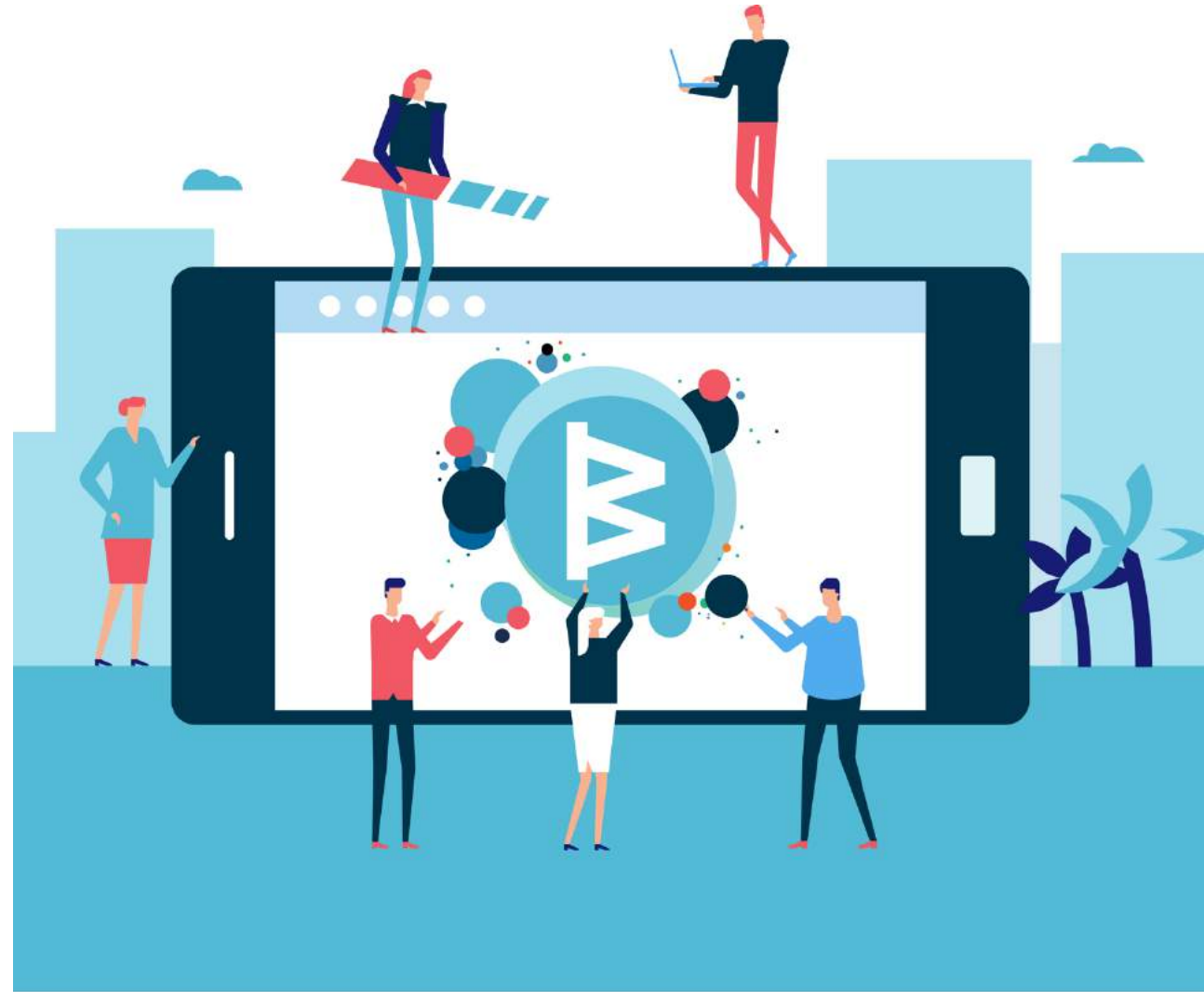


# Welcome to the July WorkBoard Community Call!



**Deidre Paknad**  
CEO & Co-Founder



**1**

**GHX: How we use 1on1s and meetings**

**2**

**Recent features**

**3**

**Coming in Q3**

**4**

**News, events and resources**



# Using 1on1s & Meetings to Accelerate Success



**Rob Gillespie**  
Chief Financial Officer



**Ryan Padilla**  
Leader of Global Strategy Execution

# Accelerating Our Focus and Execution

## G's & O's



### Where We Were:

- 1on1's to meet -- but inconsistent and lacking structure
- Meeting takeaways -- but lost in the digital/paper shuffle without visibility
- Low accountability -- but "I thought you owned that"

## OKRs



### Where We Are Evolving:

- 1on1's to accelerate -- we collaborate, engage with intention and embrace improved clarity
- Real-time action items -- captured, assigned and integrated into work with visibility
- Mutual and real accountability -- commitment to execute with acute awareness of why

