# Welcome, WorkBoard Community!







# Let's start with introductions ...



Megan Kolkman Managing Director – Client Services & Success



**Josh Brown** Customer Success Manager



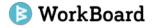
**Lizzie Klingen** UX Designer



Hemant Sharma VP Growth



Florian Hunziker





# Join other customers and the WorkBoard team for a two-day WoBo hackathon!

The best products and processes reflect technical and non-technical perspectives — everyone is welcome.

This is a great opportunity to flesh out your ideas for WorkBoard, share them with others and bring them to life in the WorkBoard platform or methodology!

- Prototype and demo new WorkBoard capabilities
- Ideate and create better or novel user experiences
- Brainstorm new process and onboarding flows that help teams align, measure and achieve key results faster
- Meet and mingle with peers from other companies and WorkBoard team members

Bring a team or let us pair you with common-interest peers for two-days of innovation and great fun.

WoBoCon is free to join. Space is limited to 40 – register yourself or the team today!

#### 👂 🜔 WorkBoard

#### WorkBoard HQ 487 Seaport Court Suite 100 Redwood City CA 94063

#### WorkBoard

Register Now

#### **EXPERT WEBINAR**

# Driving Effective Meetings

#### March 27 @ 11AM PST



Tamara Rezler Chief of Staff, Trendkite

Hear TrendKite makes meetings worth the time.







# Become a certified OKR coach!

Join 400 coaches certified helping their organizations thrive in dynamic markets!

- 2-day program
- Bring a team to our location in Silicon Valley
- Schedule for a larger group at your location
- Class size: 30







# **OKR Coach Certification Program**

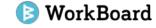
# **Coach Curriculum & Certification**

Help your organization achieve its growth agenda while increasing your personal impact and advancing your career. The training program and certification includes classroom sessions, role playing practice, offline exercises and a final exam that encompasses:



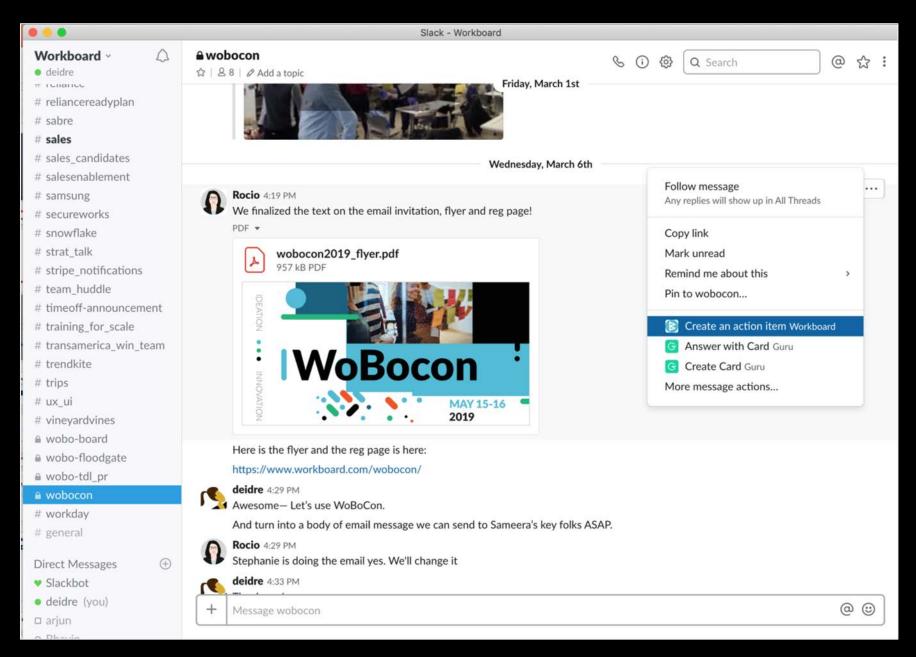
organization

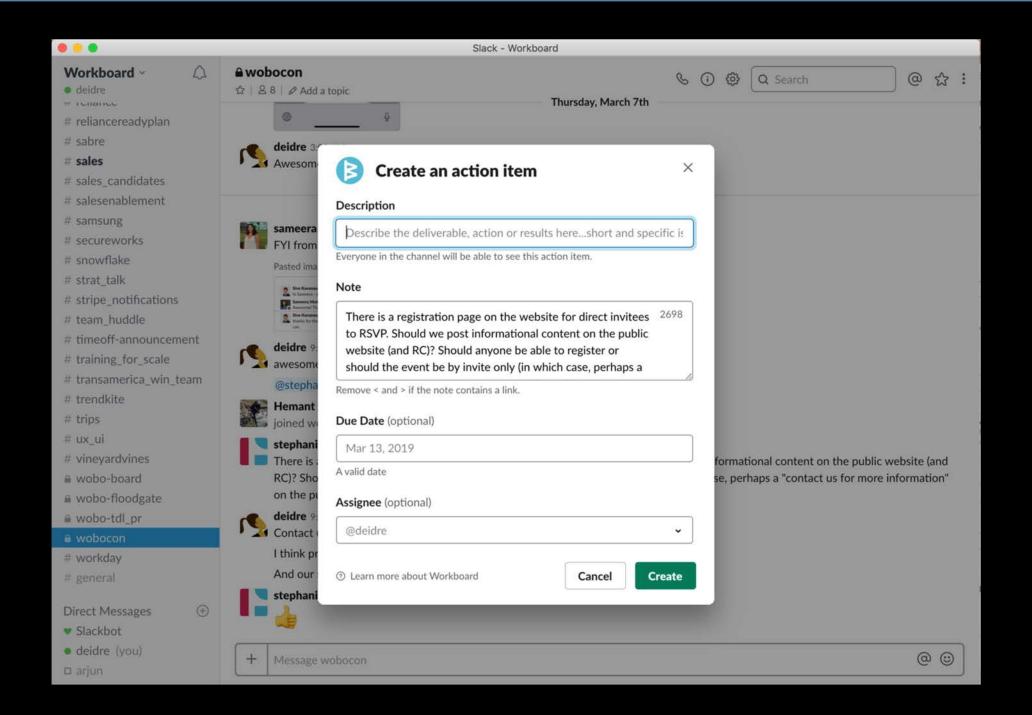
program roll out



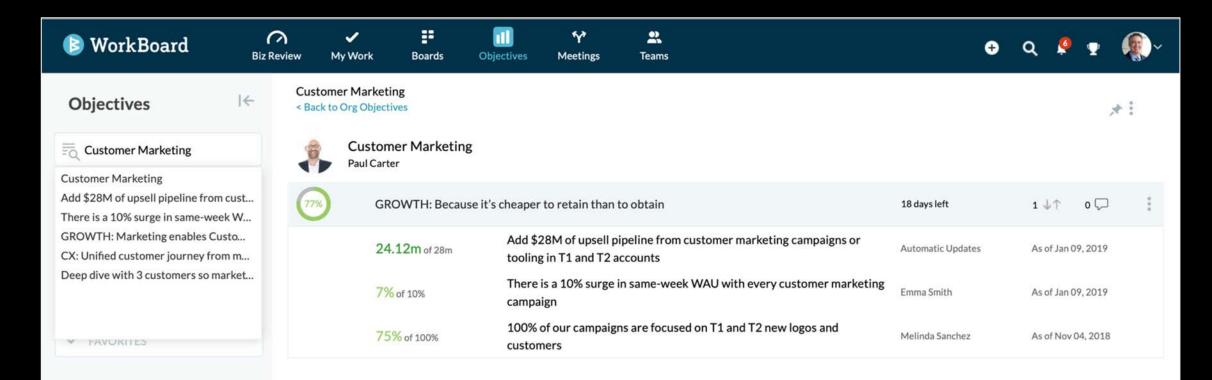
practices

#### **Speed tip #1** Create action items from slack conversations!

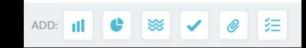




#### **Speed tip #2** Use search to get an instant OKR report for a person or team



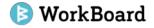
#### **Speed tip #3** Grab all the actions from the last meeting



