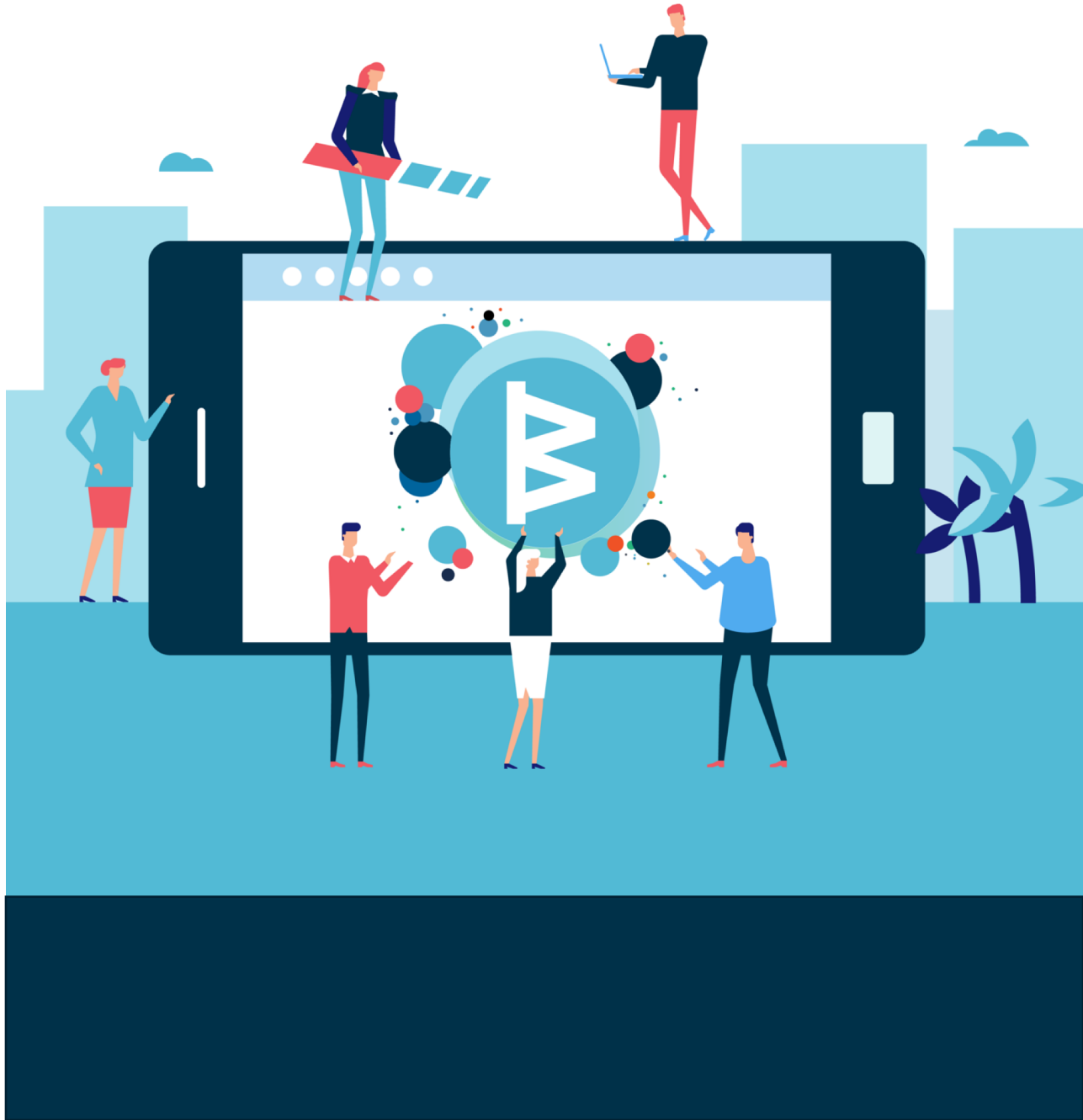
Welcome WorkBoard Community!



WorkBoard

Recent & Upcoming
WorkBoard Features

February 2020

Sameera Moinpour
Managing Director,
Strategic Accounts and
Professional Services

WorkBoard

1. **News, events and resources**
2. Recent features
3. Coming in the next 90 days

WorkBoard

We just raised a $30m Series C led by Andreessen Horowitz

ANDREESSEN HOROWITZ

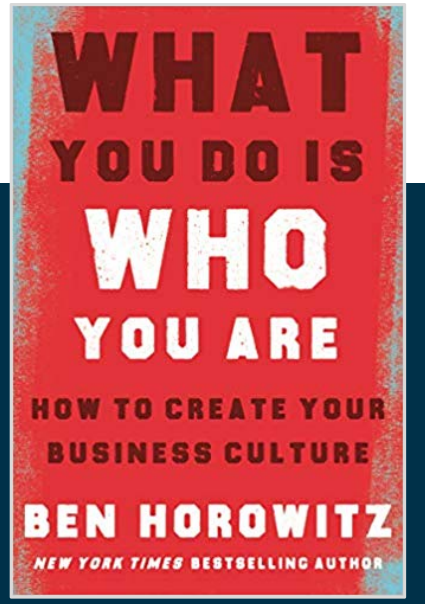
GGVCAPITAL

M12
MICROSOFT'S VENTURE FUND

workday. VENTURES

You might find these interesting ...

Investing in WorkBoard
By David Ulevitch,
Andreessen Horowitz



What You Do is Who You Are
By Ben Horowitz,
Andreessen Horowitz

Welcome our new Chief Customer Officer

Dave Ginsburg
Chief Customer Officer

Dave Ginsburg leads all our customer services, success and enablement functions.

- Chief Customer Officer, User Testing
- VP Customer Success, Mixpanel
- VP Customer Success & Services, Box
- SVP Customer Success, Delivery Agent
- Thomson Reuters
- Accenture

Save the Date!
User Group Meeting
April 2020

Join this amazing peer group of results leaders and thinkers for 2 days of learning, bench marking, ideation, networking, great food and fun!

FULL of peer-led sessions!