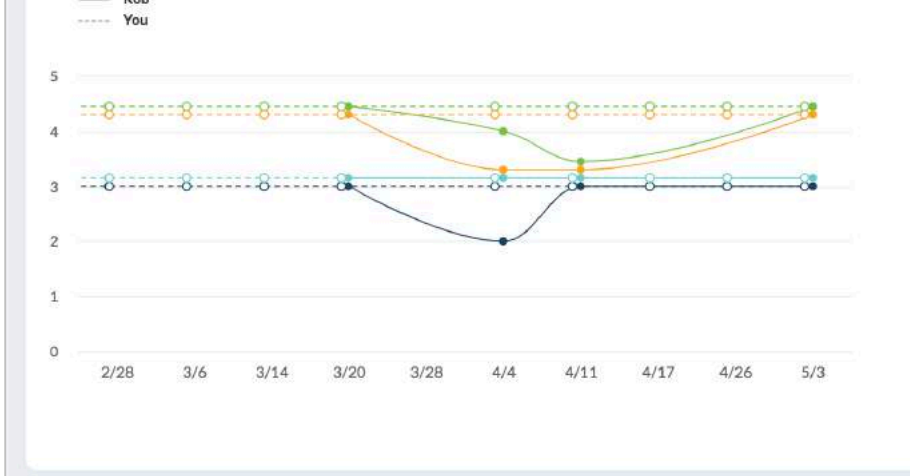
# Ryan and Rob's 1on1 Meeting

**1on1 with Rob Gillespie**  
Chief Financial Officer

Rob's office

View meeting for  
May 03 at 4:30pm

*What do you want to learn?*



- Alignment of roadmap prioritization to Q2 OKRs**  
 07:56 am May 03
- Meeting with Chris, Steve and Sonja on Thurs, 5/9 to review**  
 Maybe takeaway is spend Q2 refining roadmap and get it dialed to inform 2H 2019. Rob to send follow-up to Chris and copy Ryan.  
 Ryan Padilla 07:57 am May 03
- Q2 OKRs - Completed 40 team OKR sessions - getting positive feedback from Managers & IC's. Working through xFunctional alignment.**  
 Need to be conscious of xFunctional alignment. "Here is our religion every quarter". Here is where Dev and Product aligned to drive value creation. Managers need to be in conversation pre- retro and reset to discuss and resolve dependencies.  
 Ryan Padilla 07:53 am May 03
- WoBo training - following team OKR sessions with training on the app, Regina has led these. I will pick up where I can while she is out next two weeks.**  
 Ryan Padilla 07:54 am May 03
- HR engagement - Kayla was looking to find time for you, me and Alexis pre-Summit but didn't happen. I'll work to get this locked for next week.**  
 Ryan Padilla 07:56 am May 03
- Create a few slides on quarterly process and sequencing to use as a communication tool to set expectations for Q3 forward**  
 Personal Stream: Ryan Padilla  
 May 17  
 Added by Ryan P.
- PACE**  
 11:31 pm Apr 26
- Not clear to me where we stand relative to the project plan or Q2 OKRs**  
 How did we do in Q1 - have we summarized Q1 adequately?  
 Rob Gillespie 06:56 pm May 02

# Our Path Forward

- OKRs and 1on1's becoming the way we work
  - Piloted 1on1's with success – **requires discipline!**
  - Enabling honest, consistent feedback
  - Broader organizational adoption in 2H 2019
- 1on1's and Meeting functionality in WorkBoard are key to institutionalizing alignment and focus – and ultimately, **drive growth**



1

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# New Key Result Type

Annual result with quarterly targets – use a single annual OKR with specific targets for each quarter

OBJECTIVE  
ECONOMICS: V  
Team | Global Sales • Jan

KEY RESULTS



+ Add another

When you are

What is the result you want to measure?\*

[See sample OKRs](#)

EMEA Bookings

Where will the key result data come from?

Set multiple targets

[Change data source type](#)

What type of data will have multiple interval targets?\*

Result from a person

Connected data streams

OVERALL TARGET

Start value\* Target value is ⓘ Target value\*

8000000

Higher

15000000

INTERVAL TARGETS

Start date*	End date*	Name of interval*	Target value*
Jan 01, 2019	to  Mar 31, 2019	Q1	9000000
Apr 01, 2019	to  Jun 30, 2019	Q2	10500000
Jul 01, 2019	to  Sep 30, 2019	Q3	12500000
Oct 01, 2019	to  Dec 31, 2019	Ex: Q1	

