



August Community Call

Welcome!

Starting 3 minutes past the hour ...



News & Capabilities for the Workboard Community

August 2018

Topics Today

- 1. Building OKR Expertise**
2. New members of our customer team
3. What's coming in the next release
4. On the horizon



OKR Community Discussion on Slack



This Slack group is a public forum for practitioners to:

1. Discuss OKR best practices
2. Get and give advice on setting high integrity objectives and key results
3. Build our collective results habits

Join the OKR conversation!

Reach out to Sameera Moinpour for an invite to join! 😊

Sameera@workboard.com

RE **THINK**

Leading Fast, Smart Growth

CEO Event

September 13, 2018 • Microsoft Reactor San Francisco

Dare to Build a Legendary Company

Mike Maples, Jr., Floodgate

66 of 41,000 startups have had \$1B outcomes since 2000 — hear what makes the pivotal difference from legendary investor Mike Maples, Jr. of Floodgate. Floodgate led seed or Series A rounds at AirBnB, Lyft, Twitter, Okta, Sonos, Xamarin, Clearslide and others.

Growth Breakthroughs CEO Panel

Erik Huddleston, Mark Organ, Deidre Paknad

This panel of CEOs will discuss their experience driving growth breakthroughs including:

- Maximizing growth with the cash you have now
- Aligning product, marketing, customer success and sales for smarter growth
- Scaling yourself to scale the company
- Shifting from activity management to results management for smarter outcomes
- Removing internal barriers to growth
- Tapping hearts and minds to grow more profitably

Erik Huddleston is CEO of TrendKite, an Austin startup on a growth curve that rivals Salesforce. Mark Organ is CEO and founder of Influitive, founder of Eloqua and author of best-seller *The Messenger is the Message*. Deidre Paknad is CEO of Workboard, a three-time startup CEO and founder with a successful exit from IBM.



Register now!

www.workboard.com/rethink2018



FLOODGATE



OKR Wonk Meetup



OKR fans, coaches, experts, and newbies get together to share best practices, learn from each other, and connect with other results-minded people.

Meetup

Thursday, October 11, 2018

5:00 PM to 7:00 PM

WorkBoard Redwood City, CA

OKR Training & Coaching

OKR Coach Certification Program

OKR Coaches help organizations achieve success with the technique faster and more pervasively. Enable your colleagues or customers to:

1. set high integrity objectives and key results
2. gain true alignment and tie off
3. shift from an activity habit to a results habit
4. achieve better results in their first quarter

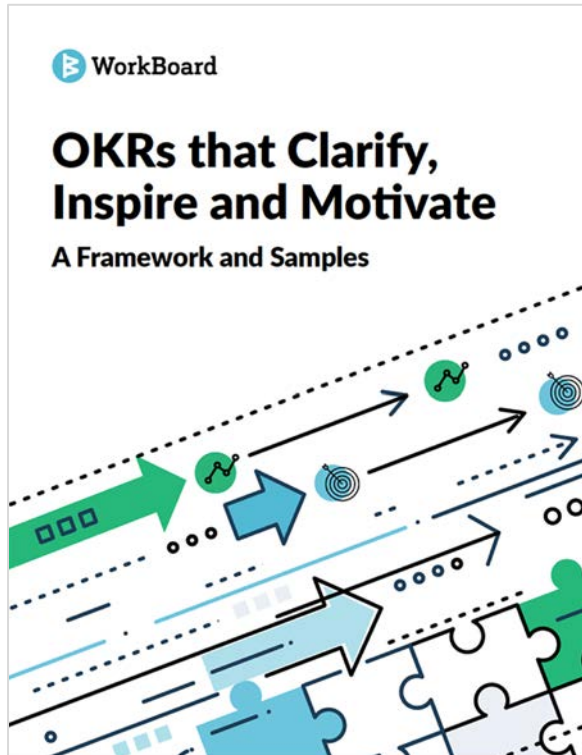
Coach Curriculum & Certification

Build your OKR expertise and coaching skills with this coaching program and use your certification to advance your career. The training program and certification includes classroom sessions, role playing practice, offline exercises and a final exam that encompasses:

- Anatomy of objectives and key results
- How to facilitate leadership team OKR setting
- Guiding teams to measuring results vs activity
- Enabling young managers to lead strong conversations and set good OKRs
- Facilitation best practices
- Managing an OKR program roll out
- Metrics and key result mastery



Recommended Resources



Get a quick reference for setting great key results with real examples, and learn how to set achievement thresholds in your organization.



