Community Call

February 2025

Agenda

- **Introducing AI Agents**

- **Workstreams**

- **Scorecards**

- **OKRs**

- **Performance Conversations**

- **Monday Memos**

Introducing AI Agents

Give every manager the capacity and competency to operate at peak performance

Great managers:

✓ Create strategic clarity and accountability

✓ Have operational rigor

✓ Are prepared for every 1on1 and business review

✓ See risks as they arise

✓ Actively coach people to improve their contributions

✓ Operate transparently and cross functionally.

Yet many managers don't consistently demonstrate these behaviors for lack of time or skill.

82%
of managers are "accidental managers" with no training.

27%
of people think their manager is effective.

17%
of people director level and below know the strategy.

72%
of employees are motivated by team goals that tie to company strategy.

79%
of employees are demotivated by the lack of ongoing coaching.

34%
of employees believe their manager lacks the skills to give performance feedback.

WorkBoard ▶ AI
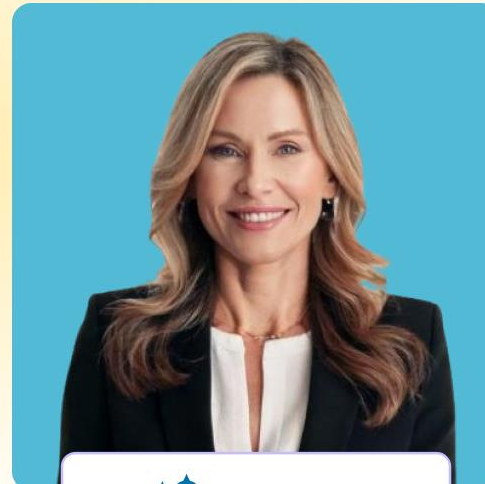
Meet your new digital team members

Hi, I'm John!
Digital Chief of Staff

Hello, I'm Sofia!
Digital Leadership Coach

Hire me

Hire me

Give every manager the power of a chief of staff and leadership coach

Help people leaders operate at their fullest potential and improve their strategic thinking, operational rigor, and coaching skills:

✓ Chief of staff agents assist managers in creating strategic clarity and operational accountability.

✓ Coach agents help managers identify where feedback is needed, and help them tackle hard conversations faster and better.

✓ Agent conversations are enriched with context on company strategy, team objectives, and team member responsibilities.

Meet John, Digital Chief of Staff

Digital chiefs of staff can help people leaders orchestrate their team operating rhythm and execute at their best by:

- ✓ Coordinating OKRs
- ✓ Creating scorecards
- ✓ Sending meeting pre-reads
- ✓ Updating them on progress
- ✓ Alerting them to risks as early as possible
- ✓ Adding risky KRs to meeting agendas

✦ **Identify risks and blockers**

John 10:19 PM

Get me status on Digipay launch

2 of 12 - Migrate 12 apps to the cloud - *Enterprise Infrastructure*

11% of 20% - Shift another 20% of our non-mfg workload to the cloud - *Information Technology*

Would you like me to create a relationship between those 2 results?

✦ **Identify cross functional alignment opportunities**

John 8:00 AM

I've identified potentially related items for **Launch 4 Digipay voice assistant Integrations (Google Assistant, Siri, Alexa, Cortana)**

- **Chatbot 3.1 users stories are ready for launch** *Key Result*
- **Digipay issues in progress** *Workstream*

✦ **Send pre reads ahead of meetings**

John 10:05 AM

Here is your pre-read for the 4pm meeting today

Suggested topics
1. **HR Process Automation:** Progressing slower than expected, with only 11/43 locations completed (25.6%). Flagged as high risk, requiring acceleration.
2. **Visa and Passport Automation:** Behind schedule, only 8/43 locations completed (18.6%).

[Send to the team] [Add to agenda]

✦ **Prepare a Monday memo with facts and focus start to the week**

John 8:00 AM

Hi Danielle, here is your **Monday Memo.** I also sent it to the IT leadership team.

Key Objectives:
- Increase Website Traffic: 85%
- Achieved a 15% growth in social media followers through engaging content and interactive posts.

Key Wins:
- Secured a high-profile partnership with ABC

✦ **Nudge people for facts so you don't have to**

John 2:34 PM

Would you like to send a mass ping notification to the Digipay team to update this stale key result?

