Oct 13

[View last 1on1](#) [See upcoming agenda](#)

# 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!**

The screenshot displays the WorkBoard interface for a manager's lens. At the top, the navigation bar includes 'WorkBoard', 'Objectives', 'Teamwork', and 'Meetings & Reviews'. The main content area is titled 'Manager's Lens' and features a profile card for Sameera Spellman, a Customer Success manager reporting to Joe Smart. Below this is an 'Impact summary' section with a 'Generate' button. The summary lists key objectives and wins, such as increasing website traffic and social media engagement. A 'Team Engagement' section shows a circular diagram with categories like Revenue Team, Revenue Leaders, Customer Support, and Internal Account Squad. A 'Momentum' section highlights recent achievements and thank-you messages. The 'Objectives' section shows progress bars for 'Maximize Customer Value' (55%), 'We master value delivery and consumption' (76%), and 'Communication, Community and Connection is the name of the CS game' (32%). The 'Total Impact' section displays metrics like 1434 key results, 55% results achieved, 4734 actions completed, 373 badges received, and 14,030 comments and badges. A 'Last PACE' section shows a conversation overview with performance, alignment, competence, and engagement metrics on a scale of 1 to 5. A 'Manager's Lens' overlay window is visible, showing a 'Next 1on1' agenda item for Tuesday, May 28, with a 'Topics' and 'Actions' button.



# Make hard conversations instantly easier

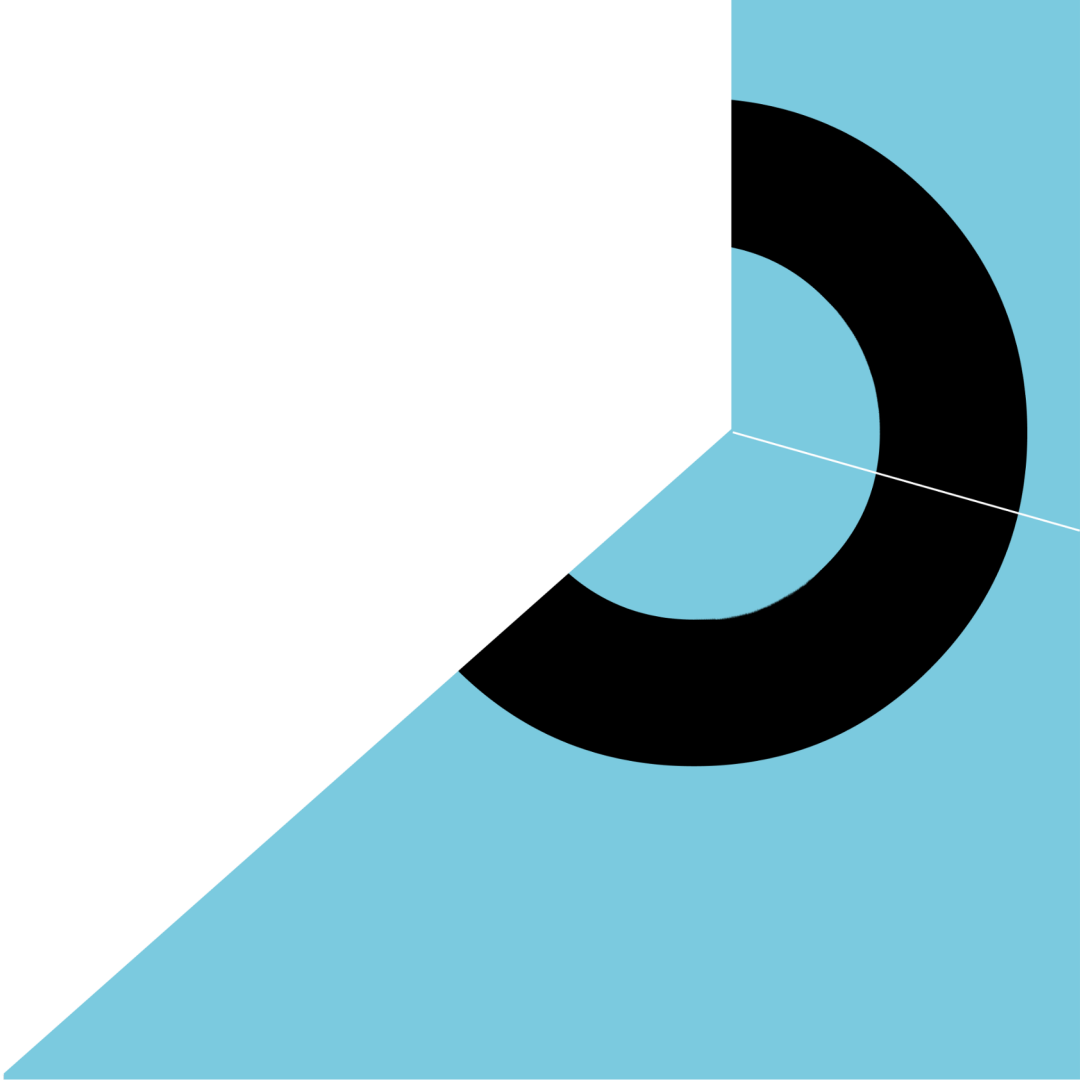
The Feedback Helper utilizes GenAI to convert employee concerns into Situation-Behavior-Impact format and help team members have hard conversations needed to unblock better outcomes.

