

# Welcome WorkBoard Community!



# Upcoming WorkBoard Features

March 2020



**Sameera Moinpour**

Sr. Director & Practice Leader  
Strategy Solutions

1

**News, events and resources**

2

What's coming in March



# Attend the 2020 **WorkBoard User Group**

SCOTTSDALE, AZ | MAY 12-13

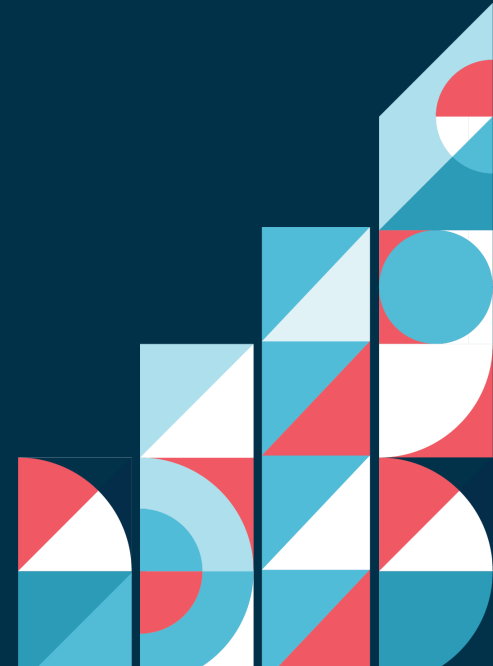
Reserve your seat today at  
[WorkBoard.com!](https://workboard.com)

Early-bird pricing  
ends Mar 6<sup>th</sup>

## **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

**Come as a team** and raise your game!



# Hear these speakers from Microsoft, Comcast, Workday, Zuora, and more!



Erin Rifkin  
General Manager  
Microsoft



Sally Huriaux  
Executive Director, Strategy  
and Field Operations  
Comcast



Emily Bruzzone  
Business Innovation Office  
Workday



Deidre Paknad  
CEO and co-founder  
WorkBoard



Paul Cohen  
Chief of Staff, Business  
Execution Office  
Juniper Networks



Vince DiMascio  
Chief Information and  
Technology Officer  
BAL Global



Sameera Moinpour  
Sr. Director & Practice Leader,  
Strategy Solutions  
WorkBoard



Camellia Ngo  
Chief People Officer  
Malwarebytes



Ryan Padilla  
Leader of Global Strategy  
Execution  
GHX



Sally-Mae Turvey  
Sr. Director ZEO Engagement  
& Communications  
Zuora

# You might find these interesting ...

## Cisco Security: Results Aligned

A CONVERSATION WITH:

**Anna Birch**  
Chief of Staff at Cisco



## Company and Value Scaling with OKRs

A CONVERSATION WITH:

**Marcin Kleczynski**  
CEO of Malwarebytes



## Outcome Focus at Scale: Zuora's OKR Story

A CONVERSATION WITH:

**Tien Tzuo**  
CEO of Zuora

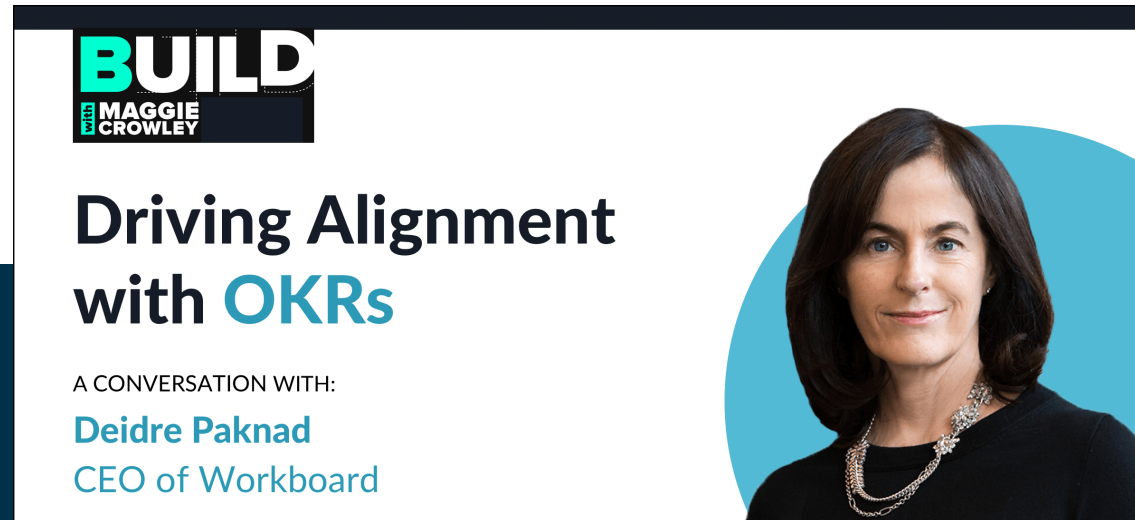


## The OKR Podcast

Hosted by Deidre Paknad  
CEO and co-founder of WorkBoard

[www.workboard.com/okr-podcast](http://www.workboard.com/okr-podcast)

# You might find these interesting ...



Deidre Paknad appears on the Build Podcast with Maggie Crowley to talk about why OKRs matter, how to use them, and how to get the doubters on board.

1

News, events and resources

2

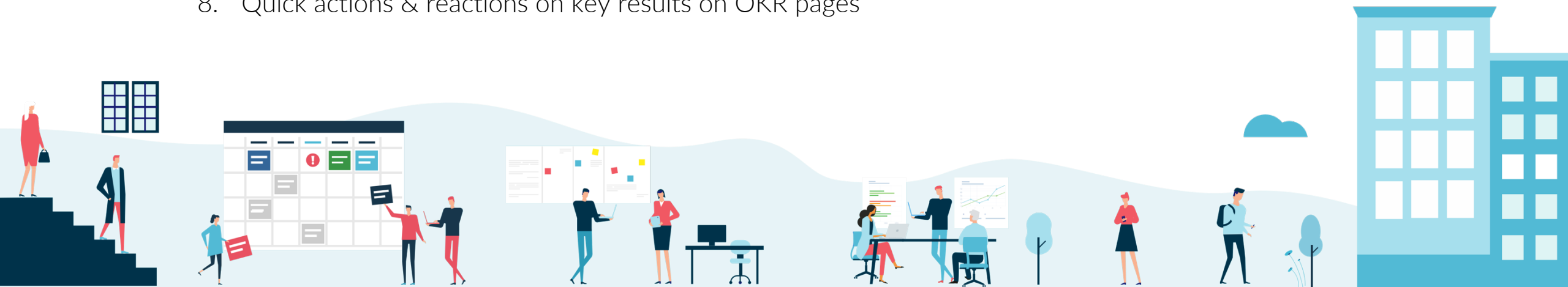
**What's coming in March**







# March 2020 Release


1. Performance improvements on high traffic pages
2. Deeper Jira integration to see key results connected to work
3. Full flexibility to sort, size and customize your Biz Review trays
4. OKR alignment tree now shows teams
5. Exec dashboard comparing aggregate OKR progress on company objectives
6. Quick link to see all key results owned by an individual
7. Manager view of OKRs and KR for their directs
8. Quick actions & reactions on key results on OKR pages






 K2 Software project

 K2 board Board


 Kanban board

 Reports

 Releases

 Issues and filters

 Pages

 Components

 Add item

 Project settings

 K2-4

 1  

## Error after session expiration with new OAuth security layer

 Attach  Link issue  Link page 

### Description

Authentication path to reconnect and log in through SSO fails after the user's session expires. User has to refresh the page in order to connect through SSO. The button to reconnect should no throw as error.