+ Add another interval

Count as currency



# 2019 Financial Plan



Joe Smarts : Global Sales



Dec 31, 2019  
161 days left

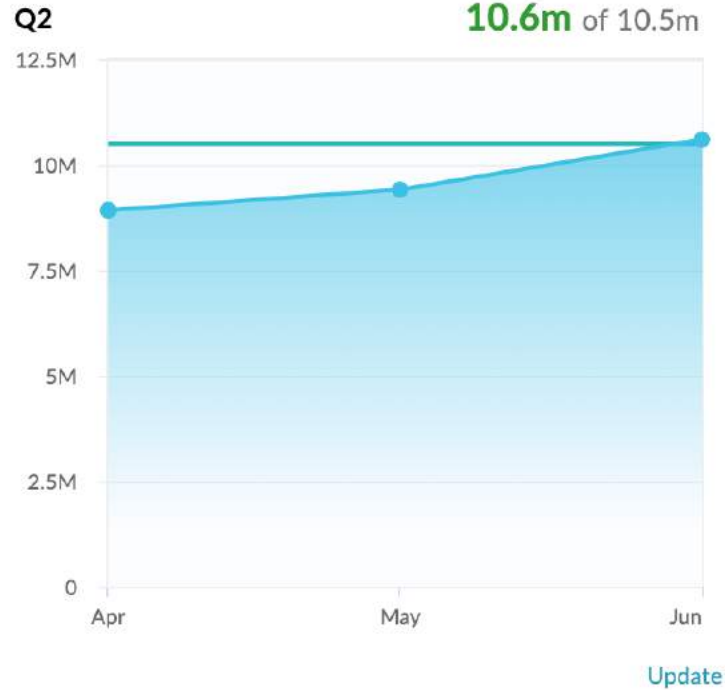
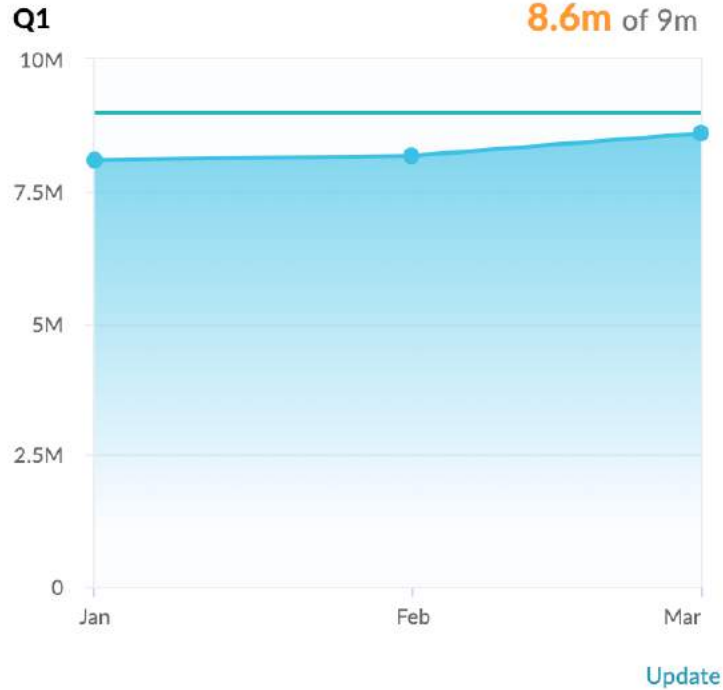


