



# Topics Today

- 1. Habits of teams that crushed it in 1H 2018**
2. Introductions
3. New Experience & Capabilities in June
4. On the Horizon



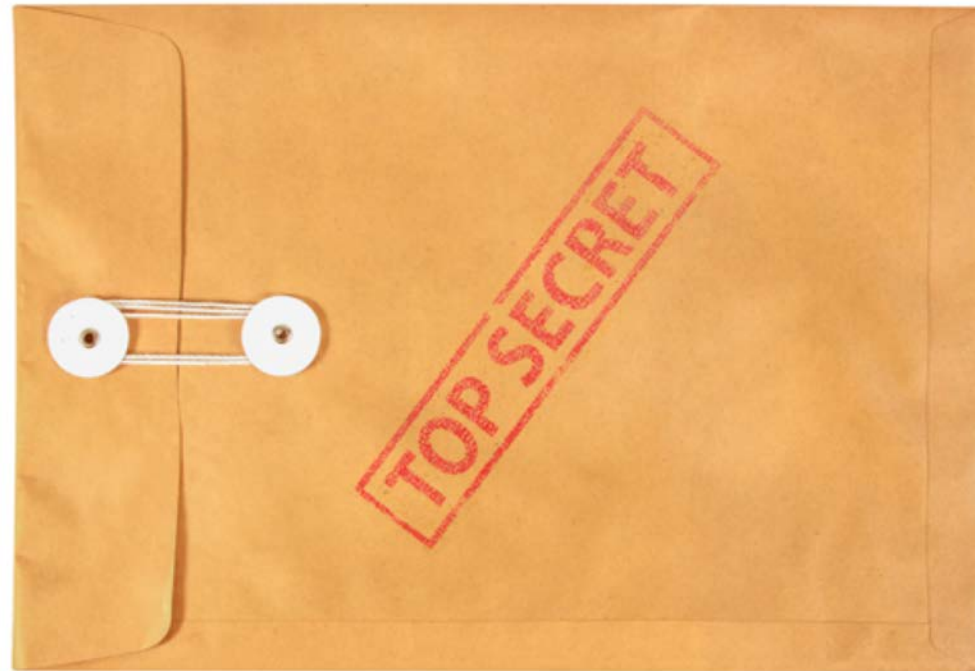
**THEY FOCUS ON RESULTS  
MORE THAN PEERS.**