- Using Results Data to Improve Results
- Growth Speed at Scale
- Building Results Rituals
- Communication Plans that Build Momentum
- Round tables for coaches, chiefs of staff, CHROs, business process owners, and super users

Ideation stations

Come as a team and raise your game!

Warm location announced next week.

CALL FOR SPEAKERS: Share your results journey!

1 News, events and resources

2 **Recent features**

3 Coming in the next 90 days

Company ELT

Jack CEOMack

78% CHURN: Customers for life

1 days left | 6 | 1

8 of 8	Maintain average NPS score of 8	Automatic Updates	Updated Jan 22, 2020
84% of 83%	Drive gross revenue retention (GRR) above 83%	Automatic Updates	Updated Jan 22, 2020
56 of 85	85 Tier 1 and Tier 2 logos renewed	Joe Smarts	Updated Jan 03, 2020
82 of 90	Increase average number of users per account from 45 to 90	Carlo Marco	Updated Jan 30, 2020
9.98% of 7%	Decrease customer churn rate (CCR) from 12% -7%	Carlo Marco	Updated Jan 03, 2020

90% ECONOMICS: Build a high velocity, high efficiency business

1 days left | 7 | 4

81% of 79%	Gross margins move from 74% to 79%	Dan Levitz	Updated Jan 30, 2020
7.5 of 8	Customer Acquisition Cost (CAC) Payback Period for new business deals improves to under 8 months	Joe Smarts	Updated Jan 03, 2020
3.2 of 3.7	Improve Lifetime Value (LTV) to Customer Acquisition Cost (CAC) ratio from 2.4 to 3.7	Maria Cmoso	Updated Jan 03, 2020
96.69m of 92.1m	$92.1M in Tier 1 and Tier 2 customer upsell sales	Mirrored KR	Updated Jan 30, 2020

73% GROWTH: Make it easy for the right customers to buy and hard for them to leave

1 days left | 6 | 14

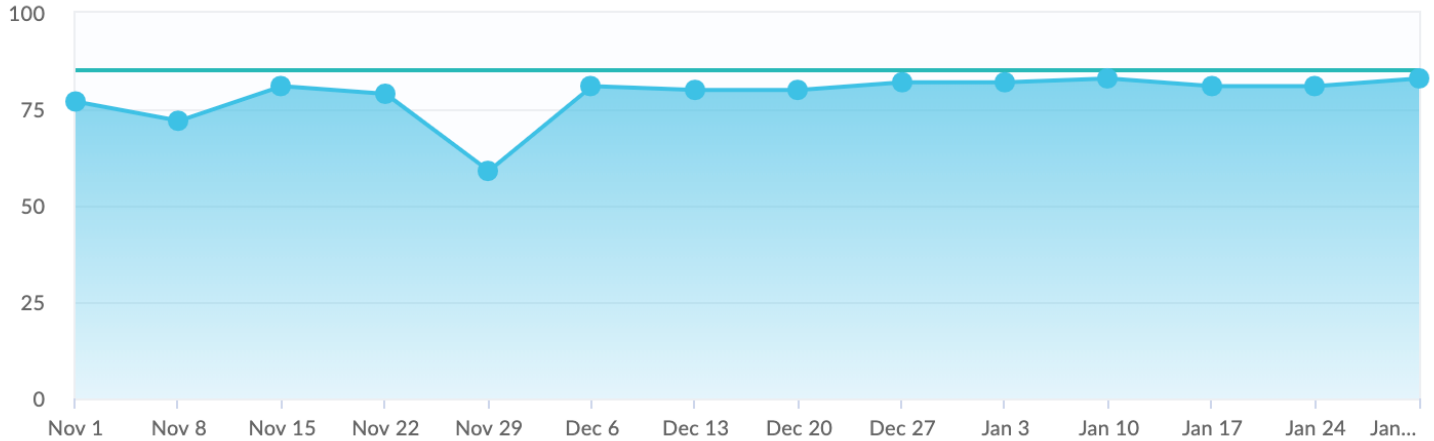
77% of 85%	85% of new logo ARR is customers in Tier 1 and Tier 2 segments	Automatic Updates	Updated Jan 30, 2020

83% of 85% • Company ELT

85% revenue retention in Tier 1 and Tier 2 customers (GRR)

Last updated Jan 30, 2020 *1 day left*

Nov 01, 2019 - Jan 31, 2020 Weekly



Activity Attachment

Add new comment

Allen Bennit • Jan 30, 2020, 2:57 pm

Updated to 83

3 major accounts (Lansing, BoxOil and Gordon Air) expected to close by month end -- they get us to 83% GRR

👏 2 🎉 1

Sandra Deenie • Jan 21, 2020, 10:33 pm

Updated to 72

We lost the Osko business. Important learnings for the team.

DATA SOURCE

Allen Bennit

Update Ping

Contributes data to 1 key result

View data flow tree

DESCRIPTION

Customers renewing this quarter: Osko, Kikasco, Acme, Lansing, Hooli, Gordon Air, WilliamsCo, Cyberdyne, BoxOil, Sirius, RB5