75% of new logo ARR is customers in Tier 1 and Tier 2 segments

Total number of people receiving ping: 8

[Send Ping]

✦ **Create and distribute key initiative scorecards and briefings**

John 8:00 AM

Scorecard for the Digipay launch

Meet Sofia, Digital Leadership Coach

Digital leadership coaches can help managers perform at their best by:

- ✓ Helping them tune in to team sentiment

- ✓ Identifying who needs coaching and kudos

- ✓ Drafting 1on1 agendas and messages

- ✓ Helping to frame challenging feedback

Early access to AI Agents will begin in May.

✦ **Provide coaching and help set individual OKRs**

Sofia 8:00 AM
Your pre-read for the 1on1 with Roger today

Suggested topics:
1. **Digipay step reduction** is behind - 25%
2. **The chatbot handles 47.42% of inquiries** (50% goal) needs a final push.
3. Cortana integration for Digipay is at risk, unlikely to meet the 3-week timeline, impacting voice assistant goals.

Add to agenda

✦ **Highlight wins, suggest and send kudos**

Sofia 2:34 PM
🎉 Happy Friday! Let's celebrate the team's accomplishments this week! I suggest you send a badge to Alex:

🤘 Rockstar

Alex Johnson
Alex, your proactive leadership and precision in deploying the security patch made a big impact this week! Thank you – great work!

Send this   Refine

✦ **Prepare for performance conversation and check-ins**

Sofia 8:00 AM
I can help you give feedback using SBI framework – situation, behavior, impact.

What kind of feedback is it?

Constructive   Difficult

Workstreams

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.

Available now.
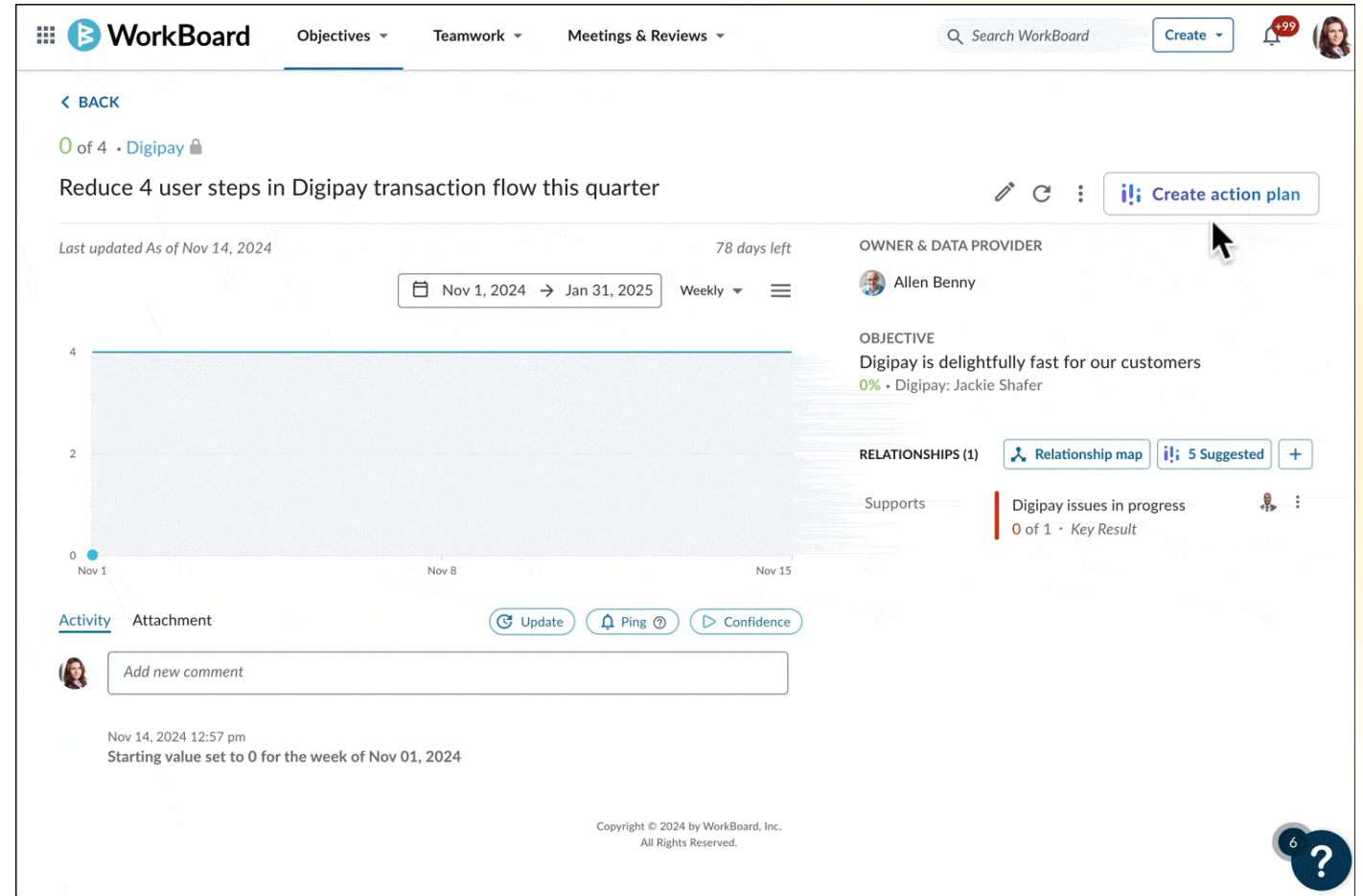
Easily visualize project timelines