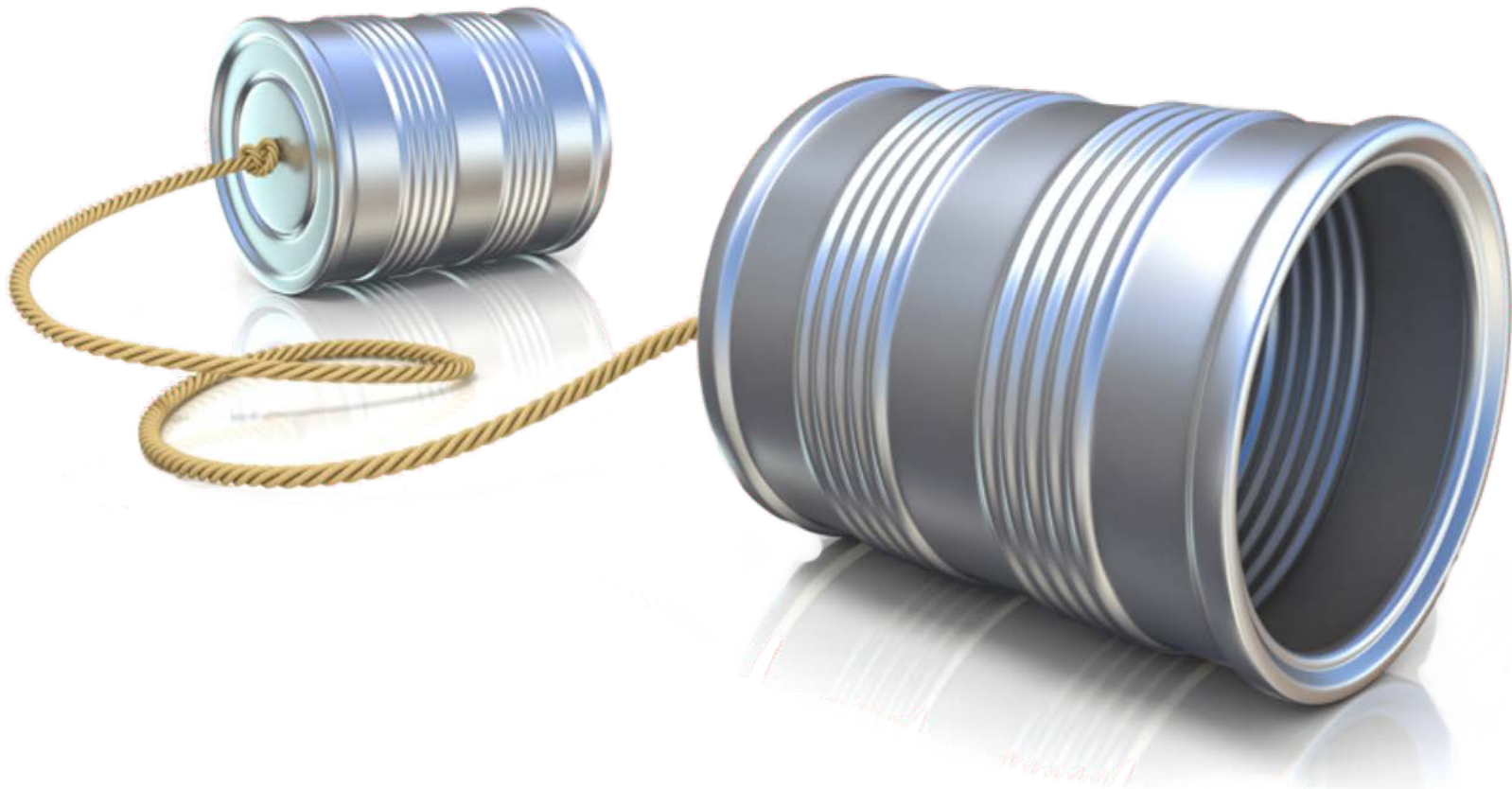
**THEY ALIGN AND RE-ALIGN WELL.**



**THEY'RE TRANSPARENT ABOUT  
PLANS, PROBLEMS AND PROGRESS.**



**THEY EMBRACE CHANGE AND  
SEEK EFFICIENCY.**



**THEY ARE (MANIACALLY) DATA DRIVEN  
AND DIGITAL.**





# Topics Today

1. Habits of teams that crushed it in 1H 2018

## **2. Introductions**

3. New experience & capabilities in June

4. On the horizon





# Introductions are in order...



**Bhavin Vyas**  
Director of Product Solutions

- 6 years experience in customer-facing tech roles at Google, OKRs
- Entrepreneur
- Guiding and assisting customers in full deployment and integration



**Mark Waitt**  
Enterprise Success Manager

- Experienced CSM (Hearsay, Great Place to Work, Citrix)
- Worked with world's largest enterprises and global financial services customers
- Primary liaison focused on maximizing the value you get from Workboard

# Topics Today

1. Habits of teams that crushed 1H 2018
2. Introductions
- 3. New experience & capabilities in June**
4. On the horizon



# Cue the fireworks, this ships for July 4th!



- Better Outlook experience
- A giant leap forward in eliminating slide deck reporting
- Filter board contents
- Convert chat to actions faster in slack
- More page favorites and smart bullets
- Super boards!
- Data streams



# New Outlook Plugin: One Click to Action Items

The screenshot displays the Outlook interface with an email titled "User Group Meeting" from Joe Smarts. The email content includes a proposal for a meeting on August 15th and a request for marketing support. A Workboard plugin sidebar is open on the right, showing fields for Assignee (Mary Cmoso), Boards (K2 User Group), Due Date (Jun-27-2018), and various status and priority options. A "Convert to action item" button is visible at the bottom of the sidebar.

Office 365 | Outlook

Search Mail and People

New | Delete | Archive | Junk | Undo

Folders

- Inbox 3
- Sent Items
- Drafts
- More

Groups New

- Acme
- Discover
- Create

User Group Meeting

Joe Smarts  
Today, 2:41 PM  
Jack Ceomack

Hi Jack,

[We're proposing the date for the User Group Meeting as August 15th.](#) Could you please let me know if that works.