OBJECTIVE

GROWTH: Make it easy for the right customers to buy and hard for them to leave

74% • Company ELT: Jack CEOMack

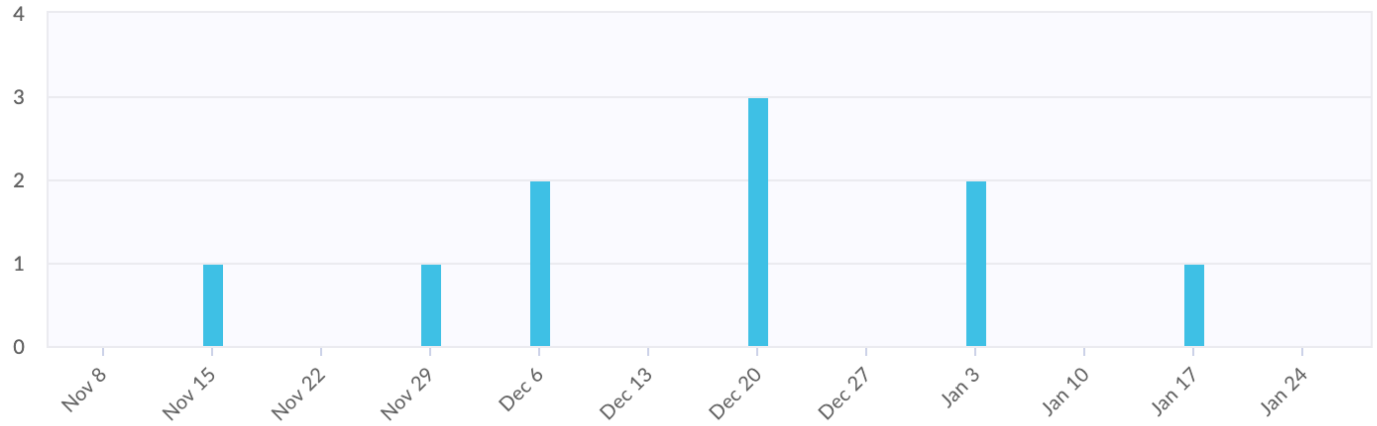
10 of 12 • Company ELT

12 new case studies from Tier 1 and Tier 2 customers with CMO quotes in them

Last updated Jan 22, 2020

0 days left

Nov 08, 2019 - Jan 24, 2020 | Weekly



Activity | Attachment

Add new comment

Jack Ceomack • Jan 22, 2020, 1:05 pm
Awesome progress, team! 🎉

Ellis Saunders • Jan 22, 2020, 12:36 pm
Updated to 1
Kikasco 🎆
👍 3 🎉 2

Ellis Saunders • Jan 22, 2020, 12:34 pm
Updated to 3

DATA S

Ell

DESCRI

Top pric
Acme, K

OBJECT

GROW
hard fo
70% • C

Notifications | Remove All

December 21st 2019 at 1:09 am
It's time to update your progress on 25 customers engaged per week via our Customer Advocate Program. Current progress: 21 of 25
update | Update

January 30th 2020 at 2:57 pm
Jack CEOMack just updated the key result, 85% revenue retention in ers (GRR) to 83 for the week of Jan 31, 2020, ajor accounts (Lansing, BoxOil and Gordon Air) nth end -- they get us to 83% GRR"
👏 15 👍 12

January 30th 2020 at 3:21 pm
Jack CEOMack commented on Create new persona "@Allen BennIT can you upload your use cases here?"

January 30th 2020 at 3:20 pm
Jack CEOMack reassigned Create new persona from Jack to Maria

January 30th 2020 at 7:21 am
Manny Admina updated multiple KRs for ECONOMICS: Build a high velocity, high efficiency business

January 30th 2020 at 7:21 am
Manny Admina updated multiple KRs for CHURN: Customers for life

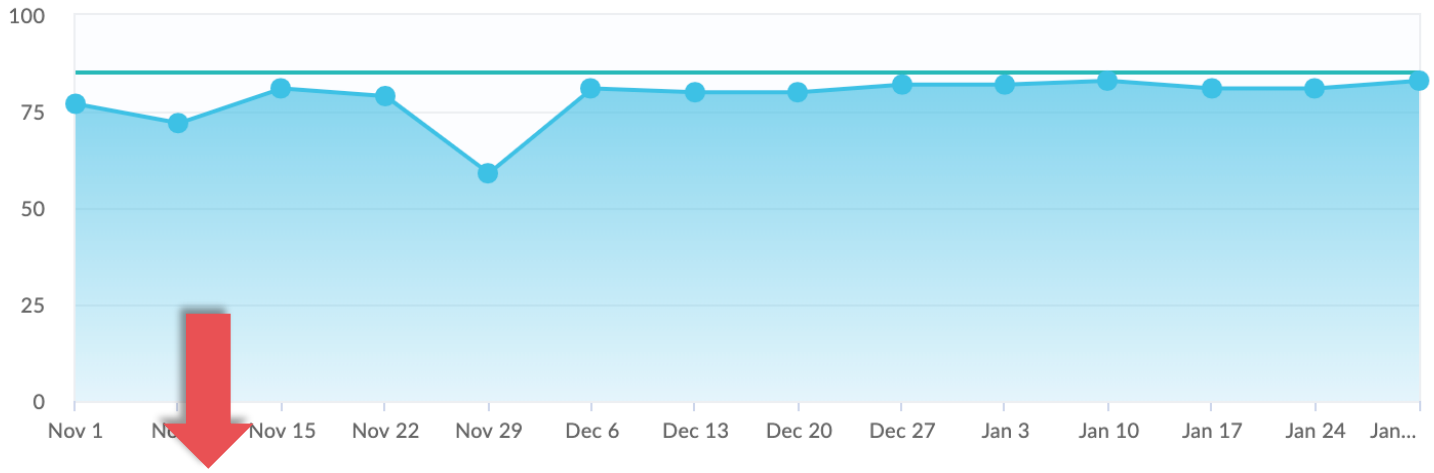
83% of 85% • Company ELT

85% revenue retention in Tier 1 and Tier 2 customers (GRR)

Last updated Jan 30, 2020

1 day left

Nov 01, 2019 - Jan 31, 2020 | Weekly



Activity | Attachment

Add new comm

Allen Bennit • Jan

Updated to 83

3 major accounts
they get us to 83

ed to close by month end --

Sandra Deenie • Ja

Updated to 72

We lost the Osko

m.