- Key Results
- Comments
- History

## EMEA Bookings

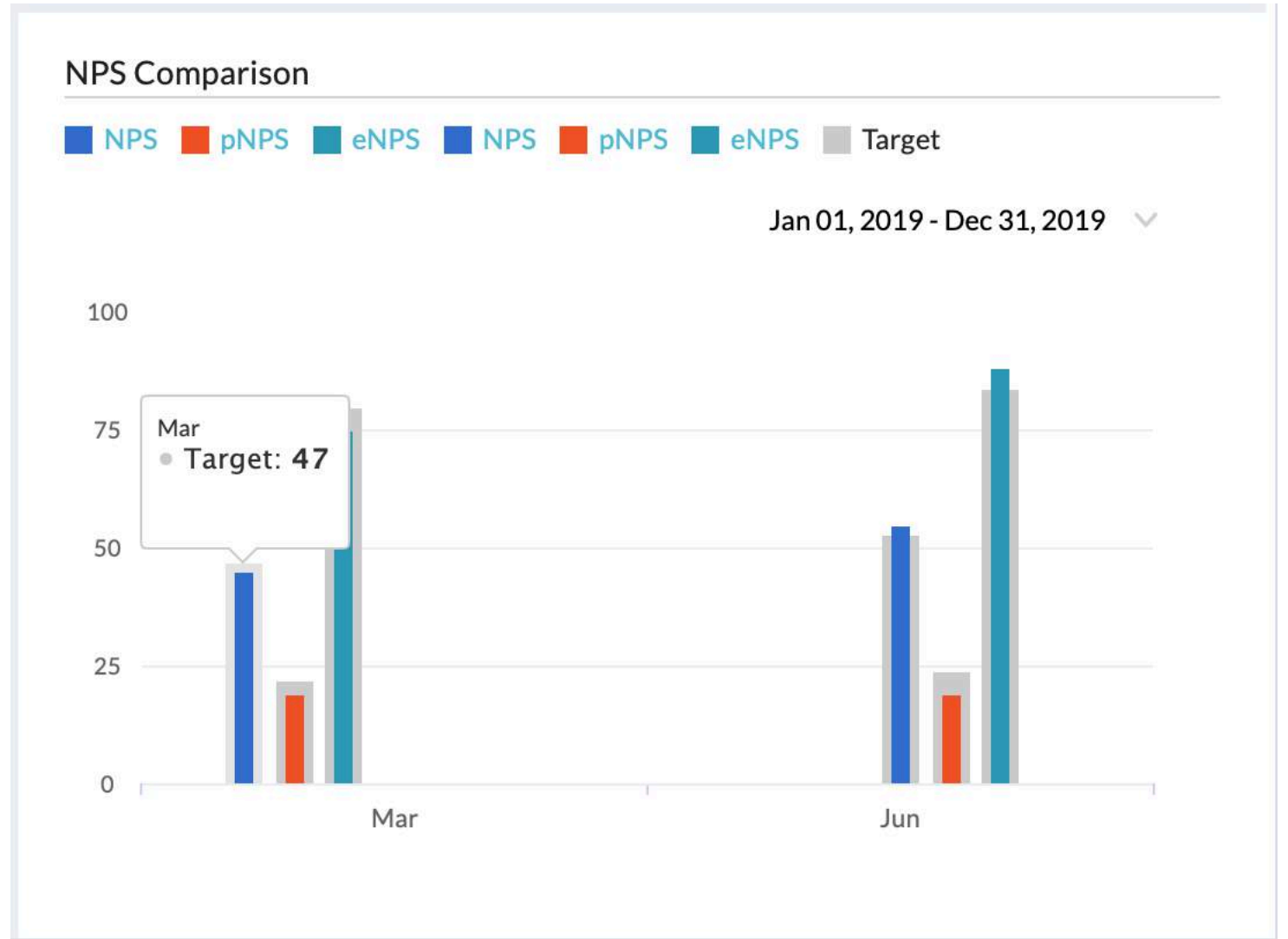
11.2m of 15m

As of Jul 23, 2019 Source: Joe Smarts



# New Biz Review Graph Type

Show Plan vs Actual for faster understanding of over/under plan



# Strategic Use Cases

View meeting for

Jul 23 at 1:00pm

Count up

00:00

Meeting feedback

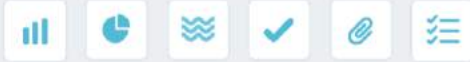


End Meeting



Description

ADD:



Put actions in: Strategic Use Cases

## Topics for Discussion

Add topic

**Re-look at the persona for chief of staff -- they are a key decision maker** Sep 06 R !  
Strategic Use Cases: Mary Cmoso

**Strategic Use Cases** Ok 42%  
Mary Cmoso

**Need to schedule CSM training on latest CMO use case**  
05:56 pm Jul 18

## Takeaways

Add takeaways here

**We have to get to a good hypothesis for this persona and move forward. We can iterate in a quarter or two, but let's stop spinning and start learning in the market.**  
Jack Ceomack 05:07 pm Jul 22

Add more

**We are behind on the core use cases and needs. They should be wrapped up this week, which will enable us to flow that through Marketing, Sales, and CX enablement.**  
Jack Ceomack 05:03 pm Jul 22

**Update product pages on website to showcase these use cases** Jul 22 G @  
Strategic Use Cases: Mary Cmoso Added by Jack C

Add more

**Work with regional managers to schedule CSM training for first week of August @carlo|**

Carlo Marco



Capture actionable takeaways as action items

Done

# Strategic Use Cases

View meeting for

Jul 23 at 1:00pm

Count up

00:00

Meeting feedback



End Meeting



Description

ADD:



Put actions in: Strategic Use Cases

## Topics for Discussion

○ Add topic

📌 Re-look at the persona for chief of staff -- they are a key decision maker  
Strategic Use Cases: Mary Cmoso  
Sep 06 🔴 ⚠️

🌊 Strategic Use Cases  
Mary Cmoso  
Ok ▶️ 39%

🔴 Need to schedule CSM training on latest CMO use case  
05:56 pm Jul 18

## Takeaways

○ Add takeaways here

👤 We have to get to a good hypothesis for this persona and move forward. We can iterate in a quarter or two, but let's stop spinning and start learning in the market.  
Jack Ceomack 05:07 pm Jul 22  
Add more

👤 We are behind on the core use cases and needs. They should be wrapped up this week, which will enable us to flow that through Marketing, Sales, and CX enablement.  
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📌 Update product pages on website to showcase these use cases  
Strategic Use Cases: Mary Cmoso  
Jul 22 🟢 🌐  
Added by Jack C

📌 Work with regional managers to schedule CSM training for first week of August  
Strategic Use Cases: Carlo Marco  
Jul 22 🟢 🌐  
Added by Jack C

Put all your staff meeting actions in a workflow

# Strategic Use Cases

View meeting for  
Jul 30 at 1:00pm

Count up  
00:00

Meeting feedback  
😊 😐 😞

End Meeting



Description

All your actions will be in a handy list in the next meeting

ADD: [Bar chart] [Pie chart] [Waves] [Checkmark] [Link] [List icon]