Also, can you let us know who to work with on the Marketing side? We'll need to set up invitations, event registration, speaker list etc.

Thanks,  
Joe

Workboard

ASSIGNEE

Mary Cmoso

BOARDS

K2 User Group

DUE DATE

Jun-27-2018

Doing Status

Highest Priority

Green Confidence

Easy Effort

IN THE LOOP

Convert to action item

# New Outlook Plugin: One Click to Meetings!

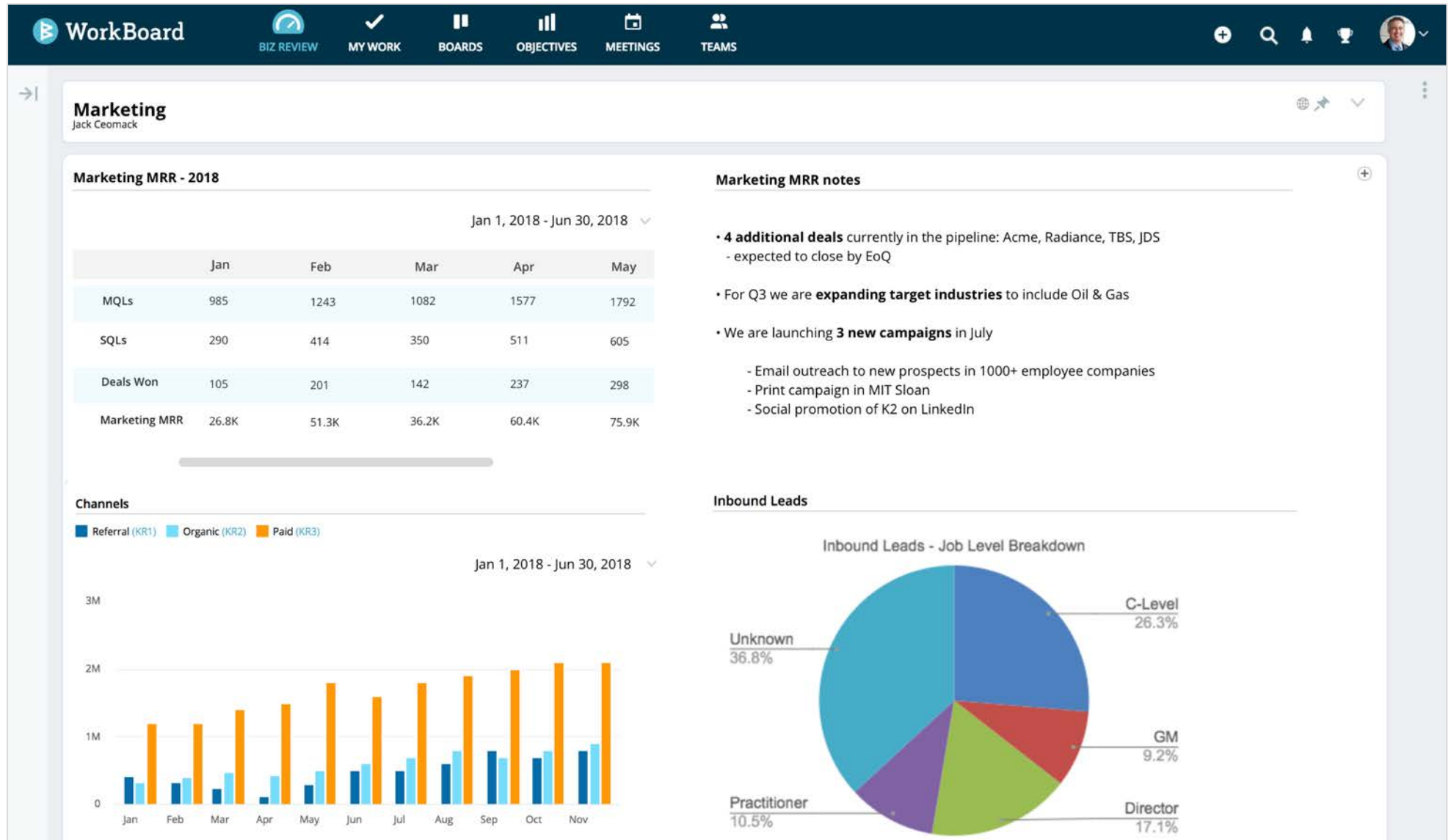
The screenshot displays the Outlook interface for creating a meeting. The main window shows the 'Details' pane with the following information:

- Title:** Marcom Executive Meetup
- Location:** Add a location or a room
- Start:** Fri 6/29/2018, 10:00 AM
- End:** Fri 6/29/2018, 10:30 AM
- Repeat:** Never
- Reminder:** 15 minutes

The 'People' pane lists attendees: Jack Ceomack, Mary Cmoso, and Joe Smarts. The 'Schedule' pane shows a calendar view for Fri 6/29, with the 10:00 AM slot highlighted in blue.

The 'Workboard' plugin window is open on the right, showing a calendar view for Fri 6/29. A hand cursor is pointing to the 'Create a Workboard meeting' button, which is accompanied by a calendar icon and three plus signs.

# Running Business Reviews (RBRs)



Show your results in tables

Add text and bullet lists

Include charts from other systems

Reorder your charts



# Filter Board Contents

The screenshot displays the WorkBoard interface for a project named "K2 Launch Marketing". The board is organized into three columns: "NEXT UP", "IN PROGRESS", and "WOOT - DONE!". A filter panel is open on the right side, allowing users to refine the board's content based on various criteria.

**Board Overview:**

- Project:** K2 Launch Marketing
- Period:** Jan 01, 2018 - May 31, 2018
- Health:** GOOD (Green triangle)
- Pace:** FAST (Green triangle)
- Priority:** P1 (Blue circle)
- Progress:** 64%
- Views:** Board View (selected), 14 List View, Calendar, Recent Activity, 5 Objectives, Files
- Filter:** Filter 3 (Dropdown arrow)

**Board Columns:**

- NEXT UP:**
  - Customer quotes on K2 (Mary Cmoso, May 31, 2018)
  - Update Budget requirements (Dede Mandrish, May 31, 2018)
  - Get Jeff's quote approved (Emma Smith, Apr 19, 2018)
  - Twitter & LinkedIn posts for launch (Emma Smith, May 08, 2018)
- IN PROGRESS:**
  - K2 branding (Emma Smith, May 07, 2018)
  - Put K2 landing page link on front page of website (Paul Carter, Apr 26, 2018)
  - Announcement to customers (Emma Smith, May 31, 2018)
  - Have PR agency put press release on the wire (Mary Cmoso, May 31, 2018)
  - K2 launch - email campaign plan (Paul Carter, May 31, 2018)
  - Announcement for strategic partners (Dede Mandrish, May 31, 2018)
  - Sync with Product on K2 release notes (Mary Cmoso, May 31, 2018)
  - Publish Jeff quote on customer page, front page, reg page (Paul Carter, Apr 27, 2018)
  - Pre-announce to channel partners (Paul Carter, May 31, 2018)
- WOOT - DONE!:**
  - Draft Budget Outline (Emma Smith, Mar 31, 2018)
  - Draft of Press Release (Mary Cmoso, Mar 31, 2018)
  - Swap out Jane's quote with Vamer quote below CTA (Rachel Palmera, Mar 20, 2018)
  - Secure 5 top tier press briefings (Dede Mandrish, Apr 06, 2018)
  - Brief Gartner (include Jack) (Mary Cmoso, Apr 10, 2018)
  - Brief Forrester (include Joe) (Emma Smith, Apr 06, 2018)
  - Brief IDC (include Jack) (Paul Carter, Apr 06, 2018)
  - Copy for channel partner announcement (Paul Carter, Apr 06, 2018)
  - Debrief with Jane (Jack Ceomack, Apr 06, 2018)
  - Business Journals

**Filter Panel (Filter action items):**

- Status:**  All,  Done,  In Progress,  Next Up
- Rating:**  All,  R,  A,  G
- Priority:**  All,  P1,  P2,  P3
- Assignee:** Search assignee
- Tags:** Search Tag
- Show done items for:** [ ] days
- Show subactions
- Highlight my action items



# Create and Filter on Tags for More Views

The screenshot displays the WorkBoard interface for a project named "K2 Launch Marketing". The top navigation bar includes icons for "BIZ REVIEW", "MY WORK", "BOARDS", "OBJECTIVES", "MEETINGS", and "TEAMS". The main header shows the project name, dates "Jan 01, 2018 - May 31, 2018", and status indicators: "HEALTH: GOOD" and "PACE: FAST". A progress bar indicates 64% completion. The board is currently in "Board View" and is divided into three columns: "NEXT UP", "IN PROGRESS", and "WOOT - DONE!".

