

# Community Call

October 2024



# Agenda

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- Peak performance with WorkBoard
- Communicating key result confidence more easily

# Peak Performance



What is “peak performance”?  
Functioning at our fullest potential.



# In peak performance, strategy is the golden thread energizing enterprise, team and individual performance



# The performance gap is obvious to everyone; how it's described and addressed varies



**Strategy execution gap:**

OKRs, MBRs and 1on1s

**Culture barrier to change:**

Discussions and more discussions

**Manager effectiveness issue:**

Classes, cohorts, programs

**Low understanding and engagement:**

Scores in the 40s and 50s



# A disjointed approach doesn't serve anyone well



Strategy is not the problem, execution

Why are engagement scores in the 40s?

Our culture is a speed barrier

It's the frozen middle

We have too many priorities!

Dependencies are a nightmare.

Everyone has change fatigue.

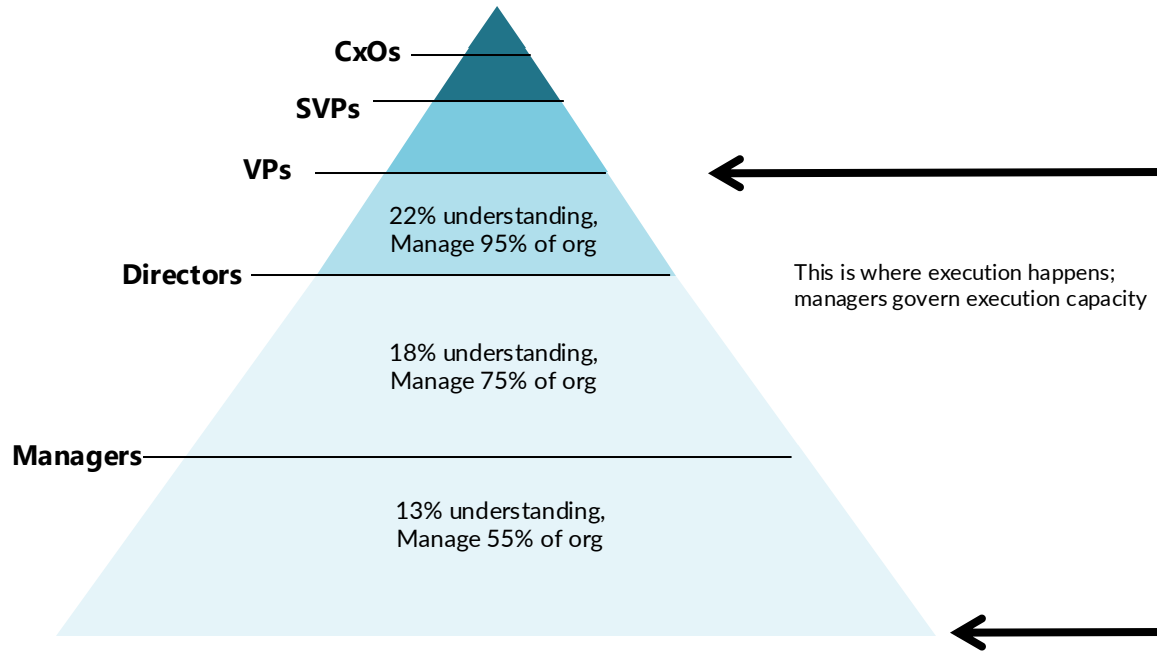
Execs don't know what they're doing!