👂 WorkBoard	Review	✔ My Work	Boards	Objectives	Meetings	<b>2</b> Teams					<b>⊕</b> ପ୍	<b>9</b> 👳	•
→ Strategic Use Cases							View meeting for Jul 24 at 1:00pm		ount up 🗸 0:00 🜔	Meeting fee		Minutes	A - 1
Description		n items from last m	eeting							×	Put actions in	: Strategic Us	
ADD: III C 💥 🗸	· · ·	lessage framework /e have the wrong	1		Mary C Jack C		gic Use Cases	Dec 04, 2018 Jun 12, 2018	R	0			
O Add topic		VP, GM or Chief Ex		смо	Barry B		egic Use Cases	Nov 09, 2018		~			
US SALES: Build skills for credibility with the right Sales NorthAmerica Team: Jaso	cus	nboarding checklis ompeting on Marke		d Analytics	Carlo M Luke L		rgic Use Cases rgic Use Cases	Jan 16, 2019 Jan 28, 2019	6	•	believe it will i		
											Feb 28 Added	by Jack C	
50% of customers are usi features / top use cases	ing				Add more				Add to	this meeting	Mar 12 Added	3 🔘 by Jack C	
<ul> <li>85% of ARR comes from of 2 segments</li> </ul>	customers in `	Tiers 1 and	81% of 85%	•									
Re-look at the persona fo are a key decision maker Personal Stream: Will Young	or chief of staf	fthey Sep C	D2 R (1)	•									

#### **Speed tip #4** Integrate your business apps to update KRs automatically

Type of results	Example KRs updated	Example integrations
Sales & Marketing	<ul> <li>Target \$ ARR and bookings</li> <li>Lead volume/quality - # MQLs, SQLs</li> <li>Churned Revenue \$ or %</li> </ul>	salesforce Marketo amazon pipedrive
Manufacturing	<ul> <li>Capacity Utilization %</li> <li>Production Throughput # by Product</li> <li>Reliability %</li> </ul>	Honeywell Manufacturing Information Intelligence System (MIIS)
Financial	<ul> <li>GRR</li> <li>Gross Margin</li> <li>\$ Lifetime customer value</li> <li>Current ratio % or contribution margin %</li> </ul>	SAPE © Periscope Data
Customer success & services	<ul> <li>NPS #</li> <li>Time to response or resolution (mins)</li> <li>Help Center usage - # views</li> </ul>	zendesk Gainsight servicenow
Collaboration and Development	<ul> <li>Product launch (Epic) % completion</li> <li>Market entry initiative % completion</li> <li># of Risks by Feature</li> </ul>	Jira asana