Column	Task	Assignee	Due Date	Status
IN PROGRESS	Have PR agency put press release on the wire	Mary Cmoso	May 31, 2018	In Progress
	Announcement for strategic partners	Dede Mandrish	May 31, 2018	In Progress
	Pre-announce to channel partners	Paul Carter	May 31, 2018	In Progress
WOOT - DONE!	Draft of Press Release	Mary Cmoso	Mar 31, 2018	Completed
	Secure 5 top tier press briefings	Dede Mandrish	Apr 06, 2018	Completed
	Brief Gartner (include Jack)	Mary Cmoso	Apr 10, 2018	Completed
	Brief Forrester (include Joe)	Emma Smith	Apr 06, 2018	Completed
	Brief IDC (include Jack)	Paul Carter	Apr 06, 2018	Completed
	Copy for channel partner announcement	Paul Carter	Apr 06, 2018	Completed

The right-hand side of the interface features a "Filter action items" panel with the following options:

- Status: [Checked] [Unchecked] [Unchecked] [Unchecked] [Unchecked] [Checked]
- Rating: [Checked] [Unchecked] [Unchecked] [Unchecked]
- Priority: [Checked] [Unchecked] [Unchecked] [Unchecked]
- Assignee: Search assignee
- Tags: Search Tag; Press, partner
- Show done items for: [ ] days
- Show subactions: [ ]
- Highlight my action items: [ ]

# Quickly Convert Slack Chats into Action Items

The screenshot shows a Slack chat window for 'Acme, Inc' with a user 'mary'. The chat history includes a message from 'jack' at 5:49 PM: "FYI- new mention on [Re-look at the persona for chief of staff -- they are a key decision maker](#) @Mary Cmoso Noticed we are a little behind schedule on this, do we have an update? To post your reply in Workboard too, use this in front of it: /wobo reply A3316571". Below this, a message from 'jack' at 5:19 PM says "Hey Mary", and a message from 'mary' at 5:20 PM says "Hi there Jack". A separator for "Yesterday" is shown. Today's messages include 'jack' at 4:56 PM: "Thinking about next quarter's customer event. Let's spend time this week brainstorming on a theme, reviewing who we should consider inviting as speakers, and making a shortlist of possible locations." and 'mary' at 4:56 PM: "sounds great!". A context menu is open over the 'jack' message, listing actions: "Follow message", "Copy link", "Mark unread", "Remind me about this", "Pin to this conversation...", "Create an action item Workboard" (highlighted), and "More message actions...".

The 'Create an action item' dialog box is shown with the following fields:

- Description:** Planning for Q3 Customer Event
- Note:** Thinking about next quarter's customer event. Let's spend time this week brainstorming on a theme, reviewing who we should consider inviting as speakers, and making a shortlist of possible locations. (Character count: 2801)
- Due Date:** Jun 27, 2018 (with a note: "A valid date")
- Assignee:** mary

At the bottom, there is a link "Learn more about Workboard", a "Cancel" button, and a "Create" button.



# Pin This Week, Today and Heatmap as Favorite Pages

The screenshot shows the WorkBoard dashboard interface. At the top is a dark blue navigation bar with the WorkBoard logo and several menu items: BIZ REVIEW, MY WORK, BOARDS, OBJECTIVES (highlighted), MEETINGS, and TEAMS. Below the navigation bar is a 'Results Watchlist' section containing several data cards. A dropdown menu is open over the 'OBJECTIVES' menu item, showing a 'FAVORITES' section with 'Heatmap' selected, and a 'RECENTS' section with several objective titles. The dashboard cards display various metrics such as '5 of 35', '80% of 100%', '12.8m of 12m', and '57% Percentage Cc'.