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

Available soon!

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 features a profile card for Sameera Spellman, a 'Reports directly to Joe Smart' section, and 'Areas of Expertise' including 'Excelling at selling software to large enterprises'. Below this are sections for 'Team Engagement' (a bubble chart), 'Momentum' (a list of recent achievements), 'Objectives' (three progress bars for 'Maximize Customer Value', 'We master value delivery and consumption', and 'Communication, Community, and Connection'), 'Total Impact' (a list of metrics like 'Key results', 'Results achieved', etc.), and 'Areas of Expertise' (a list of skills like 'Leadership', 'Collaborator', etc.). On the right, a 'Feedback Helper' sidebar is open, showing a prompt to help frame feedback and a generated SBI model for Sameera's concern about a company credit card. The sidebar includes buttons for 'Help me frame feedback', 'Tell me more about SBI', and 'Make it shorter'.

# Scorecards



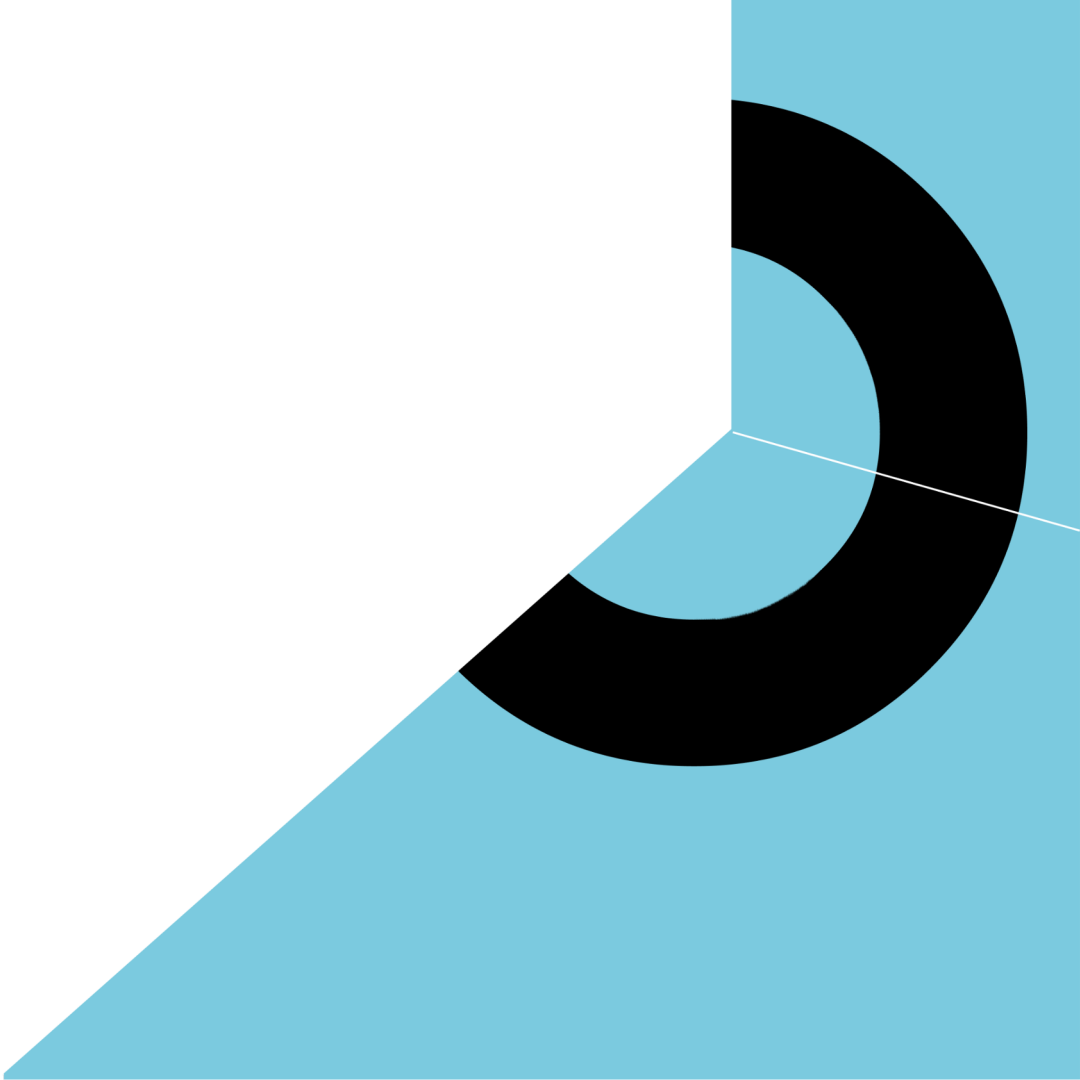
# Easily capture and share a snapshot of your Scorecard

