workboard

Welcome to the Workboard Community Call!

Topics Today

1. **Workboard news**

2. Latest release

3. Looking ahead: March and April

New Chief Customer Officer

Genia leads Workboard's customer, professional and technical services as well as growth operations

Excellent strategy, leadership and CX background:
- VP Global Customer Success at Wrike
- Chief Operating Officer at Kidaptive
- Bain Case Leader

Genia Jacques
Chief Customer Officer

workboard

Director of Product Marketing

Huz will lead our go-to-market and partnership efforts including Microsoft, IBM and Detecon/Deutsche Telekom relationships

Former Director of Product Marketing and Business Development at Goodera, Cadence, and Sr Product Marketing Manager at Intel

Huzaifa Dalal

Director of Product Marketing

workboard

Customer Success Manager

Jocelyne will be customer success manager for a portfolio of Workboard customers, helping them maximize value and velocity

Global thinker and speaker, former Customer Success Manager at Talentoday and market specialist at UNUM

Jocelyne Mazariegos

Customer Success Manager

workboard

Topics Today

1. Workboard news

2. **Latest release**

3. Looking ahead: March and April

Assign Meeting Actions Faster
@DeveloperDan #nicesprint !02/27

Assign, set due dates and tag takeaways into workstreams more easily

Meeting: K2 Launch Strategy Session
Conference 27A

Feb 23 at 3:00pm

12:39
Count up

ADD: Objective   Key Result   Workstream   Action Item   Attachment

Topics for Discussion

Type to add a topic

Launch K2 to so our innovation leads the industry   **62%**
Product   : Leo Johnson   *by Jack C*

100 validated opportunities for K2 in the pipeline   **68** of 100
                                                                      by Jack C

PR plan for K2 Launch   Feb 20
Personal Stream: Jack Ceomack
                                                                      by Jack C

Make a decision on the EMEA launch
Jack Ceomack   12:53 pm Feb 15

K2 Launch   Good   ▲ 63%
Mary Cmoso: Marketing   *by Jack C*

Takeaways and Notes

Type to add takeaways

March sales plan collateral and sales enablement tools
Jack Ceomack   01:52 pm Feb 15

Work with PR firm to draft press release !3/15 #K2 Launch# @E|

Suggested Assignees
Emma Smith
Jack Ceomack
Self
Paul Carter
Dede Mandrish

workboard

Workflow Automation

- Drive the right actions automatically and reduce administrative time

- Automate ownership and status transitions

- Script to author sophisticated automations

workboard

Design Thinking
Sandra Alvarez

Methodology

Design Thinking as a strategy for competitive advantage

Empathize · Define · Ideate · Prototype · Test

bias toward action · collaborate across boundries · focus on human values · be mindful of process · prototype toward a solution · show don't tell

In Detail

EMPATHIZE

"To create meaningful innovations, you need to know your users and care about their lives."

WHAT is the Empathize mode

Empathy is the centerpiece of a human-centered design process. The Empathize mode is the work you do to understand people, within the context of your design challenge. It is your effort to understand the way they do things and why, their physical and emotional needs, how they think about world, and what is meaningful to them.

WHY empathize

As a design thinker, the problems you are trying to solve are rarely your own—they are those of a particular group of people; in order to design for them, you must gain empathy for who they are and what is important to them.
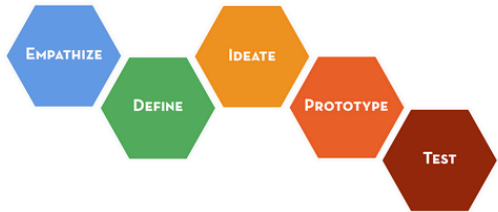
Observing what people do and how they interact with their environment gives you clues about what they think and feel. It also helps you learn about what they need. By watching people, you can capture physical manifestations of their experiences – what they do and say. This will allow you to infer the intangible meaning of those experiences in order to uncover insights. These insights give you direction to create innovative solutions. The best solutions come out of the best insights into human behavior. But learning to recognize those insights is harder than you might think. Why? Because our minds automatically filter out a lot of information without our even realizing it. We need to learn to see things "with a fresh set of eyes," and empathizing is what gives us those new eyes.

