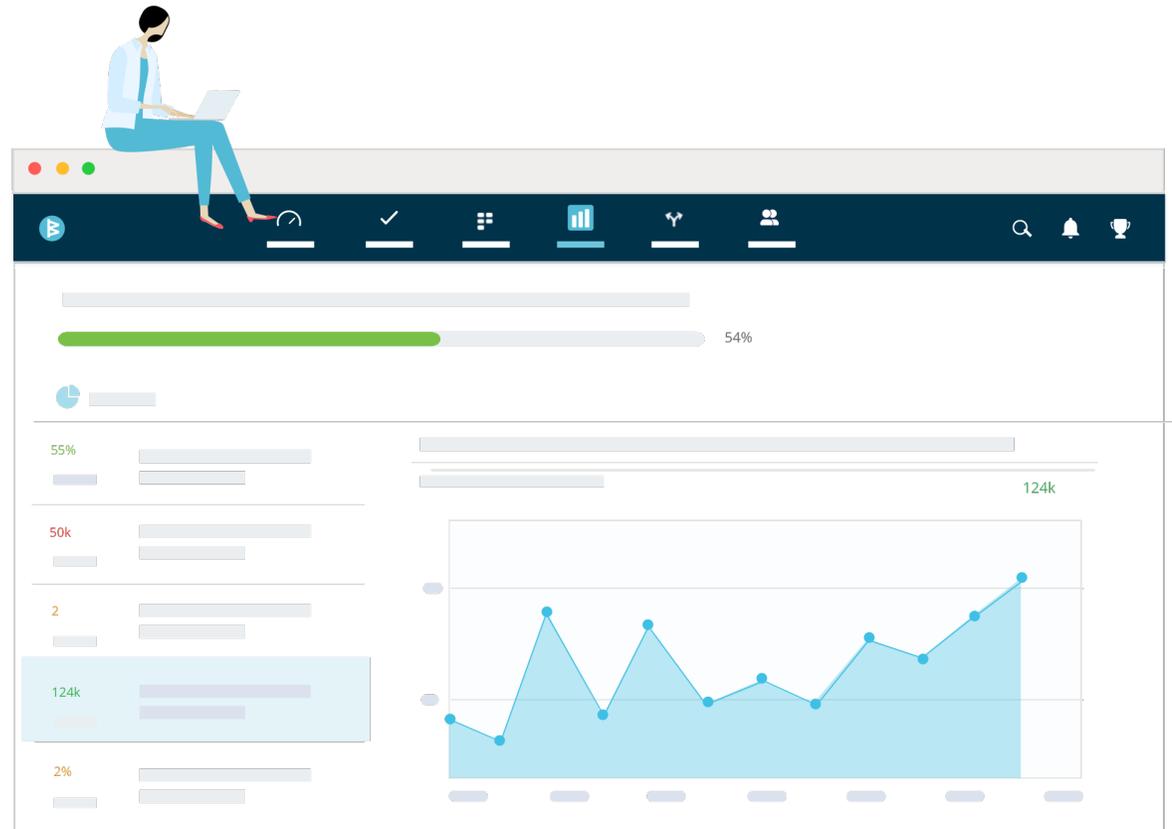


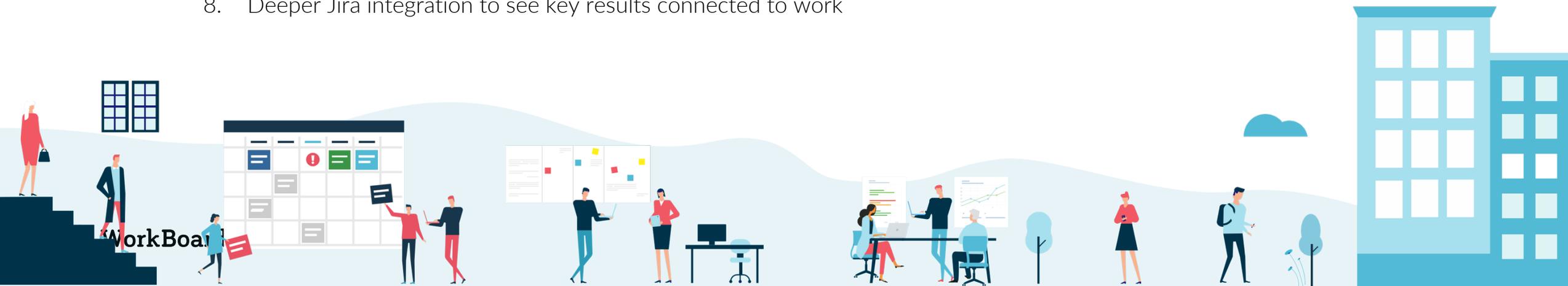
# March 2020 Product Release Highlights



Confidential

# Release Content for March Availability (est. last week)

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



# Change Description & Relevant Use

Capability	Change	Relevant Users	Complexity	Communication
<b>1. Full flexibility to sort, size and customize your Biz Review trays</b>	Enhancement to existing page – creation flows improved	All team leads and business leaders, super users	Low / Moderate	Simple highlight in WorkBoard release notes
<b>2. OKR alignment tree now shows teams</b>	Enhancement to existing page – view will now include functional team tree in additions to people reporting tree	All users	None / Low	Simple highlight in WorkBoard release notes
<b>3. Exec dashboard comparing aggregate OKR progress on company objectives</b>	New dashboard to bring insights on overall OKR progress across the company and teams	Top L1 and L2 leadership and business process owners	Low / Moderate	Direct to top L1 and L2 users
<b>4. Quick actions and reactions on key results and OKR pages</b>	Enhancements to existing OKR report pages and My OKRs pages to several clicks to main actions. Users can also cheer results directly.	All users	Low / Moderate	Simple highlight in WorkBoard release notes
<b>5. Quick link to see all key results owned by an individual</b>	New page to see all results owned by a person across teams	People and team managers primarily, and all users generally	Low	Simple highlight in WorkBoard release notes
<b>6. Manager view of OKRs and KR for their directs</b>	Enhancement to existing page to allow managers to see all OKRs or KR for all their people the manage, in one single view.	All people managers	Low	Direct to super users, OKR coaches and Jira users
<b>7. Deeper Jira integration to see key results connected to work</b>	Jira issues will show the key results that they are driving progress towards.	Jira users, super users	Low	Direct to super users, OKR coaches and Jira users

# Full flexibility to sort, size, and customize Biz Review trays

- ✓ **Better view of data with full-width charts and images:** Resize your charts, images, and iFrames to be half- or full-width to tell the story your dashboard needs to tell.
- ✓ **Sort in order of importance:** Move your OKRs and hotbox to the top, or add a narrative section next to your charts and iFrames.