The new Timeline view provides a **clear, visual way to track projects, and milestones** within and across workstreams.

✓ Each team and workstream now includes a dedicated Timeline tab.

✓ Organize, filter, or color-code displayed items by assignee, status, section, priority, and more.

✓ Zoom in or out to view the project at different time frames – across days, weeks, months, quarters or years.
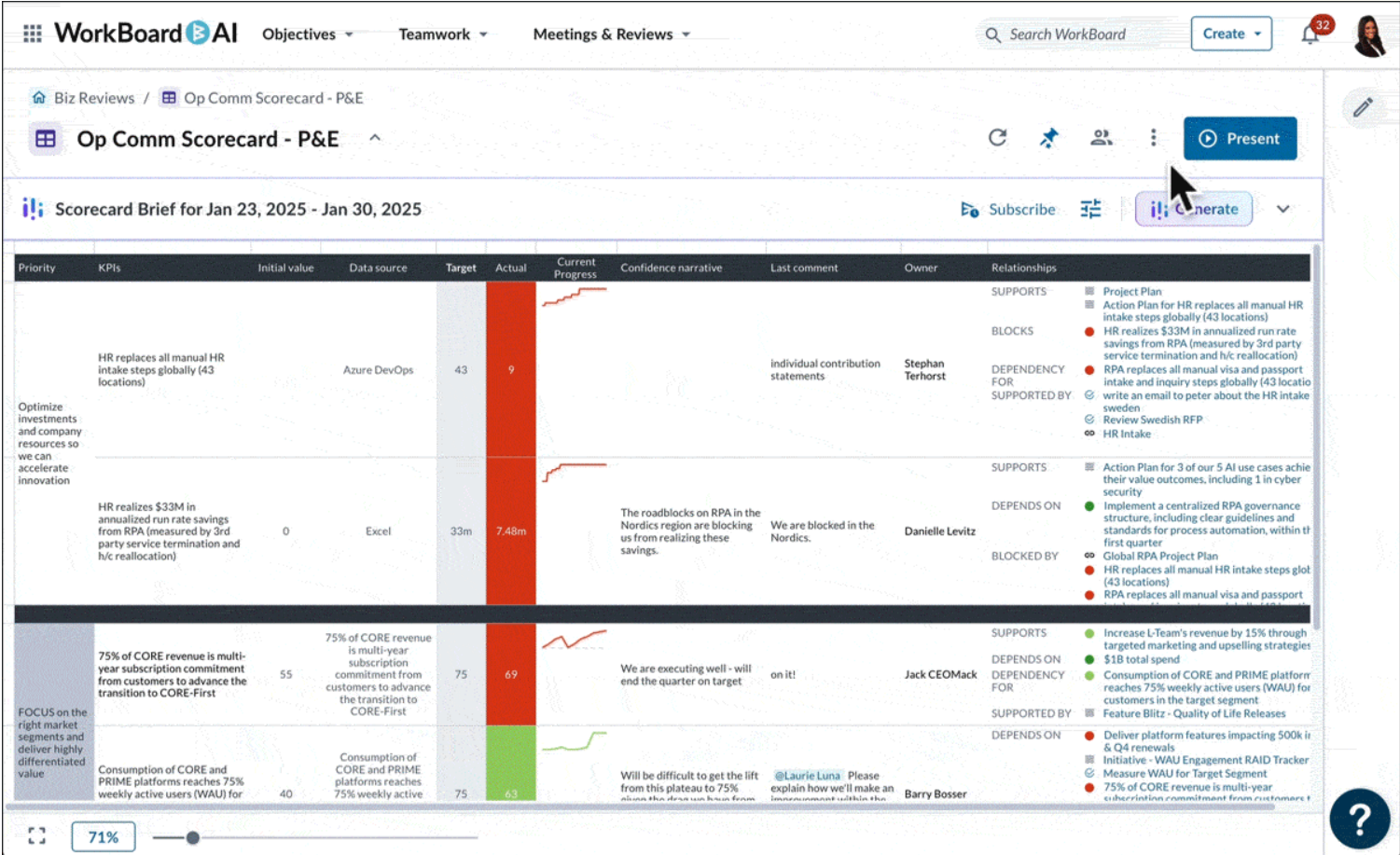
Available now
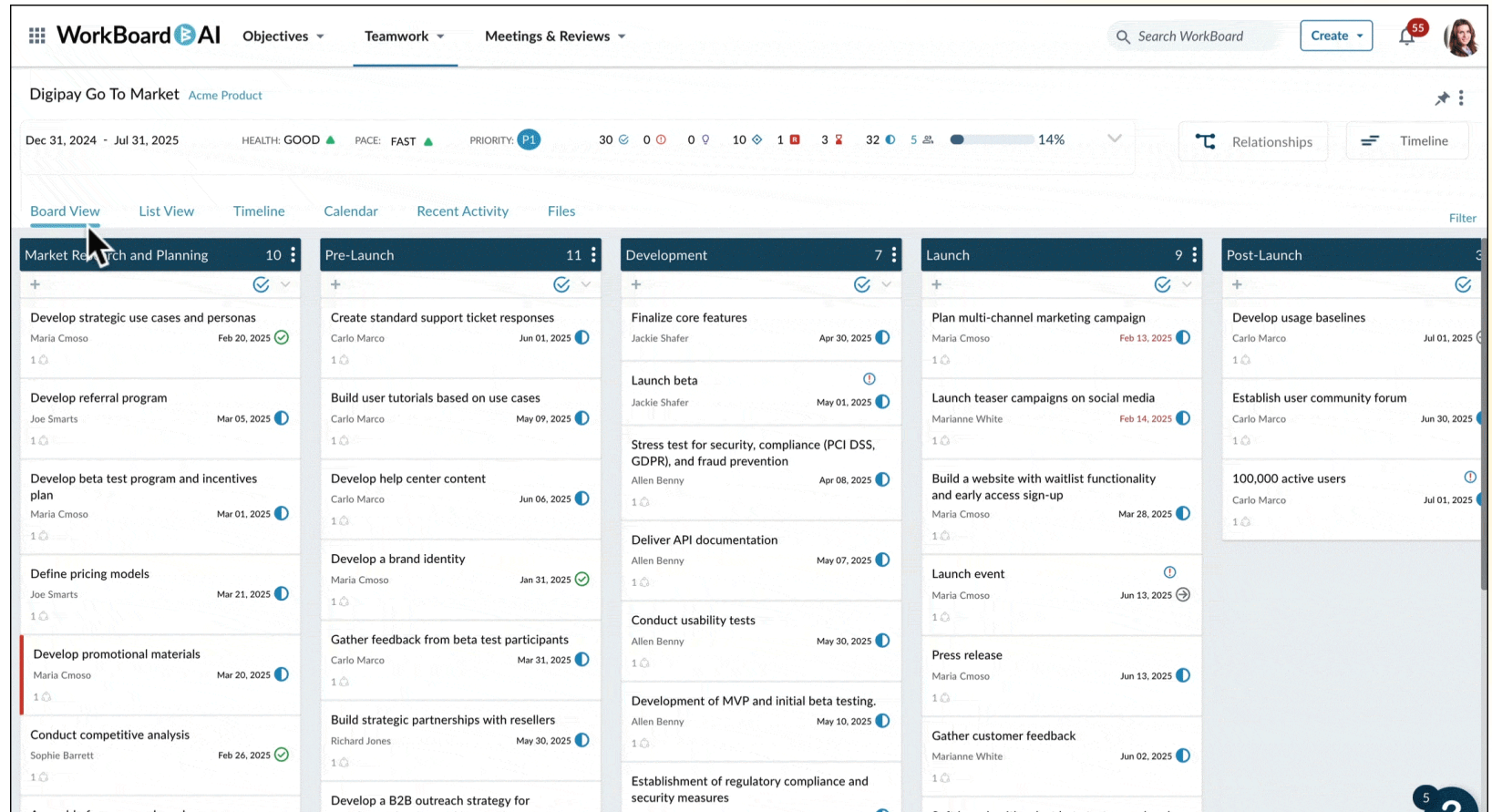
Scorecards

Publish scorecards to Powerpoint and PDF

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

Available now.