Put actions in: Strategic Use Cases

Topics for Discussion

Takeaways

○ Add topic

### Action items from last meeting

<input type="checkbox"/>	Update product pages on website to showcase these use cases	Mary C	Strategic Use Cases	Jul 22, 2019	G	D
<input type="checkbox"/>	Work with regional managers to schedule CSM training for first...	Carlo M	Strategic Use Cases	Jul 22, 2019	G	D

Add to this meeting

1

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→ Strategic Use Cases

View meeting for

Jul 30 at 1:00pm

Count up

00:00

Meeting feedback



End Meeting



Description

ADD:



Put actions in: Strategic Use Cases

Topics for Discussion

○ Add topic

● Reminders

12:41 pm Jul 23

● What is this week's focus?

12:41 pm Jul 23

● Q3 Snazzy Release

12:40 pm Jul 23

Takeaways

○ Add takeaways here

●

●



Create customer success story for September 1 release

Jack Ceomack 01:05 pm Jul 23

Add more

Add this as an action item?



Jack Ceomack





 Back to project

WorkBoard

My OKRs

Update Key Results with JI...

## My Objectives

 UPDATE KEY RESULTS 3 DUE



OKRs I Own

Key Results I Update

Team OKRs

Show: Teams I manage and co-manage 

### EXECUTIVE TEAM



Increase quality and timing of releases



4 days left



Create a high-performing engineering team



4 days left



Create a more data-secure product



4 days left



Make infrastructure more reliable



4 days left



Implement Agile across the engineering and product organizations



4 days left







 Back to project

WorkBoard

My OKRs

Update Key Results with JI...

## Update Key Results with JIRA

### KEY RESULTS I UPDATE

**Complete Jaguar sprint with fewer than 30 bugs**

Product Development... · Progress | Last value of weekly updates · 10 of 30

Updating with JIRA query:

project = WW AND Sprint = 42 AND Resolution = Done



**Fewer than 15 customer reported issues**

Product Development... · Progress | Last value of weekly updates · 20 of 15

What query should pull updates from JIRA?\*

 Value for this week | 14

project = WW AND Sprint = 42 AND Tag = Customer\_reported

Cancel

Save

**Create 4 customer success stories for healthcare vertical**

Product Development... · Progress | Last value of weekly updates · 0 of 4

[UPDATE WITH JIRA](#)



## COMPANY

### INNOVATE: Dramatically improve customer and employee experience

**\$1.1M** of \$3.1M    24 Beta Customers on Snazzy  
3 of 8    200 validated opportunities for Snazzy in the pipeline

75% of 79%    10 Evangelist interviews published in tier 1 media  
2 of 3.7    Transformation Initiatives: Platform and CX Simplification

## PRODUCT

### K2 Launches with a bang!

7 of 8    Get 10 tier 1 media outlets to cover K2  
12 of 57    Get 12 customer referrals

## MARKETING

### INNOVATE: Make the K2 Launch the most successful in our history!

85% of 85%    K2 landing page conversions  
76% of 80%    K2 Launch Readiness  
60% of 90%    Increase in website visits week of release

## CUSTOMER EXPERIENCE

### Client Experience Simplification -- improve client satisfaction, reduce client visible error rates

2 of 6    Reduce customer portals and gateways to a single system (9 to 1)  
3 of 10    Rollout the product selection bot  
10 of 25    Automate 17 L1 inquiries and responses  
2 of 5    Reduce time to question answer by 80% on L1 calls

## FIELD MARKETING

### Marketing enables Customer Success as much as it does Sales

80 of 100    Every CMO quality of life feature released will have a quality customer communication plan executed  
1 of 0    Targeted one-to-few campaigns at low usage T1 & 2 accounts drive 10 account management conversations per month

## TMO

### Platform Simplification – Improve the operating model and technology infrastructure to increase scale

2 of 6    Hit our cost reduction targets for Dev Ops and IT costs  
2 of 6    Decommission 1 accounting platform  
2 of 6    Complete roadmap for rationalizing 9 accounting platforms to 2 in 2018  
2 of 6    Reduce customer portals and gateways to a single system (9 to 1)  
3 of 5    Reduce time to question answer by 80% on L1 calls

## SALES

### Engage the right buyers and make it simple for them to buy from us

2 of 6    85% of ARR comes from customers in Tiers 1 and 2 segments  
3 of 5    Account to close ratio goes from .51 to .7  
60% of 80%    95% of deals are above the discount floor  
3 of 5    Average cubist demo score goes from 62 to 70  
60% of 80%    Handoff scores average 4 or better  
60% of 80%    Sales hires

## CUSTOMER MARKETING

### CHURN: Build customer relationships and advocacy to support our market strategy

7 of 8    Get 12 customer referrals  
12 of 57    Deep dive with 3 customers so marketing has clearer understanding of pains, benefits, dynamics  
20 of 90    Launch customer advocate program