- ✓ **Easier creation:** Add charts, graphs, images, and iframes as standalone items.

Access this by:

1. Clicking on existing Biz Reviews you have permission to edit.
2. Clicking to create a new Biz Review.

The screenshot displays the WorkBoard interface for a dashboard titled "Snazzy Solution -- Q1 Results" by Brandy Williamson. The dashboard is divided into several sections:

- OBJECTIVES:** A list of four key performance indicators (KPIs) with progress bars: INNOVATE (20%), GROWTH (52%), ECONOMICS (64%), and PEOPLE (39%).
- HOTBOX:** A red header section containing a list of tasks and metrics, such as "GROWTH: Make it easy for the right customers to buy and hard for them to..." and "Tier 1 press coverage of K2 release".
- Sales Summary:** A section with a bar chart titled "Snazzy Solution Product Sales (in thousands)" showing sales data for five regions (UL, ALU, BTK, GHP, THX) from Jan 02, 2019, to Mar 31, 2019.
- Sales by Region:** A table showing sales data for the East region, broken down by segment (FinServ, Insurance, Oil&Gas) and product (ABN5, BKT61, K2).

A customization menu is open on the right side of the dashboard, listing various widget types that can be added to the dashboard:

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

The interface includes a top navigation bar with icons for Biz Review, My Work, Workstreams, Objectives, Meetings, and Teams. A "Done Editing" button and an "Add content" button are visible in the top right corner. A "Help" button is located in the bottom right corner.

Region	Segment	Product	October 2017	November 2017	December 2017
East	FinServ	ABN5	\$1,378	\$2,262	
		BKT61	\$936	\$14,175	
		K2	\$3,336	\$2,915	
	Insurance	ABN5	\$788	\$1,560	
		BKT61	\$16,210	\$762	
		K2	\$104	\$6,234	
Oil&Gas	ABN5	\$1,411	\$8,345		
	BKT61	\$5,793	\$7,647		

# OKR alignment tree reflects team names

- ✓ **Explore alignment by teams:** Now navigate alignment through teams and people managers.
- ✓ **Jump to a team's OKR report from the tree:** As you explore OKRs by teams, click on *view team* for a full view of the team's OKRs.

Access this by:

1. Clicking on Alignment from the Objective left navigation panel.

\* This will show for teams that are part of the functional org structure – working groups are not yet incorporated into this tree.