Known Workaround to connect is to refresh the page.

Issue has been raised by two Tier 1 customers: Acme Inc. and Globex. Requires immediate fix.

### Environment


None

### WorkBoard

Feeding data to key results:

Spark 1.0 release incorporates 10 learnings and feedback from Tier 1 customers

3 of 10 · Source: Lea Rand




### Activity

Comments



**In Progress**

#### Assignee

 Hira Patel

#### Reporter

 Clara Patterson

#### Labels

Tier1

#### Priority

 Highest

 Show 6 more fields

Original Estimate, Time tracking, Epic Link, Comp...

Created October 1, 2019, 10:04 AM

 Configure

Updated October 1, 2019, 10:06 AM

### Snazzy Solution -- Q1 Results

Brandy Williamson



#### OBJECTIVES

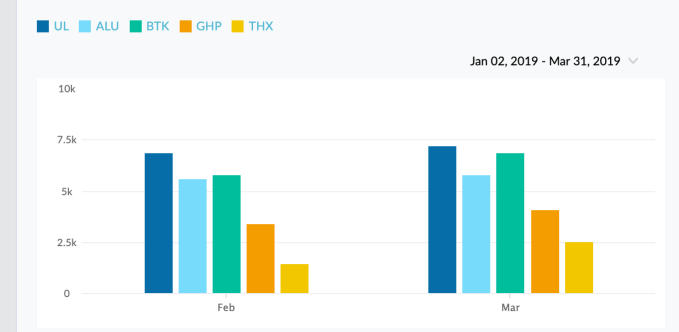
- 20%
**INNOVATE: Dramatically improve customer and employee experience**  
Executive Team: Andrea Collins
- 52%
**GROWTH: Make it easy for the right customers to buy and hard for them to leave**  
Executive Team: Andrea Collins
- 64%
**ECONOMICS: Maximize our ability to grow by optimizing our unit economics**  
Executive Team: Andrea Collins
- 39%
**PEOPLE: We attract, retain and enable the best people to operate at their best**  
Executive Team: Andrea Collins

#### HOTBOX

- ▮ **INNOVATE: Dramatically improve customer and employee experience** 20%  
Executive Team: Andrea Collins
- ▮ **Identify and implement 20 transformative innovations across the organization woosh** 17%  
Product: Lizzy Klingen
- ▮ **Help Yanming Tang Become Beginner Pingpong play in 3 Weeks** 0%  
Pingpong Tournament: Yanming Tang

#### SALES SUMMARY

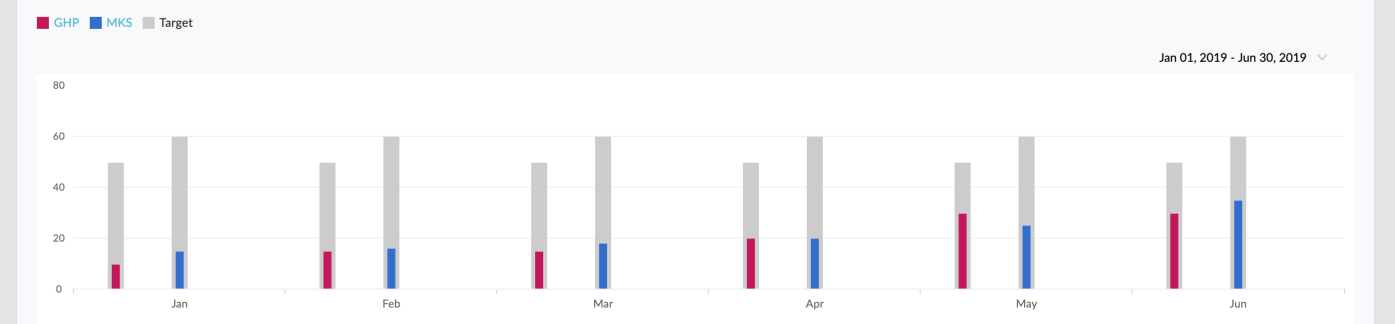
##### SNAZZY SOLUTION PRODUCT SALES (IN THOUSANDS)