Personalize and publish this Runbook Template as a guide to your group's operating philosophy, standard practices and common processes.

Want copies? Let us know!

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1. Building OKR expertise

2. New members of our customer team

3. What's coming in the next release

4. On the horizon

Introductions are in order...



Mike Hipp

VP Sales

- Led global sales and customer success organization for numerous high-growth technology companies
- 20+ years experience building and leading organizations to scale
- Fun fact: Mike has lived in South America (Argentina and Uruguay), Australia and England



John Han

Customer Advocate & Tech Support

- Managed tech support teams at Autonomy, Iron Mountain, Stratify
- Front line support focused on maximizing the value you get from Workboard
- Fun fact: John's daughter's team just won a Softball Championship in Lake Tahoe!

Topics Today

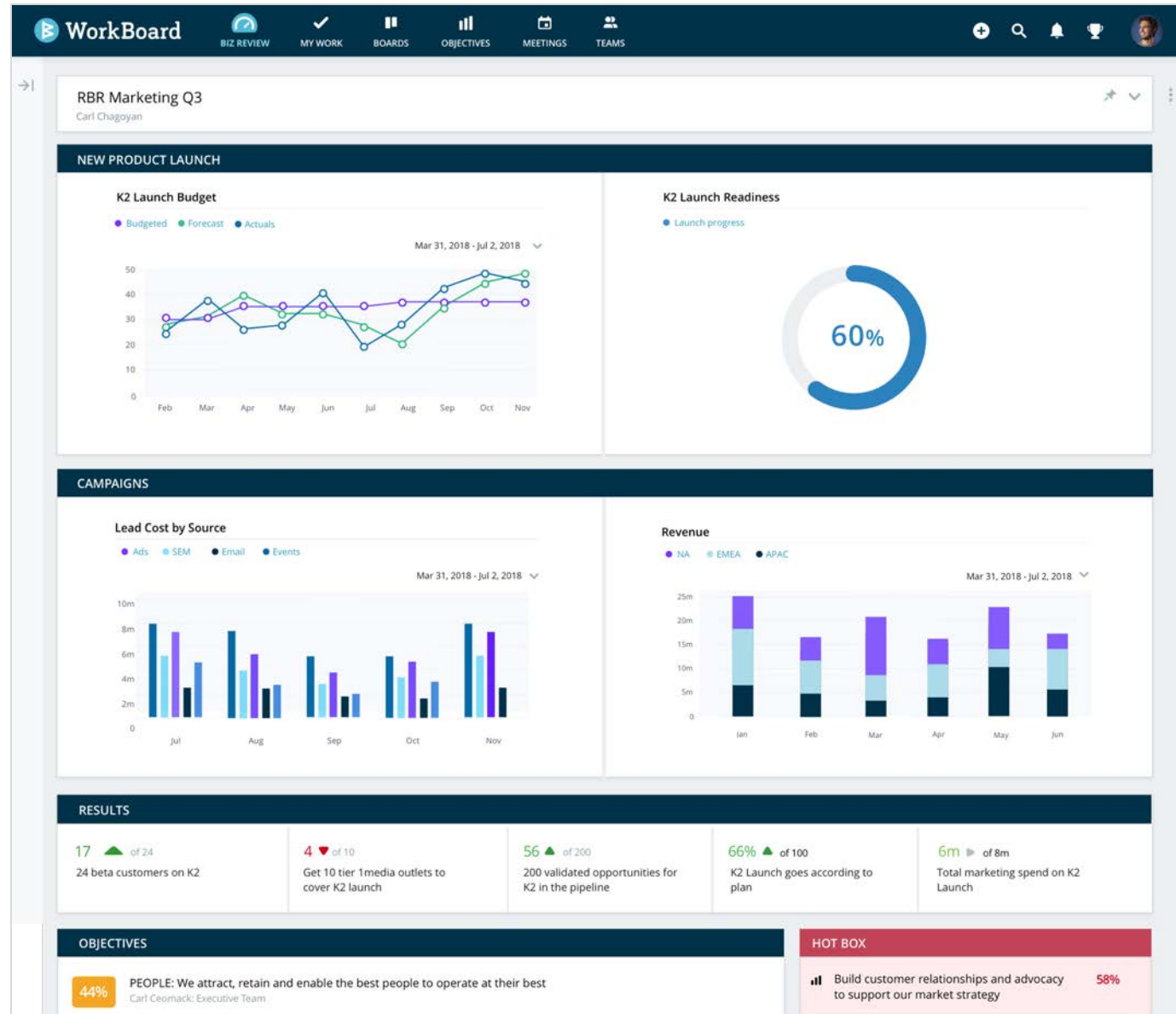
1. Building OKR expertise
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Because we know you want to make results a habit...

