

# Community Call

December 2024



# Agenda

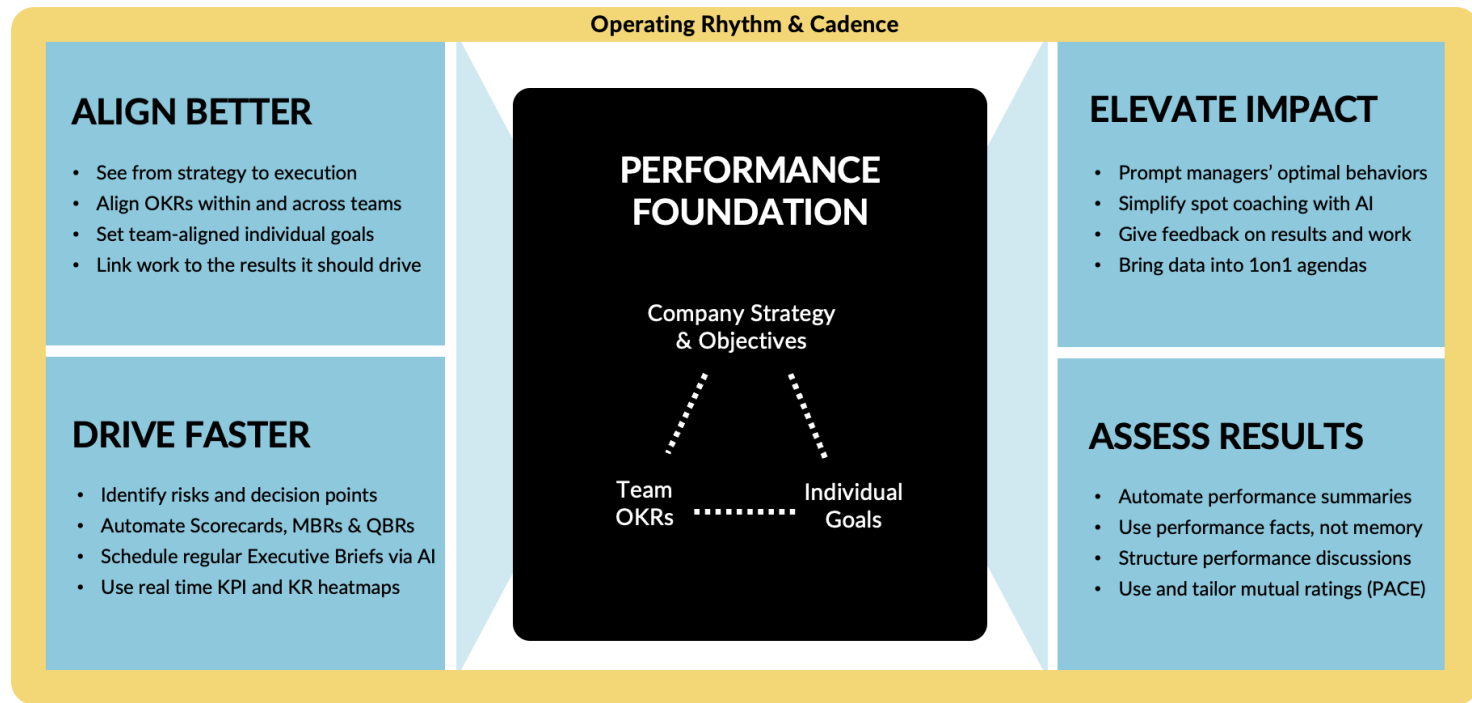
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- Driving peak performance today
- More product enhancements available now
- Sneak peek: New capabilities coming early next year

# Driving Peak Performance Today



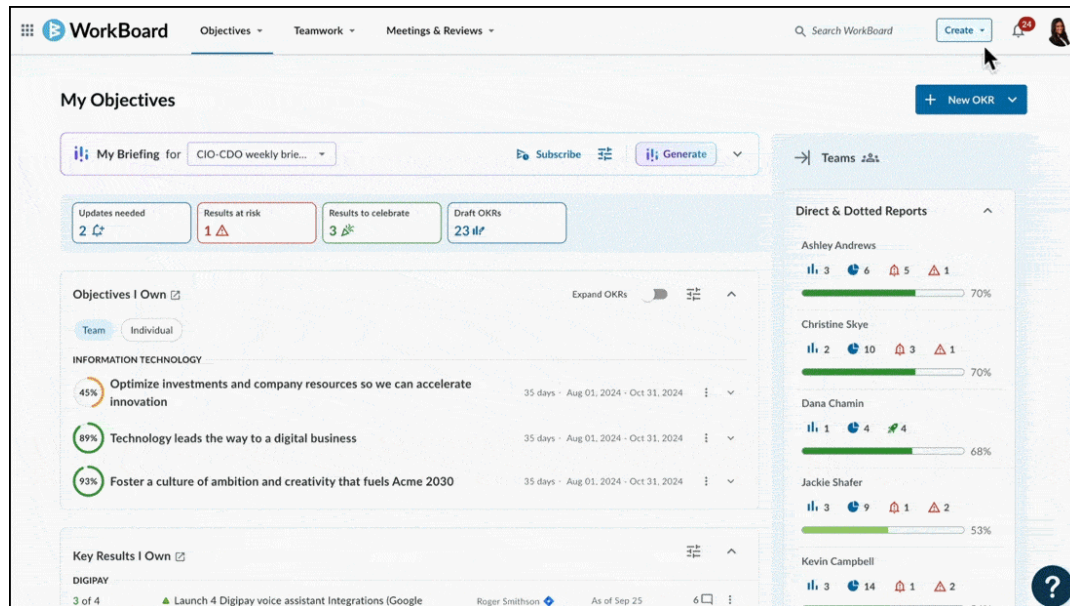
## The foundation and power to achieve peak performance