The screenshot displays the WorkBoard interface for OKR Alignment. The top navigation bar includes 'WorkBoard', 'Biz Review', 'My Work', 'Workstreams', 'Objectives', 'Meetings', and 'Teams'. The main content area is titled 'OKR Alignment' and has tabs for 'By Organization', 'By Objective', and 'Full Alignment Report'. Below these tabs are buttons for 'Teams' and 'People', along with a search bar 'Search for a team to display'. The main visualization is a tree structure where 'Company ELT' (Jack Ceomack) is the root, branching into various teams: Marketing (Maria Cmoso), Finance (Amanda Dinero), Professional Services (Carlo Marco), Client Services (Carlo Marco), Operations (Dan Levitz), IT (Allen BennIT), People (Alice Peoples), Product (Barry Bosser), and Sales. A red arrow points to the 'Marketing' team, which is expanded to show its OKRs: 'Marketing Comms' (Marianne White), 'Customer Journey' (Celeste Collins), 'Digital' (Johnny Jackson), and 'Growth' (Henry Holdens). The 'Growth' team's OKRs are listed in a table:

OKR	Progress
Grow our pipeline of sales targets	80%
Our strategic partnerships help grow our pipeline	68%
We shape the conversation for customers and prospects	62%

A 'View team' link is visible next to the 'Growth' team's OKRs.

# Objectives

Jump to...

- My OKRs
- Heatmap
- Alignment
- Timeline

COLLAPSE ALL

FAVORITES

## OKR Alignment

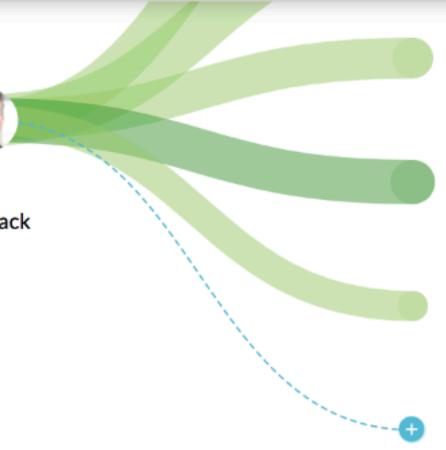
- By Organization
- By Objective
- Full Alignment Report

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

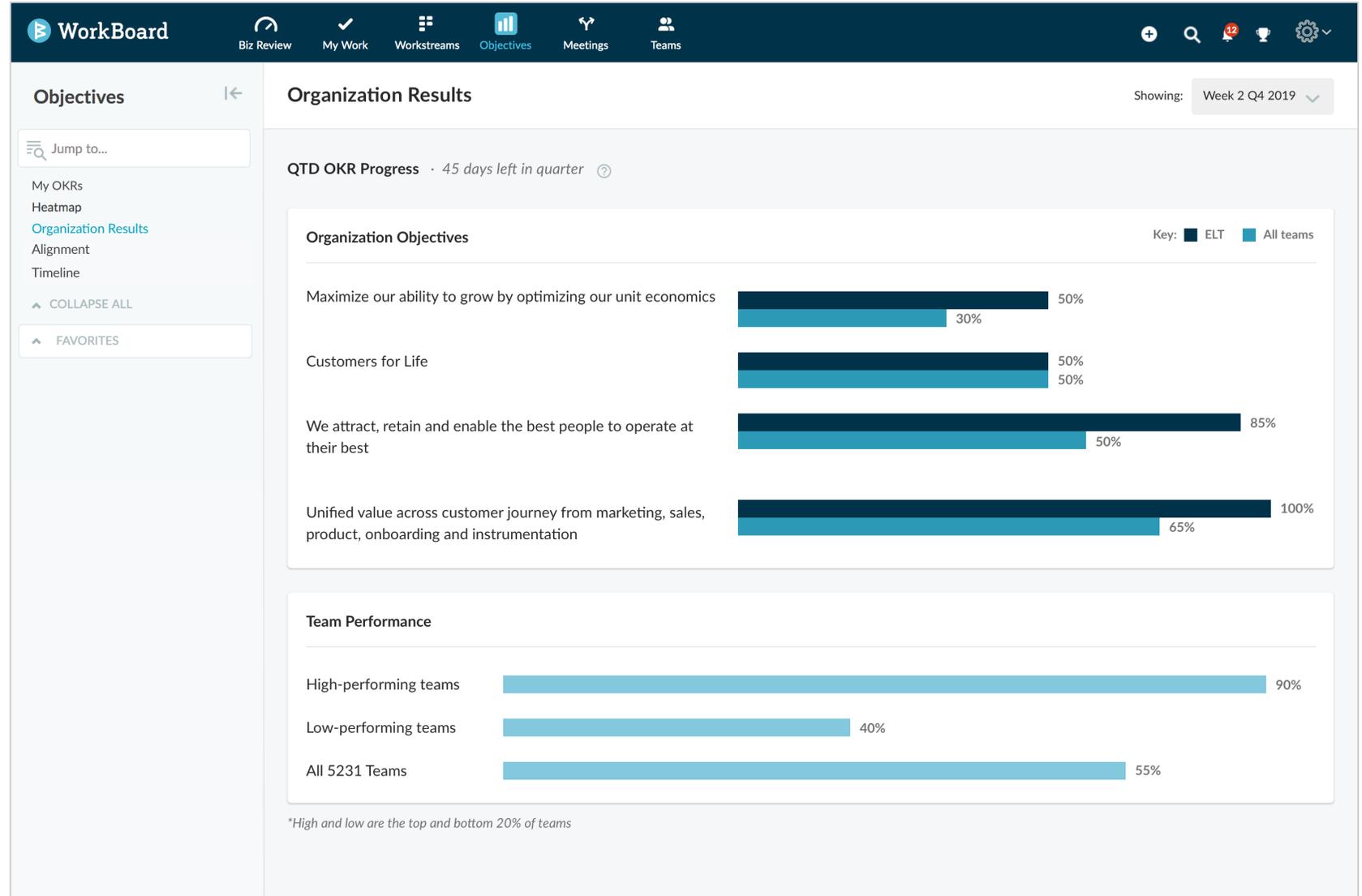
# Aggregate OKR progress on company objectives