- CEO's highest priorities
- Intended to propel execution
- Best case in WorkBoard
- Often stops at the top, fragmented in decks

- CHRO driven
- Intended to create accountability
- Long standing system of record
- Often disjointed from business outcomes

# Clarity decreases and decision volume increases as you move down the org chart





# Peak performance is highly dependent on managers so a systematic approach to their effectiveness is key

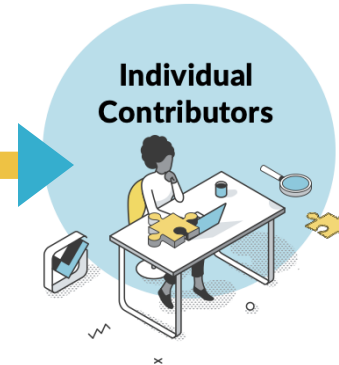
**EXECUTIVES** set strategy, mobilize people to achieve it with visibility on outcomes



**MANAGERS** translate strategy, drive accountability, and coach team members

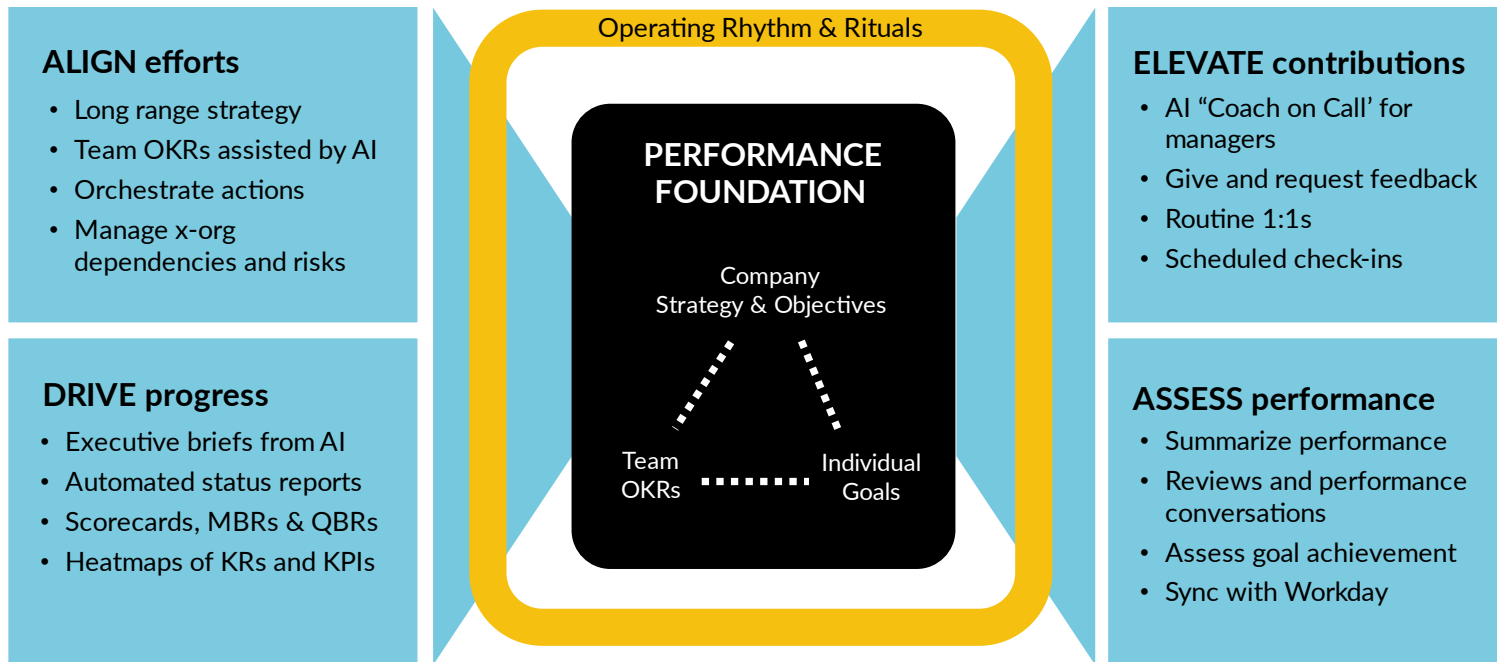


**INDIVIDUALS** execute on the most important outcomes, and build skills for the future



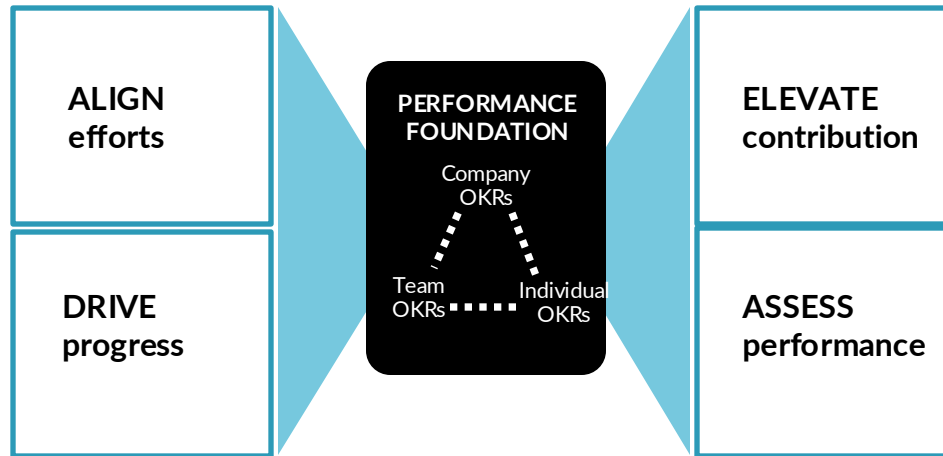
**Managers hold the key; robust team OKRs are the unlock.**  
Companies that set team OKRs deep in the org have engagement scores in the 90s and the results to show for it!

# WorkBoard Intelligent Enterprise: The foundation and power to achieve peak performance



# PERFORMANCE FOUNDATION

- Company strategy and OKRs