##### SALES BY REGION

Region	Segment	Product	October 2017	November 2017	December 2017
East	FinServ	ABN5	\$1,378	\$2,262	\$5,810
		BKT61	\$936	\$14,175	\$2,729
		K2	\$3,336	\$2,915	\$4,151
	Insurance	ABN5	\$788	\$1,560	\$870
		BKT61	\$16,210	\$762	\$1,263
		K2	\$104	\$6,234	\$1,459
Oil&Gas	ABN5	\$1,411	\$8,345	\$1,552	
	BKT61	\$5,793	\$7,647	\$905	
	K2	\$2,349	\$1,734	\$1,345	
West	FinServ	ABN5	\$2,465	\$4,829	\$2,508
		BKT61	\$2,324	\$2,294	\$4,550
		K2	\$2,224	\$7,173	\$5,532
	Insurance	ABN5	\$2,318	\$1,447	\$905
		BKT61	\$854	\$2,529	\$2,911
		K2	\$42	\$4,714	\$3,296
Oil&Gas	ABN5	\$6,175	\$704	\$5,812	
	BKT61	\$1,473	\$2,986	\$603	
	K2	\$3,336	\$2,267	\$3,534	

#### CUSTOMER SIGNS UP FOR BETA LAUNCHES





Snazzy Solution -- Q1 Results

Brandy Williamson

✓ Done Editing

+ Add content

OBJECTIVES

Show key results

- 20% INNOVATE: Dramatically improve customer and employee experience  
Executive Team: Andrea Collins
- 52% GROWTH: Make it easy for the right customers to buy and hard for them to leave  
Executive Team: Andrea Collins
- 64% ECONOMICS: Maximize our ability to grow by optimizing our unit economics  
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- 39% PEOPLE: We attract, retain and enable the best people to operate at their best  
Executive Team: Andrea Collins

HOTBOX

- INNOVATE: Dramatically improve customer and employee experience  
Executive Team: Andrea Collins 20%
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Product: Lizzy Klingen 17%
- Help Yanming Tang Become Beginner Pingpong player  
Pingpong Tournament: Yanming Tang 0%

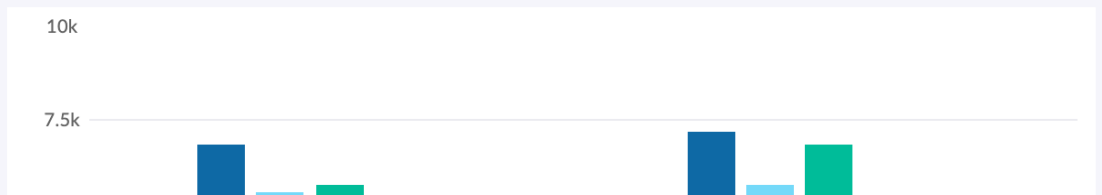
- Chart
- Text
- Image
- IFrame
- Objectives Tray
- Key Results Tray
- Workstreams Tray
- Section

Sales Summary

Snazzy Solution Product Sales (in thousands)