## CX OPERATIONS

### Provide RevOps data and insights that move us from good to incredible

2 of 6    Provide a real time RevOps workstream and project intake visible to the entire company to deliver quarterly tools usage report value survey  
60% of 80%    6 new CSMs get product and customer success certified within 30 days of start and have first onboarding accounts within 45 days  
3 of 5    7 new AMs hit their first quarter OTE  
60% of 80%    100% of Rev Ops requests use Zendesk by May 15th  
60% of 80%    Define and publish Revenue Ops SLAs  
60% of 80%    First response to internal ticket goes from 34 hours to 8 hours

## LEGAL

### Establish a Legal Ops function to optimize our value to the business

2 of 6    Hire Legal Ops Dir  
2 of 6    Ratify the metrics and unit economics we want to measure

# Be the best service provider in the space



Daniel Wallace: Product Management

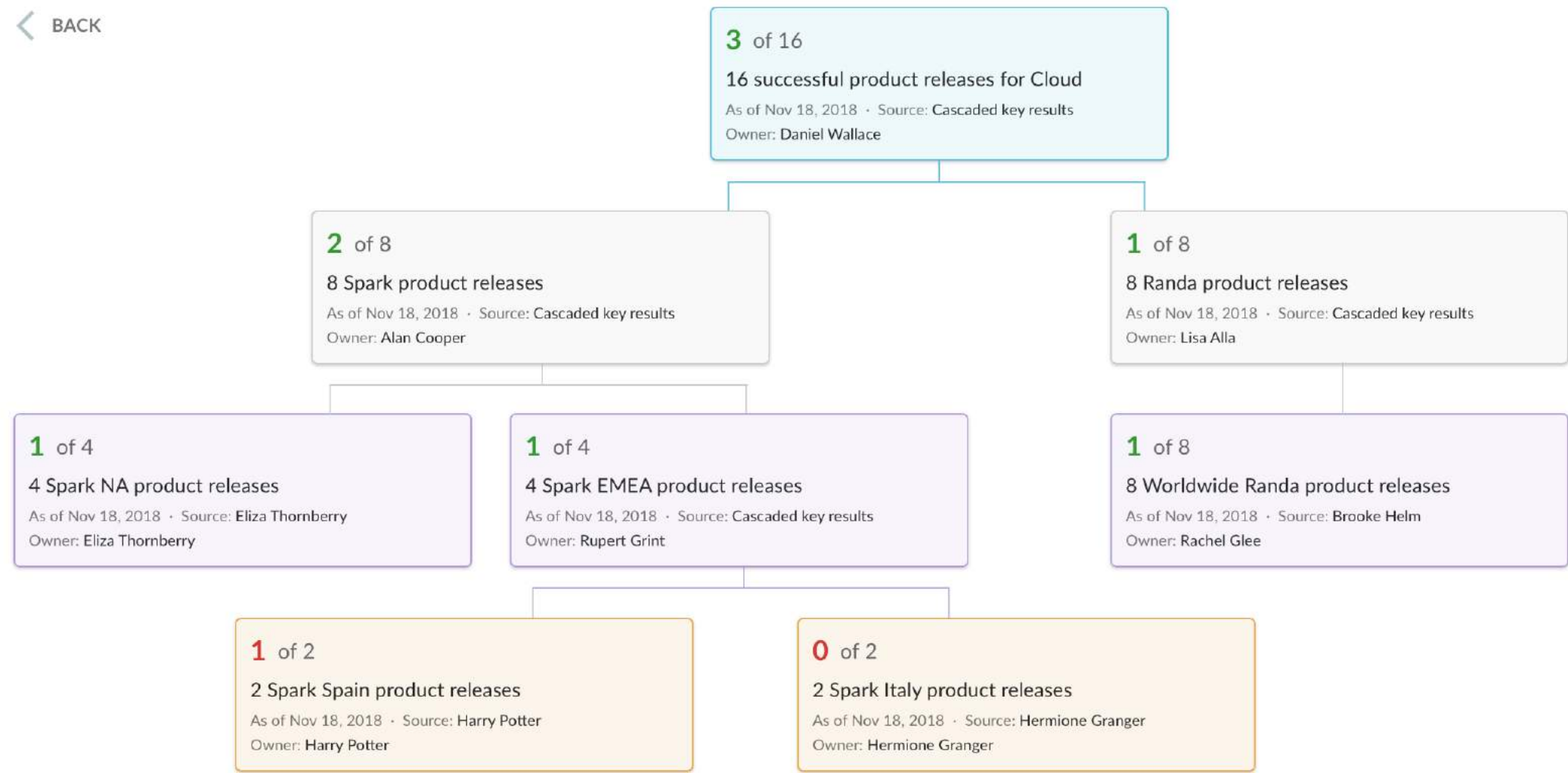


Jan 01, 2019

30 days left

- Key Results
- Aligns
- Comments
- History

BACK



1

**GHX: How we use 1on1s and meetings**

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Video



# WoBoCon

MAY 15-16  
2019

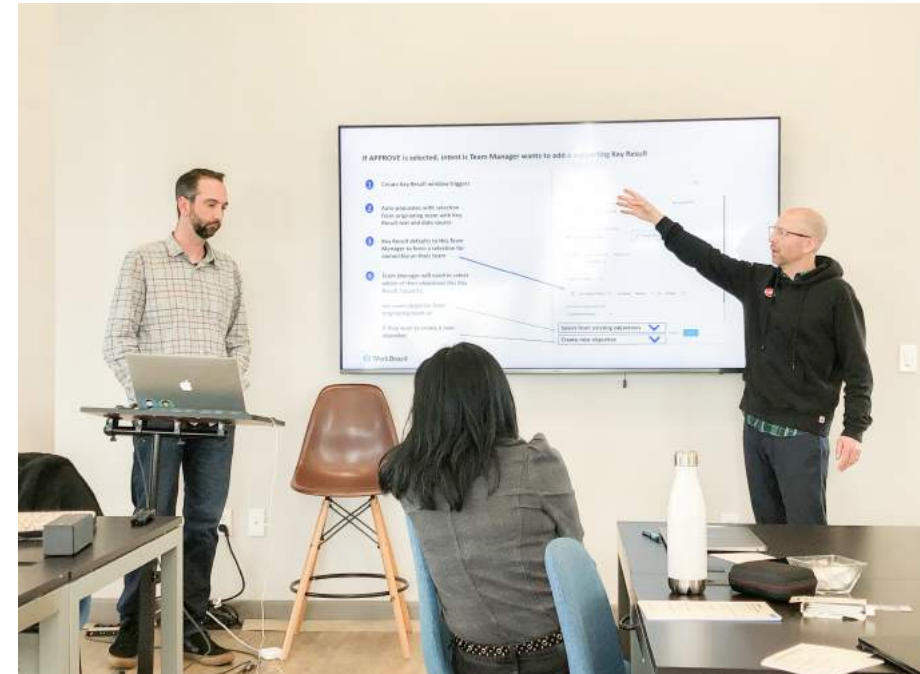
IDEATION



INNOVATION

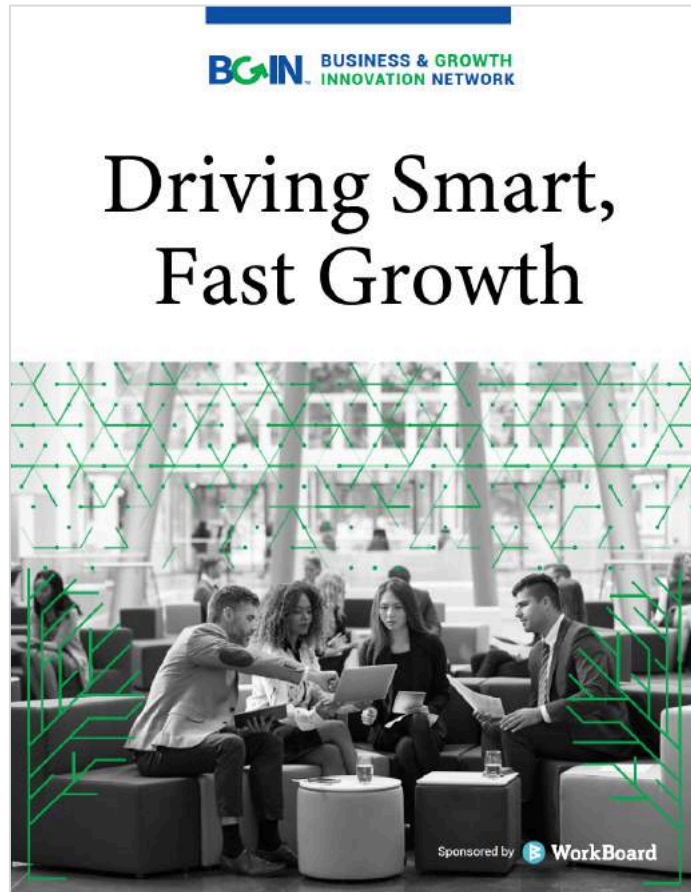


# Thank you to all who joined WoBoCon this summer – we will announce 2020 dates soon!



# BUSINESS & GROWTH INNOVATION NETWORK

BGIN is a forum for P&L owners, business innovation executives and chiefs of staff to exchange insights on driving smart, fast growth.