Engaging with people directly reveals a tremendous amount about the way they think and the values they hold. Sometimes these thoughts and values are not obvious to the people who hold them, and a good conversation can surprise both the designer and the subject by the unanticipated insights that are revealed. The stories that people tell and the things that people say they do—even if they are different from what they actually do—are strong indicators of their deeply held beliefs about the way the world is. Good designs are built on a solid understanding of these beliefs and values.

DEFINE

"Framing the right problem is the only way to create the right solution."

WHAT is the Define mode

The Define mode of the design process is all about bringing clarity and focus to the design space. It is your chance, and responsibility, as a design thinker to define the challenge you are taking on, based on what you have learned about your user and about the context. After becoming an instant-expert on the subject and gaining invaluable empathy for the person you are designing for, this stage is about making sense of the widespread information you have gathered.

The goal of the Define mode is to craft a meaningful and actionable problem statement - this is what we call a point-of-view. This should be a guiding statement that focuses on insights and needs of a particular user, or composite character. Insights don't often just jump in your lap; rather they emerge from a process of synthesizing information to discover connections

Tools

Empathy Map
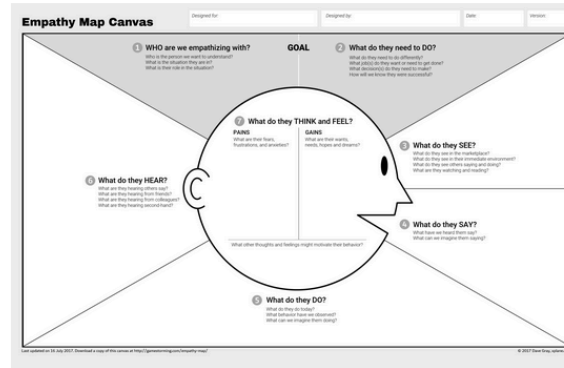
Customer Journey Map

Resource Sites

An Introduction to Design Thinking

We create positive impact through design
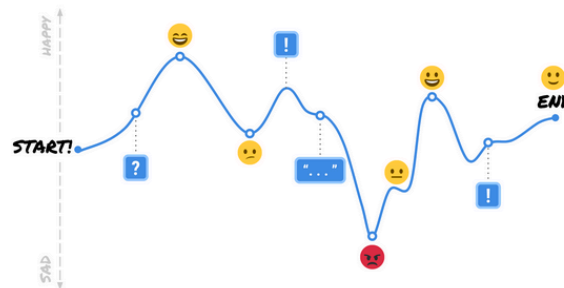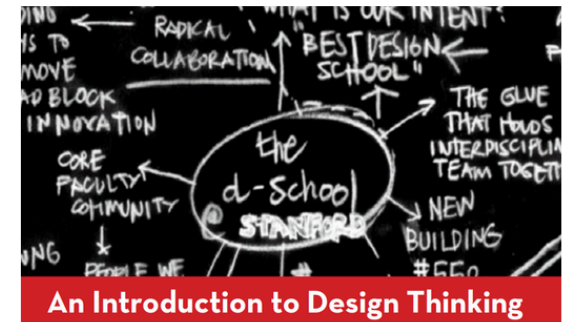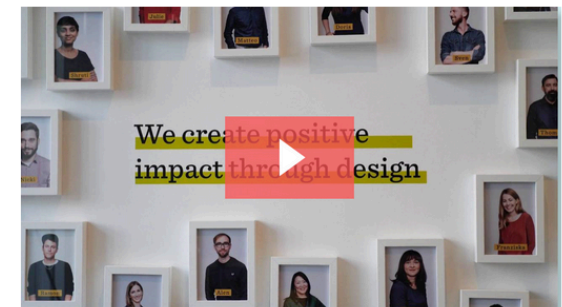
Get more value from WoBo in March!