UL ALU BTK GHP THX

Jan 02, 2019 - Mar 31, 2019



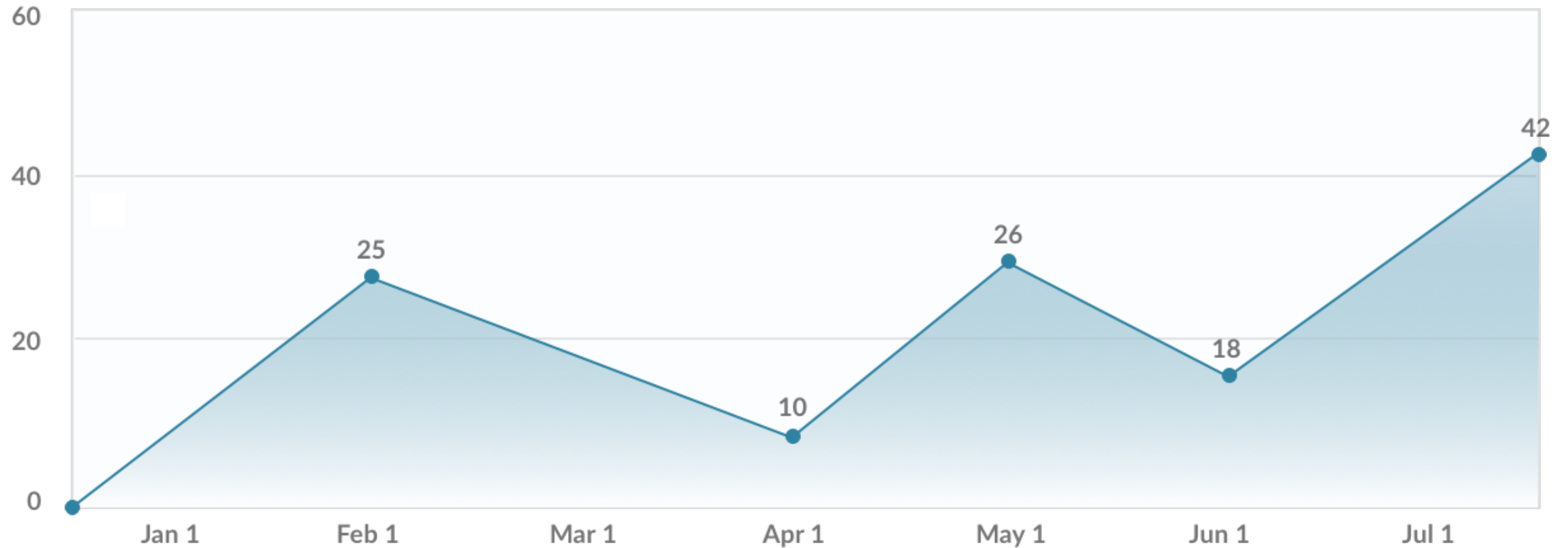
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# Labels on Biz Review Charts

Show data labels

Jan 1 , 2019 - Jul 31, 2019



# 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



# Objectives

Jump to...

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COLLAPSE ALL

FAVORITES

## OKR Alignment

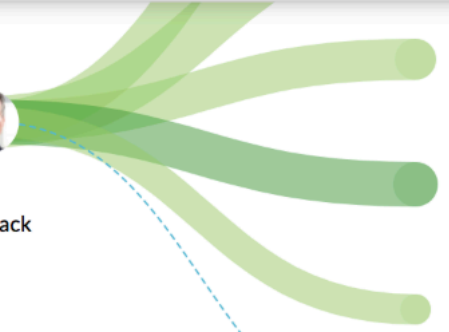
- By Organization
- By Objective
- Full Alignment Report

Search for a person or team to display

- Addison Chu
- Addy Din
- Adva Rin
- Advertising
- Ally Sop



Jack Ceomack



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

INNOVATE: Dramatically improve customer and employee experience

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

for life

mize our optimizing our unit

Jump to...