- Team OKRs
- Individual OKRs synced with Workday



# My Objectives

+ New OKR ▾

 My Briefing for 

IT Leadership meeting... ▾

 Subscribe 

 Generate ▾


<


Updates needed  
4 🚀

Results at risk  
1 ⚠️

Results to celebrate  
3 🎉

>

Objectives I Own 

Expand OKRs ☐  ^

Team Individual

INFORMATION TECHNOLOGY


45%


Optimize investments and company resources so we can accelerate innovation

34 days · Aug 01, 2024 - Oct 31, 2024

4.75% of 5%

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


Jackie Shafer  · As of Sep 27

16 

16 of 43


HR replaces all manual HR intake steps globally (43 locations)


Me · As of Sep 25

56 

11 of 43


▼ RPA replaces all manual visa and passport intake and inquiry steps globally (43 locations)


Shreenath Panditrao  · As of Sep 10

1 

7.48M of 33m

▼ HR realizes \$33M in annualized run rate savings from RPA (measured by 3rd party service termination and h/c reallocation)

Danielle Levitz  · As of Sep 27

9 


90%


Technology leads the way to a digital business

34 days · Aug 01, 2024 - Oct 31, 2024

3 of 3


3 of our 5 AI use cases achieve their value outcomes, including 1 in cyber security