# Create Team OKRs from a Doc

Quickly align your team's efforts to the organization's strategic priorities by asking Co-Author to **draft OKRs based on existing strategy slide decks or documents**

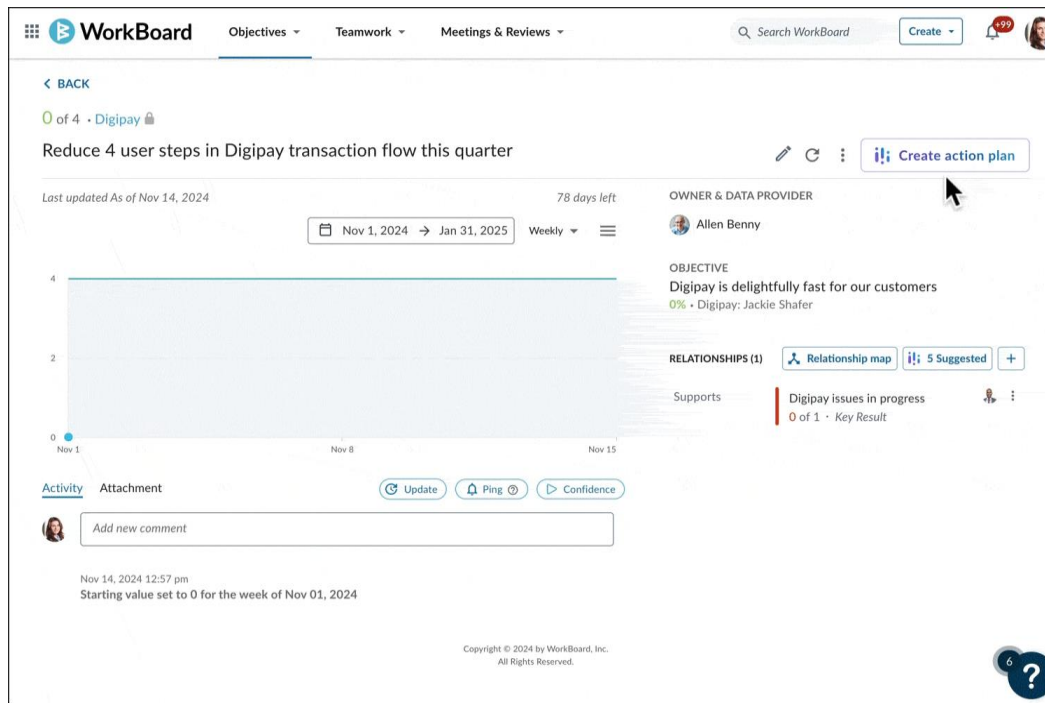
- ✓ Co-Author can use the text from any PDF or .doc file as a basis for drafting your team OKRs
- ✓ Provide guidance such as "Focus on the digital transformation initiative" or "Include a cost savings objective."
- ✓ Easily edit the drafted objectives or key results, or ask Co-Author to help refine your results (ex. making them leading, lagging, more inspiring etc.)



# Accelerate the Path to Great Execution with Action Plans

Use the power of GenAI to **instantly draft an action plan** to achieve a key result, so you can focus on driving great progress.

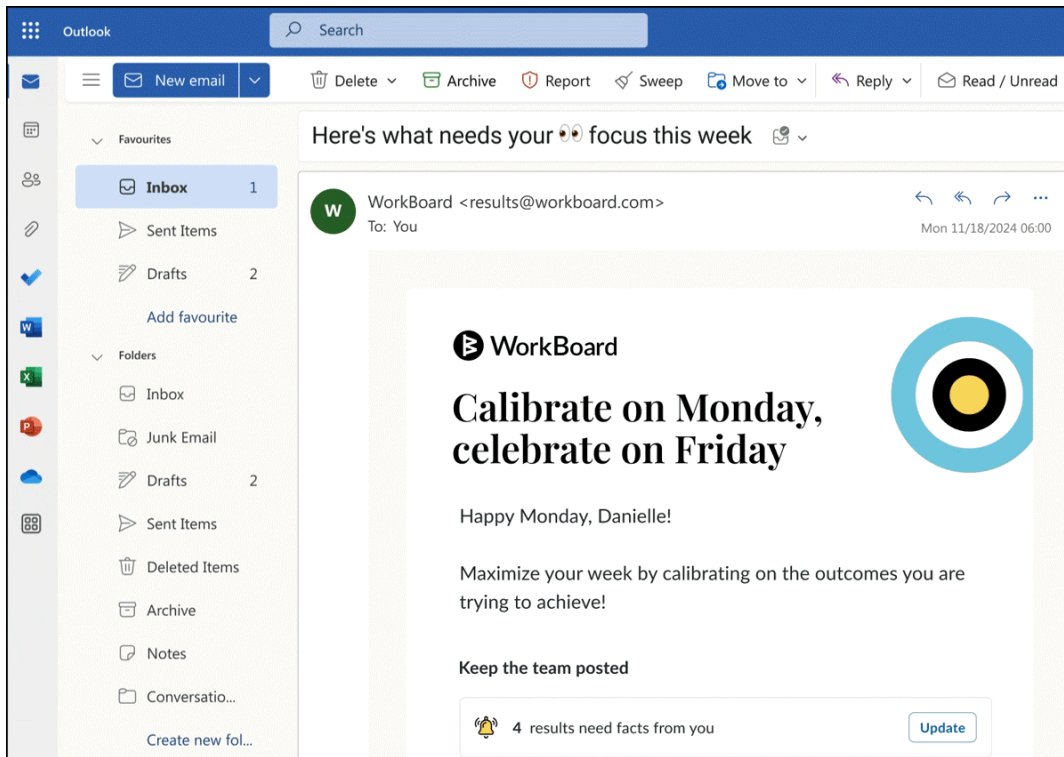
- ✓ Easily adjust the language of the drafted plan, assign owners, change due dates, and add or remove deliverables
- ✓ Publish the plan to an existing team workstream or create a new one right from the action plan draft.
- ✓ The plan workstream is automatically added as a relationship to the key result.



