

Community Call

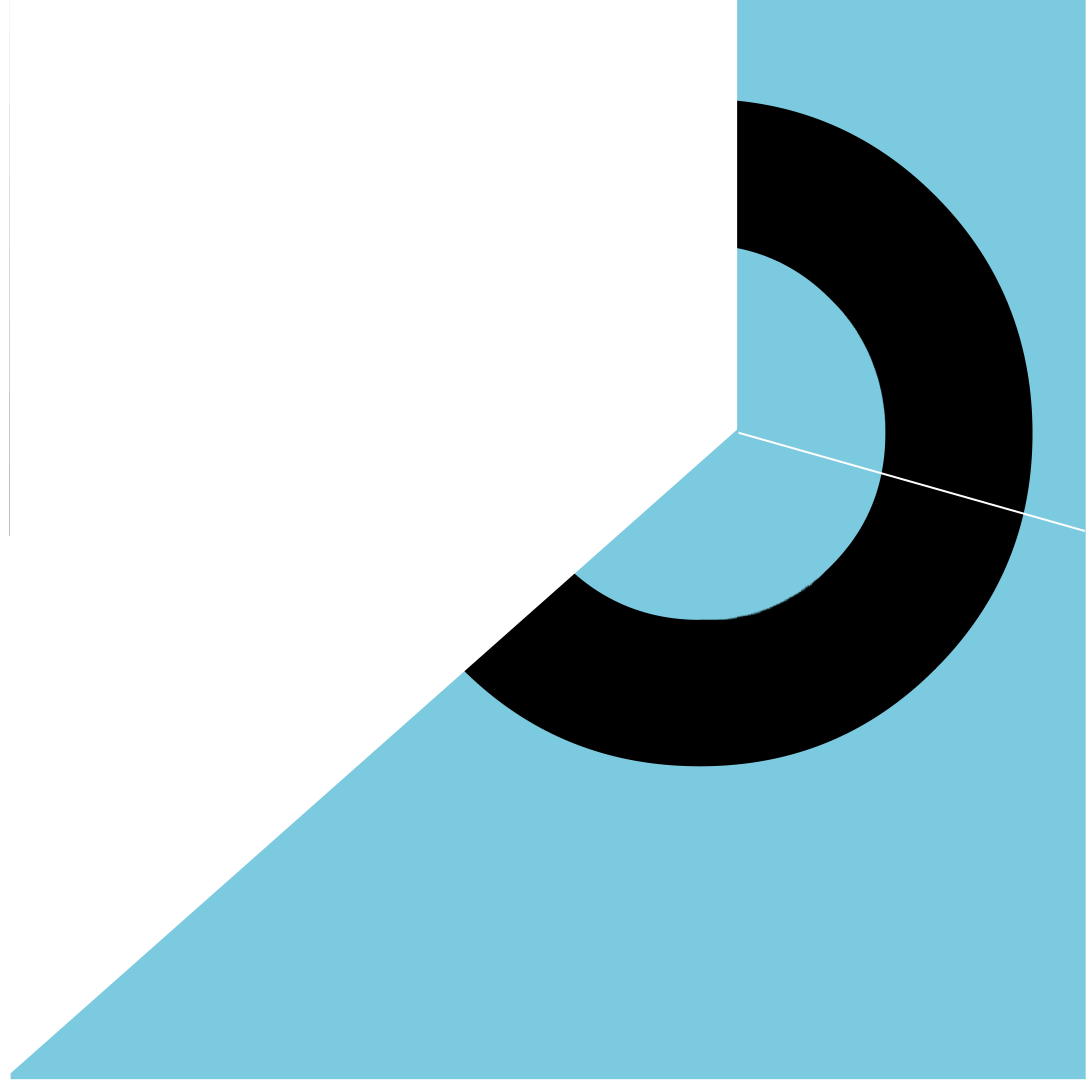
July 2024



Agenda

- Enabling managers to be more effective
- Sync personal objectives from WorkBoard to Workday
- Subscribe team members to scheduled executive briefs
- New data columns for Scorecards
- Join us at Accelerate 2024!