- ✓ **Exec dashboard on top-level objectives:** See overall progress QTD on top-level objectives and aggregate progress of all aligned objectives.
- ✓ **See the high/low results spectrum compared to the average**

## Access this by:

1. Reaching out to WorkBoard customer success team to turn on this capability for your organization.

*\* View available only for L1-L2 leaders and permissioned users when activated for the organization.*



# Quick actions & reactions on key results

- ✓ **See social momentum on results:**  
Add emoji responses directly on key results to cheer the team on bold targets and progress made on outcomes.
- ✓ **Quick access to main actions:**  
Update data for results you own, add emoji reactions, ping for updates, or join the conversation (see next two slides).

## Access this by:

1. On any OKR list view, hover over individual key results (My OKRs, Team OKRs, Heatmap).
2. Click the quick action icons that appear to the far right of the list view.

The screenshot displays the WorkBoard interface with a dark blue header. The main content area shows a list of OKRs. The first OKR is 'GROWTH: Make it easy for the right customers to buy and hard for them to leave' with a 67% progress indicator. It lists several key results, including '32 of 30' for Snazzy v1 release. A red arrow points to a quick action menu on the right side of the '32 of 30' result, which contains icons for emoji reactions, a ping, and a comment. The second OKR is 'INNOVATE: Maximize our platform to maximize our market position' with a 73% progress indicator. The third OKR is 'PEOPLE: We attract, retain and enable the best people to operate at their best' with a 73% progress indicator. The interface includes navigation tabs like 'Biz Review', 'My Work', 'Workstreams', 'Objectives', 'Meetings', and 'Teams'.

Progress	Key Result	Owner	Update
67%	<b>GROWTH: Make it easy for the right customers to buy and hard for them to leave</b>	25 days left	4 ↑ 4 ↓
77% of 85%	85% of new logo ARR is customers in Tier 1 and Tier 2 segments	Automatic Updates	Updated Jan 30, 2020
81% of 85%	85% revenue retention in Tier 1 and Tier 2 customers (GRR)	Automatic Updates	Updated Jan 30, 2020
71% of 75%	75% WAU in Tier 1 and Tier 2 accounts	Automatic Updates	Updated Jan 30, 2020
32 of 30	30 Tier 1 and Tier 2 customers have the Snazzy v1 release in production	Barry Bosser	Updated Jan 30, 2020
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%	<b>INNOVATE: Maximize our platform to maximize our market position</b>	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	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)	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%	<b>PEOPLE: We attract, retain and enable the best people to operate at their best</b>	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



### 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



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 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 ↓

- 77%** of 85% 85% of new logo ARR is customers in Tier 1 and Tier 2 segments
- 81%** of 85% 85% revenue retention in Tier 1 and Tier 2 customers (GRR)
- 71%** of 75% 75% WAU in Tier 1 and Tier 2 accounts
- 32** of 30 30 Tier 1 and Tier 2 customers have the Snazzy v1 release in production
- 60%** Re-vamped strategic use cases are final and embedded in sales, marketing and product mgmt
- 9** of 15 15 new case studies from Tier 1 and Tier 2 customers with CMO quotes in them

16	Automatic Updates	Updated Jan 30, 2020
	Automatic Updates	Updated Jan 31, 2020
	Automatic Updates	Updated Jan 31, 2020
	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

👤 🔄 5 🗨️ ⋮

# Quick access to two-level OKR view & QoQ report

- ✓ **See two-levels of OKRs in one view:**  
This view shows the OKRs for one manager and for each of that managers' OKRs, all next-level aligned OKRs on one convenient page
- ✓ **Quarter over quarter OKRs:** See how OKRs progressed and changed quarter over quarter for any team

Access this by:

1. Clicking the quick link icons at the top of any OKR list page for a team or person

**WorkBoard** Biz Review My Work Workstreams Objectives Meetings Teams

**Objectives** Company FLT

View one-level alignment

Jump to...