Adorina Neeman  · As of Sep 27

9 

5 of 6


Condition monitoring goes live in 6 NA locations

Serena Security  · As of Sep 27

9 

31 of 35

We have measurable outcomes, iteration cadence and instrumentation in place for

9 

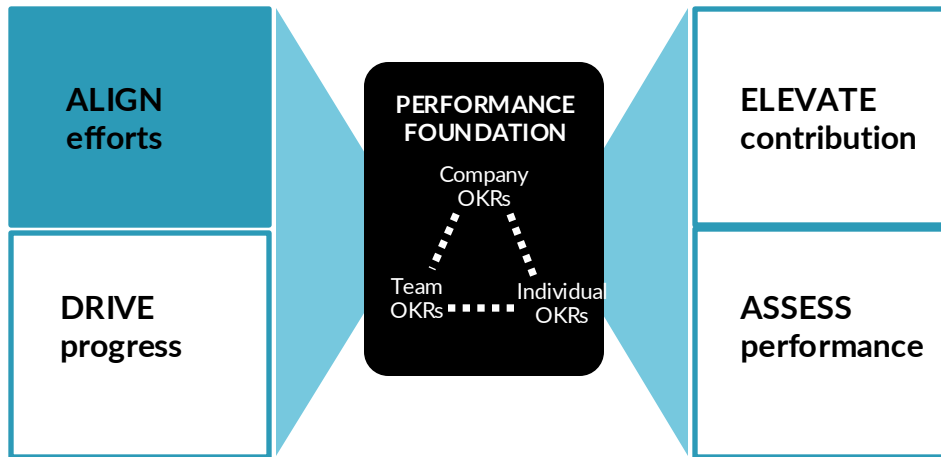


Hello! I'm an AI assistant specialized in OKR (Objectives and Key Results) management. How can I help you with your OKRs today?

 Enter your question... 

# ALIGN efforts

- Long range strategy
- AI-assisted team and individual OKRs
- Orchestrate actions
- Manage x-org dependencies and risks



My Objectives

+ New OKR

My Briefing for CIO-CDO weekly brie... Subscribe Generate

Updates needed 2 Results at risk 1 Results to celebrate 3 Draft OKRs 23

Objectives I Own

Team Individual

INFORMATION TECHNOLOGY

- Optimize investments and company resources so we can accelerate innovation (45%)
- Technology leads the way to a digital business (89%)
- Foster a culture of ambition and creativity that fuels Acme 2030 (93%)

Key Results I Own

DIGIPAY

3 of 4 Launch 4 Digipay voice assistant Integrations (Google) Roger Smithson As of Sep 25 6

Teams

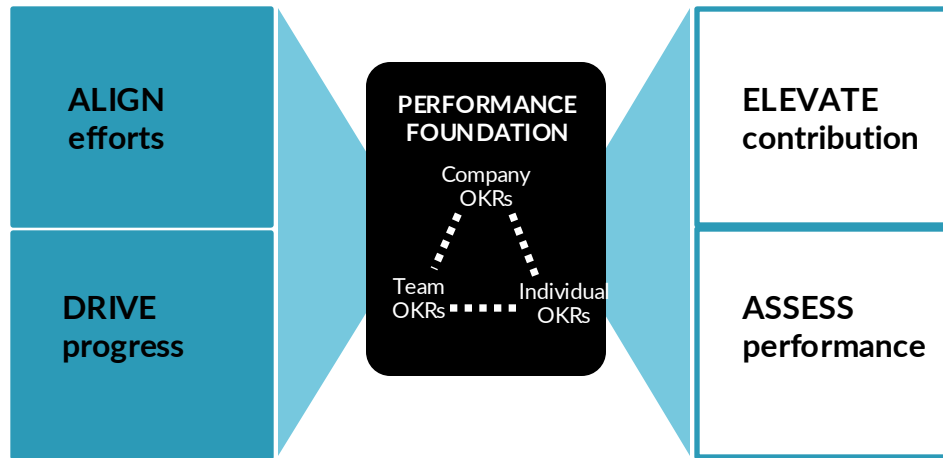
Direct & Dotted Reports

- Ashley Andrews (70%)
- Christine Skye (70%)
- Dana Chamin (68%)
- Jackie Shafer (53%)
- Kevin Campbell (54%)



# DRIVE progress

- AI generated scheduled briefs
- Automated status reports
- Scorecards & Biz Reviews
- Heatmaps of KRs and KPIs