Manager Effectiveness



Strategy should be the golden thread connecting enterprise, team and individual performance



EXECUTIVES set strategy, mobilize people to achieve it with visibility on outcomes

MANAGERS translate strategy, drive accountability, and coach team members

INDIVIDUALS execute on the most important outcomes, and build skills for the future

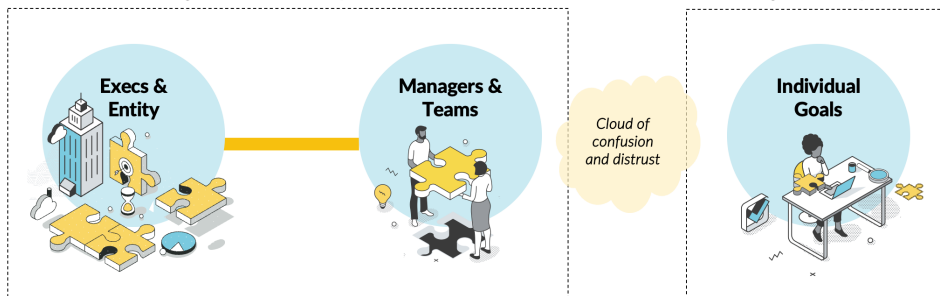
Managers are the big lever in performance

Team OKRs are how they translate strategy and define accountability

Many HR execs want more cohesion with business outcomes and more frequent, fair, and fact-based performance feedback for employees

FROM ...

Documenting performance and giving feedback separate from driving team and org performance



TO ...

Giving managers and individuals the means to improve performance so it impacts company results



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



WorkBoard is enhancing *existing* capabilities to elevate performance and pull the strategy golden thread all the way through



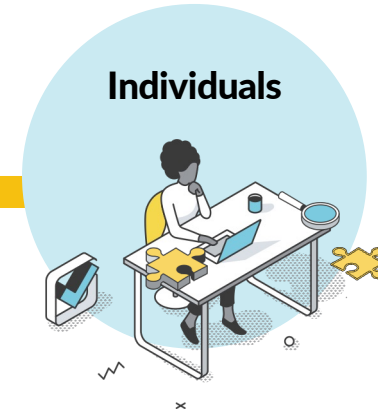
Execs & Entities

- ✓ Align long range strategies
- ✓ Align current year and quarter objectives
- ✓ Get transparency across disparate efforts
- ✓ Drive operating cadence with scorecards, MBRs



Managers & Teams

- ✓ Align OKRs within and across teams
- ✓ Simplify team meetings and status reporting
- ✓ Manage joint outcomes and output efficiently
- ✓ Identify dependencies between teams



Individuals

- ✓ Harmonize personal goals with team OKRs
- ✓ Get coaching that reflects true efforts
- ✓ Simplify feedback between peers and manager
- ✓ Be prepared and fully engaged in conversations

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 bar includes 'WorkBoard', 'Objectives', 'Teamwork' (selected), and 'Meetings & Reviews'. A search bar and a 'Create' button are also present. The main section is titled 'My Direct & Dotted' and has tabs for 'Members', 'OKRs', and 'Key Results'. Below these tabs is a table with columns: Team Member, Title, Responsibilities, Status, Focus, and Next 1on1. The table lists seven team members with their respective progress bars, workload indicators, and upcoming 1on1 meetings. A tooltip for Rakesh Wardekar is shown, providing details about his next 1on1 meeting.

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

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, Roger Smithson, Head of Customer Access Solutions and IT. The interface includes a navigation bar with 'Objectives', 'Teamwork', and 'Meetings & Reviews'. A 'Manager's Lens' sidebar on the right provides a quick overview of the team's progress and challenges. The main content area shows a 'TEAM ENGAGEMENT' chart, a 'MOMENTUM' section with shoutouts, and an 'OBJECTIVES' section with progress bars. The 'Impact summary for Jul 12, 2024' is prominently displayed, featuring an AI-generated summary of the team's progress and challenges, along with suggested topics for the next 1on1.

Manager's Lens

+ Topic + Action X

Add Topic to next 1on1

Next: Jul 25 · 1:30 - 2:00 pm · 0

Let's discuss what additional dev resources might be available to work on cutting transaction processing time

Impact summary for Jul 12, 2024 Generate

customer inquiries without the need for a support representative, nearing their 50% target.

In terms of onboarding improvements, the team has received and actioned feedback from 8 out of the targeted 10 sign-ups to enhance the account creation process. They have also made progress in reducing lag time for customer access sites from 1s to 0.66s, though they have not yet reached their target of 0.54s.