Activity | 1 Attachment

Add attachment

- Upload from computer
- Link to OneDrive
- Link to Box
- Link to Dropbox
- Link to Google Drive
- Add a link

DATA SOURCE

Allen Bennit

Update | Ping

Contributes data to 1 key result

View data flow tree

DESCRIPTION

Customers renewing this quarter: Osko, Kikasco, Acme, Lansing, Hooli, Gordon Air, WilliamsCo, Cyberdyne, BoxOil, Sirius, RB5

OBJECTIVE

GROWTH: Make it easy for the right customers to buy and hard for them to leave

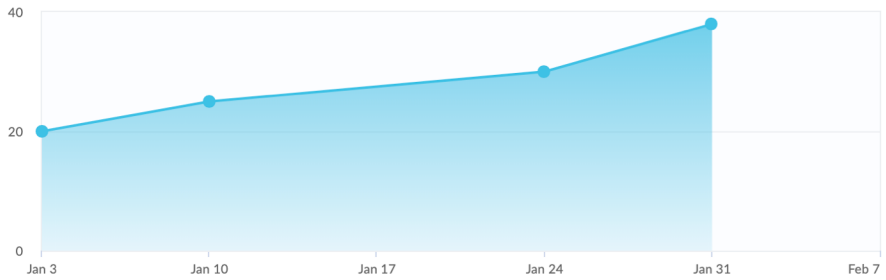
74% • Company ELT: Jack CEOMack

38% of 100% • Product

Validate and finalize product strategy and user stories for MVP of predictive nudges f e-engage module

Last updated Jan 31, 2020 *59 days left*

Jan 03, 2020 - Feb 07, 2020 Weekly



Activity Attachment

Add new comment

WorkBoard Coach • Jan 31, 2020, 6:59 pm
Updated to 38
12 epics defined for MVP. Meeting with Avengers pod and engineering stakeholders for tie-off on the first 6.
👏 1

Troy Harvey • Jan 21, 2020, 5:15 pm
Updated to 30
4 of 6 epics tied off with technical teams. Will be working on open questions for the other 2.
👍 3 👏 1 🎉 1

Troy Harvey • Jan 21, 2020, 5:01 pm

DATA RCE
Harvey
Update Ping

ALIGNMENT
Depends on 2 key results
View alignment tree

OBJECTIVE
Elevate our Platform to set the technology
20% • Product: Pat Murray

ALIGNMENT

Product: Pat Murray
Validate and finalize product strategy and user stories for MVP of predictive nudges for re-engage module
38% of 100% · Source: Troy Harvey

Engineering: Blake Fitzgerald
Predictive text feature for re-engagement nudges technical POC completed
33% Completed · Source: Workstream

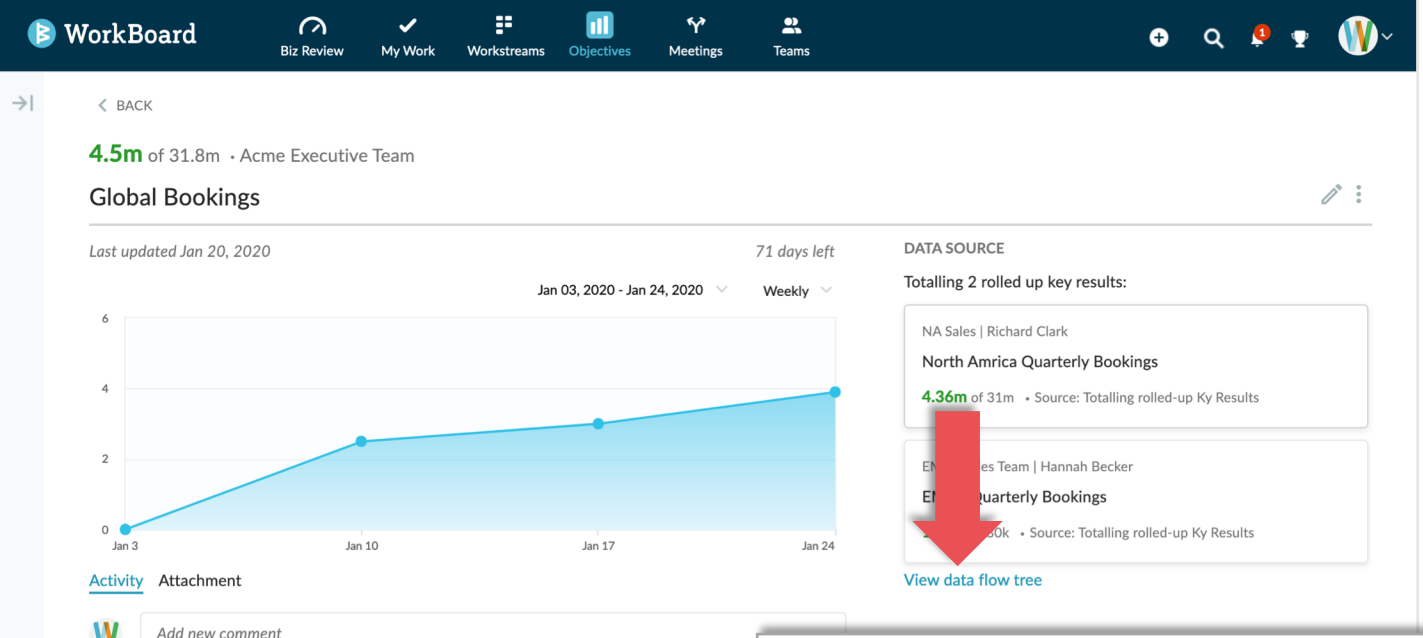
Engineering Infrastructure: Nathan Lowe
Migrate analytics and unstructured text data to EU servers based on new ML algorithm requirements
34% of 100% · Source: Nathan Lowe