- My OKRs
- Heatmap
- Organization Results
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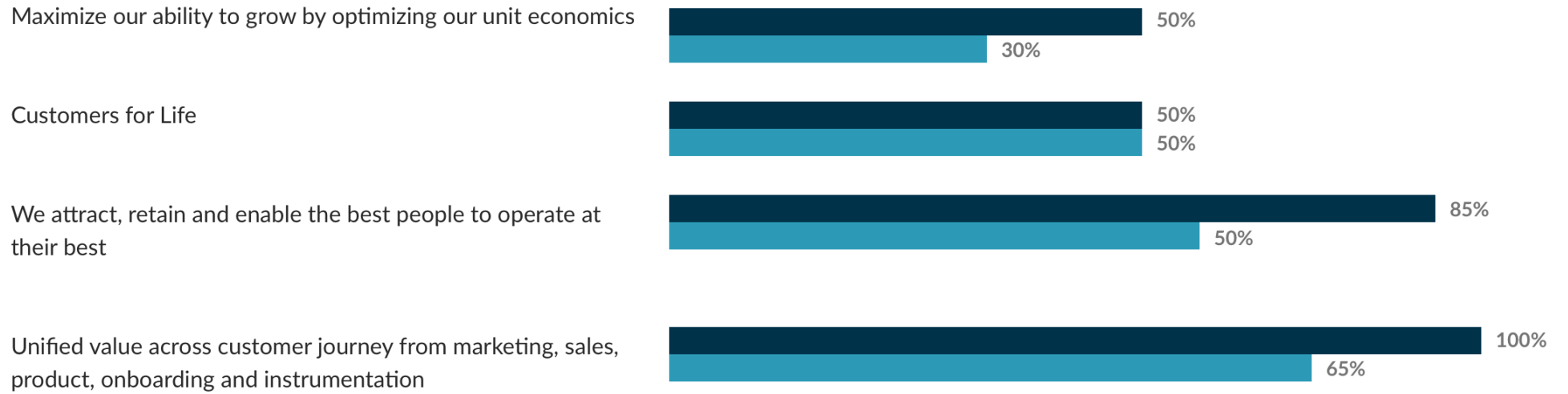
COLLAPSE ALL

FAVORITES

QTD OKR Progress · 45 days left in quarter

Organization Objectives

Key: ELT All teams



Team Performance





# Quick link to see all KR's owned by an individual

The image shows a screenshot of the WorkBoard interface. On the left, a search bar contains 'Matt Thompson' and a red arrow points to the search results. The search results list 'Matt Thompson's Profile Page', 'Matt Thompson's OKRs', 'Matt Thompson's Key Results', and 'Product Management's OKRs'. On the right, a detailed view of 'Matt Thompson's Key Results' is shown, categorized by 'PRODUCT MANAGEMENT' and 'PRODUCT PORTFOLIO'. The 'PRODUCT MANAGEMENT' section includes three key results: '100% of Rev Ops requests use Zendesk by Feb 15th', '10% of 100% Public cloud API available and documented', and '20% of 100% Get direct feedback from 7 target users on new integrations'. The 'PRODUCT PORTFOLIO' section includes three key results: '12 of 20 20 features shipped follow new product development process', '1 of 5 5 publicly referenceable Tier 1 and Tier 2 customers', and '87% of 100% Subscription orders can be placed for Products X, Y, and Z'. The 'INTEGRATIONS' section includes three key results: '4 of 5 5 new customers self-serve our API', '34% of 100% JIRA native integration is live', and '27% of 100% Operation model changes plan signed off by CTO'. The interface also shows a navigation bar with icons for 'Biz Review', 'My Work', 'Boards', 'Objectives', 'Meetings', and 'Teams', and a sidebar with 'Objectives', 'My Objectives', 'Heatmap', 'Alignment', and 'Timeline'.

Teams



Jump to...