# Calibrate on Monday with a GenAI Briefing

If you manage or co-manage a team, **calibrate on OKRs every Monday morning with an AI generated brief** highlighting the team's latest accomplishments, as well as areas that need attention, right in your inbox.

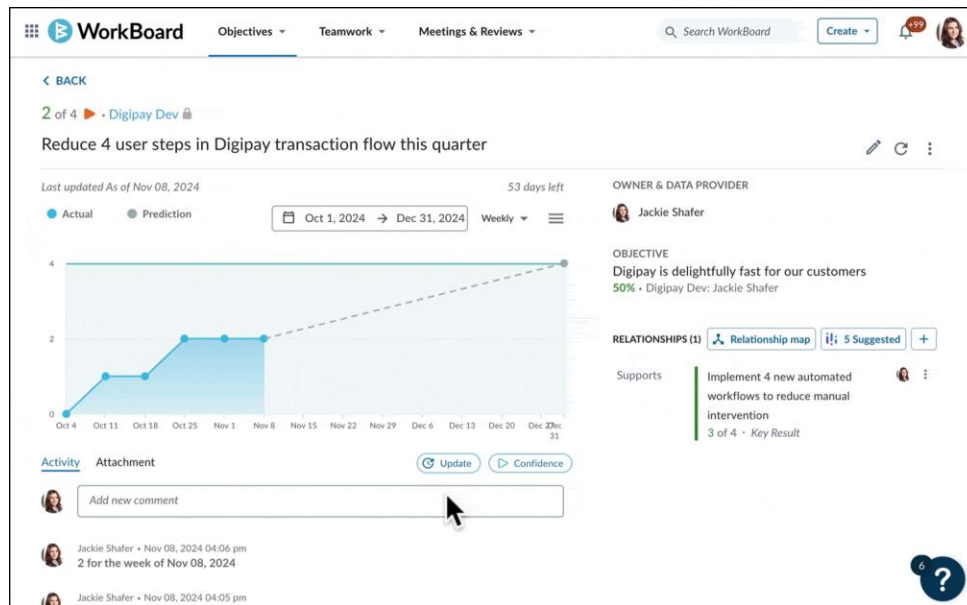
*Coming soon:* Get your Monday morning GenAI briefing delivered to Slack or Microsoft Teams!



# Update Confidence Ratings and Key Result Data in a Single View

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

Confidence flags are now **incorporated directly into the regular KR update table**, helping everyone share more easily and frequently provide a leading signal of anticipated risk or success.

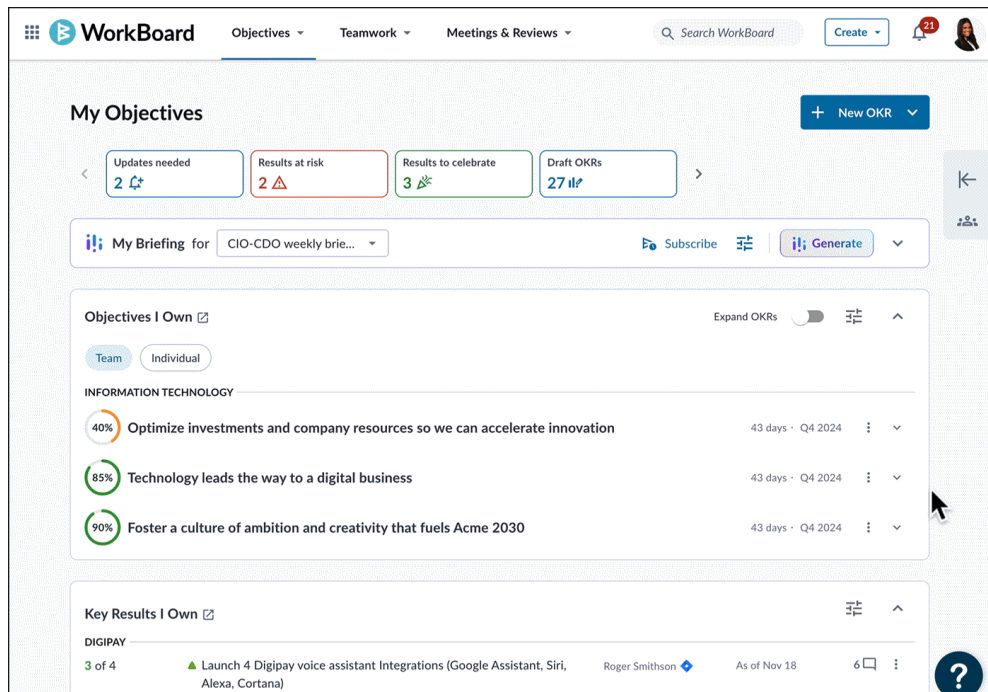




# Celebrate Great Work with Feedback

Easily give or request feedback on specific objectives, key results or actions, or just send spur-of-the-moment kudos!

- Ask WorkBoard AI for help in striking the right tone – more fun, more professional, or more constructive.
- See all the feedback you've given, received or requested in one place.