At Risk or Stalled:

While the team has made progress in several areas, there are a few key results that are at risk or stalled. The goal of cutting transaction processing time by 4.5 seconds has only seen a 1.3-second reduction so far, and Roger has expressed a low confidence in achieving the target, citing the need for deeper changes.

Additionally, the goal of completing mockups for a new navigation to accelerate adoption is only at 50% progress, with a red spotlight risk color indicating potential challenges.

Suggested Topics for Your Next 1-on-1:

1. Discuss strategies to address the stalled progress on cutting transaction processing time and explore potential solutions or adjustments to the target.
2. Review the challenges faced in completing the mockups for the new navigation and provide guidance or additional resources to help the team overcome any roadblocks.
3. Evaluate the progress on the Digipay voice assistant integrations and discuss contingency plans if the Cortana integration faces further delays.
4. Discuss the team's confidence levels for the remaining key results and identify areas where additional support or resources may be needed to increase the likelihood of achieving the targets.

Co-Author briefings may contain inaccuracies. Learn more

TEAM ENGAGEMENT

Digipay

MOMENTUM

Give a shoutout

Jul 17 from Danielle Levitz
Excellent!
Great job driving this initiative!

Mar 01 from Barry Bosser
Excellent!

Dec 15 from Jack CEO/Mack
Good Job!
Love the contributions you're making!

Roger was most recently working on:
• Q2 Strategic Use Cases Project
• Digipay Priorities Q2 2024

OBJECTIVES

13% Simplify and revolutionize

21% Engage, retain, and inspire the

20% Develop my strengths and

TOTAL IMPACT

27 Key results

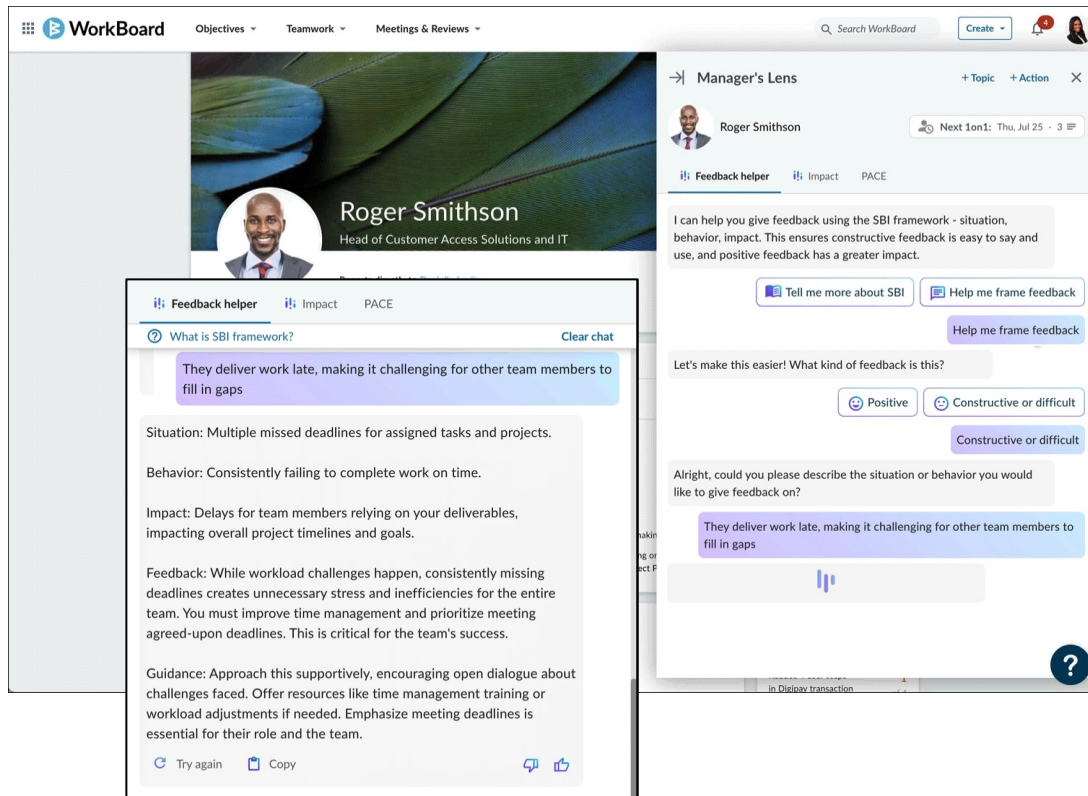
55% Results achieved

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 now!