My Objectives  
Heatmap  
Alignment  
Timeline  
COLLAPSE ALL  
FAVORITES

**CHURN: Customers for life** 83% 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%

**ECONOMICS: Build a high velocity, high efficiency business** 92% 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

**GROWTH: Make it easy for the right customers to buy and hard for them to leave** 71% 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)

Only show overdue key results

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

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

Automatic Updates Updated Feb 25, 2020  
Automatic Updates Updated Feb 25, 2020

# Two-level OKR view with “next page” feature to cycle through a set of objectives and all aligned OKRs (available now – we’ve made it easier for find!)

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		IT	
We are a lean mean revenue driving machine always winning		We act reliably and efficiently	
109m of 135m	\$135M in services revenue	57.5% of 90%	We deliver against 90% of our IT projects
29.39k of 35k	ACV goes from \$18k to \$35k	0 of 2	Decommission X and Y mainframe systems by end of quarter
193.45m of 92.1m	\$92.1M in Tier 1 and Tier 2 customer upsell sales	35% of 50%	50% reduction in utilization of on-premise environments by end of quarter
320.93m of 366m	\$366M Bookings (ARR)	3 of 3	Close 3 Data Centers
58.6m of 1.2b	4x pipeline coverage to \$1.2B	289k of 350k	Realize \$350k in cost-savings
FINANCE		PEOPLE	
Build a world class operations organization that amplifies value for the company		Reduce time to hire and improve offer acceptance	
100% of 100%	100% of new purchases go through the procurement process	66% of 75%	Improve offer acceptance from 52% to 75%
7% of 0 - 10	Forecast our monthly P&L within 10% of plan	34 of 21	Reduce days to hire globally to 21 days (reflects global average)
13% of 0 - 10	Forecast our burn within 10% of plan	65% of 60%	Candidate pipeline conversion increases from 30% to 60%
15% of 0 - 5	Food and beverage spend within 5% of budget	85% of 100%	100% of candidates experience 2 new hospitality initiatives throughout their recruitment process
FINANCE		FINANCE	
Be strategic business and thought partners so the business can grow even faster		Transparency and accountability on our financial metrics for everyone	
4% of 0 - 5	90 day accuracy within 5% of adjusted EBITDA forecast	1.1m of 1.54m	Quarterly net burn forecast
55% of 100%	Vendor selected and all requirements met for ERP implementation migration	1.09m of 2.11m	Quarterly collections forecast
9 of 7	Monthly consolidated financial statements submitted to the board by business day 7	6.5% of 0 - 5	P&L forecast is accurate within 5%
50% of 100%	We receive an unqualified opinion from external auditors by mid-quarter		



### Objectives



Jump to...

My Objectives

Heatmap

Alignment

Timeline

COLLAPSE ALL

FAVORITES

### Company ELT

View timeline



Only show overdue key results



#### CHURN: Customers for life

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%

28 days left

3 🔽 2 🗨

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

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

28 days left

6 🔽 0 🗨

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

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)