1. Use RBRs to share a product or segment dashboard

2. Add charts to your Running Business Reviews

3. Automate a board for the team, starting with emailing in new items

4. Have data driven meetings: use a WoBo meeting, RBR or the Heatmap.

5. Bookmark your favorite streams, boards and RBRs

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Topics Today

1. Workboard news

2. Latest release

3. Looking ahead

March: Microsoft Teams integration

April: Major UI change

Microsoft Integrations

TEAMS

- Grab and update your objectives, results, workstreams, action items and meetings — all at the speed of chat. (*Late March*)

- Search for and include strategic objectives in Teams' conversations (*Late March*)

- Running Business Review on Microsoft Teams (*April*)

ONE DRIVE

- Link files on OneDrive to action items and project workstreams (*Late March*)

OUTLOOK

- Outlook Plug in to schedule Workboard Meetings from the Calendar (*April*)

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Favorites

Ray Tanaka		1:40 PM
Louisa will send the initial list of attendees		
Trello		1:43 PM
You have 2 cards due today		
Kayo Miwa		4/17
I reviewed with the client on Tuesday, she h...		
Will, Kayo, Eric, Jazmine, +2		12:00 PM
Kayo: It would be great to sync with you bo...		
KAYAK		1:20 PM
Sent a card		
Chris Naidoo		5/23
You: Thanks! Have a nice weekend		
Daichi Fukuda		6/4
No, I think there are other alternatives we c...		
Babak Shammas		10:08 AM
Is this a weird interaction?		
Kian Lambert		6/2
Have you ran this by Beth? Make sure she is...		
Charlotte de Crum		6/3
Let's set up a brainstorm session for tomor...		

Recent

Workboard		2:02 PM
Good news, you're in the green!		
Charlotte and Babak		1:58 PM
I asked the client to send the feedback by e...		
Krystal McKinney		1:55 PM
Yes!		
David Power		1:50 PM
Cool, look forward to the update		
Keiko Tanaka		Yesterday
You: That's cool!		
Jazmine Simmons		6/5
Nah, I would not worry about that.		
Cassandra Dunn		6/5

Workboard ☆

Conversation   Personal   Team   All   About   Help

Approve Summit branding

Have you met with 2 customers this quarter? 6 of 16
Executive team

Update result   KR History   Ping   Follow

3:14 PM
How am I doing on my objectives?

Workboard   2:02 PM
Good news, you're in the green!

77% - Drive demand and build the sales pipeline
Dec 31

44% - Make the K2 Launch the most successful in our history
Dec 31

62% - Build customer relationships and advocacy to support our market strategy
Dec 31

Share   Edit   Update

Send a message

Activity
Chat
Teams
Meetings
Calls
Files
Feedback
Get apps

Teams

Northwind Traders

General
Product
Design
Engineering
Finance
Sales
32 more channels

Tailspin Toys

Account Team

General
Accounting
Finance
FY2017 Planning
Strategy
6 more channels

Northwind Traders › **Engineering**

Conversations   Files   OneNote   Team Goals

those options with the client before and she believes those are too costly for the brand. If we don't acknowledge those concerns, she may lose confidence in our recommendations.

Reply

Babak Shammas   9:25 AM

Daniela Daichi mentioned that the client had some changes to our design for the July promotional splash page. Could you make those edits before our Wednesday client sync?

5 replies from Franz, Giselle, and Inna

Kadji Bell   9:18 AM

I thought the client wanted to include a section about the buy one get one offer as well? Originally it was slated for August but she mentioned she got the budget approved for July.

Reply

Daniela Mandera   9:25 AM

B **Workboard**

Goals:	Launch New Mobile App
Description:	Android based HRIS mobile app that will empower our employees.
Progress:	38% Complete
Owner:	Chris Hansley
Category:	Business Objective
Due Date:	11/04/2017

View

Chris, any update on this?

Reply

Send a message

Activity
Chat
Teams
Meetings
Calls
Files
Feedback
Get apps

Create and join teams

‹ ›

| | 18 Sunday | ☁ | 19 Monday | ☀ | 20 Tuesday | 21 Wednesday | 22 Thursday | 23 Friday | 24 Saturday |

8a

9a

Invitation to K2 La
Blue Marine Room

10a

Wed 2/21/2018 1:00p - 2:00p ▱

Blue Diamond 3A

11a

1on1 with Maryan
Blue Marine Room
↻

Demand Generat

BTK Kickoff call

12p

SG **Sam Gartner**

Weekly progress

1p

BTK Kickoff call
Blue Diamond 3A

B Create a Workboard meeting

2p

3p

Big UX change coming in April – the fast path

workboard

BIZ REVIEW | MY WORK | BOARDS | OBJECTIVES | MEETINGS | TEAMS

Company Operations
Jack Ceomack

FAVORITES

Marketing

Funnel Optimization

Company Operations

Q1 Sales Pipeline

RECENTS

K2 Launch

July Release

Board Matters

Go to Market Strategy

New Website

PR & Analysts

⊕ New Biz Review

Major Account Revenue

■ Acme (KR1) ■ Mobilio (KR2)