Give quick kudos for great progress right on the spot

Send any individual or team quick feedback on any objective, key result, or action item to which you have access. They'll get a fun badge that will show on their Profile and My Work Today pages.

Available now!

The screenshot displays the WorkBoard interface. At the top, a user profile for Roger Smithson, Head of Customer Access Solutions and IT, is shown. Below this, a 'Give Feedback' modal is open, allowing a user to provide feedback on a specific objective. The modal includes a 'Who's it for?' field (Roger Smithson), a message field, and a 'Pick a badge' section with various options like 'Mentor', 'Awesome!', 'Touchdown!', 'Gifted', 'Hazardous Duty', 'Good Luck!', 'Thank You!', and 'Congrats'. The 'Awesome!' badge is selected. The background shows a 'Launch 4 Digipay voice assistant Integrations' objective with a progress chart and a 'MOMENTUM' section listing recent achievements and feedback.

WorkBoard Objectives Teamwork Meetings & Reviews Search WorkBoard Create 15

3 of 4 • Digipay

Launch 4 Digipay voice assistant Integrations (Google Assistant, Siri, Alexa, Cortana)

Last updated As of Jul 29, 2024

33 days left

OWNER Roger Smithson

DAILY Jun 1, 2024 → Aug 31, 2024

DATA SOURCE

Give Feedback

Who's it for?
Roger Smithson, Digipay Launch Squad

Include a message with your feedback:
Terrific progress on this initiative!

Pick a badge:

- Mentor
- Awesome!**
- Touchdown!
- Gifted
- Hazardous Duty
- Good Luck!
- Thank You!
- Congrats

Relationship map 4 Suggested +

MOMENTUM

5m from Danielle Levitz
Awesome!
Terrific progress on this initiative!

2h from Danielle Levitz
Excellent!

Jul 17 from Danielle Levitz
Excellent!
Great job driving this initiative!

Roger was most recently working on:

- Engagement Improvement Action Plan
- Q2 Strategic Use Cases Project Plan
- Digipay Priorities Q2 2024
- FY24 Individual Development Plan - Roger Smithson

Workday Integration



Sync Personal Goals from WorkBoard to Workday

- Sync your personal objectives from WorkBoard into Workday Goals, and your personal key results as Workday Milestones.
- Save time by updating your team OKRs and Workday Goals in one place!

Available now!

Talk to your customer success team about turning it on for your organization.

The image displays two overlapping screenshots of the WorkBoard application. The top screenshot shows a goal titled 'Achieve my Personal Development Goals for FY24' for Addison Harvey, with a 49% completion status. It lists three key results: 'Attend 3 Professional Development Conferences' (2 of 3), 'Author 10 articles on the company blog' (6 of 10), and 'Participate in 5 Cross-functional Feedback Sessions' (1 of 5). The bottom screenshot shows the Workday interface with a sidebar menu for Addison Harvey, including sections for Summary, Job, Contact, Personal, Compensation, Benefits, Pay, Performance, Career, Feedback, and Absence. The main content area shows 'In Progress' goals, including the same 'Achieve my Personal Development Goals for FY24' goal, and 'Completed Goals' such as 'Achieve \$10MM ARR for Product X'. A detailed view of the 'Edit Goal' interface is also shown, displaying milestones with due dates and status (Partially Complete).

WorkBoard

Achieve my Personal Development Goals for FY24

Addison Harvey

49%

Sep 30, 2024
73 days left

Key Results

Comments

History

2 of 3 Attend 3 Professional Development Conferences

6 of 10 Author 10 articles on the company blog

1 of 5 Participate in 5 Cross-functional Feedback Sessions

Author 10 articles on the company blog

As of Jul 19

Jul 01, 2024 - Sep 30, 2024

Weekly

Workday

MENU

W

workday ID

Performance Reviews

Goals

Competencies

Develop

Create Goal

Archive or Unarchive Goals

Individual Goals

Archived Goals

Organization Goals

In Progress

PARTIALLY COMPLETE

Achieve my Personal Development Goals for FY24

Due Date: 09/30/2024

Organization Alignment

Category

Edit Goal

Completed Goals

SUCCESSFULLY COMPLETE

Achieve \$10MM ARR for Product X

Edit Goal

Goal Details

Additional Details

Milestones

History

Milestones: 3 items

Milestone	Due Date	Status
Attend 3 Professional Development Conferences	09/30/2024	Partially Complete
Author 10 articles on the company blog	09/30/2024	Partially Complete
Participate in 5 Cross-functional Feedback Sessions	09/30/2024	Partially Complete