# Sync Personal Objectives to Workday Goals and Milestones

- ✓ **When you set individual goals in WorkBoard, it automatically creates corresponding Workday Goals & Milestones nightly,** matching names, due dates, and progress statuses.
- ✓ **Changes to WorkBoard Objectives and Key Results are pushed as needed to a Workday Goal and its Milestones,** maintaining alignment between the platforms.
- ✓ **Each WorkBoard-managed Goal in Workday includes a “Managed by WorkBoard” link** for easy navigation back to the original OKR in WorkBoard.

The screenshot displays the WorkBoard interface for 'Roger Smithson's OKRs'. The top navigation bar includes the WorkBoard logo and tabs for 'Objectives', 'Teamwork', and 'Meetings & Reviews'. Below the navigation bar, the breadcrumb trail shows 'My Objectives / Roger Smithson's OKRs'. The main heading is 'Roger Smithson's OKRs', followed by a summary: '3 Objectives, 16 Key Results | Filtered by Open OKRs X'. The 'Objectives' section is divided into three categories: 'DIGIPAY' (64%), 'Onboarding is easier than associates' favorite consumer app' (80%), and 'INDIVIDUAL' (47%). Each objective is represented by a circular progress indicator and a description.

Category	Progress	Description
DIGIPAY	64%	Digipay is delightfully fast for our customers
Onboarding	80%	Onboarding is easier than associates' favorite consumer app
INDIVIDUAL	47%	Develop my strengths and skills as an engineering leader

# Elevate Performance with Scheduled Check-Ins

Check-ins are a structured way to align team members and managers, fostering impactful coaching conversations and performance reviews within WorkBoard.

- ✓ Enable HR to facilitate templated performance conversations that include OKR progress on the agenda.
- ✓ Structure agendas for specific business units, organizational levels, or the entire organization.
- ✓ Managers can access guidance on how to frame feedback and an Impact Summary for easier meeting prep.

The screenshot shows the 'Agenda template' modal in the WorkBoard application. The modal is titled 'Agenda template' and has a close button (X) in the top right corner. It contains the following fields and options:

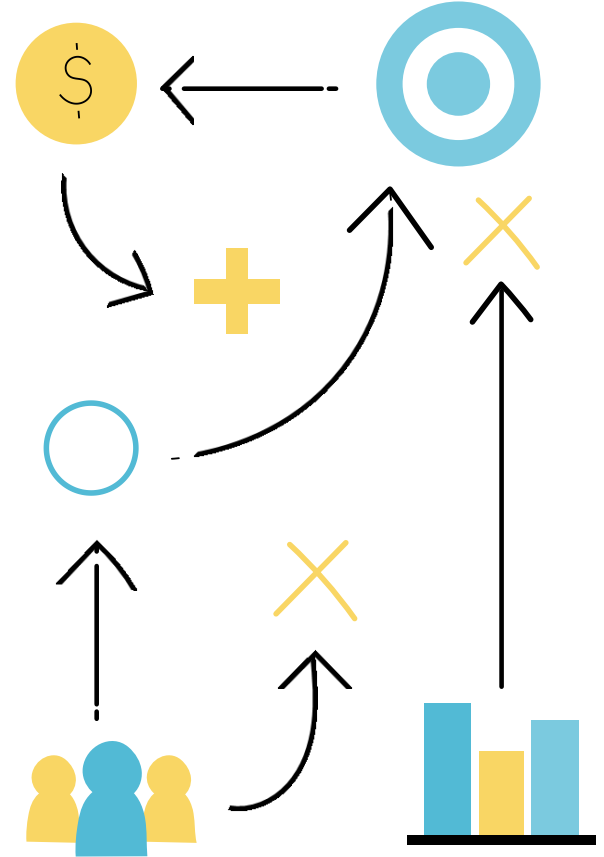
- Template Name \***: A text input field with the value 'Coaching Conversations'.
- Description (optional)**: A text input field.
- Include WorkBoard elements**: A section with four checkboxes:
  - ☐ Participant's Team OKRs
  - ☒ Participant's personal OKRs
  - ☒ Participant's KR's on Team OKRs
  - ☒ Participant's PACE ratings
- Discussion topics**: A section with a list of topics, each with a trash icon to its right:
  - Add a topic**: A link to add a new topic.
  - Team Member:**
    - What are you most proud of, or excited about?
    - What areas do you want to improve or grow?
    - Where do you need more support?
  - Manager:**
    - Highlight areas of success.
    - Make suggestions for growth and identify areas that must improve.
    - Discuss opportunities to collaborate with peers and across teams
  - Team Member and Manager:** Complete PACE and discuss gaps if any.

At the bottom of the modal, there are three buttons: 'Schedule Check-ins', 'Cancel', and 'Save'.