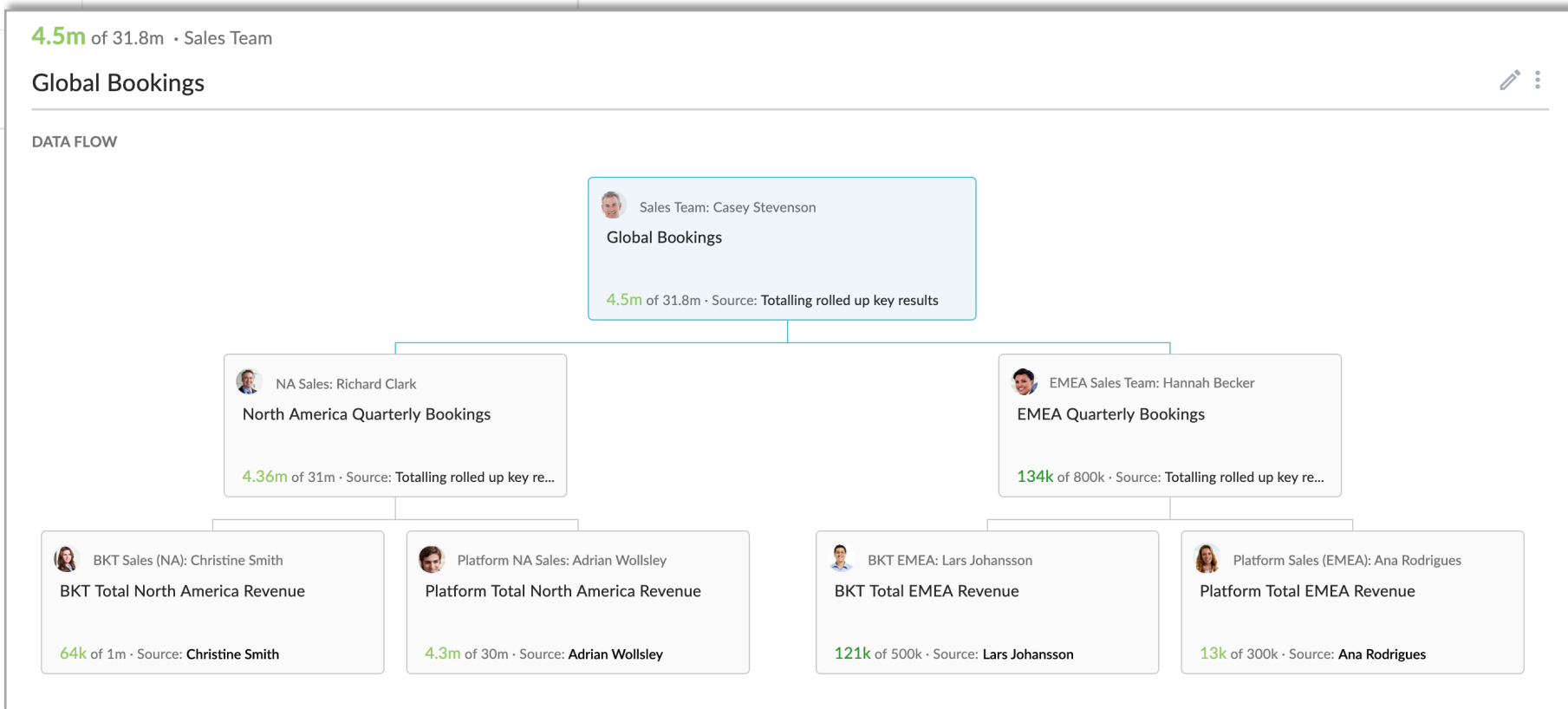
Machine Learning: Brendan Myers
Improve predictive model to reach 85% accuracy by March 15
71% of 85% · Source: Brendan Myers

Fantastic Four Data Pod: Debra Padilla
92% accuracy for predictive text using the supervised learning model
86% of 92% · Source: Debra Padilla

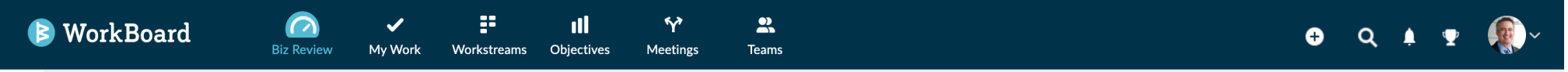
Data Analytics: Frankie Moran
Cross validate library of content, rating and

WorkBoard


WorkBoard
Biz Review
My Work
Workstreams
Objectives
Meetings
Teams
BACK
4.5m of 31.8m • Acme Executive Team
Global Bookings
Last updated Jan 20, 2020
71 days left
Jan 03, 2020 - Jan 24, 2020
Weekly
6
4
2
0
Jan 3
Jan 10
Jan 17
Jan 24
DATA SOURCE
Totalling 2 rolled up key results:
NA Sales | Richard Clark
North Amrica Quarterly Bookings
4.36m of 31m • Source: Totalling rolled-up Ky Results
Team | Hannah Becker
uarterly Bookings
Source: Totalling rolled-up Ky Results
View data flow tree
Activity
Attachment
Add new comment
Wendy Adelman • Jan 20, 2020, 2:37 pm
We are driving a campaign to drive the in-quarter pipeline. Should see pipeline impact in 1st week of February.


4.5m of 31.8m • Sales Team
Global Bookings
DATA FLOW
Sales Team: Casey Stevenson
Global Bookings
4.5m of 31.8m · Source: Totalling rolled up key results
NA Sales: Richard Clark
North America Quarterly Bookings
4.36m of 31m · Source: Totalling rolled up key re...
EMEA Sales Team: Hannah Becker
EMEA Quarterly Bookings
134k of 800k · Source: Totalling rolled up key re...
BKT Sales (NA): Christine Smith
BKT Total North America Revenue
64k of 1m · Source: Christine Smith
Platform NA Sales: Adrian Wollsley
Platform Total North America Revenue
4.3m of 30m · Source: Adrian Wollsley
BKT EMEA: Lars Johansson
BKT Total EMEA Revenue
121k of 500k · Source: Lars Johansson
Platform Sales (EMEA): Ana Rodrigues
Platform Total EMEA Revenue
13k of 300k · Source: Ana Rodrigues

WorkBoard



Company Strategic Priorities

Jack CEOMack

12

RESULTS

32.78k ▼ of 35k	164.18m ▲ of 131.42m	156.83m ▲ of 221m	70% ▼ of 75%
ACV goes from $18k to $35k	EMEA Quarterly Bookings	North America Quarterly Bookings	75% WAU in Tier 1 and Tier 2 accounts
Automatic Updates	Rolled-up KR	Rolled-up KR	Automatic Updates

OBJECTIVES

Show key results

- 70% GROWTH: Make it easy for the right customers to buy and hard for them to leave — Company ELT: Jack CEOMack
- 78% CHURN: Customers for life — Company ELT: Jack CEOMack
- 90% ECONOMICS: Build a high velocity, high efficiency business — Company ELT: Jack CEOMack
- 73% INNOVATE: Maximize our platform to maximize our market position — Company ELT: Jack CEOMack
- 73% PEOPLE: We attract, retain and enable the best people to operate at their best — Company ELT: Jack CEOMack

WORKSTREAMS

63%	Strategic Use Cases — Company ELT: Lily Lovegood		7	14
58%	New Tier 1 and Tier 2 customer references — Marketing: Maria Cmoso	1 R	5	2