enter your comment

Additional Information

Related Links

Business Review Document

Cancel

Save for Later

Submit

View results details

Update

Jack Ma42

Schedule Executive Briefs

Schedule a meeting pre-read for the team

- Update the whole team on the latest progress on selected teams, objectives, key results and workstreams before your next meeting.
- Subscribe multiple people to your favorite scheduled briefs.
- All subscribed recipients will get the scheduled brief in their inbox, or can generate a copy on demand on their My Objectives page.

Coming soon – deliver scheduled briefs right to Microsoft Teams!

Available now!

The screenshot displays the WorkBoard interface with a modal window titled "Staff meeting pre-read" open. The modal allows users to configure a scheduled brief for a meeting. Key settings include:

- Team:** 2 Teams
- Workstream:** 2 Workstreams
- Objective:** 3 Objectives
- Frequency:** Weekly on Tuesday at 10 AM, America/Los Angeles, until 11/24/2024.
- Gen AI Summary:** Since Last Week as Bullet point summary in English.
- Email:** A list of email addresses (danielle@acme.com, roger@acme.com, christine@acme.com, jackie.shafer@acme.com, ashley.andrews@acme.com, dana.chamin@acme.com, kevin.campbell@acme.com) with a plus sign to add more.

The background shows the "My Objectives" page with a list of accomplishments and areas needing attention. The footer includes the text "Optimize investments and company resources so we can accelerate innovation" and a date range "46 days - Jun 01, 2024 - Aug 31, 2024".

Manage your subscriptions

- Click the paper airplane icon to preview your own scheduled briefs. Click View All to access the full list, including briefings to which other people have subscribed you.
- Use the kebab menu to edit or delete any of your own briefings, or to unsubscribe from one to which you've been added.

The screenshot displays the WorkBoard interface. At the top, the 'My Objectives' section shows a briefing titled 'Monday Morning Briefing' with a 'Subscribe' button. A tooltip for 'Active subscriptions' lists 'Monday Morning Briefing' as 'Weekly on Mon, 8:00 AM' with a 'View all' link. Below this, the 'Lists & Subscriptions' section features a table with columns: Name, Owner, Modified, Subscriptions, and Actions. The table lists three subscriptions: 'Monday Morning Briefing' (You, Jul 29, 2024, Active, Weekly, Monday at 8:00 am PDT), 'Staff meeting pre-read' (Danielle Levitz, Jul 29, 2024, Active, Weekly, Tuesday at 10:00 am PDT), and 'Digipay Monthly Business Review Brief' (Danielle Levitz, Jul 19, 2024, Active, Monthly, first Friday at 9:00 am PDT). A 'New list' button is at the top right, and an 'Unsubscribe' button is at the bottom right. The left sidebar shows 'Settings' with options like Profile Settings, Preferences, Lists & Subscriptions, Integrations, Custom Integrations, and Import from Excel. The bottom left corner shows '©2024 WorkBoard Inc.' and the bottom right corner shows 'WorkBoard | 16'.

My Objectives

My Briefing for Monday Morning Brie... [Subscribe](#) [Generate](#)

Active subscriptions:

- Monday Morning Briefing
Weekly on Mon, 8:00 AM

[View all](#)