OKRs

Ping teams to update overdue results

Nudge multiple teams to take action on overdue key results with a single, streamlined tool.

✓ Pings are triggered centrally by WorkBoard admins.

✓ Target all teams across the organization, those reporting up to a specific leader, or individual teams.

✓ Customize the nudge message to drive clarity and urgency.

Available soon!

Performance Conversations

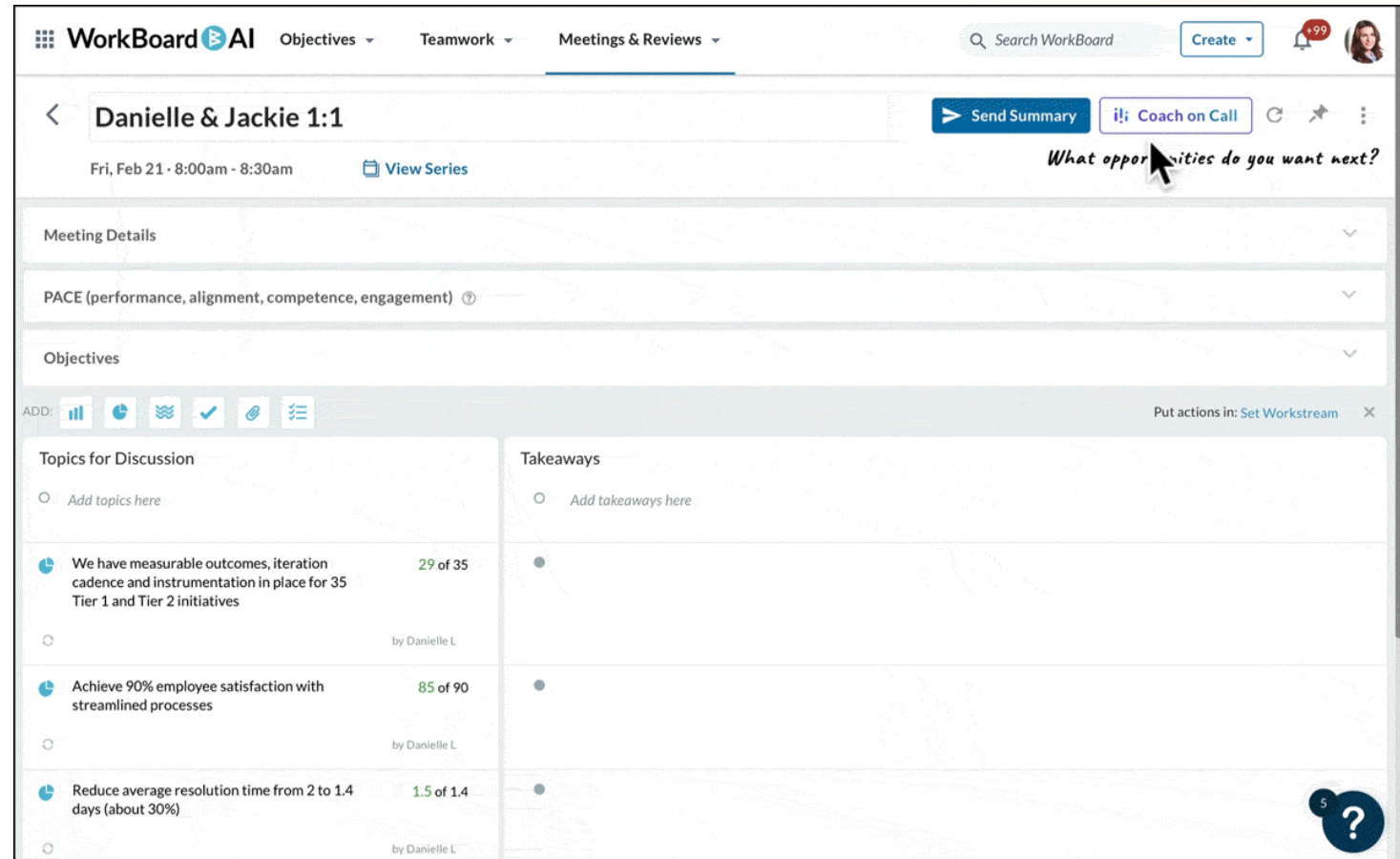# Have more impactful performance conversations