My Objectives

+ New OKR

My Briefing for My Monday Briefing

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Generate

- Accomplishments & Victories:
  - Drive gross revenue retention (GRR) above 83%: Currently at 80%, 96.4% progress towards target
  - 85% of new business (ARR) from target market segments: At 79%, 92.9% progress
  - Consumption of CORE and PRIME platforms reaches 75% weekly active users: At 64%, 68.6% progress
  - 285 Tier 1 and Tier 2 logos renewed: At 275, 96.5% progress
  - MAU for Digipay increased from 32% to 39.4%, 92.5% progress towards 40% target
  - Chatbot system addressing 48.2% of customer inquiries without support rep, 96.5% progress to 50% goal
  - Access issue resolution time decreased from 2 hours to 1.2 hours, 80% progress to 1 hour target
- Areas Needing Attention:
  - 85% net revenue retention target for customers in target segments: Currently at 83.8%, only 41.5% progress
  - Reduce Scope 1 and 2 emissions from 35M to 32M metric tons: At 33.5M, only 50.8% progress
  - Customer churn rate reduction from 12% to 7%: Currently at 10.12%, only 37.6% progress
  - Cut transaction processing time by 4.5 seconds: Only 1.7 seconds cut so far, 37.8% progress
  - Reduce 4 user steps in Digipay transaction flow: Only 1 step reduced, 25% progress

Co-Author briefings may contain inaccuracies. Learn more

Publish

Updates needed

2

Results at risk

1

Results to celebrate

3

Draft OKRs

23

Objectives I Own

Expand OKRs

Team Individual

Teams

Direct & Dotted Reports

Ashley Andrews

3 6 5 1

70%

Christine Skye

2 10 3 1

70%

Dana Chamin

1 4 4

68%

Jackie Shafer

3 9 1 2

53%

Kevin Campbell

3 14 2

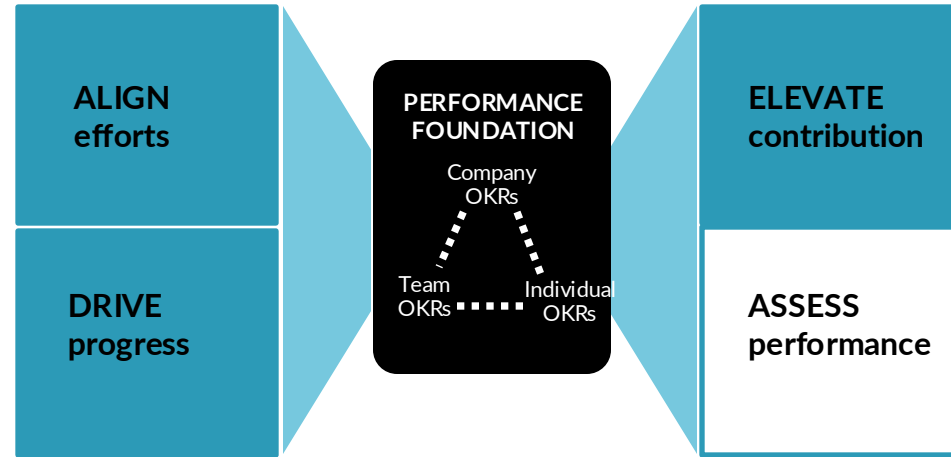
54%





# ELEVATE contribution

- AI “Coach on Call” for managers
- Give and request feedback
- Routine 1:1s
- Scheduled check-ins