- Better Running Business Reviews (RBRs)
- Slick meeting improvements
- Customize your JIRA integration
- New releases for iOS, Android
- And more...

New Charts on Tidy Running Business Reviews (RBRs)

- Organize charts by topic or category
- Display data as bar charts or donuts
- Include up to 7 results in each chart (up from 5)
- Select your own chart colors
- Print to pdf (including charts!)



Cancel Save

RBR Marketing Q3

Carl Chagoyan

CAMPAIGNS

Marketing 2H2018 Notes

- **4 additional deals** currently in the pipeline: Acme, Radiance, TBS, JDS - expected to close by EoQ
- For Q3 we are **expanding target industries** to include Oil & Gas
- We are launching **3 new campaigns** in September
 - Email outreach to new prospects in 1000+ employee companies
 - Print campaign in MIT Sloan
 - Social promotion of K2 on LinkedIn

Reduction in Customer Acquisition Costs (CAC)



Lead Cost by Source



Revenue



Edit

Delete

RESULTS

<p>17 ▲ of 24</p> <p>24 beta customers on K2</p>	<p>4 ♥ of 10</p> <p>Get 10 tier 1 media outlets to cover K2 launch</p>	<p>56 ▲ of 200</p> <p>200 validated opportunities for K2 in the pipeline</p>	<p>66% ▲ of 100</p> <p>K2 Launch goes according to plan</p>	<p>6m ▶ of 8m</p> <p>Total marketing spend on K2 Launch</p>
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OBJECTIVES

Placeholder for objective content

HOT BOX

Placeholder for hot box content

WORKSTREAMS

ACTION ITEMS

→

RBR Marketing Q3

Carl Chagoyan

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K2 Launch goes according to plan

6m ▶ of 8m

Total marketing spend on K2 Launch

OBJECTIVES

→|



Marketing Q3 RBR

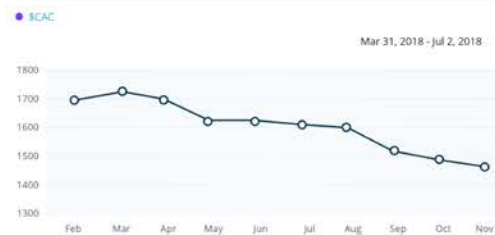
Printed on July 13, 2018

CAMPAIGNS

Marketing MRR notes

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Reduction in Customer Acquisition Costs (CAC)



NEW PRODUCT LAUNCH

K2 Launch Budget



K2 Launch Readiness

Launch progress



OBJECTIVES

65% GROWTH: Drive demand and build the sales pipeline

Jun 30, 2018

Marketing: Jennifer Orban

- 8 of 20 New logo wins
- 5.25k of 6.2k MQLs
- 10 of 20 SQLs
- 20% Conversion rate

Emma S: We are looking really good on this one team! -

Meeting: K2 Launch Planning

Blue Marina Room

View Meeting for

5:00pm on May 23

Count Up

00:24

Meeting Feedback

4 😊 1 😐 0 😞

Send Minutes



Description

ADD



Put actions in: K2 Launch

Topics for Discussion

○ Add topic

🕒 PR Plan

K2 Launch: Emma S.