- 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.

The screenshot displays the WorkBoard interface for a 'Digital TX Scorecard'. The main content area shows a table with columns for Objective, Key Result, Actual, Target, and Relationships. The 'Actual' column contains values like '4.5' and '1.7 +70% MoM'. The 'Target' column contains values like '4.5' and '4'. The 'Relationships' column contains values like 'BLOCKS' and 'SUPPORTS'. A context menu is open over the table, showing options such as 'Set as start page', 'Add to Collection', 'Duplicate Scorecard', 'Copy embed link', 'Copy to Clipboard as...', 'Publish', 'Export as...', 'Switch to Multi-period', 'Archive Scorecard', and 'Delete Scorecard'. A hand cursor is pointing at the 'Copy as Image (PNG)' option in the menu.

Objective	Key Result	Actual	Target	Relationships
	Cut transaction processing time 4.5 seconds	1.7 +70% MoM	4.5	BLOCKS
	Launch 4 Digipay voice assistant		4	SUPPORTS
			40%	
			33m	
			5%	
			43	BLOCKS
			43	
			5%	
			43	BLOCKS

# OKRs



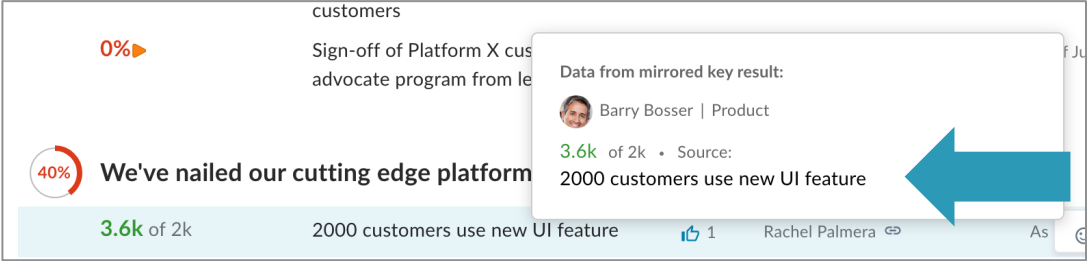
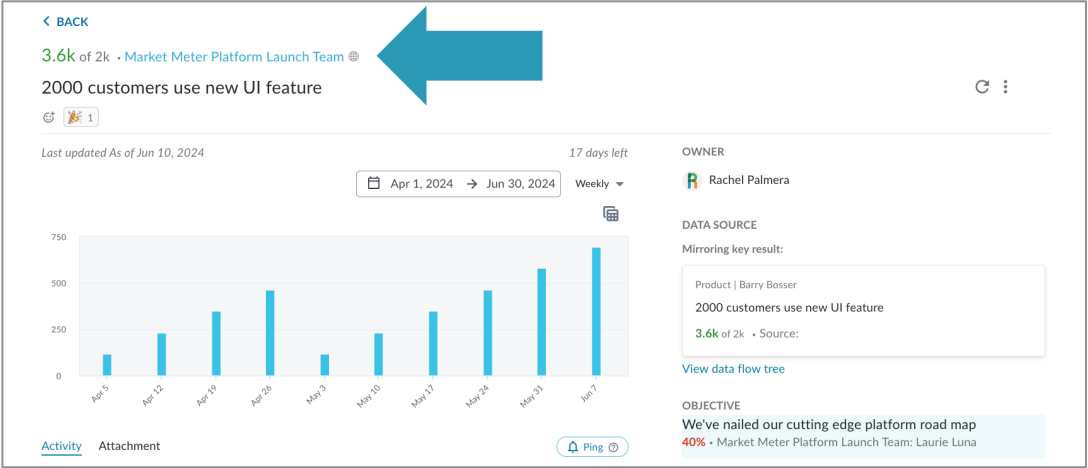
# Filters on My OKRs