28 days left

6 🔽 22 🗨

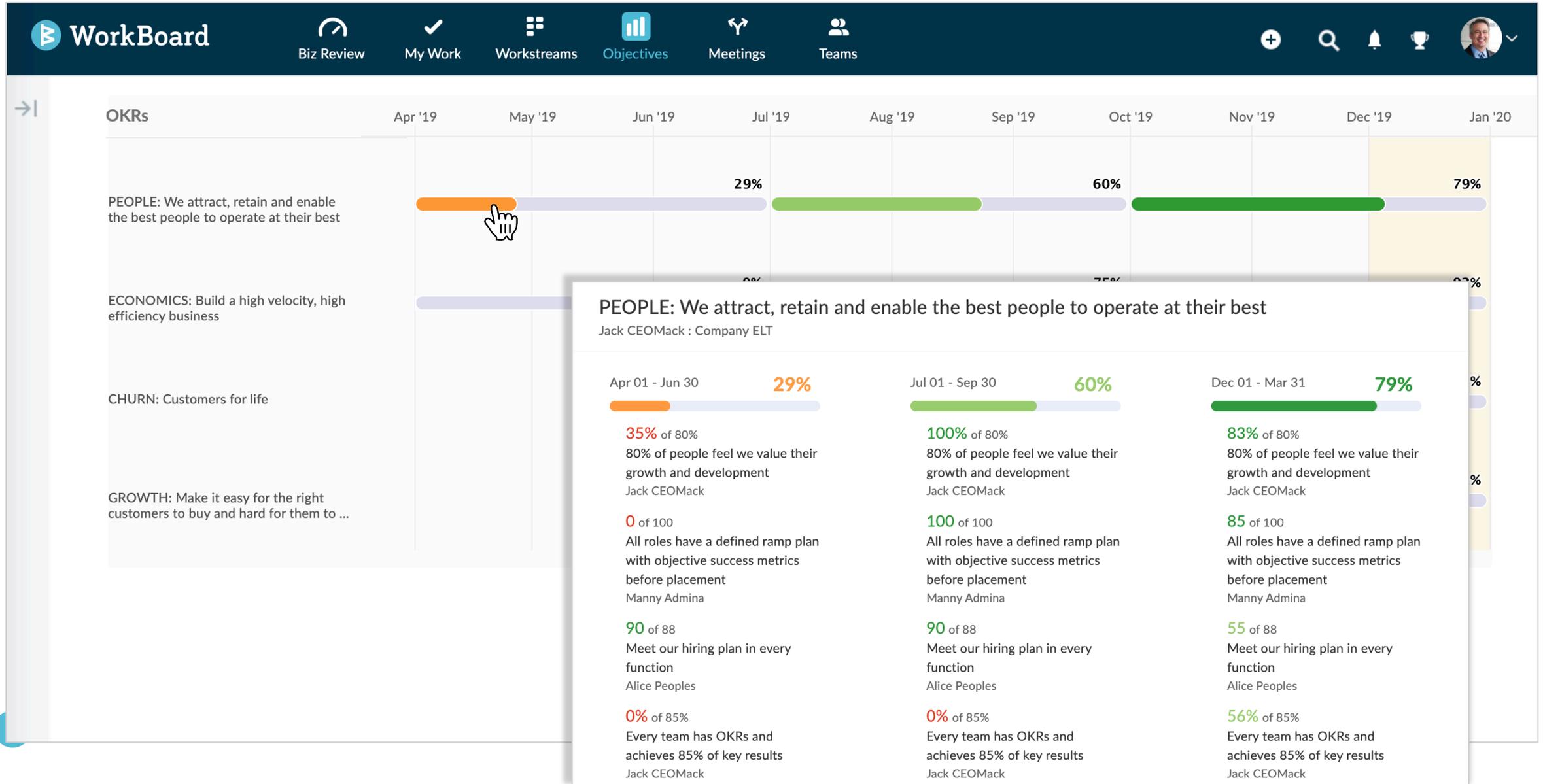
Automatic Updates

Updated Feb 25, 2020

Automatic Updates

Updated Feb 25, 2020

# Quarter-over-Quarter OKR Timeline with double-click to see KR progress over time (available now – we’ve made it easier for find!)



# Tune your OKR pages

- ✓ **Collapse results:** New toggle to show or hide all KR. Your preference will be saved across sessions.
- ✓ **Filter to past due results:** Narrow down the list to see which KRs from your Objectives are missing updates.

Access this by:

1. Clicking the KR icon toggle on the MyOKRs page to show or hide results.

The screenshot displays the WorkBoard interface with the following elements:

- Navigation Bar:** Includes 'WorkBoard' logo, 'Biz Review', 'My Work', 'Boards', 'Objectives', 'Meetings', and 'Teams'.
- Left Sidebar:** Contains 'Objectives', a search bar 'Jump to...', and filters for 'My Objectives', 'Heatmap', 'Alignment', and 'Timeline'. It also has 'COLLAPSE ALL' and 'FAVORITES' buttons.
- Main Content Area:** Titled 'My Objectives', it shows tabs for 'My OKRs', 'My Key Results', 'My Manager's OKRs', and 'My Team OKRs'. A 'Show:' dropdown is set to 'Teams I manage and co-manage'. A checkbox 'Only show overdue key results' is checked. A red arrow points to a KR icon toggle in the top right of this area.
- Right Sidebar:** Features 'Past 30 Day OKR Activity' with a calendar grid, and three 'Excellent!' badges with a crown icon, each accompanied by the text: 'You gave Carlo Marco a badge for Provide RevOps data and insights that move us from good to incredible'.

# New Page with “My Key Results”

- ✓ **Easier to scan:** Cleaner view of your key results, grouped by the teams they contribute to.

Access this by:

1. Clicking on the My Objectives page
2. Clicking on *My Key Results* to see a list of results assigned to a user for updates.