Aug 13
By Emma

Takeaways

○ Add a takeaway



💬 Update campaign timeline to launch 2 weeks before Christmas

Mary Cmoso 2:40pm Jul 13

- Still behind on the core use cases and needs. They should be wrapped up this week. Let's make sure we are highlighting the value of the product across the various personas for teh press release content.

We need to have a draft of the press release this week. I am engaging a PR firm to drive the social and market articles for publication. I want to make sure they have ample time to engage with the content so they can be effective in who they are in engaging in. I should have a final close of agreement with the firm in the next two days.

Done



📊 K2 Launch Readiness
Emma Smith

44%



Draft channel partner announcement

K2 Launch : Emma S.

Aug 13
By Emma

🌊 K2 Launch Press Release Campaign

45%



The collateral for the blogs and email campaigns, and ads that will go out aftr the press release are not



Meeting: K2 Launch Planning

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00:00

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Description

ADD

Topics for Discussion

Add topic

Takeaways

Add a takeaway

Put actions in: [Set Workstream](#)

Type a workstream name or team name to search

- Development**
 - K2 Development
- Marketing**
 - K2 Launch
- R&D**
 - K2 Architecture
- Sales**
 - K2 Beta Program

Meeting: K2 Launch Planning

Blue Marina Room

View meeting for
5:00pm on May 23

Count Up
00:00

Meeting Feedback
😊 😐 😞

Send Minutes



Description

ADD

Topics for

○ Add to

Action items from last meeting

<input type="checkbox"/>	Action Items	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	🕒
<input type="checkbox"/>	Draft partner announcement	Jack C.	K2 Launch	Feb 30, 2018	G	🕒
<input type="checkbox"/>	Have PR agency put press release on the wire	Jack C.	K2 Launch	Feb 30, 2018	G	🕒
<input type="checkbox"/>	Draft of press release	Jack C.	K2 Launch	Feb 30, 2018	A	🕒
<input type="checkbox"/>	Reach out to vendor on the specs	Emma W.	K2 Launch	Feb 30, 2018	R	🕒
<input type="checkbox"/>	PR Plan	Emma W.	K2 Launch	Feb 30, 2018	R	🕒

Add to this meeting

Workstream Import

Where do you want to import from?



Would you like to use the guided wizard or JQL for you integration mapping?

Basic JQL

Work in JIRA that needs to be imported

Jira JQL query for all issues to be imported:

Add your JQL query to pull the issues that you would like to see in Workboard. You can use any JIRA attributes to narrow down and filter the search results.

EX. project = K2 AND Sprint = 42

Workboard

Create a new workstream in Workboard

Workstream Name

Sync Tasks (action items)
Syncing Tasks will pull taks from jira and convert them to action items in workboard

Validate

K2 Sprint 4 Application Development

Source: JIRA project K2 Sprint 4 (one-way Sync)

Sourced from JIRA issues

Jul 08, 2018 - Jul 08, 2018

HEALTH: OK

PACE: STEADY

PRIORITY: P5

0 R 1 ⏸ 44 ⌚ 32 👤

31%

Board View

62 List View

Calendar

Recent Activity

Files

BACKLOG

+

- Change code to pull static images from CDN
Allen Bart Aug 13, 2018
- Disable directory listing in the web server
Allen Bart Aug 13, 2018
- Update CSS to match new marketing guidelines
Allen Bart Aug 13, 2018
- Add Javascript auto-populate to the State field in address form
Allen Bart Aug 13, 2018