- 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!

The screenshot displays the WorkBoard interface. At the top, there's a navigation bar with the WorkBoard logo, 'Objectives' dropdown, 'More' dropdown, a search bar, and a 'Create' button. Below the navigation bar, there are four summary cards: 'Updates needed' (5), 'Results at risk' (5), 'Results to celebrate' (6), and 'Draft OKRs' (6). The main content area is titled 'Objectives I Own' and shows a list of OKRs. A 'Filters' modal is open, allowing users to filter OKRs by status and time period. The 'Status' filter has options for 'Open', 'Closed', and 'Open & Closed' (selected). The 'Time Period' filter has a dropdown set to 'Matches exactly' and a date picker showing 'Fiscal Year - 2024' with options for 'Q1', 'Q2', 'Q3', 'Q4', 'FY', and 'Custom date'. The background shows a list of OKRs with progress indicators and titles like 'FOCUS on the right market segment', 'PEOPLE have their best career experience', 'CUSTOMERS have an exceptional experience', 'RESPONSIBILITY for Trust, Sustainability and Equity at the core of our business', and 'INNOVATION drives CORE advantage for our customers'.

# Navigate key result details more easily

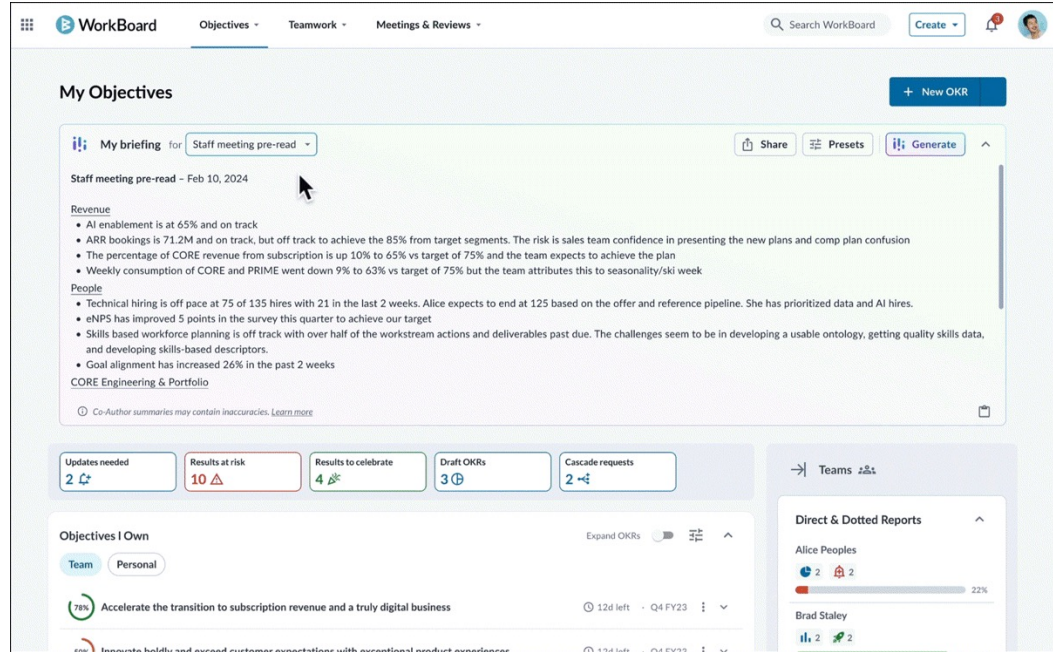
- Click the team name on the KR Details page to navigate to the team
- Hover over mirrored or rolled-up key results and click the source results to open their details.