Priorities & Risks

My Direct & Dotted

Reports

EXPAND ALL

FAVORITES

TEAMS

My Direct & Dotted



Members

OKRs

Key Results

Only show overdue key results



Jan Smith

MARKETING



Bring in the right customers

104 days left

4 ↑ 4 ↓



Build customer relationships and advocacy to support our market strategy

104 days left

2 ↑ 4 ↓

Carlo Marco

CLIENT SERVICES



The Customer Experience team operates at its best

104 days left

0 ↑ 4 ↓



Keep and expand our customer base

104 days left

4 ↑ 6 ↓



The Customer Team operates at its best

104 days left

1 ↑ 3 ↓



254.89m of 92.1m

\$92.1M in Tier 1 and Tier 2 customer upsell sales

Mirrored KR

Updated Jan 30, 2020



### 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

👤 🔔 3 💬 ⋮

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



### 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



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

25 days left

1 ↑ 2 ↓

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Mirrored KR

Updated Jan 30, 2020



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Updated Jan 31, 2020

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



## 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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16	Automatic Updates	Updated Jan 30, 2020
	Automatic Updates	Updated Jan 31, 2020
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	Barry Bosser	Updated Jan 21, 2020
	Workstream	Updated Feb 04, 2020
	Cascaded KR	Updated Jan 31, 2020



## INNOVATE: Maximize our platform to maximize our market position

25 days left

2 ↑ 3 ↓

- 50%** Completed platform V3 launch plan in place EOQ
- 6** of 6 All roadmaps include committed dates for common UI
- 89** of 184 Demo scripts are unified and every seller has done a demo check out (184 sellers total)
- 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

	Workstream	Updated Jan 03, 2020
11	Ryan Rogers	Updated Jan 03, 2020
8	Joe Smarts	Updated Jan 03, 2020
	Maria Cmoso	Updated Jan 03, 2020



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

25 days left

1 ↑ Update key result

- 82.4%** of 80% 80% of people feel we value their growth and development
- 85** of 100 All roles have a defined ramp plan with objective success metrics before placement
- 47** of 88 Meet our hiring plan in every function
- 44%** of 85% Every team has OKRs and achieves 85% of key results

	Jack CEOMack	Updated
	Manny Admina	Updated Jan 03, 2020
	Alice Peoples	Updated Jan 03, 2020
	Jack CEOMack	Updated Jan 03, 2020

Update key result

Objectives

← Company FLT

View one-level alignment

Jump to...

- My Objectives
- Heatmap
- Alignment
- Timeline
- COLLAPSE ALL
- FAVORITES



CHURN: Customers for life

28 days left

3 ↓ 2 □

- 86 of 85 Maintain average NPS score of 85
- 81.2% of 83% Drive gross revenue retention (GRR) above 83%
- 88 of 85 85 Tier 1 and Tier 2 logos renewed
- 84 of 90 Increase average number of users per account from 45 to 90
- 9.5% of 7% Decrease customer churn rate (CCR) from 12% -7%

- Automatic Updates Updated Feb 25, 2020
- Automatic Updates Updated Feb 25, 2020
- Joe Smarts Updated Feb 25, 2020
- Carlo Marco Updated Feb 25, 2020
- Carlo Marco Updated Feb 25, 2020



ECONOMICS: Build a high velocity, high efficiency business

28 days left

6 ↓ 0 □

- 81.1% of 79% Gross margins move from 74% to 79%
- 7.53 of 8 Customer Acquisition Cost (CAC) Payback Period for new business deals improves from 10 months to under 8 months
- 3.3 of 3.7 Improve Lifetime Value (LTV) to Customer Acquisition Cost (CAC) ratio from 2.4 to 3.7
- 193.45m of 92.1m \$92.1M in Tier 1 and Tier 2 customer upsell sales

- Dan Levitz Updated Feb 25, 2020
- Joe Smarts Updated Jan 31, 2020
- Maria Cmoso Updated Feb 25, 2020
- Mirrored KR Updated Feb 25, 2020



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

28 days left

6 ↓ 22 □

- 78% of 85% 85% of new logo ARR is customers in Tier 1 and Tier 2 segments
- 82% of 85% 85% revenue retention in Tier 1 and Tier 2 customers (GRR)

- Automatic Updates Updated Feb 25, 2020
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COMPANY ELT