NEXT

+

IN PROGRESS

+

- Configure hot backup of prod. DB
Allen Bart Aug 13, 2018
- End-to-end user acceptance review of UX
Allen Bart Aug 13, 2018
- Get Signed SSL cert for both domains
Allen Bart Aug 13, 2018
- Security: Third party penetration tests
Allen Bart Aug 13, 2018
- Allow year drop down in date pop-up field
Allen Bart Aug 13, 2018

DONE

+

- Upgrade to JQuery v3.3.1
Allen Bart Aug 13, 2018 ✓
- Penetration tests by internal security team
Allen Bart Aug 13, 2018 ✓
- Allow user edits to profile
Allen Bart Aug 13, 2018 ✓
- Internal launch of UX
Allen Bart Aug 13, 2018 ✓

Deliver high quality, scalable solutions on time every time

Allen Bart : Development



Sep 30, 2018
47 days left

Key Results Comments

3.1
of 0 - 2
Median task cycle time is 2 days (+/- 1 day)

25
of 30
Bring Dev to 30 people in Q2

22
of 0 - 12
Fewer than 12 field reported bugs per month (33 total in Q2)

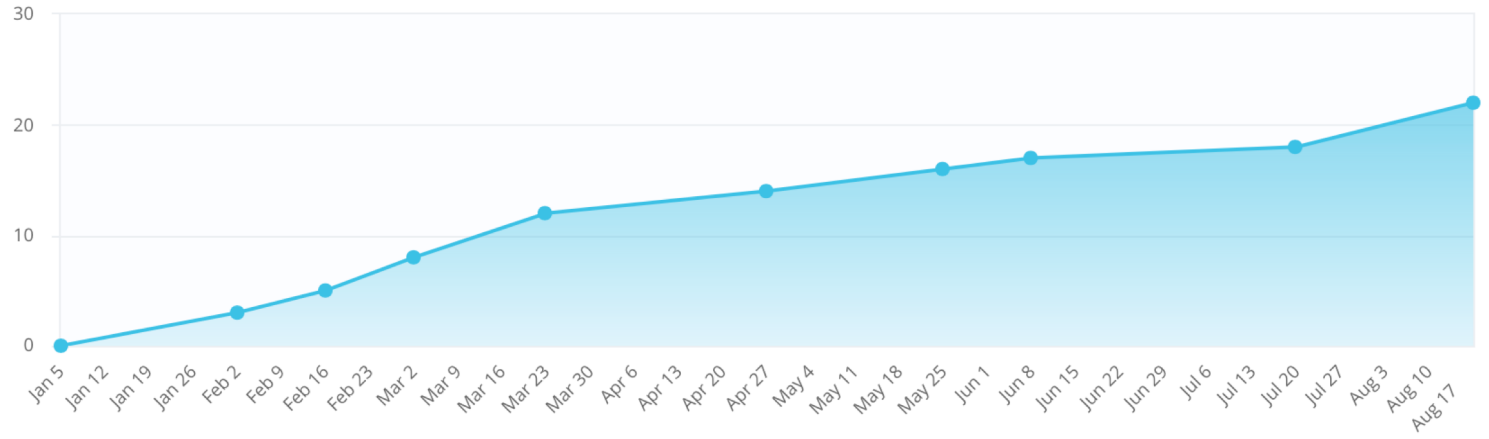
0
of 0
0 critical bugs on initial deploy of production code

Fewer than 12 field reported bugs per month (33 total in Q2)