WorkBoard Objectives Teamwork Meetings & Reviews Search WorkBoard Create +99

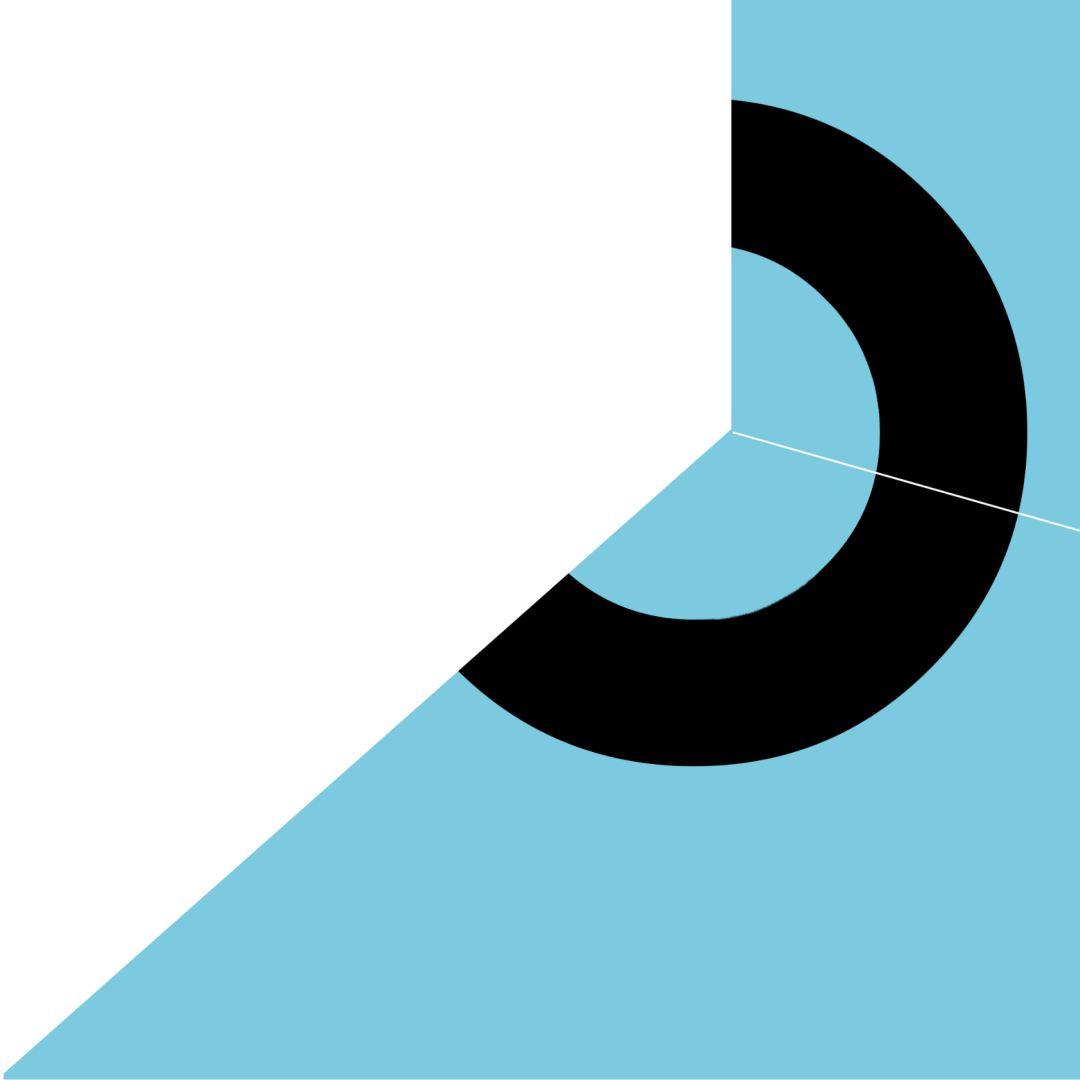
Settings Profile Settings Preferences **Lists & Subscriptions** Integrations Custom Integrations Import from Excel

Lists & Subscriptions + New list

Name	Owner	Modified	Subscriptions	Actions
Monday Morning Briefing	You	Jul 29, 2024	Active Weekly, Monday at 8:00 am PDT	⋮
Staff meeting pre-read	Danielle Levitz	Jul 29, 2024	Active Weekly, Tuesday at 10:00 am PDT	⋮
Digipay Monthly Business Review Brief	Danielle Levitz	Jul 19, 2024	Active Monthly, first Friday at 9:00 am PDT	⋮

Rows per page: 25 [Unsubscribe](#)

Scorecards



New column options for Scorecards

- Choose what types of comments to display on your Scorecards.
- Include Objective categories, Key Result tags, or custom Objective fields as columns.

Available now!