## My Direct & Dotted

Members

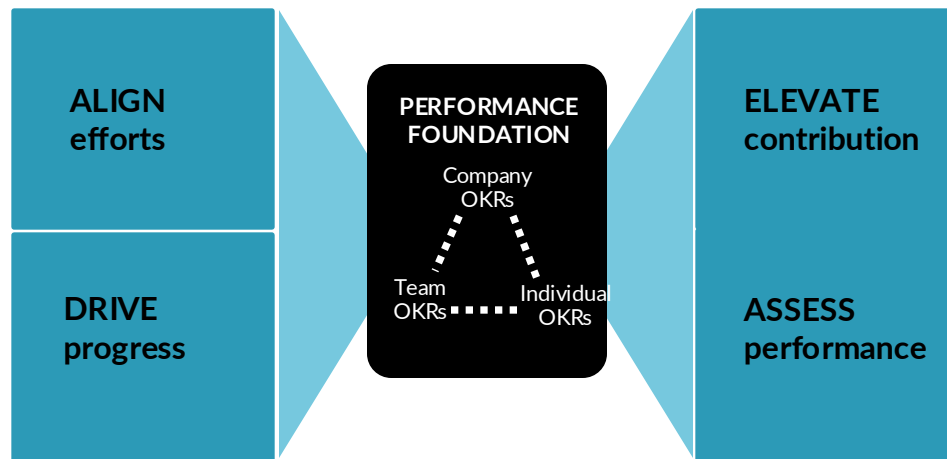
OKRs

Key Results

Team Member	Title	Responsibilities	Status	Focus <sup>?</sup>	Next 1on1	Check-ins
Ashley Andrews	Head of Global Supply Chain	3  6  5  1	<div><div></div></div> 70%	8 of 10	Mon, Sep 30 3	Due by: Jan 31 <i>Completed</i>
Christine Skye	Head of IT, Strategy, Plannin...	2  10  2  1	<div><div></div></div> 74%	7 of 10	Fri, Oct 4 3	Due by: Jan 31 <i>Completed</i>
Dana Chamin	Head of IT & Workplace	1  4	<div><div></div></div> 70%	3 of 10	Mon, Sep 30 0	Due by: Jan 31 <i>Not Started</i>
Jackie Shafer	Chief of Staff - Office of the ...	3  9  1  2	<div><div></div></div> 56%	4 of 10	Fri, Oct 4 3	Due by: Jan 31 <i>Not Started</i>
Kevin Campbell	SVP, Information Systems	3  14  2	<div><div></div></div> 54%	6 of 10	Mon, Sep 30 0	Due by: Jan 31 <i>Completed</i>
Roger Smithson	Head of Customer Access So...	4  17  6  8	<div><div></div></div> 41%	2 of 10	Thu, Sep 27 4	Due by: Jan 31 <i>Not Started</i>
Shreenath Panditrao	Head of Business Systems	2  5  3  2	<div><div></div></div> 74%	4 of 10	Mon, Sep 30 2	Due by: Jan 31 <i>Completed</i>

# ASSESS performance

- Summarize performance
- Reviews and performance conversations
- Assess goal achievement
- Sync with Workday



- Governance
- Result Management
- Custom fields
- Close out OKRs
- Past Due Key Results
- Organizational Engagement - OKR's
- Organizational Engagement - Teams
- Key Result Tags & Clusters
- Objective Categories
- HR Management
- Agenda templates
- Check-in cycles

# Agenda Templates

+ New Template

- Published
- Draft
- Archived

Name	Created By	Modified	Active Check-ins	Actions
Performance Discussion	Barry Bosser	Sep 30, 2024 by You	---	
Coaching conversations	You	Sep 27, 2024 by You	● Active	

Rows per page: 25 1-2 of 2

# Peak Performance with WorkBoard-IE

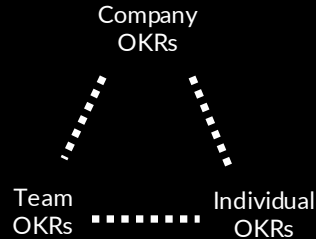
## ALIGN efforts

- Long range strategy
- Team OKRs assisted by AI
- Orchestrate actions
- Manage x-org dependencies and risks

## DRIVE progress

- Executive briefs from AI
- Automated status reports
- Scorecards, MBRs & QBRs
- Heatmaps of KR and KPIs

## PERFORMANCE FOUNDATION



## ELEVATE contribution

- AI “Coach on Call” for managers
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## ASSESS performance