# Smart Bullets are back ... after we not-so-smartly removed them

The screenshot displays the WorkBoard interface for a meeting titled "Meeting: K2 Launch Planning" held in the "Blue Marina Room" on "May 23 at 5:00pm". The meeting duration is "00:12". The interface includes a navigation bar with icons for "BIZ REVIEW", "MY WORK", "BOARDS", "OBJECTIVES", "MEETINGS", and "TEAMS". Below the meeting title, there are participant avatars and a "Send Minutes" button. A toolbar offers options to "ADD" an "Objective", "Key Result", "Workstream", "Action Item", or "Attachment".

The main content area is divided into two columns: "Topics for Discussion" and "Takeaways".

- Topics for Discussion:** Contains a topic "PR Plan" with a sub-note "K2 Launch Readiness: Emma S.". A context menu is open over this topic, listing options: "Add smart bullets", "Add to next meeting", "Convert to action item", "Add attachment", "Remind Me", and "Delete".
- Takeaways:** Contains a takeaway "Update campaign timeline to launch 2 weeks before Christmas" by "Mary Cmoso" (posted "Just now"). A context menu is open over this takeaway, listing options: "Add smart bullets", "Add to next meeting", "Convert to action item", "Add attachment", "Delete", and "Remind Me".

Both context menus also feature a vertical list of "Smart Bullets" on the left side, including: "Idea" (lightbulb icon), "Decision" (checkmark icon), "Red" (red square icon), "Amber" (orange square icon), "Green" (green square icon), "Discussion" (speech bubble icon), "FYI" (text icon), and "Note" (yellow arrow icon).

# Super Boards: Higher Level View of Other Boards or Projects

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

Account Health  
Carlo Marco

High Risk	Risk – Next Q Renewal	Risk – Renewals +1 Q	Happy, Can Get More Value	High Value Re
<b>Cheers</b> Carlo Marco Jan 14, 2018 - No End Date	<b>Soylent</b> Carlo Marco Mar 03, 2016 - No End Date	<b>Cyberdyne Systems</b> Carlo Marco Jun 27, 2018 - No End Date	<b>Wayne Enterprises</b> Carlo Marco No Start Date - No End Date	<b>Wonka Industries</b> Carlo Marco
<b>The New York Inquirer</b> Carlo Marco Sep 30, 2017 - No End Date	<b>Acme Corp.</b> Carlo Marco Apr 30, 2018 - No End Date	<b>Pope &amp; Associates</b> Carlo Marco Sep 30, 2016 - No End Date	<b>Hooli</b> Carlo Marco No Start Date - No End Date	<b>Massive Dynamic</b> Carlo Marco
		<b>Gekko &amp; Co</b> Carlo Marco Feb 28, 2017 - No End Date	<b>Umbrella Corporation</b> Carlo Marco No Start Date - No End Date	<b>Initech</b> Carlo Marco
		<b>Genco Pura Olive Oil Company</b> Carlo Marco Jan 19, 2018 - No End Date	<b>Vehement Capital Partners</b> Carlo Marco No Start Date - No End Date	<b>Stark Industries</b> Carlo Marco
		<b>Globex</b> Carlo Marco Dec 31, 2017 - No End Date	<b>Sterling Cooper</b> Carlo Marco No Start Date - No End Date	
			<b>Ollivander Inc.</b> Carlo Marco Jun 27, 2018 - No End Date	

# Define your own customer, project or organizing attributes to manage at a higher level of detail

The screenshot displays the WorkBoard interface with a modal form for editing the 'Hooli' account. The background shows a dashboard with 'Account Health' for Carlo Marco, including a 'High Risk' section and a list of accounts like 'Cheers', 'The New York Inquirer', 'Enterprise', 'Pirella Corporation', 'Co & Co', 'Investment Capital Partners', 'ing Cooper', and 'ander Inc.'.

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

**Hooli** (Lead: Carlo Marco)

START DATE: Sep 26, 2017 | END DATE: M D, Y | HEALTH: GOOD | PRIORITY: P1 | PACE: FAST

Description: Custom Attributes

**Business Need**: alignment tool to close the strategy and execution gap in their innovations and technology development units.

**PO**: PO10592

**Account Status**

Renewal Date: 9/27/2018

**Cadence/Status/Situation**: We have delivered strategy alignment accelerators services. Currently in the process of training and roll out.