The screenshot shows the WorkBoard interface. The top navigation bar includes 'Biz Review', 'My Work', 'My Objectives', 'Objectives', 'Meetings', and 'Teams'. A red arrow points to the 'My Key Results' tab under 'My Objectives'. The main content area is titled 'My Objectives' and has sub-tabs for 'My OKRs', 'My Key Results', 'My Manager's OKRs', and 'My Team OKRs'. The 'My Key Results' tab is active, showing a list of key results grouped by categories: 'PRODUCT MANAGEMENT', 'PRODUCT PORTFOLIO', and 'INTEGRATIONS'. Each key result entry includes a progress indicator (e.g., '2 of 10'), a description, and a due date. On the right side, there is a 'Past 30 Day OKR Activity' calendar and two achievement badges: 'Awesome!' and 'Excellent!'.

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

See how someone is driving results across functional and cross functional teams; add comments, cheer on results, or ping for updates from the same view.

Access this by:

1. Clicking the search icon from the top right navigation
2. Searching for a person and selecting their key results' page

The screenshot illustrates the process of finding and viewing an individual's key results in the WorkBoard system. A search bar at the top left contains the name 'Matt Thompson', and a red arrow points to the search results. The results list includes 'Matt Thompson's Profile Page', 'Matt Thompson's OKRs', 'Matt Thompson's Key Results', and 'Product Management's OKRs'. The 'Key Results' page for Matt Thompson is shown in the foreground, displaying a list of key results under the heading 'PRODUCT MANAGEMENT'. The first key result is '100% of Rev Ops requests use Zendesk by Feb 15th', which is highlighted. Other key results include 'Public cloud API available and documented' (10% of 100%), 'Get direct feedback from 7 target users on new integrations' (20% of 100%), and '20 features shipped follow new product development process' (12 of 20) under 'PRODUCT PORTFOLIO'. The 'INTEGRATIONS' section shows '5 new customers self-serve our API' (4 of 5), 'JIRA native integration is live' (34% of 100%), and 'Operation model changes plan signed off by CTO' (27% of 100%).

# Manager view of OKRs and KRAs for their directs

See all the OKRs that belong to your direct and dotted line reports in a single view -- quickly spot and address risks or filters to results that are past due.

Access this by:

1. Clicking "My Direct & Dotted" on the Teams sidebar

*\* Note: this new view is an update of the existing "My Directs" view on the Teams sidebar.*

The screenshot shows the WorkBoard interface with the following components:

- Header:** WorkBoard logo and navigation icons for Biz Review, My Work, Workstreams, Objectives, Meetings, and Teams.
- Left Sidebar:** Teams sidebar with a search bar "Jump to...", "Priorities & Risks", "My Direct & Dotted" (selected), "Reports", "EXPAND ALL", "FAVORITES", and "TEAMS".
- Main Content Area:** "My Direct & Dotted" view with tabs for "Members", "OKRs", and "Key Results" (selected). A filter "Only show overdue key results" is active.
- Team Members:** Jan Smith and Carlo Marco.
- Key Results:**
  - MARKETING:**
    - Bring in the right customers:** 50% progress. 11.7m of 13m. Deliver new leads with \$13m in pipeline value this quarter. 104 days left. Responsible: Julia Andrew (Updated Nov 18, 2019), John Marcus (Updated Nov 18, 2019), Workstream (Updated Nov 18, 2019).
    - 44 of 50:** Increase cubist score of inbounds from 43 to 50.
    - 290 of 500:** 500 demos set up from inbound leads.
    - Build customer relationships and advocacy to support our market strategy:** 92% progress. 104 days left. Responsible: 2 team members.
  - CLIENT SERVICES:**
    - The Customer Experience team operates at its best:** 50% progress. 104 days left. Responsible: 0 team members, 4 workstreams.
    - Keep and expand our customer base:** 65% progress. 104 days left. Responsible: 4 team members, 6 workstreams.
    - The Customer Team operates at its best:** 73% progress. 104 days left. Responsible: 1 team member, 3 workstreams.

# Reminders to close and reset OKRs

**One click to reset:** Close and reset or archive OKRs that are past their end dates.

Access this by:

1. Clicking on the My Objectives page

\* Note: this notice will only appear to team managers or co-managers.

GROWTH: Make it easy for the right customers to buy and hard for them to leave  
Andrea Collins: Executive Team

82% 0 days left

94% of 96%	96% revenue retention of T1/2 customers	Camille Haley	As of Mar 12, 2020
12 of 12	Create 12 new CMO references and case studies in T1/T2 accounts	Camille Haley	As of Aug 09, 2019
9 of 10	Initial Snazzy solution release is used by 10 T1/2 customers	Clair Becker	As of Mar 12, 2020
4 of 6	Release CMO notable quality-of-life features every two weeks into production	Andrea Collins	As of Mar 12, 2020
75% of 85%	85% of ARR comes from customers in Tiers 1 and 2 segment	Brandy Williamson	As of Mar 12, 2020

The time period for the above OKR is over! Close and reset this OKR or archive it.