2017 ⌄

300k

200k

100k

0

Jan   Feb   Mar   Apr   May   Jun

NA & EMEA Revenue

■ NoAm (KR1) ■ EMEA (KR2) ■ Global (KR3)

Dec 30, 2016 - Dec 29, 2017 ⌄

15M

10M

5M

0

Feb Mar Apr May Jun Jul Aug Sep Oct Nov
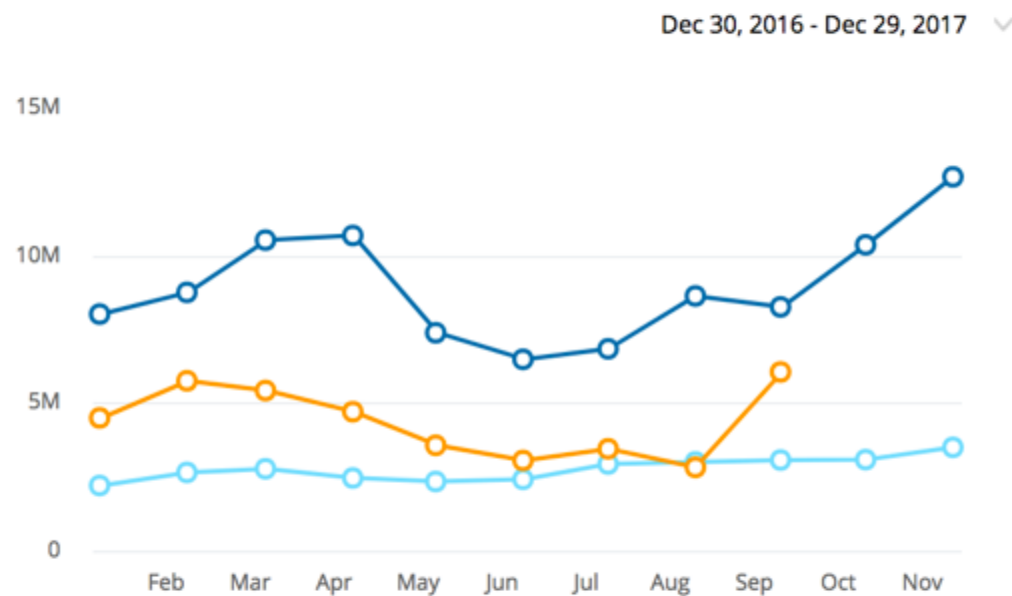
68.2% ▲ of 69.7%
Retention forecast - February

70.5% ▲ of 70.1%
Retention forecast - March

3.67 ▼ of 3.7
Improve LTV to CAC to 3.7

9.4 ▲ of 8
CAC Payback Period for new business deals improves from 10 months to un-

9 ▼ of 10
10 Evangelist interviews published in tier 1 media

75.6% ▲ of 79%
Gross margins move from 74% to 79%

147 ▼ of 200
200 validated opportunities for K2 in the pipeline

4 ▲ of 10
10 T1 customers actively using K2 with an average NPS of 30

79 ▲ of 125
K2 Demos

12 ▼ of 24
24 Beta Customers on K2

BIZ REVIEW

MY WORK

BOARDS

OBJECTIVES

MEETINGS

TEAMS

Biz Review

Jump to…

COLLAPSE ALL

FAVORITES

Marketing
Emma Thompson

Funnel Optimization
Guy Sales

Company Operations
Emma Thompson

Q1 Sales Pipeline
Guy Sales

MY RUNNING BIZ REVIEWS

BIZ REVIEWS SHARED WITH ME

K2 Launch
Emma Thompson

Customer Advocate Program
Guy Sales

DemandGen
Emma Thompson

New Biz Review

BKT Product Line Performance
Jack Ceomack

BKT77

■ NorthAmer... (KR1)   ■ EMEA (KR2)