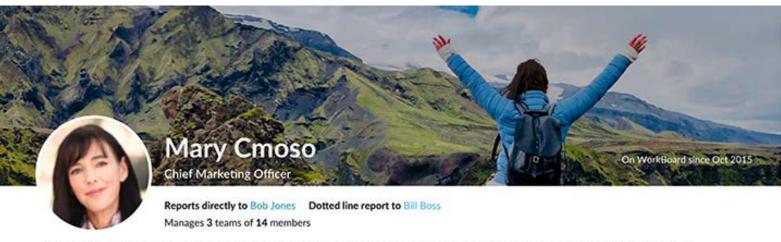




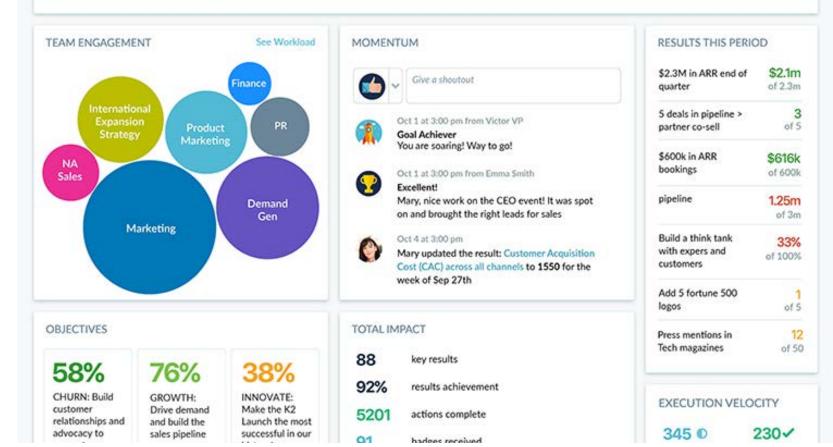
WorkBoa	ard 🛛 🖉 🖉 🖉 🖉	✔ My Work	Boards Objectives	<b>₩</b> Meetings	<b>2</b> Teams						Ð	Q 👰	2 🤇
Company S Jack Ceomack	trategic Priorities											19 (	0 A
CHURN													
7.6 $\blacktriangle$ of 8 Maintain aver	rage NPS of 8		all > \$55K ARR ewing this quarter	Increase	of 90 average num from 45 to 9		users per	81% 🔺 o Drive 0700 83%			102  of 10		
GROWTH													
69% ▲ of 75% of Tier 1 active weekly	and 2 customers are	88% ♥ of 9 96% revenue r customers	retention of T1/2	Create 1	f 12 2 new CMO dies in T1/T2			80% 🔺 of 85% of ARR Tiers 1 and 2	comes from	n customers in		notable quality-o two weeks into p	
OBJECTIVES	5								нот	3OX			Show
85% E	GROWTH: Make it easy for executive Team: Jack Ceomack ECONOMICS: Maximize o Executive Team: Jack Ceomack							-	N		rsonas, use cases, &S and Sales team ining		17
72%	CHURN: Customers for life	2							ĸ	usage T1 & 2 a	co-few campaigns accounts drive 10 conversations per	account	of
	AMS Strategic Use Cases Executive Team: Mary Crnoso		2 🖬	17 🕱	28	٥	Dec 31, 2018		N		lback from 7 CM0 MO dashboards a		o
	CMO Case Studies			8 🕱	8	0			N	85% of ARR co Tiers 1 and 2 s	omes from custon	ners in	59 of 85

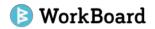
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## Let the Team Know How "You Do You"



I'm very excited to be developing the marketing strategy for new and existing products. Stoked about building strong pipeline for Q4 to enable our sales team to succeed! 🥢





👂 WorkBoard	Biz Review	🖌 My Work	Boards	Objectives	Meetings	Teams			Ð	۹	<b>9</b> 🝷	•
Governance & HR	←	Past Due Key	Results									
Custom User Attributes Categories		Ping all H	KR owners				Source	Date of last update	Frequency	Missed	Ping	
Org Directory Past Due Key Results		Talent Acqu	uisition: Jean	Wobo							() 0	
		Improve em	ployee engage	ment							G	
		0 of 8	Score on satisf	action survey			Alice Peoples	Never updated	Weekly	62	(z)	
		0% of 100%	New skill build	ing programs im	plemented		Alice Peoples	Dec 31, 2017	Weekly	63	Ð	
		Executive 1	feam: Jack Ce	omack							(1)	
		INNOVATE:	Dramatically i	mprove custon	ner and employ	vee experience						
		97 of 10	10 Evangelist i	nterviews publis	shed in tier 1 m	edia	Jack Ceomack	Jan 15, 2019	Weekly	18	(g)	
		Emma Smit	h								٢	
		Expand my	expertise as a r	marketing mast	ter							
		80% of 100%	Attend Toastm	asters			Emma Smith	Dec 05, 2018	Weekly	12	P	
		Catie Smith	1.								(j)	
		Improve my	public speakin	ig skills								
		6 of 8	Attend 8 Toast	master meetings	s this quarter		Catie Smith	Jan 30, 2018	Weekly	4	<b>()</b>	
		Improve my	nublic eneskin	o ekille								



## **Performance Enhancements to WorkBoard**

Continuous performance enhancements ...