**More enhancements  
available today**



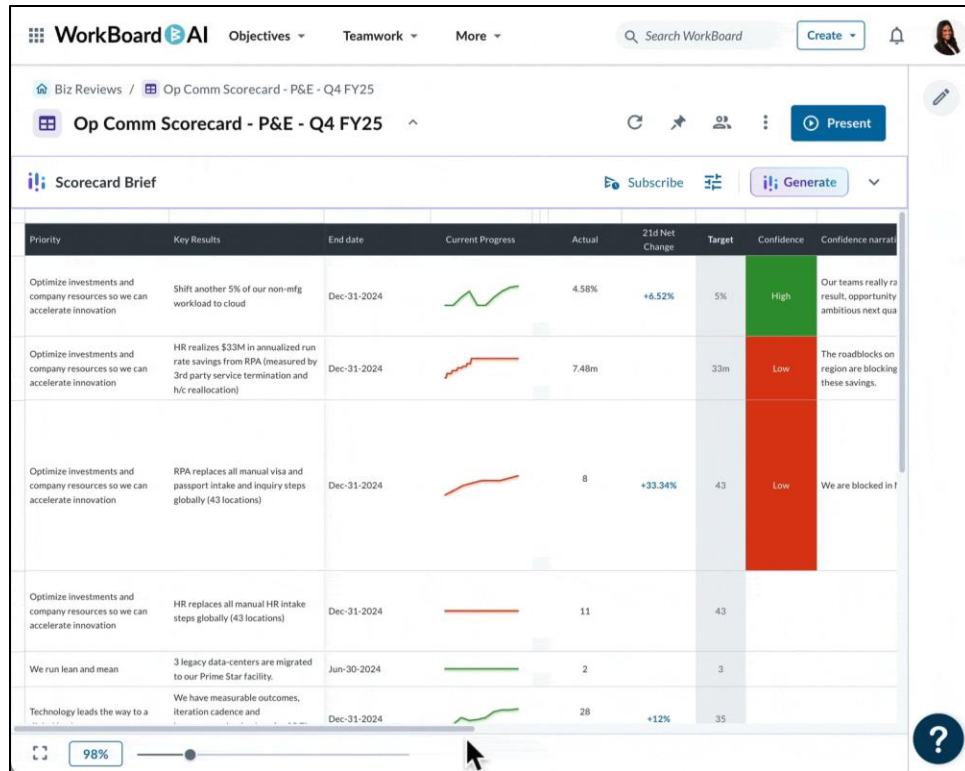
# Scorecards



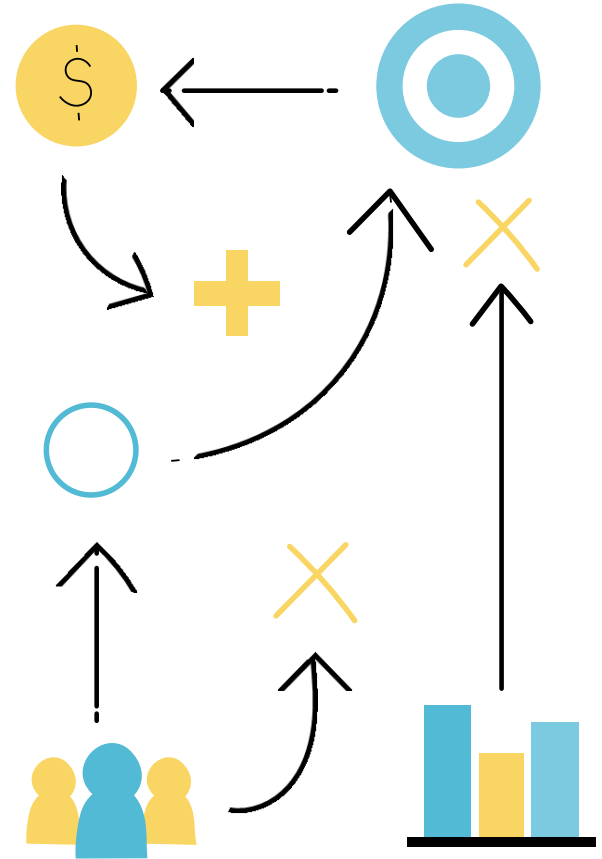
# Publish Scorecards to PDF

Easily publish your scorecard to PDF – the handy preview makes it easy to **adjust the scale, page layout, and paper size** to best fit your scorecard.

*Coming soon:* Publish your scorecard to Powerpoint!



# People Analytics



## Team Objectives

Available now

Leader

Hewie Jack

Team Name

All

Time Period

All

27

Teams with OKRs

79

Total Objectives

311

Total KRs

61%

Average KR Progress

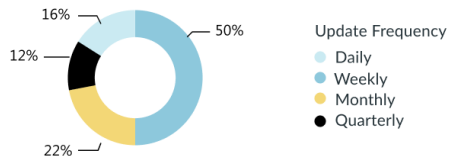
38%

Aligned Objectives

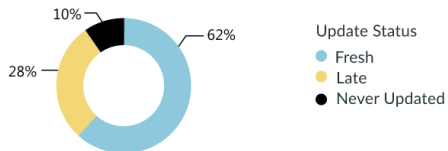
62%

Unaligned Objectives

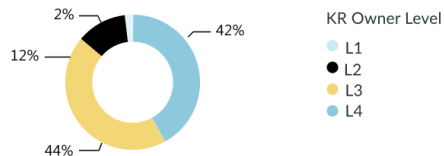
Intended Focus



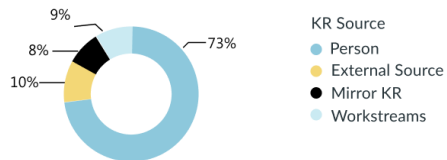
Actual Focus



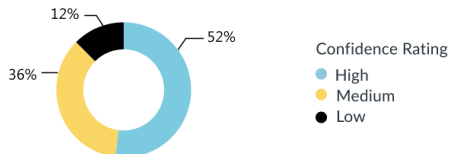
Accountability – Results ownership by level



KRs by Source



KR Confidence Rating



Committed vs Aspirational KRs



Teams with OKRs





Individual Objectives

Available now

Leader

Hewie Jack

Team Name

All

Time Period

2H 2024 (Q3 - Q4)