Dec 30, 2016 - Dec 29, 2017
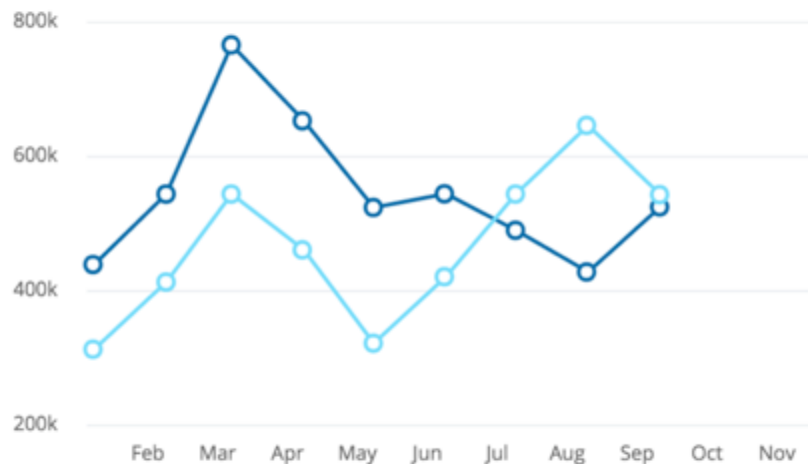
EMEA -- all products

■ BKT 76 (KR1)   ■ BKT 75 (KR2)   ■ BKT 77 (KR3)   ■ BKT 78 (KR4)   ■ BKT 79 (KR5)

Dec 29, 2016 - Dec 28, 2017

P60X2 & X2 -- North America

■ 76-X2 NoAm (KR1)   ■ 75-X1 NoAm (KR2)

Jun 29, 2016 - Dec 27, 2017
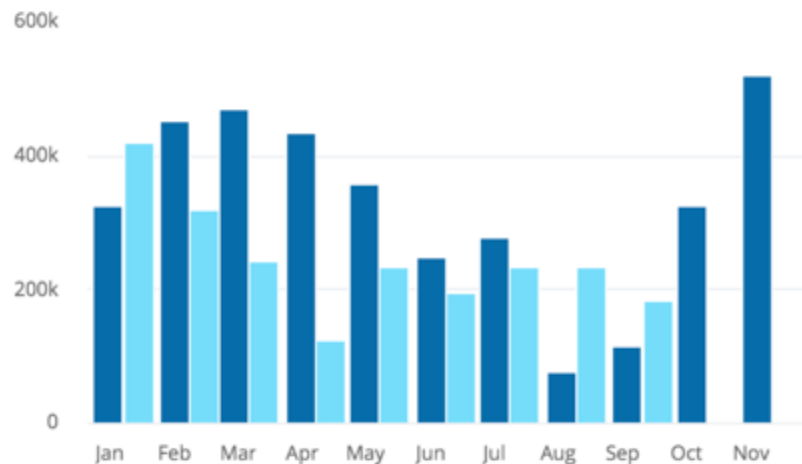
North America -- all products

■ BKT 75 (KR1)   ■ BKT 76 (KR2)   ■ BKT 77 (KR3)

Dec 30, 2016 - Dec 25, 2017

My Work

Jump to...

Today	12
This week	22
Requests for me	234
Overdue	23
All my work	567
Work I delegated	45
In the loop	526

MY REPORTS

Weekly Check-Ins
Manager First Last

Reports sent via email

Email report

Add action item

This Week

You are getting it done Victor!

Happy New ye...   From Workboard,   Cheers to your 2018 success from your friends and fans at Workboard!   ✓ 134 Total Done

Show me: Action Items and Subactions ⌄

Mon Feb 19	Tue Feb 20	Wed Feb 21	Thu Feb 22	Fri Feb 23	Sat Feb 24
Follow up on pricing plan with agency \n PERSONAL STREAM	Connect Barry with Tom from conference on machine learning opportunity \n PERSONAL STREAM	Review product roadmap with dev team \n PERSONAL STREAM	Approve New Proposal \n RENEGOTIATE CONTRACT ...	K2 Launch Strategy Session \n 15:02 pm	Review curriculum with Joaquin \n PERSONAL STREAM \n ⚠ 1 1
K2 sales team training is completed by August 4th \n PERSONAL STREAM	Reach out to Barry for an update on Innovation Strategy Workshop \n PERSONAL STREAM	Follow up with Stephanie on the launch plan \n PERSONAL STREAM	Baxter RFP -- what is our high level pitch? \n MAJOR ACCOUNTS	Budget for the TV campaign in the northeast \n PRODUCT ROADMAP \n ⏸ 2	Review and Sign Off on the Runbooks \n OPERATIONS \n ◉ 1 3
Provide team with an updated budget \n PERSONAL STREAM	Set up the initial meeting with our partners \n K2 LAUNCH CAMPAIGNS	PR plan for K2 Launch \n PERSONAL STREAM	Discuss hiring with Mary \n PERSONAL STREAM	Put together a round table on product centric org model \n PERSONAL STREAM	
		Review Finances for Upcoming Board Meeting \n BOARD MATTERS	Follow up with Bob \n PERSONAL STREAM	Send George and Phil the final Q2 competitive analysis \n PERSONAL STREAM	Sun Feb 25
		Sync with Lisa \n PERSONAL STREAM	Follow up with Jane \n PERSONAL STREAM	Website review \n PERSONAL STREAM	
		Update metrics: Hire 10	Make flight reservations for next week's meeting \n PERSONAL STREAM		