As of Aug 14, 2018

22 of 0 - 12

Jan 04, 2018 - Aug 16, 2018 Weekly

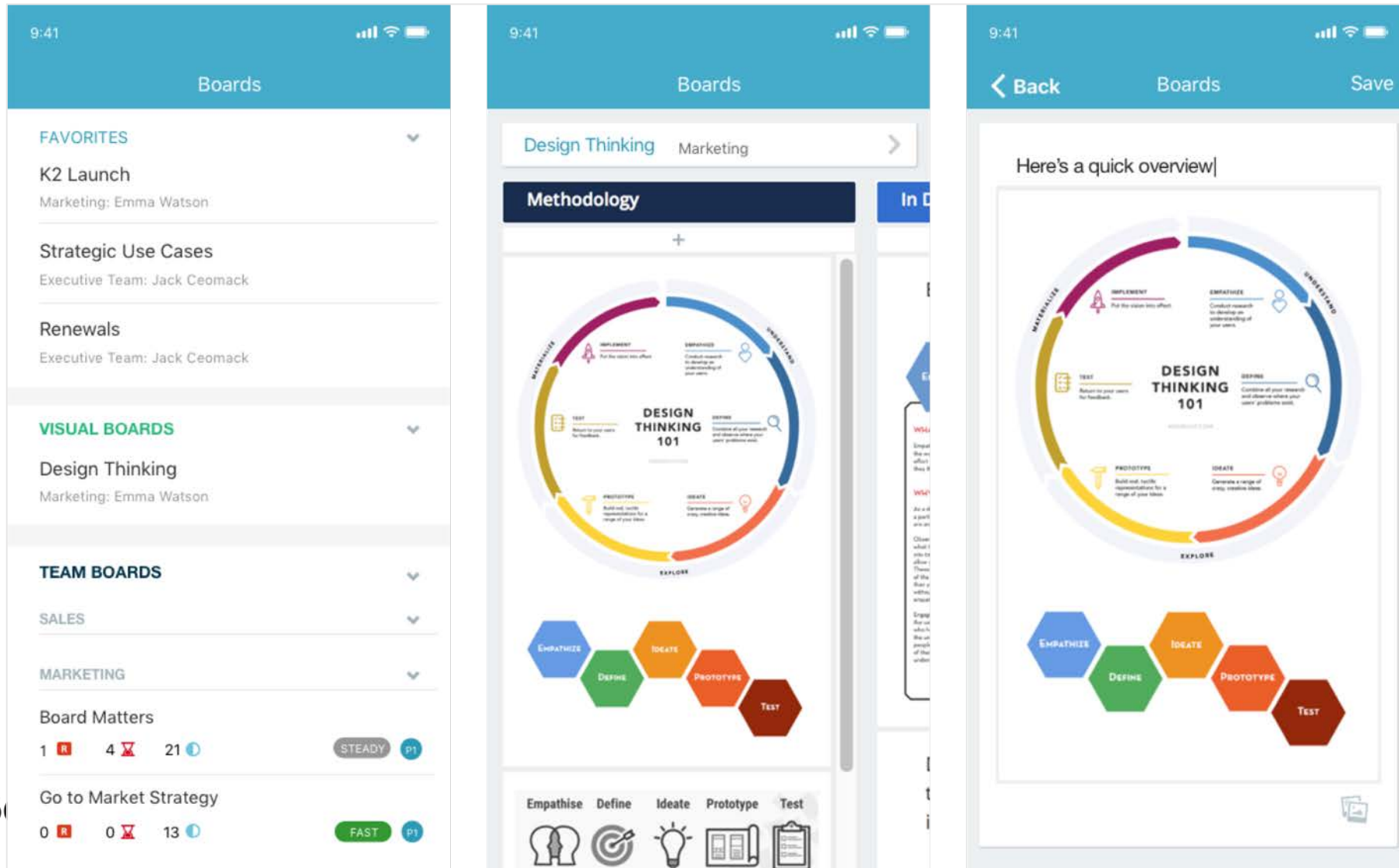


Source: Atlassian K2 Sprint 4

Sourced from JIRA

Sync Now Follow

Browse all collaboration and visual boards from your phone



And more...



- Categorize and sub categorize objectives
- Set your organization's OKR thresholds and Heatmap colors
- Get reminders to update your key results



- Notify a group of people automatically when actions are added to a column
- Faster action items on iPhone app



- @mention notifications for Microsoft Teams
- Login with SSO on mobile

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Coming in Q3 and Q4



- Streamlined OKR Wizard
- Weighting on metrics



- Refresh of the meetings dashboard



- New connectors to external business data sources
- Gmail plugin



What do you think?





*Thank you for the opportunity to
support your success!*