244

People with Individual Objectives

37

People without Individual Objectives

482

Total Individual Objectives

23%

Average Progress

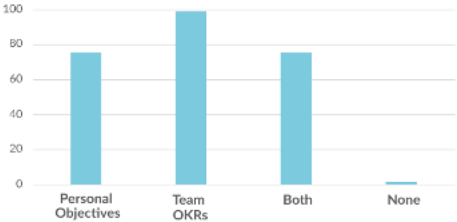
1.7

Measured Results/Person

776

Total Measured Results

People with Performance Clarity



Employee	Manager	Individual Objectives	Individual KR's	Team Objectives	Team KR's	Progress
Hewie Jack		2	5	3	5	45%
Manny Admina	Hewie Jack			2	6	
Barry Tiller	Hewie Jack	1	2	2	4	33%
Lily Lovegood				1	5	
Alice Peoples	Barry Bosser	1	2	2	5	22%
Jackie Shafer		2	4	2	5	56%
Amanda Dinero	Jackie Shafer			2	4	
Rachel Palmera	Rachel Palmera	1	1	2	5	22%
Suzy Sandstorm		1	1	1	3	33%
Keshia Newman	Keshia Newman			2	5	
Joe Smarts		1	2	2	4	24%
Michael North		1	2	2	5	9%
Maria Cmoso	Maria Cmoso			2	3	
Bob Cross		1	1	2	5	10%
Aubrey Auggers	Bob Cross			1	4	
Danielle Levitz	Hewie Jack	1	1	2	4	2%
Manny Admina	Bob Cross	1	2	1	5	0%

**Sneak Peek:  
Capabilities coming  
early next year**



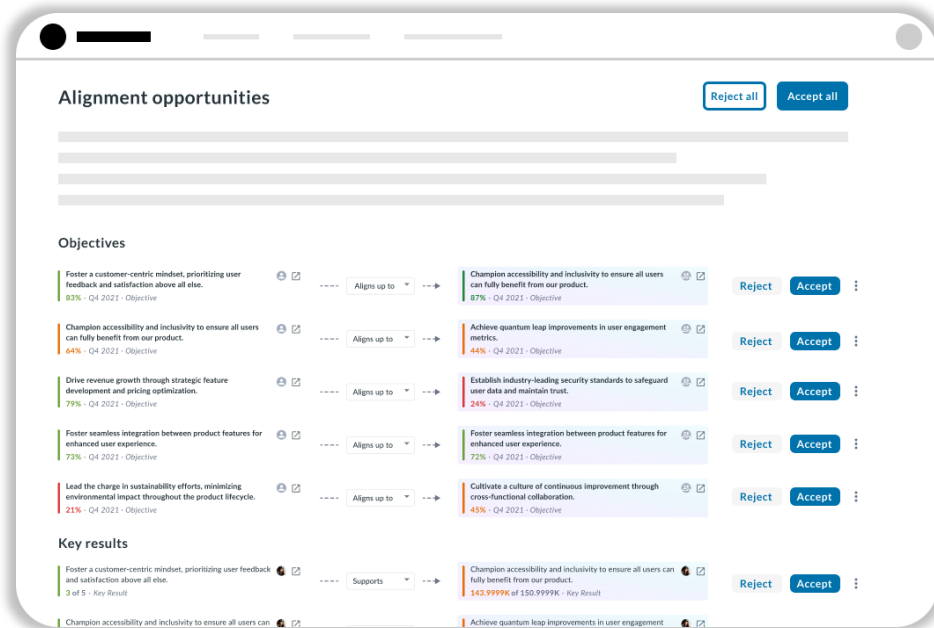
**ALIGN Better**



# AI-Agent facilitated Alignment Cycle

The AI Alignment Agent audits OKRs at an organizational level and identifies cross-team alignment and collaboration on outcomes.

- ✓ Triggered centrally informed by your OKR alignment cycle
- ✓ Surfaces actionable alignment opportunities per team
- ✓ Easy button to accept or reject suggestions, or to help teams connect for conversation



# Bulk Key Result Status Nudge

Easily nudge teams to take action on late results with a single, streamlined tool.

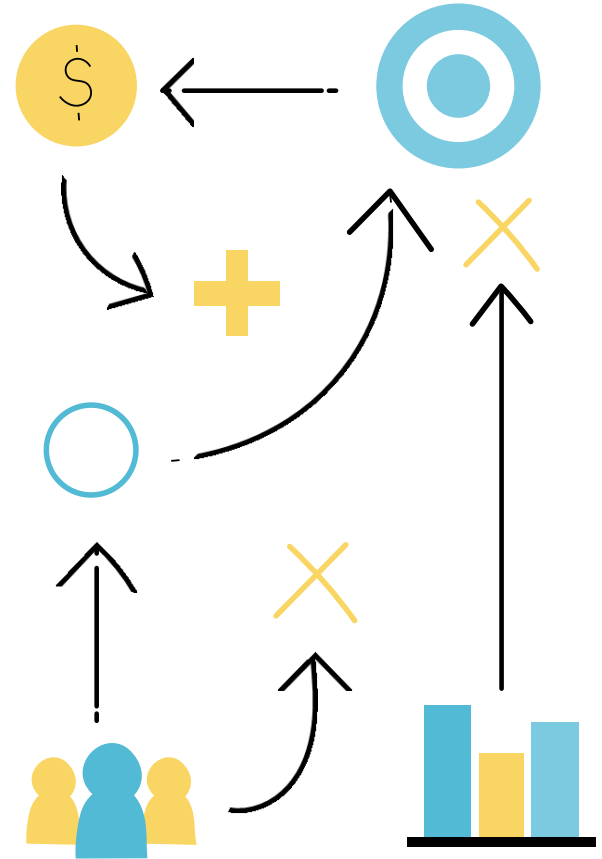
- ✓ Triggered centrally across the organization or target subgroups within your org
- ✓ Customize the messages to drive clarity and urgency; reminders are sent at the click of a button