This Week

re getting it done Victor!

Happy New ye...   From Workboard,   iends and fans at Workboard!   ✓ 134 Total Done

RECENT

Website revamp

K2 Launch Budget

K2 Launch Schedule

K2 Launch Campaign

July Google Ads

Approve Gartner review

Draft Budget for Q2

Speak with finance regarding the pending invoices

Submit all expenses for approval

PR & Analyst list we want to target

Email campaign plan

⊕ Add action item

Today	‹ Tuesday, Feb 27, 201						Bulk Change ⌄
Action Item		ort	Priority	Rating	Workstream	Due	Status
+ Type a new action item here and hit E							
Review product roadmap with dev team 0/1 ☑		▪▪▪	◎	G	Personal Stream	Feb 27, 2018	◖
Approve New Proposal		▪		G	Renegotiate contract w...	Feb 27, 2018	◖
Baxter RFP -- what is our high level pitch 0/1 ☑		▪		G	Major Accounts	Feb 27, 2018	◖
Discuss hiring with Mary		▪▪▪		G	Personal Stream	Feb 27, 2018	◖
Follow up with Bob		▪▫▫		G	Personal Stream	Feb 27, 2018	◖
Follow up with Jane		▪▫▫		G	Personal Stream	Feb 27, 2018	◖

Boards

Jump to...