ECONOMICS: Build a high velocity, high efficiency business



7.53 of 8

Customer Acquisition Cost (CAC) Payback Period for new business deals improves from 10 months to under 8 months

81.1% of 79%

Gross margins move from 74% to 79%

3.3 of 3.7

Improve Lifetime Value (LTV) to Customer Acquisition Cost (CAC) ratio from 2.4 to 3.7

193.45m of 92.1m

\$92.1M in Tier 1 and Tier 2 customer upsell sales

SALES

We are a lean mean revenue driving machine always winning

109m of 135m

\$135M in services revenue

29.39k of 35k

ACV goes from \$18k to \$35k

193.45m of 92.1m

\$92.1M in Tier 1 and Tier 2 customer upsell sales

320.93m of 366m

\$366M Bookings (ARR)

58.6m of 1.2b

4x pipeline coverage to \$1.2B

IT

We act reliably and efficiently

57.5% of 90%

We deliver against 90% of our IT projects

0 of 2

Decommission X and Y mainframe systems by end of quarter

35% of 50%

50% reduction in utilization of on-premise environments by end of quarter

3 of 3

Close 3 Data Centers

289k of 350k

Realize \$350k in cost-savings

FINANCE

Build a world class operations organization that amplifies value for the company

100% of 100%

100% of new purchases go through the procurement process

7% of 0 - 10

Forecast our monthly P&L within 10% of plan

13% of 0 - 10

Forecast our burn within 10% of plan

15% of 0 - 5

Food and beverage spend within 5% of budget

PEOPLE

Reduce time to hire and improve offer acceptance

66% of 75%

Improve offer acceptance from 52% to 75%

34 of 21

Reduce days to hire globally to 21 days (reflects global average)

65% of 60%

Candidate pipeline conversion increases from 30% to 60%

85% of 100%

100% of candidates experience 2 new hospitality initiatives throughout their recruitment process

FINANCE

Be strategic business and thought partners so the business can grow even faster

4% of 0 - 5

90 day accuracy within 5% of adjusted EBITDA forecast

55% of 100%

Vendor selected and all requirements met for ERP implementation migration

9 of 7

Monthly consolidated financial statements submitted to the board by business day 7

50% of 100%

We receive an unqualified opinion from external auditors by mid-quarter

FINANCE

Transparency and accountability on our financial metrics for everyone

1.1m of 1.54m

Quarterly net burn forecast

1.09m of 2.11m

Quarterly collections forecast

6.5% of 0 - 5

P&L forecast is accurate within 5%

# Objectives

Jump to...

- My Objectives
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COLLAPSE ALL

FAVORITES

## Company ELT

View timeline



<b>83%</b>	<b>CHURN: Customers for life</b>	<b>28 days left</b>	<b>3</b> ↓ <b>2</b> 🗨
86 of 85	Maintain average NPS score of 85	Automatic Updates	Updated Feb 25, 2020
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<b>92%</b>	<b>ECONOMICS: Build a high velocity, high efficiency business</b>	<b>28 days left</b>	<b>6</b> ↓ <b>0</b> 🗨
81.1% of 79%	Gross margins move from 74% to 79%	Dan Levitz	Updated Feb 25, 2020
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# PEOPLE: We attract, retain and enable the best people to operate at their best

Jack CEOMack : Company ELT

Apr 01 - Jun 30

29%

35% of 80%

80% of people feel we value their growth and development

Jack CEOMack

0 of 100

All roles have a defined ramp plan with objective success metrics before placement

Manny Admina

90 of 88

Meet our hiring plan in every function

Alice Peoples

0% of 85%

Every team has OKRs and achieves 85% of key results

Jack CEOMack

Jul 01 - Sep 30

60%

100% of 80%

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Dec 01 - Mar 31

79%

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55 of 88

Meet our hiring plan in every function

Alice Peoples

56% of 85%

Every team has OKRs and achieves 85% of key results

Jack CEOMack

# What are you **curious** about?



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