The screenshot shows the 'Mass Ping notification' interface in the WorkBoard application. The top navigation bar includes 'WorkBoard AI', 'Objectives', 'Teamwork', and 'Meetings & Reviews'. A search bar and a 'Create' button are on the right. The left sidebar under 'Governance' lists 'Custom fields', 'Close out OKRs', 'Mass Ping' (highlighted), 'Organizational Engagement - OKRs', 'Organizational Engagement - Teams', 'Key Result tags & clusters', and 'Objective Categories'. The main content area is titled 'Mass Ping notification' and includes a description: 'Will send a ping message to all results owners whose Key results are past due using the criteria below'. It features three dropdown menus: 'Key result owners' (set to 'All teams in organization'), 'Key result type' (set to 'All'), and 'Key result data source' (set to 'Person'). A status line indicates 'Total number of teams receiving ping: 13'. Below this are fields for 'Subject Line' (containing the placeholder 'Updated requested for [KR name]') and 'Message' (containing the placeholder 'You have been pinged you for an Update. Your input is needed to keep things moving forward smoothly!'). At the bottom right are 'Cancel' and 'Send Ping' buttons.

**DRIVE Faster**

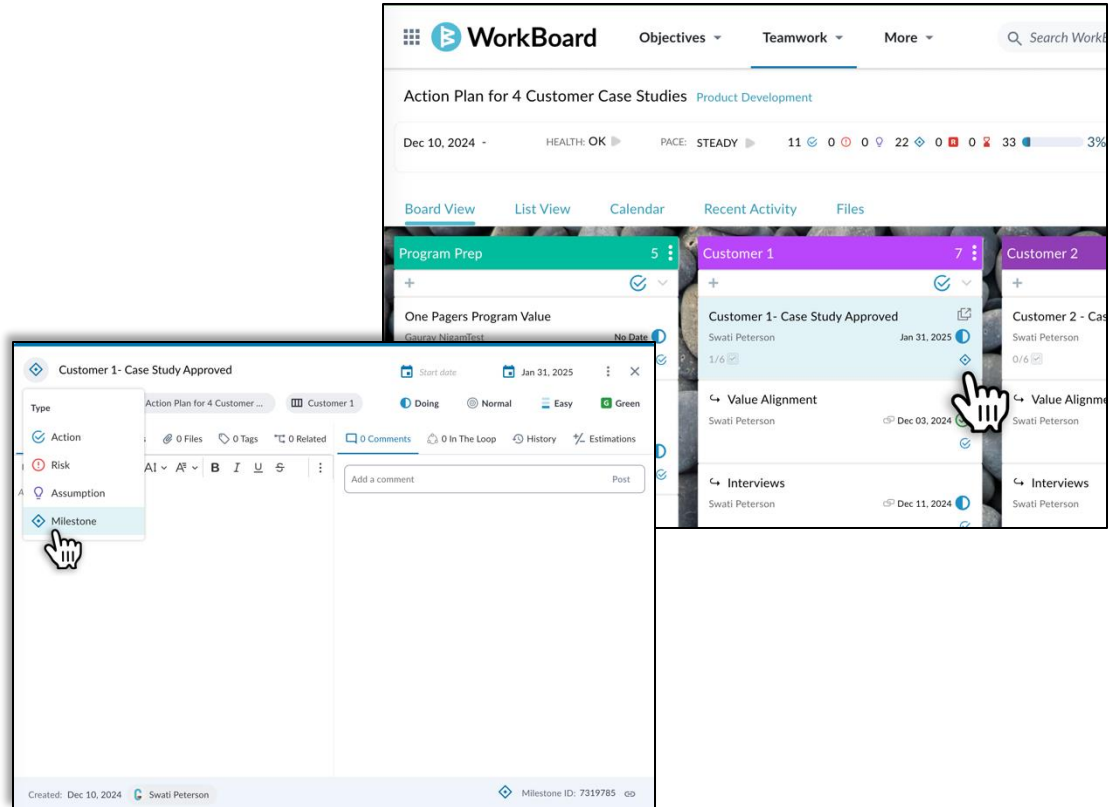


# Workstreams 2.0



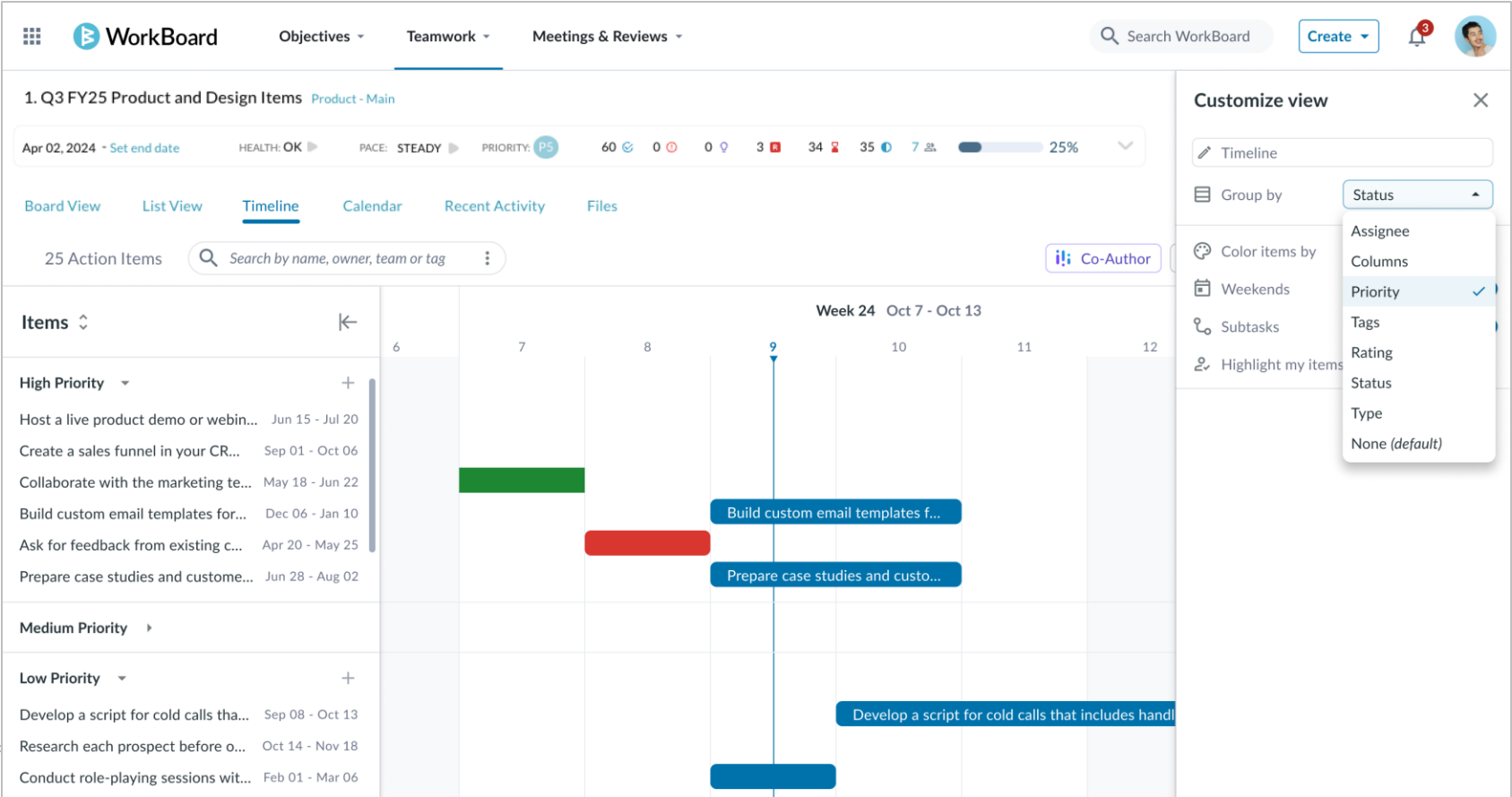
# Track Milestones in a Workstream

- ✓ Set due dates and track status, priority and risk levels for high-level milestones.
- ✓ Easily distinguish milestones from detailed actions on workstream views.





# Timeline Views of Workstreams



# **ELEVATE Impact**

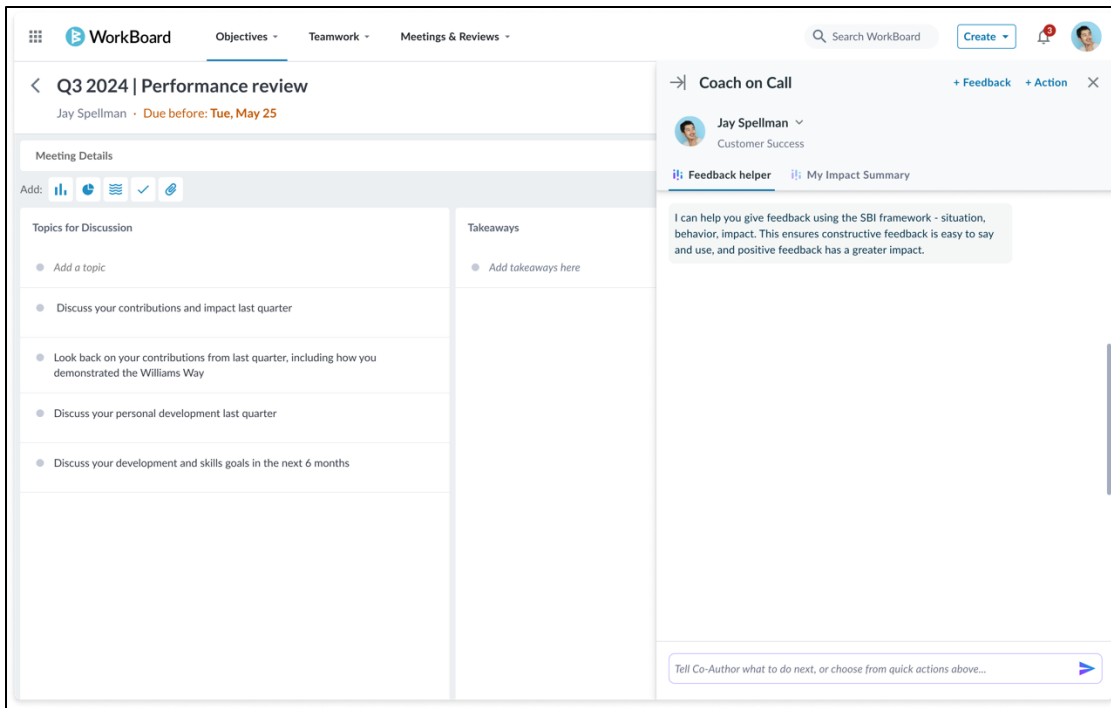
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# Impact Summary & SBI Feedback Helper for Individual Contributors

Managers can already use the Feedback Helper and Impact Summary to prepare for fact-based conversations and coaching with their direct reports.

Soon, **individual contributors** will be able to **generate their own impact summary** and **get help with framing feedback** for their colleagues, so they can:

- ✓ Become more skillful at delivering constructive feedback
- ✓ Quickly understand their own impact on team OKRs and initiatives
- ✓ Reduce prep time for reviews and performance conversations



**What are You  
Curious About?**



# Thank you

See you next year!