- ... to make WoBo snappier all around

- Optimized database table access
- Improve search and adjust dropdowns for scale
- Reduce redundant calls to certain functions
- Reduce the amount of data sent to the browser for alignment view interactions
- Move to React on browser for faster load time
- Optimizations for very large enterprises

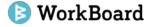
- ✓ Faster page load times
- ✓ Quicker search responses
- ✓ Faster data entry and updates
- ✓ Smarter dropdowns

# **Author smart OKRs quickly**

- 1. Create and edit OKRs fast with conversation-style wizard.
- 2. Easily mirror a key result on a different objective
- 3. Roll up and inherit key results more efficiently
- 4. Control transparency by defining the specific teams that can see your OKRs

OBJECTIVE		.0
	it easy for the right customers to buy and harder for them	D°
to leave because t	hey love the product	
Team   Executive Team · Alig	ned to 3 objectives - Dec 15, 2018 - Dec 31, 2018	
KEY RESULTS		
#	Release CMO notable quality-of-life features every two weeks into production	1 0
	Jack Ceomack to update number every Friday. • 0 of 15	
#	Initial Snazzy solution release is used by 10 Tier 1 and 2 customers at least	/ Ō
	two times a week Barry Bosser to update number every Friday. • 0 of 10	
Add apoth	or kov rosult	
(±) Add anoth	er key result	

When you are finished adding key results, Add Dependencies or select Done.



## **Faster conversations on mobile**

@ mention colleagues while collaborating on OKRs and action items on mobile

9:41		all 🗢 🖿		9:41						all S	-
<	Comments		<			Co	mme	nts			
	No comments yet				I	Νο coi	mmen	nts yei	t		
Aaron W	lison										
🛞 Andy Vu		1									
🥚 Alexa Sm	hith	1									
Anjelica	Wilson-Becker										
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@ Aa		× ۲	Contraction of Contraction	Andrea mber of						e!	R N
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ASD	FGHJ	KL	1	A S	D	F	G	н	J	К	L
★ Z X		M	+	Z	x	С	۷	В	Ν	м	$\langle \times \rangle$
123	space	return		123		s	space			re	turn
		Ŷ	6								Ŷ





庨 WorkBoard	Image: Weight of the service     Image: Weight	ર 🌲 🝸 🥘
Objectives	4 UPDATE REY RESULTS	R Focus
Q Jump to	OKRs I Own Key Results I Update My Manager's OKRs	
My Objectives Heatmap Alignment	Show: Teams I manage V	
Timeline Engagement	Image: Drive demand and build the sales pipeline     80%     140 days left     V	Now
COLLAPSE ALL     FAVORITES	Marketing enables Customer Success as much as it does Sales 71% 16 days left	Legend
	Make the K2 Launch the most successful in our history!   73%   16 days left   A	wesome!
	Pro	gave Carlo Marco a badge for vide RevOps data and insights t move us from good to incredible
	Sales and marketing target differentiated use cases 63% 16 days left V	xcellent!
	You	gave Carlo Marco a badge for vide RevOps data and insights



You gave Carlo Marco a badge for Provide RevOps data and insights

that move us from good to incredible

#### 🜔 WorkBoard

2 Y Meetings Teams

11



Update 2 key results

9

\* :

My Calendar  $\rightarrow$ 

MY OKR		View all	MYW	ORKSTREAMS	View all
60%	Increase average number of users per account from 45 to 90 account		44%	Strategic Use Cases	
30%	CAC Payback Period for new business deals improves from 10 months to under 8 months		44%	Snazzy Solution Launch	
40%	Drive gross revenue retention above 83%		44%	Go to Market Strategy	
53%	Gross margins move from 74% to 79%		(44%)	Renewals Q1-Q2	

Week V < > March 2019

3

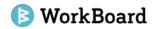
**Biz Review** 

Show me:	Action items & subactions	$\sim$

Mon Feb 25	Tues Feb 26	Wed Feb 27	Thurs Feb 28	Fri Mar 1	Sat Mar 2
+	+	+	+	+	+
Marketing Weekly Huddle 9:00 am	Prep for 1on1 with Carlo 7:30 am	TMO Weekly 10:00 am	Talk to charles about unblocking the compliance element	Pick up the key result Joe C. cascaded to you	
Retail Chief of Staff STRATEGIC USE CASES	Meet with Mary and discuss Demand Gen and LTV/CAC Ratio and plan	K2 Launch Planning 10:00 am	() (I)	Prep for 1on1 with Mary 8:30 am	Sun Mar 3
© <b>0</b>	SNAZZY SOLUTION LAUNCH	Complete pricing sensitivity analysis for NA + EMEA services GO TO MARKET STRATEGY	CSM training needs urgent attention > make it happen in March! SNAZZY SOLUTION LAUNCH	Oil & Gas CMO STRATEGIC USE CASES	+
		•		Talk to Pete about Salesforce field RENEWALS Q1-Q2	
		Check with Stacy on weekly report RENEWALS Q1-Q2	Vertical Planning 2019 STRATEGIC USE CASES		
		0	0	Submit business proposal to Dan PERSONAL STREAM	
		Call bank PERSONAL STREAM	Create a plan for Oil & Gas CMO Customer Rerference and Video CUSTOMER REFERENCES	0	
			00		