Buttons: Cancel, Save, Help



# Workboard has the plan, get the actuals against it more easily with data streams ...

## What's new now:

- An integration framework and architecture your IT team can easily use combined with a front-end catalog for business users to select the appropriate data stream to update a given key result as they create OKRs
- We've created several connectors to business systems. Extend these and create your own.

Salesforce and Pipedrive  
Redshift data warehouse  
StatusCast  
Zendesk  
SQL database  
Jira and Github  
Asana

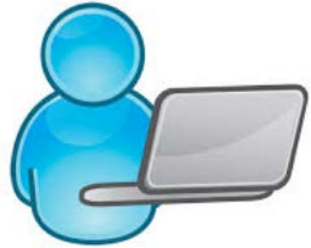
*What are your priority connectors?*

Caution: Easiest way to miss your plan .. your focus is what helps you close the gap between plan and actual





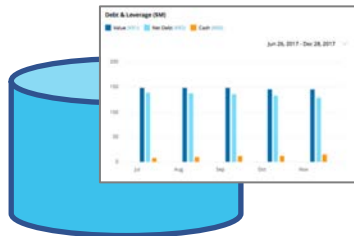
# Creating & Updating KPIs (and key results)



## Establish objectives and metric

*End user KPI creation*

1. User creates metric as they establish objectives
2. Determines what and how to measure and how often
3. Chooses data source for updates:
  - Self
  - Project in Workboard
  - Other Workboard metrics
  - Excel or app
  - Data stream



## Update metric data

*Period data push*

1. If “self”, user enters data through Web, mobile, or chat interface
2. If any other source, period data is updated automatically



# Let your data flow!

Tech savvy folks –  
Ping and we'll send  
documentation



Everyone else –  
**Bhavin's your guy!**

He's focused on activating  
integrations for customers.  
[bhavin@workboard.com](mailto:bhavin@workboard.com)



# Topics Today

1. Habits of teams that crushed 1H 2018
2. Introductions
3. New experience & capabilities in June

## **4. On the horizon**



# Action Items on Chrome Extension: Get and Add to Your List

The image shows a Chrome browser window with two tabs: 'Google' and 'My Work'. The address bar shows 'Secure | https://www.google.com'. The Google homepage is visible, featuring the 'Google' logo, a search bar, and buttons for 'Google Search' and 'I'm Feeling Lucky'. A 'WorkBoard' extension popup is open on the right side of the browser. The popup has a dark blue header with the 'WorkBoard' logo and title. Below the header is a text input field with the placeholder text 'Type action item and press Enter to add'. Below the input field is a list of action items, each with a blue menu icon, a green 'G' icon, and a blue circular icon.

About Store

Google

Secure | https://www.google.com

WorkBoard

Type action item and press Enter to add

- Create internal FAQ
- Share RBR with team
- Send finalized report to Joe
- Align with Marketing for launch

Google Search I'm Feeling Lucky

# Quick Look at Actions from Last Meeting

The screenshot displays the WorkBoard interface for a meeting titled "Meeting: K2 Launch Planning" held on April 19 at 2:00pm in the Blue Marine Room. The interface includes a navigation bar with options like "BIZ REVIEW", "MY WORK", "BOARDS", "OBJECTIVES", "MEETINGS", and "TEAMS". A sidebar on the left lists "Meetings", "One on Ones", and "Past Meetings", along with a "Jump to..." search bar and a "FAVORITES" section containing "Strategic Use Cases", "K2 Launch Core Team", and "Strategic Use Cases".

The main content area shows the meeting details and a list of "Topics for Discussion":

- Launch time** (27% progress)
- Board Matters** (Good status, by Jack Ceomack)
- Review and Sign Off on the Runbooks** (by Jack Ceomack)
- Let's have a discussion about our progress here our ability to get to a robust conclusion** (01:11 pm Apr 19)
- Revenue** (10.73m of 25m)
- 5 Star Reviews on G2** (74 of 250)

An "Action items from last meeting" modal window is open, displaying a table of tasks:

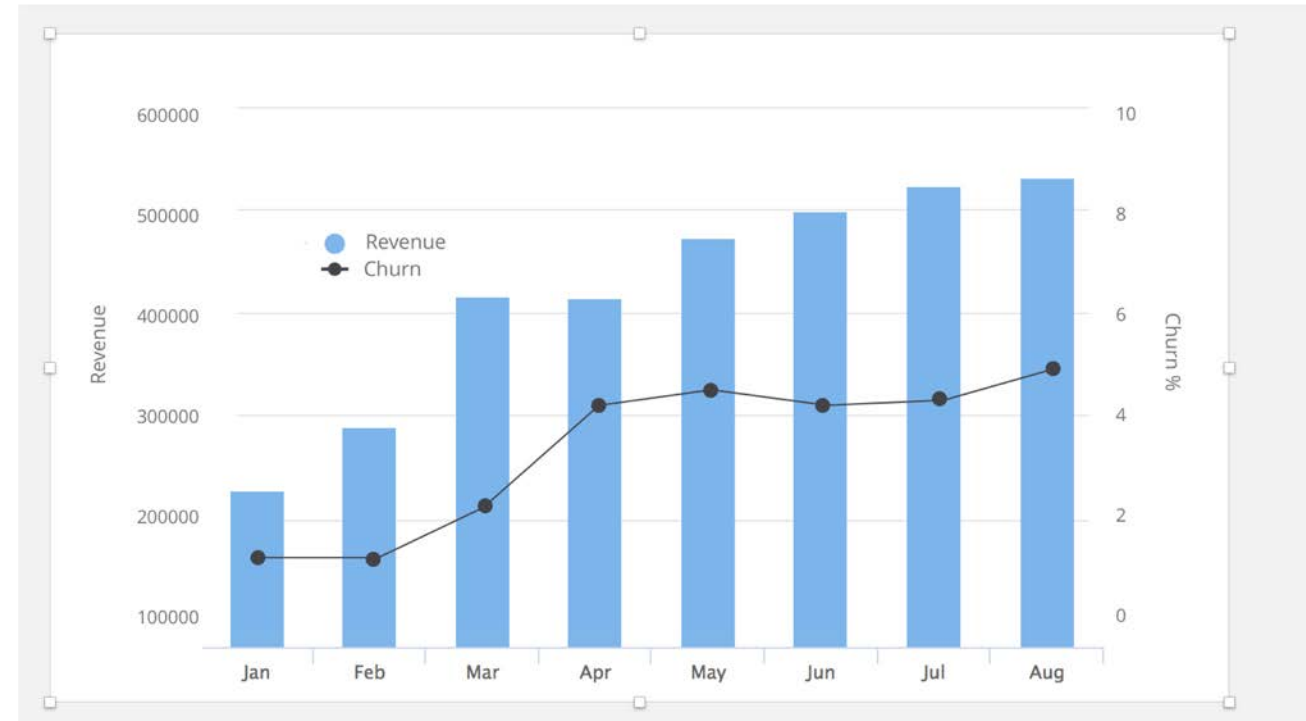
Action Item	Owner	Workstream	Due	Rating	Status
<input type="checkbox"/> Put K2 landing page link on front page of website	Konstantin C.	K2 Launch	Feb 30, 2018	G	I
<input type="checkbox"/> Draft list of cloud transition candidate apps	Jack C.	Cloud Applcaiton Candidates	Feb 30, 2018	G	I
<input type="checkbox"/> Have PR agency put press release on the wire	Jack C.	K2 Launch	Feb 30, 2018	G	I
<input type="checkbox"/> Draft of press release	Jack C.	K2 Launch	Feb 30, 2018	A	I
<input type="checkbox"/> Reach out to vendor on the specs	Emma W.	K2 Launch	Feb 30, 2018	R	I
<input type="checkbox"/> K2 launch - email campaign plan	Emma W.	K2 Launch	Feb 30, 2018	R	I

The modal window includes an "Add to this meeting" button and an "Add more" link at the bottom.

# More Flexibility & Richness on Business Reviews

## Running Business Reviews at the center of your universe

- More elegant appearance
- Group charts by topic
- Stacked bar charts, pie charts, dual axis charts
- Up to 7 KRs or data streams (from 5)



# Enhanced workflows

- Notify a list of people when items are added or moved to a column on your boards
- Get notifications for key results that need to be updated
- Quick access to team meetings from boards and workstreams
- Progress to plan reporting and visibility for multi-unit businesses
- Today and This Week spiffs







**What do you think?**