The **Manager's Lens** helps people managers prepare for 1on1s with:

- ✓ An instant summary of a team member's recent progress

- ✓ Suggestions on how to frame effective feedback

Now individual contributors can ask the Coach on Call to:

- ✓ Generate a summary of their own impact on OKRs and initiatives

- ✓ Provide guidance on having difficult conversations with managers or co-workers

Available now

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.

Available now

Sync WorkBoard check-ins to Workday

Ensure seamless record keeping by **syncing WorkBoard check-ins to Workday**:

✓ HR admins can sync check-ins with one click after the scheduled cycle is complete

✓ Check-in conversation records, including OKRs, PACE ratings, topics, and takeaways, are uploaded as a PDF to the employee's Workday profile
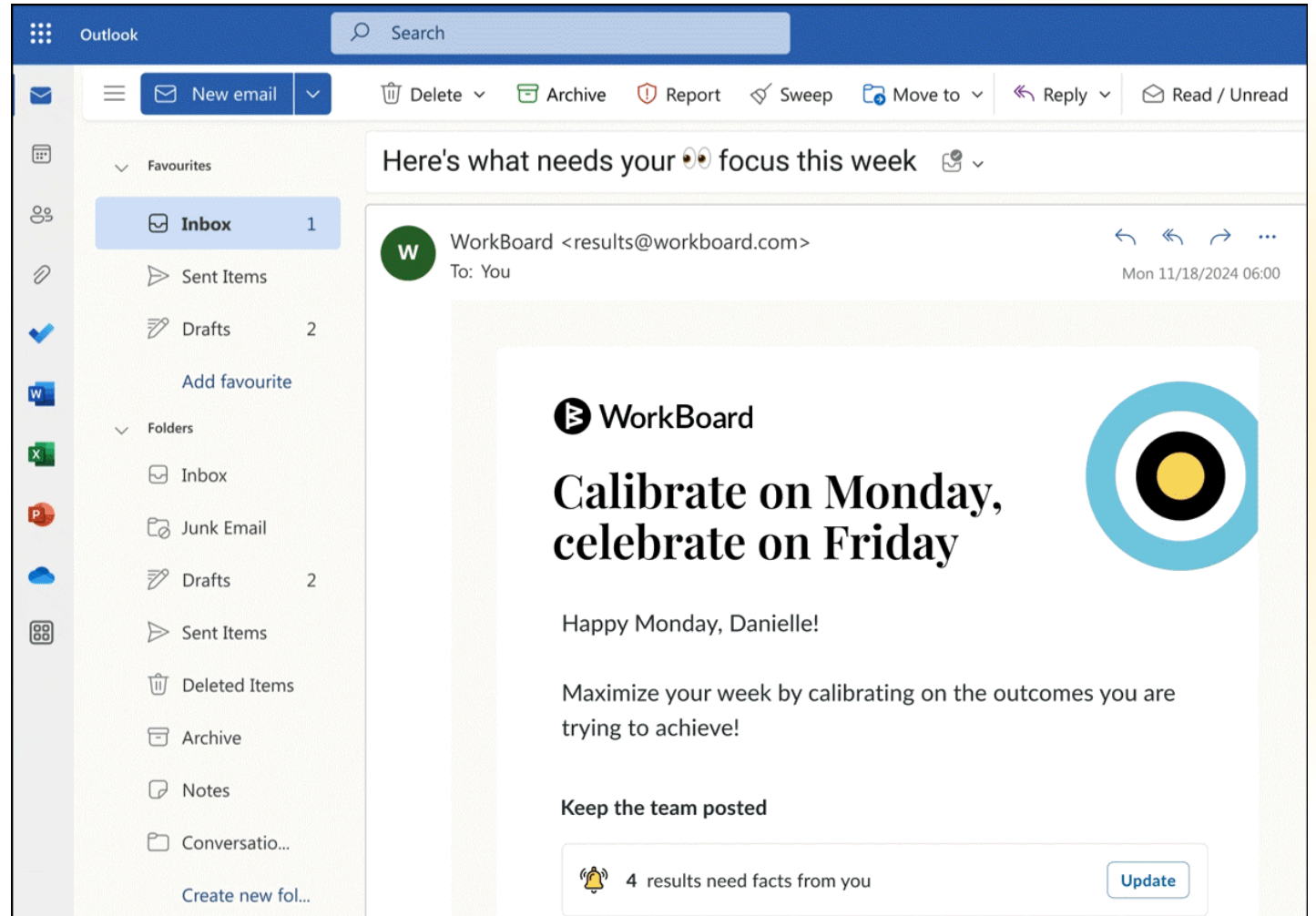
Available now
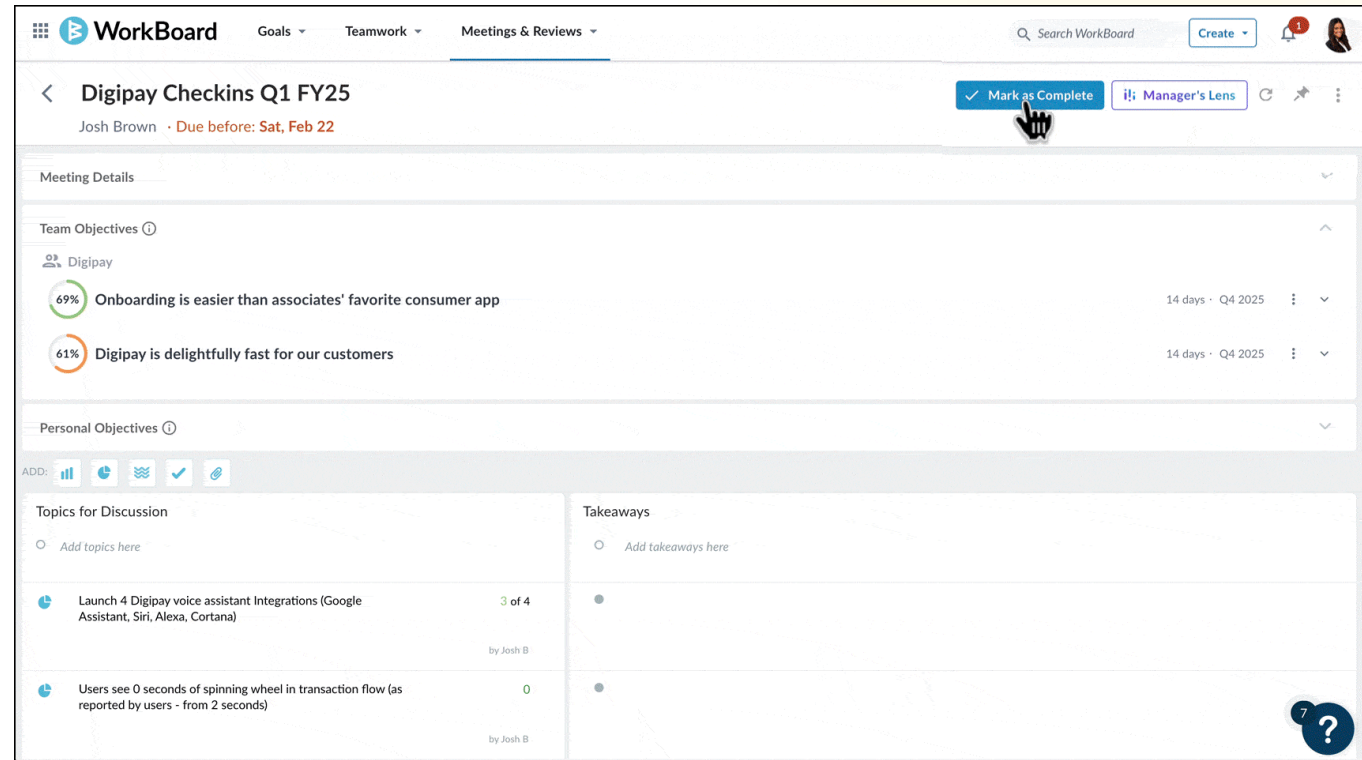
Monday Memos

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.

These Monday memos can now be delivered to **your inbox, Slack or Microsoft Teams**!

Available now

What are You Curious About?

Thank you!

WorkBoard