View All Boards

▲ COLLAPSE ALL

▲ FAVORITES

K2 Launch

Funnel Optimization

Gartner MQ Submission

Q1 Sales Pipeline

Google Ad Campaign

▲ NON-TEAM BOARDS

K2 Launch

Customer Advocate Program

DemandGen

▼ SALES

▼ MARKETING

⊕ Add workstream

⊕ Add board

Favorites

Q1 Sales Pipeline
North America sales
John Morales

Strategy
Marketing
Emma Smith

Deep Thinking
Marketing
Emma Smith

K2 Launch
Dev Team
Kamilla Brzenski

Google Ad Campaign
Marketing
Emma Smith

Website
Marketing
Emma Smith

Non-Team Boards

Other Fish in the Sea
Sales
John Morales

Customer Success
Marketing
Emma Smith

Budget Allocation
Sales
John Morales

Marketing

Social Media Marketing
Marketing

Marketing Emails
Marketing
Emma Smith

Crazy Ideas
Marketing
Emma Smith

Chat

workboard

BIZ REVIEW | MY WORK | **BOARDS** | OBJECTIVES | MEETINGS | TEAMS

Strategic Use Cases   Executive Team

Jan 01, 2018 - Mar 31, 2018   HEALTH: GOOD ▲

0 R   0 ⧗   15 ◐   18 👤   ━━━━━ 17% ⌄   ⇄ Timeline

Board View | 15 List View | Recent Activity | 1

1 ▽ Filter ⌄

Use Cases

+

Advanced Analytics ⚠
Rachel Palmera   Feb 27, 2018 ✓

Market Predictor
Rachel Palmera   Feb 27, 2018 ◐

Amplifier
Rachel Palmera   Feb 27, 2018 ◐

Sales E

Selling Am
Luke Lancaste

Selling Adv
Leads and
Luke Lancaste

Competing
Luke Lancaste

arketing Implementation

sage framework updated
         Feb 27, 2018 ◐

oiler plate updated
Cmoso   Feb 27, 2018 ◐

uct pages on website updated to
wcase these use cases
Cmoso   Feb 27, 2018 ◐

tion overviews for each use case
Cmoso   Feb 27, 2018 ◐

CX Implementation

+

Onboarding checklists for Advanced Analytics
Carlo Marco   Feb 27, 2018 ◐

CX team training on the new use cases
Carlo Marco   Feb 27, 2018 ◐

Panda updated to reflect use cases
Carlo Marco   Feb 27, 2018 ◐

Onboarding checklists for Amplifier
Carlo Marco   Feb 27, 2018 ◐

OKR Progress in your organization

Show me
Team

Include
All

State
Active

Achievement Date
Select date ran

Show
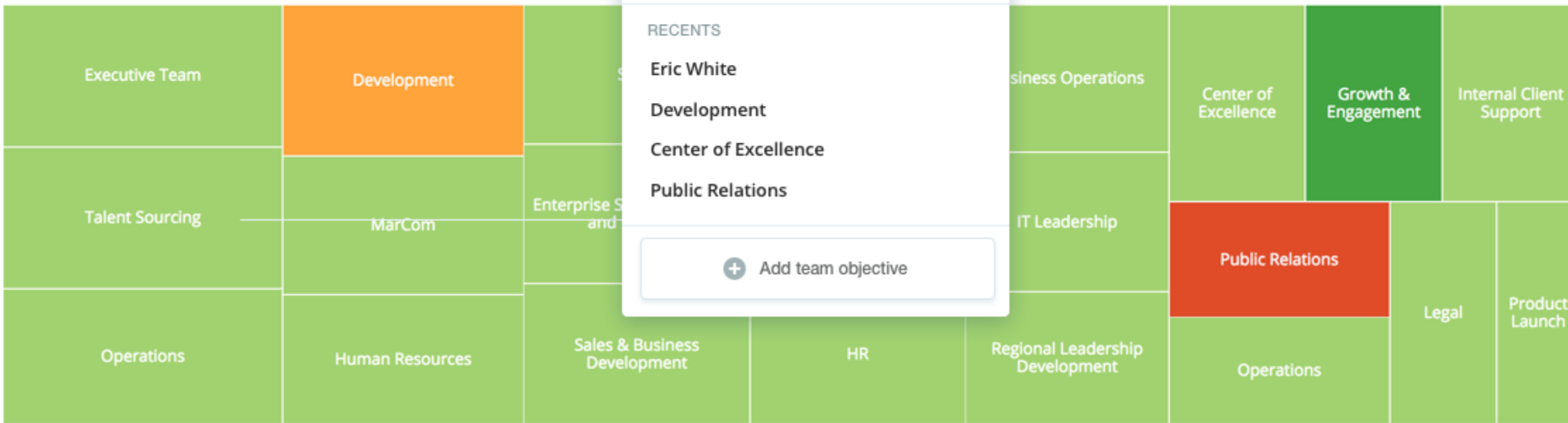
FAVORITES

Marketing

Charlie Smith

Demand Generation

RECENTS

Eric White

Development

Center of Excellence

Public Relations

➕ Add team objective

Executive Team

Development

Talent Sourcing

MarCom

Enterprise S and

Operations

Human Resources

Sales & Business Development

siness Operations

Center of Excellence

Growth & Engagement

Internal Client Support

IT Leadership

Public Relations

HR

Regional Leadership Development

Operations

Legal

Product Launch

Legend

Business Operations

Progress

Dec 31	17' Company Objectives	75%	0 💬
Dec 31	Enable our team to grow and succeed	67%	0 💬
Dec 31	Killer K2 Launch	1	73%	1 💬

Objectives & KRs

Jump to...

My OKrs

Heatmap

Alignment

Timeline

Engagement

Due for update now   4

▲   COLLAPSE ALL

▲   FAVORITES

⊕ Add personal objective

⊕ Add team objective

OKR Progress in your organization

< Back to Org Objectives

Development
Barry Bosser

83%   Fill product gaps to drive referencability   0 days left   2 ↓↑   1 💬   ⋮

100% of 100%	Code complete on current gap fixes	Barry Bosser	As of Nov 15, 2016
83% of 100%	Complete QA resourcing plan	Barry Bosser	As of Mar 08, 2016
11 of 15	Hire developers	Barry Bosser	As of Nov 15, 2016