Single-period Scorecard

Rows (33) Columns (6)

Actual	Target	Comments
4.5	4.5	@Roger Smithson Let's discuss a way forward
4	4	@Barry Bosser @Roger Smithson Congrats, you are doing really impressive work...
40%	40%	@Shawna Herrera how can I help?
4	4	@Roger Smithson Please let me know how we plan on achieving...
0	0	
60%	60%	Nice job Roger!
1	1	
50	50	@Roger Smithson Hey Roger, great progress!
1	1	All hands are on deck to address
0.54	0.54	
10	10	

Generate

Single-period Scorecard

Objective name

KR name

123 Actual Current

123 Target

Comments Current

User Comment

All

Update Narrative

User Comment ✓

Confidence Narrative

System Comment

Add column

category

Objective | Categories

tag

Key Result | Tags

Create a scorecard once, use it all year

- Select teams and key result attributes to include in your scorecard, and set it to automatically update with each OKR reset.
- Instantly include any new OKRs that match your criteria as they are created, and remove them when they are closed.

Available soon!

WorkBoard Objectives Teamwork Meetings & Reviews Search WorkBoard Create

Biz Reviews / Digital Transformation Scorecard

Digital Transformation Scorecard Present

Scorecard Brief Generate

Objective name	KR name	Actual	Target	Comments	Trend
Digipay is delightfully fast for our customers	Cut transaction processing time by 4.5 seconds	1.7	4.5	@Roger Smithson Let's discuss a way forward	
	Launch 4 Digipay voice assistant Integrations (Google Assistant, Siri, Alexa, Cortana)	3	4	@Barry Bosser @Roger Smithson Congrats, you are doing really impressive work...	
	MAU increases 8% from 32% to 40% (about 4k users)	39.4%	40%	@Shawna Herrera how can i help?	
	Reduce 4 user steps in Digipay transaction flow this quarter	1	4	@Roger Smithson Please let me know how we plan an achieving...	
Onboarding is easier than associates' favorite consumer app	Users see 0 seconds of spinning wheel in transaction flow (as reported by users - from 2 seconds)	0	0		
	60% interaction completion on our new user in-app guides	46%	60%	Nice job Roger!	
	Access issue resolution time decreased from 2 hours to 1 hour	1.2	1		
	Chatbot system addresses 50% of customer inquiries without the need of a support rep	48.24	50	@Roger Smithson Hey Roger, great progress!	
	Digipay issues in progress	2	1	All hands are on deck to address...	
	Lag time reduced from 1s to .54s for customer access sites	0.7	0.54		
	Receive and action feedback from 10 sign ups to improve account creation process	17	10		
	User database encryption increases from 2 to 4 levels for customer data access	3	4		
Optimize investments and company resources so we can	HR realizes \$33M in annualized run rate savings from RPA (measured by 3rd party service termination and h/c reallocation)	7.48m	33m	The roadblocks on RPA in the Nordics region are blocking us from realizing these savings.	
	HR replaces all manual HR intake steps globally (43 locations)	11	43		

Edit List

Teams: Digipay Information Technology PM Cloud Compute Search teams by name

Status: Open OKRs Closed OKRs

LIST AUTOMATION

Add new items in List to Scorecard ☒

Remove items no longer in List from Scorecard ☒

34 Key Results

Save and apply list

Join the Conversation





Strategy Execution

COASTAL RETREAT

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

Register now:
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.

Conference pricing

\$699 Individuals

\$999 Bring a peer (2 tickets)

Conference fee includes a light meal at reception Sep. 30, all meals Oct. 1, breakfast and lunch Oct. 2, and conference materials.

REGISTER NOW

Agenda at a glance

Monday, September 30

2:00 PM - 4:00 PM

Pre-conference WorkBoard Labs

4:30 PM - 7:30 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

Speaker Lineup

 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

 **Trimble**



Duncan Hawksbee

Director of Strategic
Execution, Trimble

 **aprimo**



Erik Huddleston

Chief Executive Officer,
Aprimo

Trellix



Mary Wheelwright

Senior Director of
Business Operations,
Trellix

 **pax8**



Rory Thompson

Operations Manager,
Pax8

 **WAVENINE**



Philipp Schett

CEO, Wave Nine

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 \$314/
night (including resort fees) for Accelerate
attendees from September 29 - October 2.

REGISTER NOW



You truly know how to take care of
your guests. Thank you so much!

— Mike Limanni, IBM



Upcoming Courses



Class	Description	Dates	How to Sign Up
OKR Coach Certification	Become a certified OKR coach	<ul style="list-style-type: none">• Aug. 20/22 at 8am PT• Sep. 17/19 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">• Aug. 5-6 at 8am PT• Sep. 10-11 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">• Fall cohort begins September 10!	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 August 28.

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



**What are You
Curious About?**



Thank you

See you next time!