庨 WorkBoard	Biz Review	My Work	Boards	0bjectives	Y Meetings	<b>R</b> Teams						÷	۹	<b>. .</b>	9
Objectives	← Al	lignment													8 0
Q Jump to	Œ	By Organization	II. By C	Dbjective	Full Alignment	Report	٩.5	earch for a perso	on, team, objective	, or category		S	show:	Default view	$\sim$
Due for update now My Objectives	4	David Ceomo	o Full Alignm	ent Report								Owne	er	End Date	View
Heatmap Alignment	个	🕞 <b>19%</b> Crus	h my revenu	e goal for Q1!								Josh E	3	Mar 31	
Timeline		□	WAU: Ir	ncrease activity	in all of our acc	counts						Alice	Y	Mar 31	$\square$
Engagement			20% Gr	reat CX across	our entire applie	cation for	both int	ernal and exter	nal			Alice '	Y	Mar 31	$\square$
		L 🕀	13% G	ROWTH: Make	it easy for the	right custo	omers to	buy and hard f	or them to leave			Brenn	ia S	Apr 31	
* FAVORITES			43% PE	EOPLE: We attr	act, retain and e	enable the	e best pe	ople to operate	e at their best			Clark	E	Apr 26	
			22% EC	CONOMICS: M	aximize our abil	ity to grov	w by opt	imizing our unit	t economics			Shant	anu S	Apr 31	2
		199	6 Crush m	ny revenue goa	l for Q1!							Josh E	3	Mar 31	Z
		Θ	58%	WAU: Increase	activity in all of	our accou	unts					Alice	Y	Mar 31	Z
		L	20	% Great CX	across our entir	e applicat	tion for b	oth internal and	d external this is	really long and	runs to	Alice	Y	Mar 31	Z
		L	- 🖂 19	% Crush my	revenue goal fo	or Q1!						Brenn	ia S	Apr 31	
				⊝ 58% v	VAU: Increase a	ctivity in a	all of our	accounts				Clark	L	Apr 26	Z
				209	% Great CX a	cross our (	entire ap	oplication for bo	oth internal and e	xternal		Shant	anu S	Apr 31	2
				÷ 139	WAU: Incre	ease activi	ity in all	of our accounts				Brenn	na S	Apr 31	Z
				439	WAU: Incre	ease activi	ity in all	of our accounts				Clark	L	Apr 26	
				229	% WAU: Incre	ase activi	ity in all	of our accounts				Shant	anu S	Apr 31	Z

Due for upd					
My Objectiv Heatmap	WAU: Increase activity in all of our accounts			k	×:
Alignment	Alice Yang: Customer Success 58%				25, 2018 lays left
Engageme	Key Results 1 Aligns Comments  History				
* FAVOR	↑ ○ 19% Crush my revenue goal for Q1!		Josh Burns	Mar 31	
	S8% WAU: Increase activity in all of our accounts	9	Alice Yang	Mar 31	
	20% Great CX across our entire application for both internal and external	0	Alice Yang	Mar 31	Z
	ECONOMICS: Maximize our ability to grow by optimizing our unit economics		Brenna Sted	Apr 31	2
۲	43% PEOPLE: We attract, retain and enable the best people to operate at their best	-	Clark Larson	Apr 26	2
	GROWTH: Make it easy for the right customers to buy and hard for them to leave	2	Shantanu Saggar	Apr 31	



#### WorkBoard

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1  $\bigcirc$ **Biz Review** 