73%   Identify and define architecture and product strategy for K2 release   0 days left   2 ↓↑   0 💬   ⋮

26% of 25%	Maximize resources on architecture and strategy	Barry Bosser	As of Nov 15, 2016
78% of 85%	Improve measurement accuracy on resource consumption	Barry Bosser	As of Mar 08, 2016
85% of 100%	Complete draft architecture for unified, scalable backend	Jordy Moe	As of Nov 15, 2016
65% of 100%	Review design options and constraints for next release	Jordy Moe	As of Nov 15, 2016

77%   Scale dev team to increase bandwidth   0 days left   1 ↓↑

⑦ Help

Meeting: K2 Product Launch

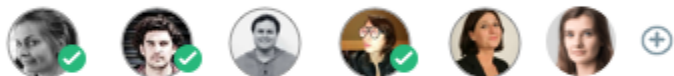MEETING RATING   00:12   Close

May 23 at 5:00pm

Description

ADD | Objective | Key Result | Workstream | Action Item | Attachment

Topics for Discussion

○ Add topic

☑ **Draft customer announcement**   Aug 13
K2 Launch Readiness: Mary C.

▦ **Killer K2 Launch**
Marketing: Kim L.

Takeaways

○ Add a takeaway

Mary Cmoso Just now
We have to draft the customer announcement to send Jun 1

☑ PR Plan   Aug 13
K2 Launch Readiness: Emma S.
Added by Emma S.

Kim Lou 1m ago
We need to realign our messaging to the sales vision. The messaging needs to focus on digital transformation and the fast pace of change in the current market environment .

There is a real opportunity to use recent market developments and disruptions to our advantage. There are a lot of marketing campaigns from our competitors that focuse on predictive technologies and solving problems of the future. We should dial back and focus on how we can solve today's market problems with our messaging.

Mary Cmoso Just now
Jennifer on vacation March 15-23, campaign delayed

Meeting: K2 Launch Planning
Blue Marina Room

00:26
Count up

End Meeting

FAVORITES

Leadership Meetings

1on1 with Tom H.

Product Marketing

Meet now

Description

ADD: 📊 Objective   📈 Key Result   〰 Workstream   ☑ Action Item   📎 Attachment

Topics for Discussion

Type a topic

Killer K2 Launch
Marketing: Kim Lou

74%
Added by Jonathan N.

Finalize launch campaign schedule
Jonathan Hu   10:00 am Jul 07

PR Plan
K2 Launch Readiness: Emma S.

Aug 13 Ⓡ ◑
Added by Emma S.

K2 Launch

75%
of 100%
Added by Jonathan N.

K2 Launch Press Release Campaign

▼ **45%**

Takeaways and ...

Type a takeaway

● General Launch Plan - Team, we will be covering the following areas:
- Website & Blog
- Social Media & Email Marketing
- Pricing
- Post launch webinar

☑ Draft customer announcement to send August 15
Kim Lou   10:25 am Jul 07

● We need to realign our messaging to the sales vision. The messaging needs to focus on digital transformation and the fast pace of change in the current market environment

There is a real opportunity to use recent market developments and disruptions to our advantage. There are a lot of marketing campaigns from our competitors that focuse on predictive technologies and solving problems of the future. We should dial back and focus on how we can solve today's market problems with our messaging.
Tim Dawson   10:18 am Jul 07

● Jennifer will be on vacation until July 14 - PR campaign will launch July 15. Kate and Tim will coordinate and create campaign this week.
Tim Dawson   10:10 am Jul 07

☑ Invite 25 additional customers to participate in pre-launch beta.
Emma Smith   10:05 am Jul 07

workboard

BIZ REVIEW
MY WORK
BOARDS
OBJECTIVES
MEETINGS
TEAMS

Meetings & 1:1s

Jump to…

Meetings
One on Ones
Past Meetings

FAVORITES

Meeting: K2 Product Launch

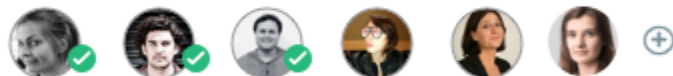MEETING RATING   00:12   Close

May 23 at 5:00pm

Description

ADD   Objective   Key Result   Workstream   Action Item   Attachment

Topics for Discussion

○ Add topic

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Jennifer on vacation March 15-23, campaign delayed

Meet now

New meeting   New 1:1