# Schedule Executive Briefs

# 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!

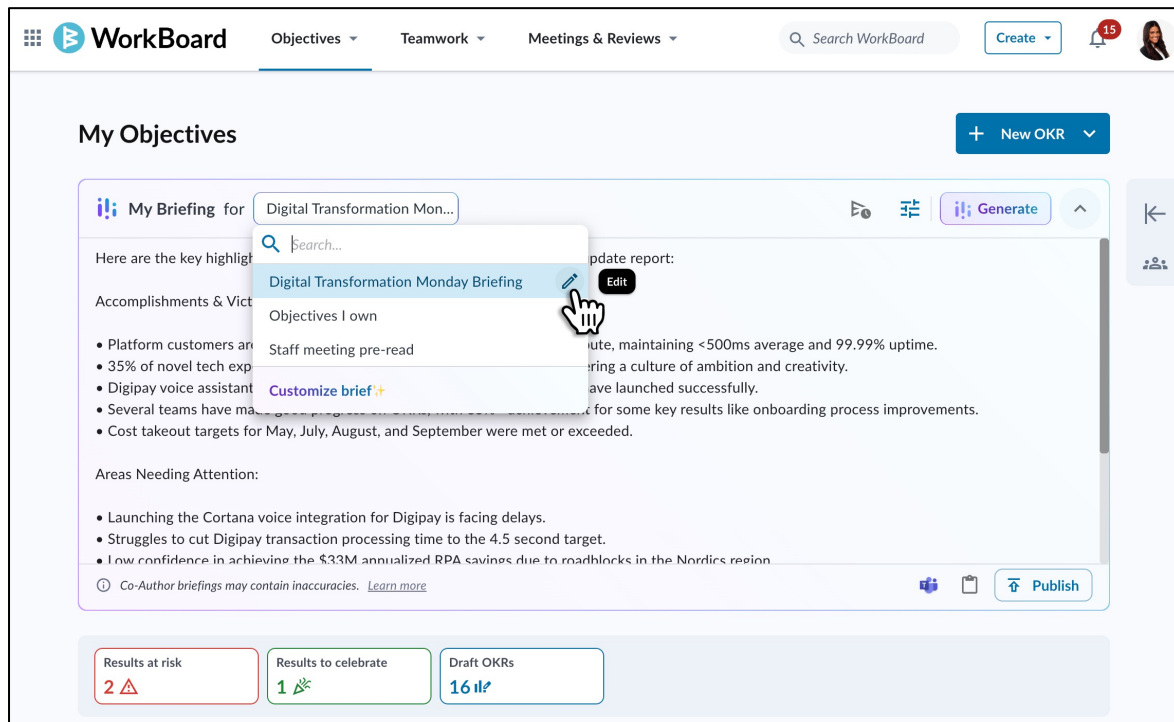


**Coming soon:** Include Scorecards and Biz Reviews in your draft briefing, subscribe other users to a brief via email, and schedule briefings to be automatically delivered to MS Teams or Slack.



# 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.



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 is titled 'My Objectives' and features a '+ New OKR' button. A dropdown menu is open, showing a search bar and several options: 'Digital Transformation Monday Briefing' (highlighted), 'Objectives I own', and 'Customize brief +'. A hand cursor is pointing at the 'Customize brief +' option. The background content shows a brief for 'Digital Transformation Monday Briefing' with sections for 'Here are the key highlights', 'Accomplishments & Victories', 'Areas Needing Attention', and a 'Publish' button at the bottom right. At the bottom of the interface, there are three summary boxes: 'Results at risk' (2), 'Results to celebrate' (1), and 'Draft OKRs' (16).