= My Work Boards 57

2

Teams

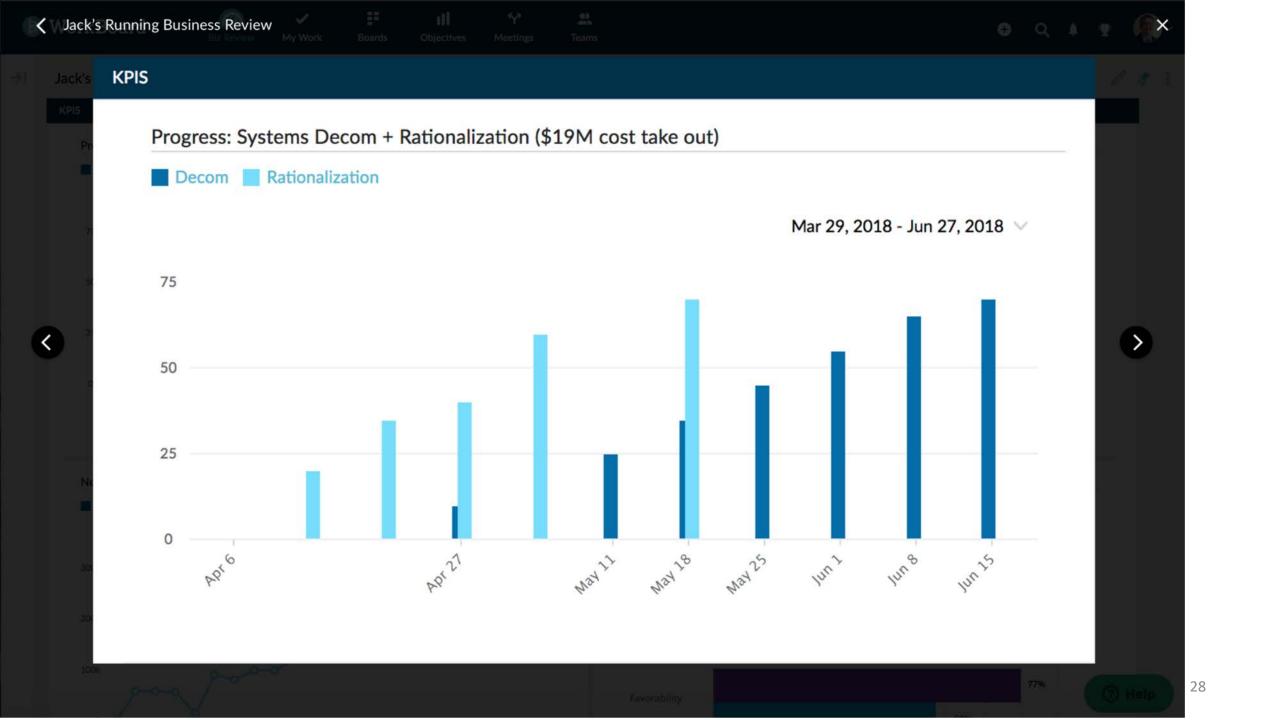
Objectives Meetings

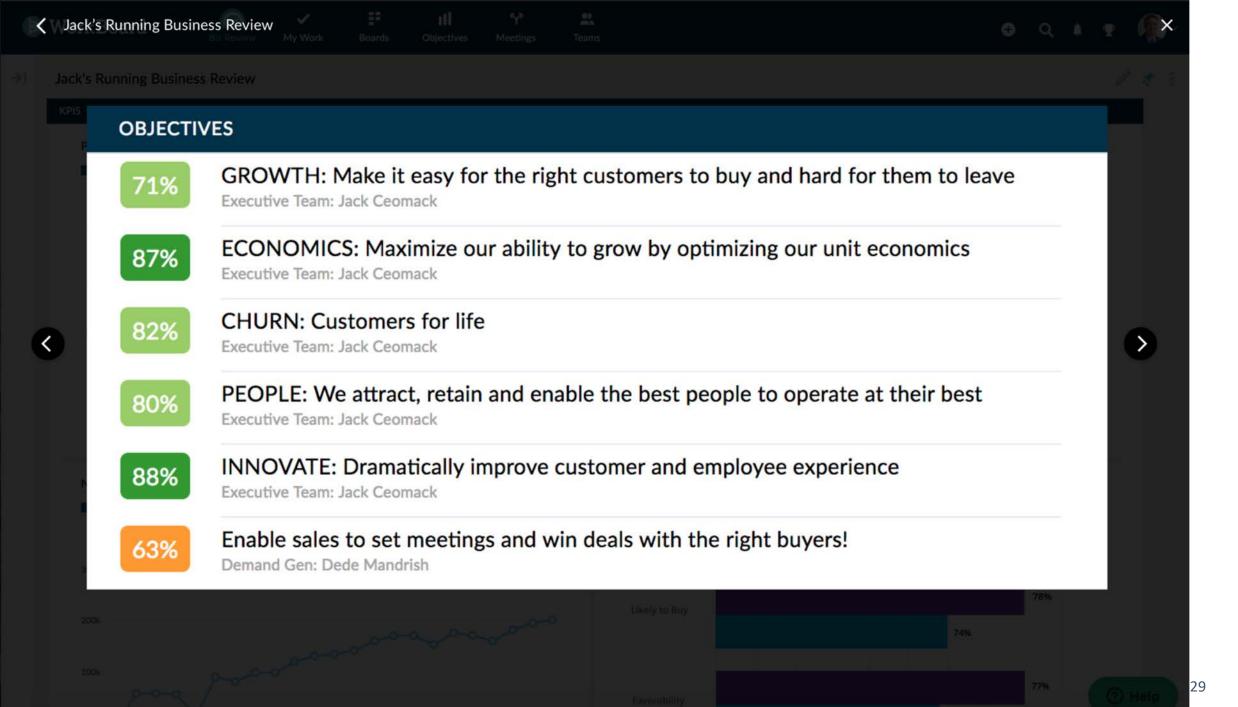
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#### Jack's Running Business Review

#### Personalize Hotbox KPIS Presenter Mode 1 Progress: Systems Decom + Rationalization (\$19M cost take out) Margins 📕 Decom 📕 Rationalization (KR1) Mar 29, 2018 - Jun 27, 2018 🔍 Dec 30, 2017 - Jul 31, 2018 🗸 75 80 77.5 50 75 25 72.5 0 70 N2418 May 25 Junt Ing Por 21 May 11 Jun 15 P.91 0 Jans 12519 tep tep 20 20 1 Nay Nay Nay Jun Jun Jun 8 101 101 20121 a a a para para a a New ARR (\$Rev) Market Sentiment Bookings 📃 (KR2) Market Perception Next 2 Us Dec 28, 2017 - Jun 29, 2018 🗸 300k 78% Likely to Buy 200k 74% 0000





<	Jack's I	Running Bus	iness Review												0			×		
	Jack's Ri		ess Review															<b>*</b> 1		
		ogress: Systems Decom + Rationalization (\$19M cost take out)						M	Margins											
		WORKSTREAMS																		
<		45% 58% 50% 84%	Strategic Executive Tea						2	R	26	X	25	0	Mar 31, 2019					
			Snazzy CMO Beta Program Global Sales: Joe Smarts				5		10	×	10	0	Mar 31, 2019							
			Renewals Q1 - Q2 Executive Team: Carlo Marco						R	8	X	8	•	Jun 30, 2019						
			Snazzy So Marketing: M								1	X	7	0	Feb 28, 2019					
		0%	Transition S&D Managers International Expansion Strategy: Jack Ceomack									2	0							
																77%		elp		

#### Jack's Running Business Review

#### Jack's Running Business Review

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нотвох		
al	Build a world class operations organization that amplifies value for the company Operations: Dan Levitz	63%
at	Keep and expand our customer base Customer Experience: Carlo Marco	15%
at	GROWTH: Marketing enables Customer Success as much as it does Sales Marketing: Mary Cmoso	57%
at	Sales team hiring Global Sales: Sam Admina	55%
at	Client Experience Simplification improve client satisfaction, reduce client visible error rates and meet client critical commitments TMO: Tom Transform	63%
*	Roadmaps Jack Ceomack	50%
2006	Likely to Bay	78%
		74%
		77%

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31



# What are you curious about and what do you think?

# Thank you for the opportunity to support your success!