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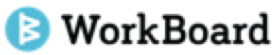


HOTE

OBJECTIVES

Hide key results

70% GROWTH: Make it easy for the right customers to buy and hard for them to leave — Company ELT: Jack CEOMack

81% of 85%	85% revenue retention in Tier 1 and Tier 2 customers (GRR)	Automatic Updates	As of Jan 30, 2020
77% of 85%	85% of new logo ARR is customers in Tier 1 and Tier 2 segments	Automatic Updates	As of Jan 30, 2020
70% of 75%	75% WAU in Tier 1 and Tier 2 accounts	Automatic Updates	As of Jan 21, 2020
32 of 30	30 Tier 1 and Tier 2 customers have the Snazzy v1 release in production	Barry Bosser	As of Jan 21, 2020
63%	Re-vamped strategic use cases are final and embedded in sales, marketing and product mgmt	Workstream	As of Jan 31, 2020
11 of 15	15 new case studies from Tier 1 and Tier 2 customers with CMO quotes in them	Cascaded KR	As of Jan 31, 2020

78% CHURN: Customers for life — Company ELT: Jack CEOMack

8 of 8	Maintain average NPS score of 8	Automatic Updates	As of Jan 22, 2020
84% of 83%	Drive gross revenue retention (GRR) above 83%	Automatic Updates	As of Jan 22, 2020
56 of 85	85 Tier 1 and Tier 2 logos renewed	Joe Smarts	As of Jan 03, 2020
82 of 90	Increase average number of users per account from 45 to 90	Carlo Marco	As of Jan 30, 2020
9.98% of 7%	Decrease customer churn rate (CCR) from 12% -7%	Carlo Marco	As of Jan 03, 2020

90% ECONOMICS: Build a high velocity, high efficiency business — Company ELT: Jack CEOMack

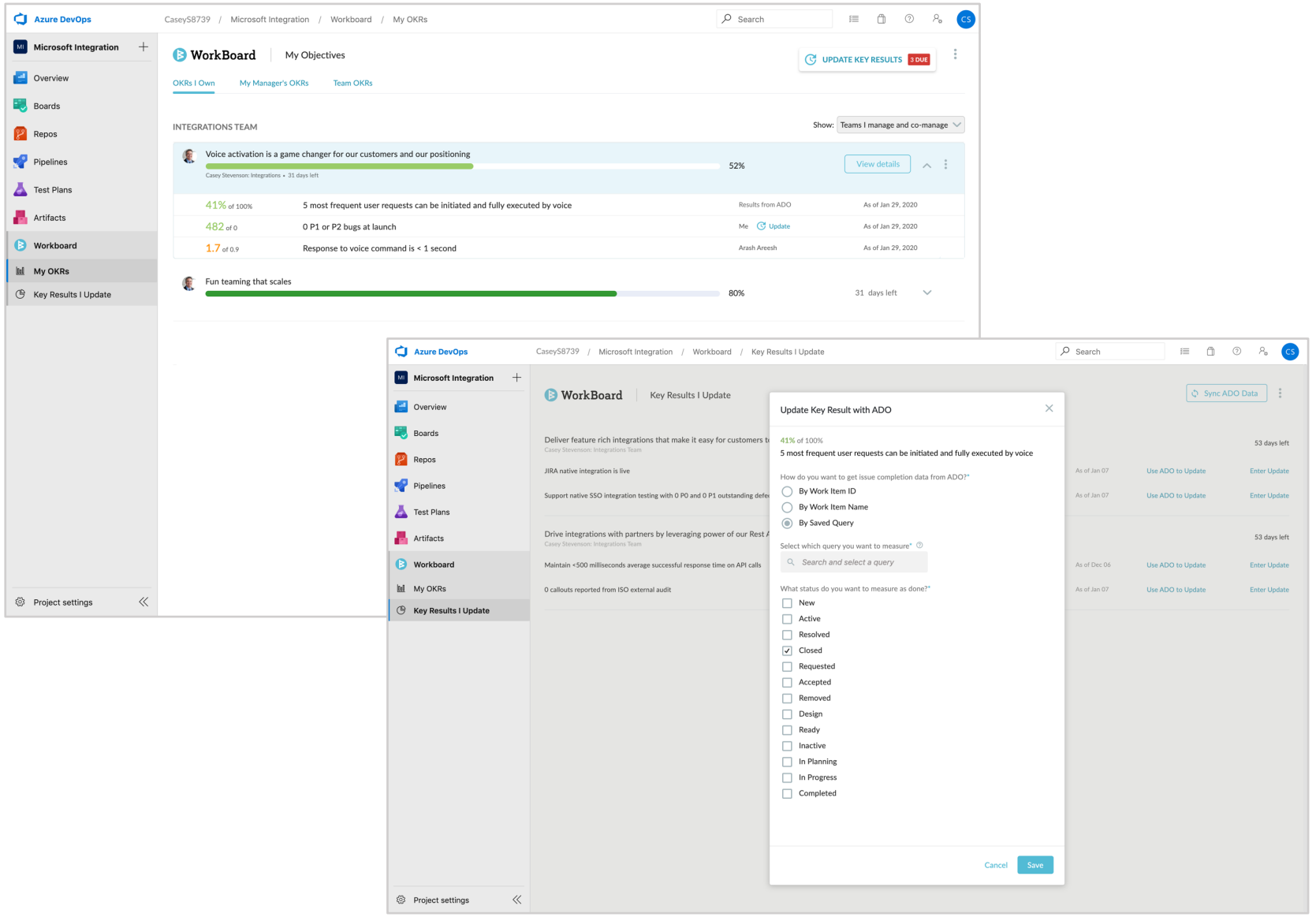
7.68 of 8	Customer Acquisition Cost (CAC) Payback Period for new business deals improves from 10 months to under 8 months	Joe Smarts	As of Jan 31, 2020
3.2 of 3.7	Improve Lifetime Value (LTV) to Customer Acquisition Cost (CAC) ratio from 2.4 to 3.7	Maria Cmoso	As of Jan 03, 2020
81% of 79%	Gross margins move from 74% to 79%	Dan Levitz	As of Jan 30, 2020
130.39m of 92.1m	$92.1M in Tier 1 and Tier 2 customer upsell sales	Mirrored KR	As of Jan 30, 2020