## CEO Perspective: Achieving Smart, Fast Growth

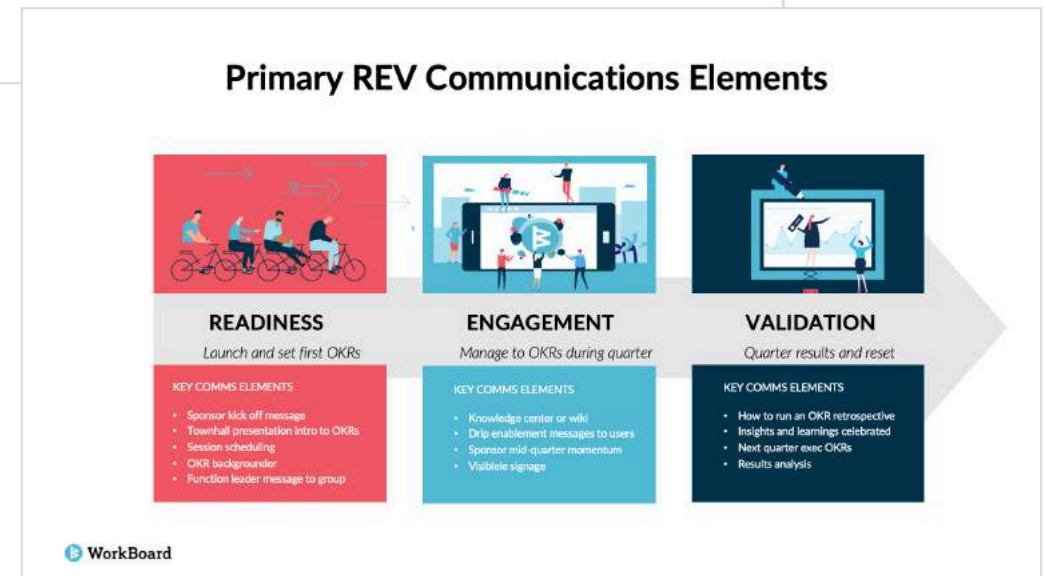
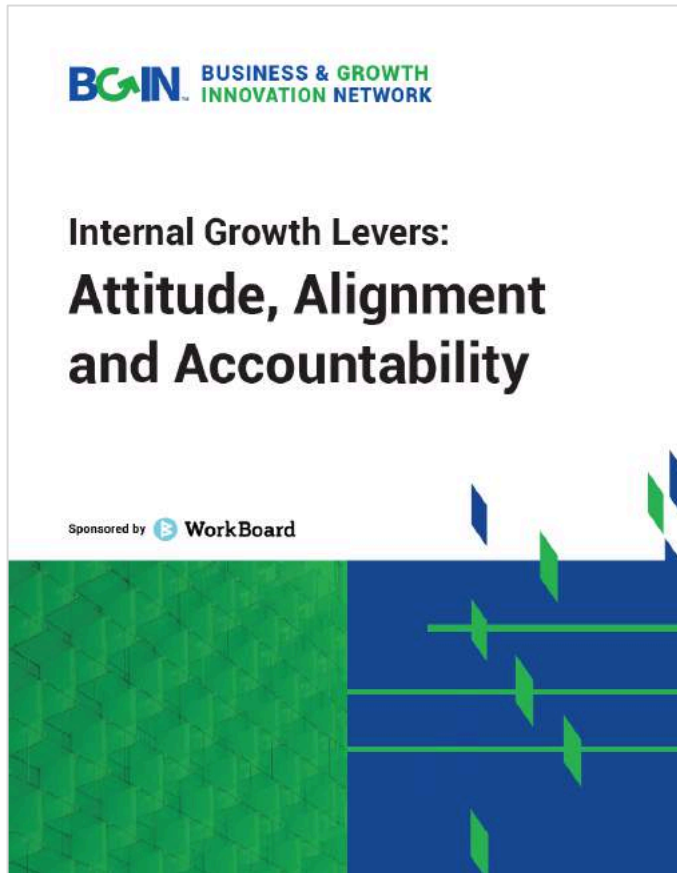
Thursday, September 12th 3-6pm

Location: Palo Alto, CA

### MEETING TOPICS

- First principles for smart, fast growth
- Data-driven leadership
- Iterating on strategic priorities in super dynamic markets
- Gaining results alignment across the organization
- Using OKRs to drive results speed at scale

# New Resources for You





# New members of our field team



**Hans Bjornavold**  
Strategy Solutions  
Manager



**Christina Bos**  
Customer Success  
Manager



**Brian Connolly**  
Managing Director



**Matt Katawicz**  
Strategy Solutions  
Manager



**Amy Kishimura**  
Customer Success  
Manager



**Jason Shriver**  
Customer Success  
Manager



**Doug Stein**  
Managing Director



**Michelle Van Bogart**  
Communications and  
Community Manager



**Natalie Webb**  
Strategy Solutions  
Manager

# Become an official WorkBoard Expert!

Learn the full power of the WorkBoard application and how to apply it in your organization!

2-day course covers:

- Setting, aligning and measuring key results
- Organization and teaming structures
- Workstreams, workflow automation, and templating
- Meeting management and 1on1 best practices
- Business reviews with OKRs, narratives and risks
- Chat bots and calendar integrations

August 14-15

September 18-19

Register @ [www.workboard.com/expert-training](http://www.workboard.com/expert-training)



A collection of diverse hands raised against a dark background. The hands vary in skin tone, including light, medium, and dark. Some hands have accessories like a watch, bracelets, or a tattoo. The text 'What are you curious about and what do you think?' is overlaid in white, with the word 'curious' in blue.

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



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