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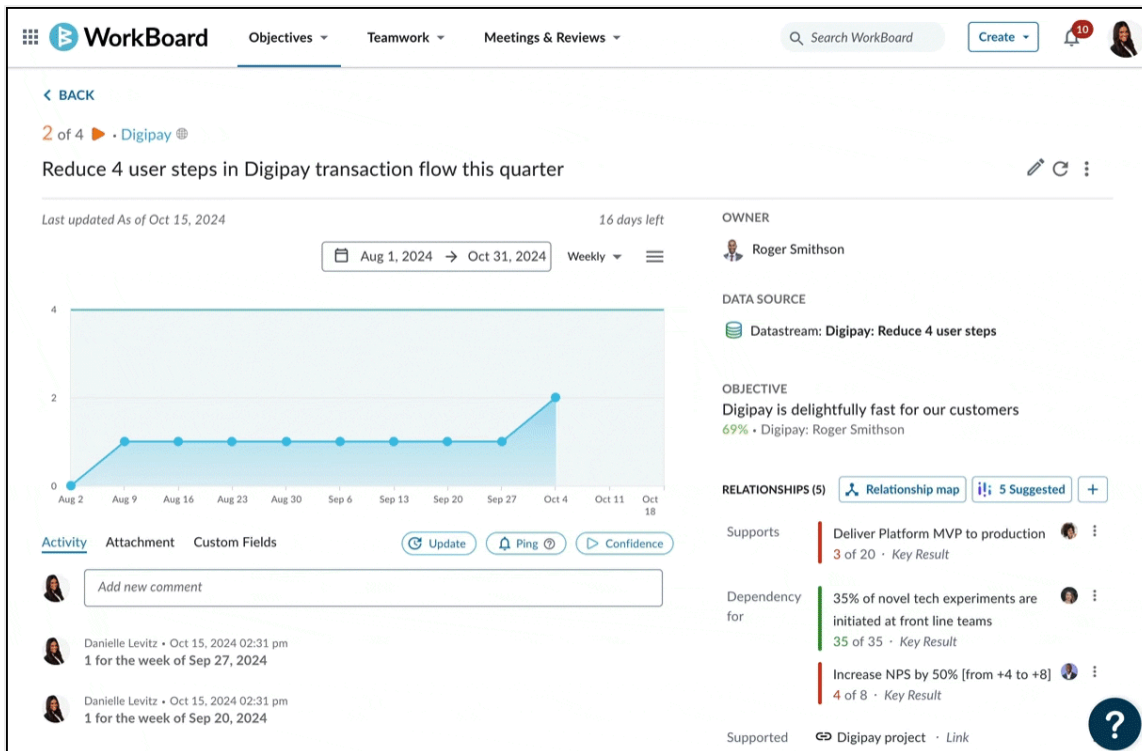
# Key Result Confidence Flags

# Communicate key result confidence more easily

Confidence flags and narratives are a great way to communicate the likeliness of achievement for an individual key result.

- Confidence flags will now be incorporated directly into the regular key result update table
- Easily include both a value and a confidence rating with each scheduled update
- Give teams regular insights into which results are on and off track

**Available Nov 12**

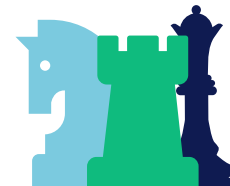


# Join the Conversation





# Upcoming Courses



Class	Description	Dates	How to Sign Up
<b>OKR Coach Certification</b>	Become a certified OKR coach	<ul style="list-style-type: none"><li>• Nov 11/13 at 9am CET</li><li>• Nov 19/21 at 10am 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>• Dec 3-4 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 January 14, 2025!</li></ul>	<a href="https://workboard.com/rme-certification">workboard.com/rme-certification</a>

# Community Call: Save the Date!

**Our next Community Call is  
Wednesday, December 11.**

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



**What are You  
Curious About?**



# Thank you

See you next time!