73% INNOVATE: Maximize our platform to maximize our market position — Company ELT: Jack CEOMack

50%	Completed platform V3 launch plan in place EOQ	Workstream	As of Jan 03, 2020

Bring OKRs to Life in Azure Dev Ops

- See OKRs defined in WorkBoard in Azure DevOps
- See, navigate and comment on OKRs
- Get a single list of key results across all OKRs
- Automatically update key results data in WorkBoard as work is completed in Azure DevOps



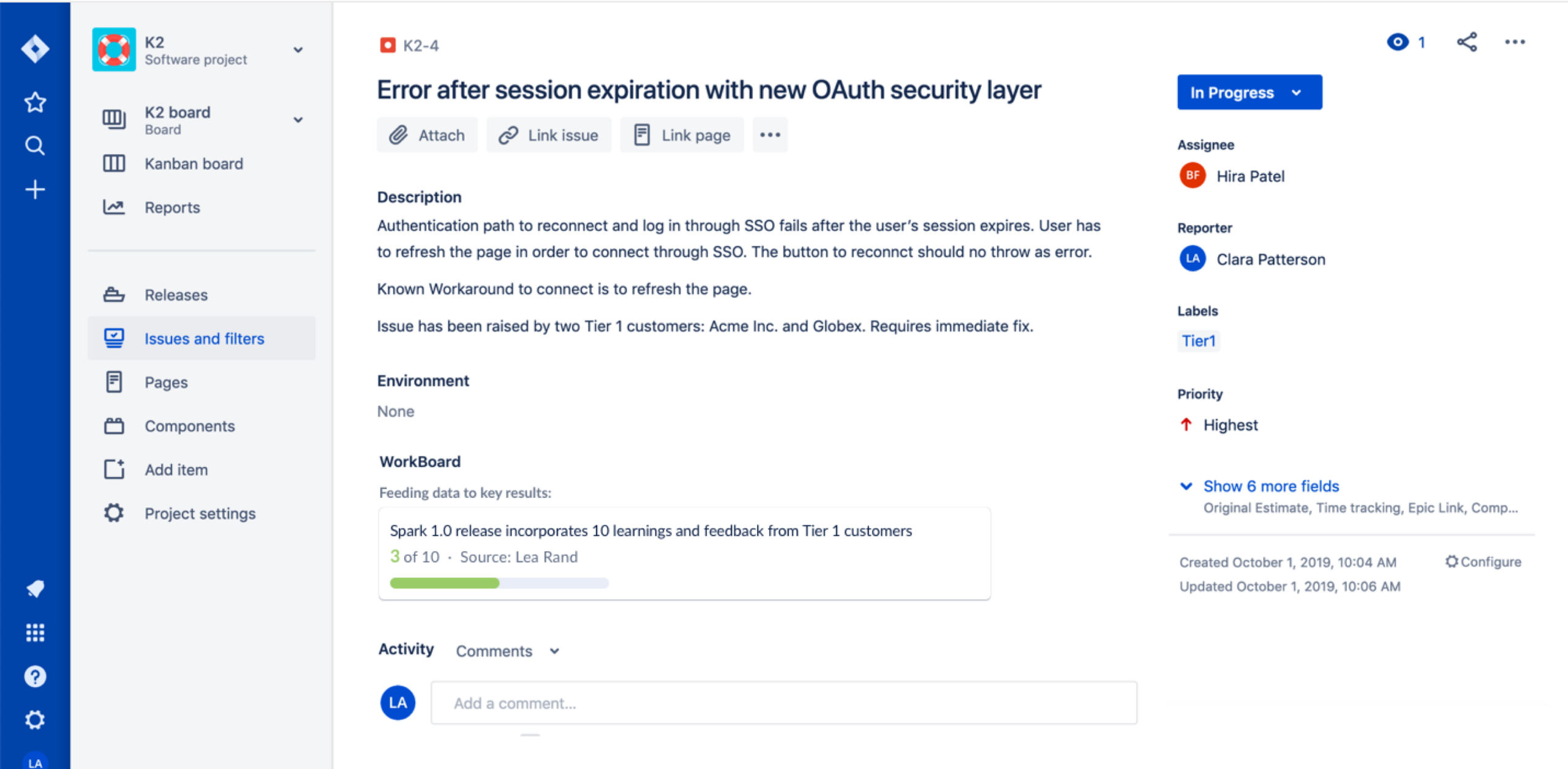
WorkBoard

1 News, events and resources

2 Recent features

3 **Coming in the next 90 days**

See Key Results Connected to Work in Jira



Objectives

Jump to...