# 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.

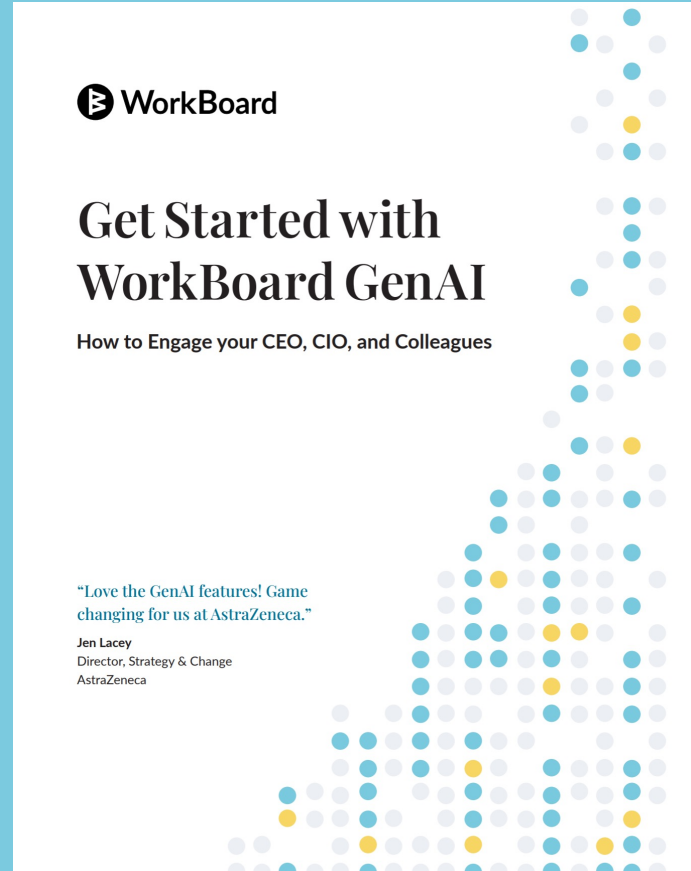
The screenshot displays the WorkBoard interface. The top section, 'My Objectives', features a 'New OKR' button and a 'My Briefing' card for 'Digital Transformation Mon...'. A tooltip shows 'Active subscriptions' with a list of briefings: 'Digital Transformation Monday Briefing' (Weekly on Mon, 7:00 AM) and 'Staff meeting pre-read' (Weekly on Tue, 10:00 AM). A 'View all' link is also present. The bottom section, 'Lists & Subscriptions', shows a table of subscriptions with columns for Name, Owner, Modified, Subscriptions, and Actions. A kebab menu is open over the 'Staff meeting pre-read' row, showing 'Edit' and 'Delete' options.

Name	Owner	Modified	Subscriptions	Actions
Digital Transformation Monday Briefing	You	May 28, 2024	Active Weekly, Monday at 7:00 am PDT	⋮
Staff meeting pre-read	You	May 28, 2024	Active Weekly, Tuesday at 10:00 am PDT	Edit Delete

# 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.



# Join the Conversation



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](https://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

 WorkBoard



**Deidre Paknad**  
Founder and CEO,  
WorkBoard

 BOEING



**Brad Surak**  
Vice President, Digital  
Aviation Solutions, Boeing

**MARS**



**Beth Dawson**  
Director, Strategy Deployment  
Strategic Initiative, Mars

 twilio



**Ivy Grant**  
SVP, Corporate Strategy  
& Operations, Twilio

 aprimo



**Erik Huddleston**  
Chief Executive Officer,  
Aprimo

## 2023 Speakers

**BAIN & COMPANY**

**Darren Johnson**  
Expert Partner

 vmware®

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

 JPMORGAN  
CHASE & CO.

**John Glander**  
Senior Vice President

 ALBEMARLE

**Patrick Thompson**  
Chief Information &  
Transformation Officer

 JUNIPER

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

 Trimble

**Duncan Hawksbee**  
Director of Strategic Execution

 CARMAX

**Summers Hutchings**  
Director, Product Delivery &  
Portfolio Strategy





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](http://www.workboard.com/accelerate2024)

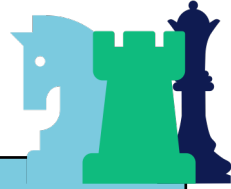


# Interested in sharing your journey at Accelerate?

Send me an email at [sameera@workboard.com](mailto:sameera@workboard.com)



# 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>● July 22/24 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>● July 10 at 8am PT</li><li>● July 17 at 1pm 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>● July 17 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>● July 9/11 at 1pm PT</li><li>● July 16/18 at 1pm PT</li><li>● July 23/25 at 1pm CET</li><li>● July 23/25 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>● July dates TBD</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>● Fall cohort begins Sept. 10!</li></ul>	<a href="https://workboard.com/rme-certification">workboard.com/rme-certification</a>



**What are You  
Curious About?**



# Thank you

See you next time!