My OKRs
Heatmap
Alignment
Timeline

COLLAPSE ALL

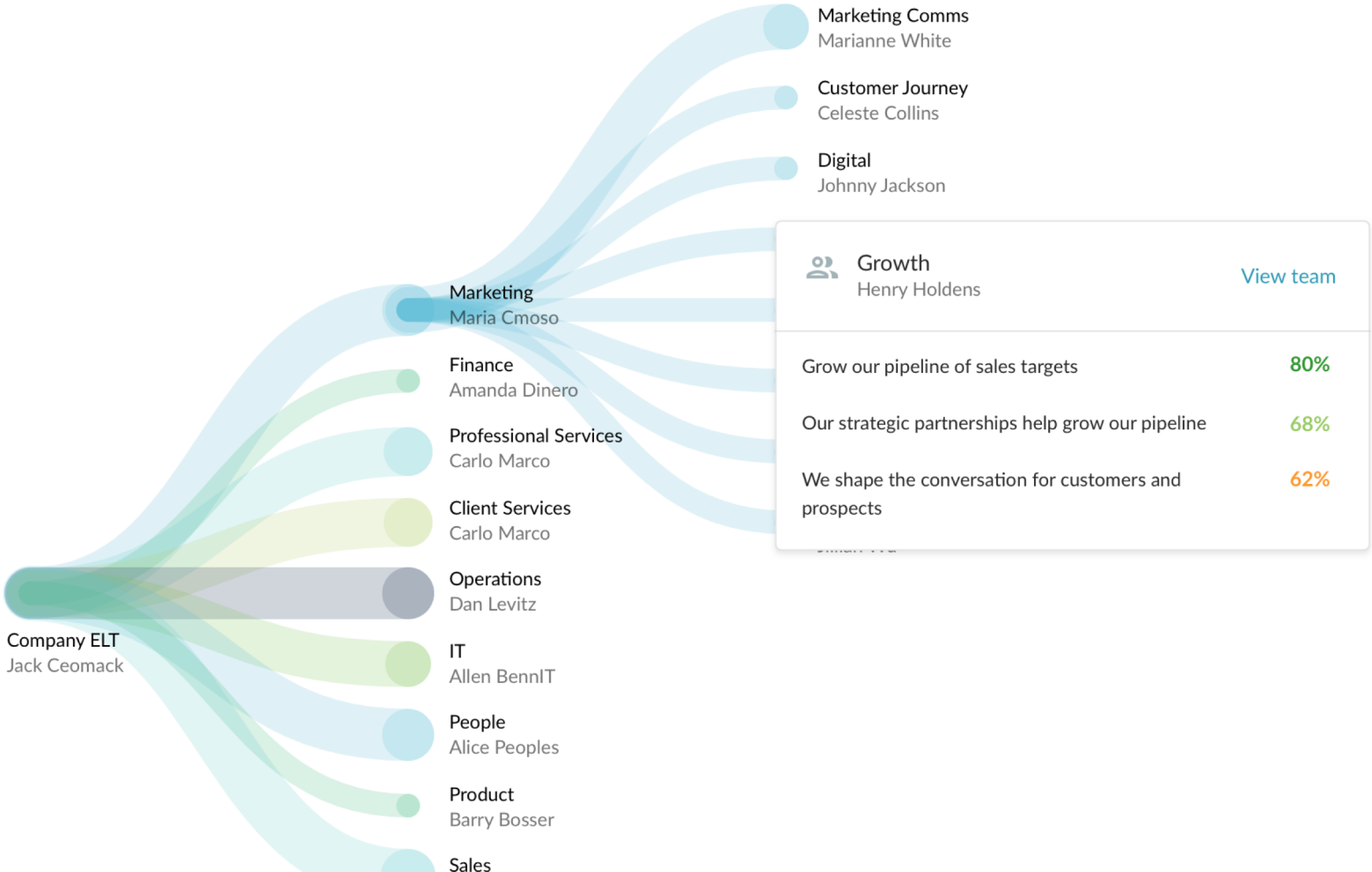
FAVORITES

OKR Alignment

By Organization | By Objective | Full Alignment Report

Teams | People

Search for a team to display



254.89m of 92.1m	$92.1M in Tier 1 and Tier 2 customer upsell sales		Mirrored KR	Updated Jan 30, 2020

67%

GROWTH: Make it easy for the right customers to buy and hard for them to leave

25 days left | 4 ↑ | 4 ↓

77% of 85%	85% of new logo ARR is customers in Tier 1 and Tier 2 segments	16	Automatic Updates	Updated Jan 30, 2020
81% of 85%	85% revenue retention in Tier 1 and Tier 2 customers (GRR)		Automatic Updates	Updated Jan 31, 2020
71% of 75%	75% WAU in Tier 1 and Tier 2 accounts		Automatic Updates	Updated Jan 31, 2020
32 of 30	30 Tier 1 and Tier 2 customers have the Snazzy v1 release in production		Barry Bosser	Updated J
60%	Re-vamped strategic use cases are final and embedded in sales, marketing and product mgmt		Workstream	Updated Feb 04, 2020
9 of 15	15 new case studies from Tier 1 and Tier 2 customers with CMO quotes in them		Cascaded KR	Updated Jan 31, 2020

73%

INNOVATE: Maximize our platform to maximize our market position

25 days left | 2 ↑ | 3 ↓

50%	Completed platform V3 launch plan in place EOQ		Workstream	Updated Jan 03, 2020
6 of 6	All roadmaps include committed dates for common UI	11	Ryan Rogers	Updated Jan 03, 2020
89 of 184	Demo scripts are unified and every seller has done a demo check out (184 sellers total)	8	Joe Smarts	Updated Jan 03, 2020
19 of 20	New platform messaging has been implemented across the web site, social, seller select portal, partner sales kits and the top 20 sales collateral		Maria Cmoso	Updated Jan 03, 2020

73%

PEOPLE: We attract, retain and enable the best people to operate at their best

25 days left | 1 ↑ | 2 ↓

254.89m of 92.1m	$92.1M in Tier 1 and Tier 2 customer upsell sales	Mirrored KR	Updated Jan 30, 2020

67%

GROWTH: Make it easy for the right customers to buy and hard for them to leave

25 days left 4 ↑ 4 ↓

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32 of 30	30 Tier 1 and Tier 2 customers have the Snazzy v1 release in production		Barry Bosser	Updated Jan 21, 2020

Add new comment

Barry Bosser · Jan 21, 2020, 4:11 pm
Updated to 32
Added Barsfield Oil, Level9, Acme, Kikasko, BVE, AppliedPhysics, LoneTree

Barry Bosser · Jan 10, 2020, 2:00 pm
Updated to 25
Added Lansing, Moogle, Bayern, Fornwood Farms, Snell Plastics

Barry Bosser · Jan 5, 2020, 3:20 pm
Updated to 20
Added FinT Sys, Pell Petroleum, Vizon Media

1

60%	Re-vamped strategic use cases are final and embedded in sales, marketing and product mgmt	Workstream	Updated Feb 04, 2020

Our focus next 60 days

1. Quality and performance
2. Focus on mobile: KR comments, notification filtering
3. Biz Review enhancements and flexibility
4. List of KRs for a person and filter by past due

Best Practices and Learnings

Build your results ritual

- Calibrate on gap to desired outcomes weekly
- Leverage cross-functional biz reviews and meetings to drive lateral alignment

Super Sessions drive momentum

- OKR immersion, parallel working sessions, & tie off

Confidential and Protected Information

What are you curious about?

Thank you for the opportunity to support your success!

WorkBoard