[↩ Close and reset](#) [📁 Close and archive](#) [✕](#)

# Deeper Jira integration

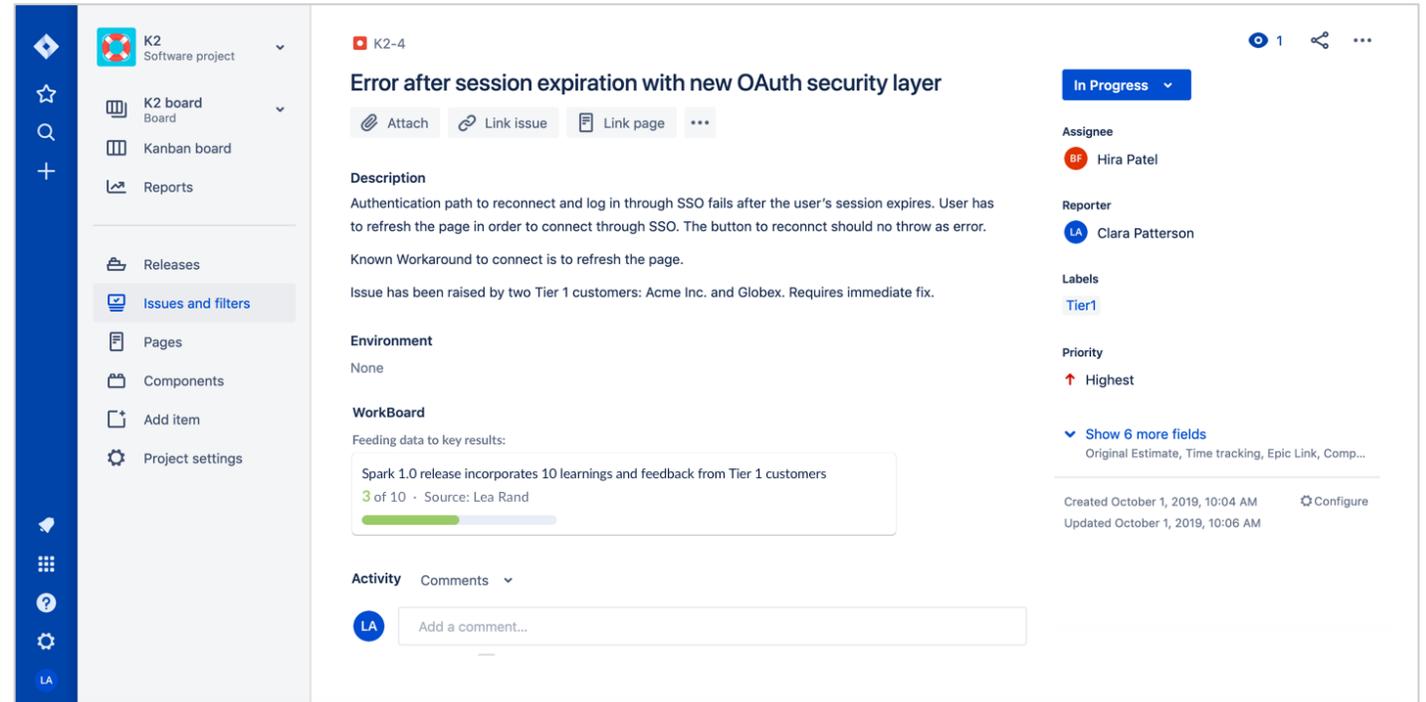
- ✓ Jira integration to see key results connected to work
- ✓ Run JQL queries to report on issues that are aligned to results

Access this by:

Install plugin version 1.2.0 from the [Atlassian Marketplace](#).

1. The new capabilities will only become accessible for your users once you upgrade the WorkBoard plugin for Jira to the latest version.
2. Following the upgrade, users will need to reconnect their WorkBoard accounts to Jira.

*Please note that the menu item name for **Key Results I Update** has changed to **Manage Key Results***



The screenshot displays a Jira issue page for 'K2-4' titled 'Error after session expiration with new OAuth security layer'. The issue is in the 'In Progress' state. The description details an authentication path failure after session expiration, with a known workaround of refreshing the page. The issue is assigned to Hira Patel and reported by Clara Patterson. It has a 'Tier1' label and 'Highest' priority. The 'WorkBoard' section shows a key result: 'Spark 1.0 release incorporates 10 learnings and feedback from Tier 1 customers', with 3 of 10 items completed. The activity section shows a comment input field for user LA.

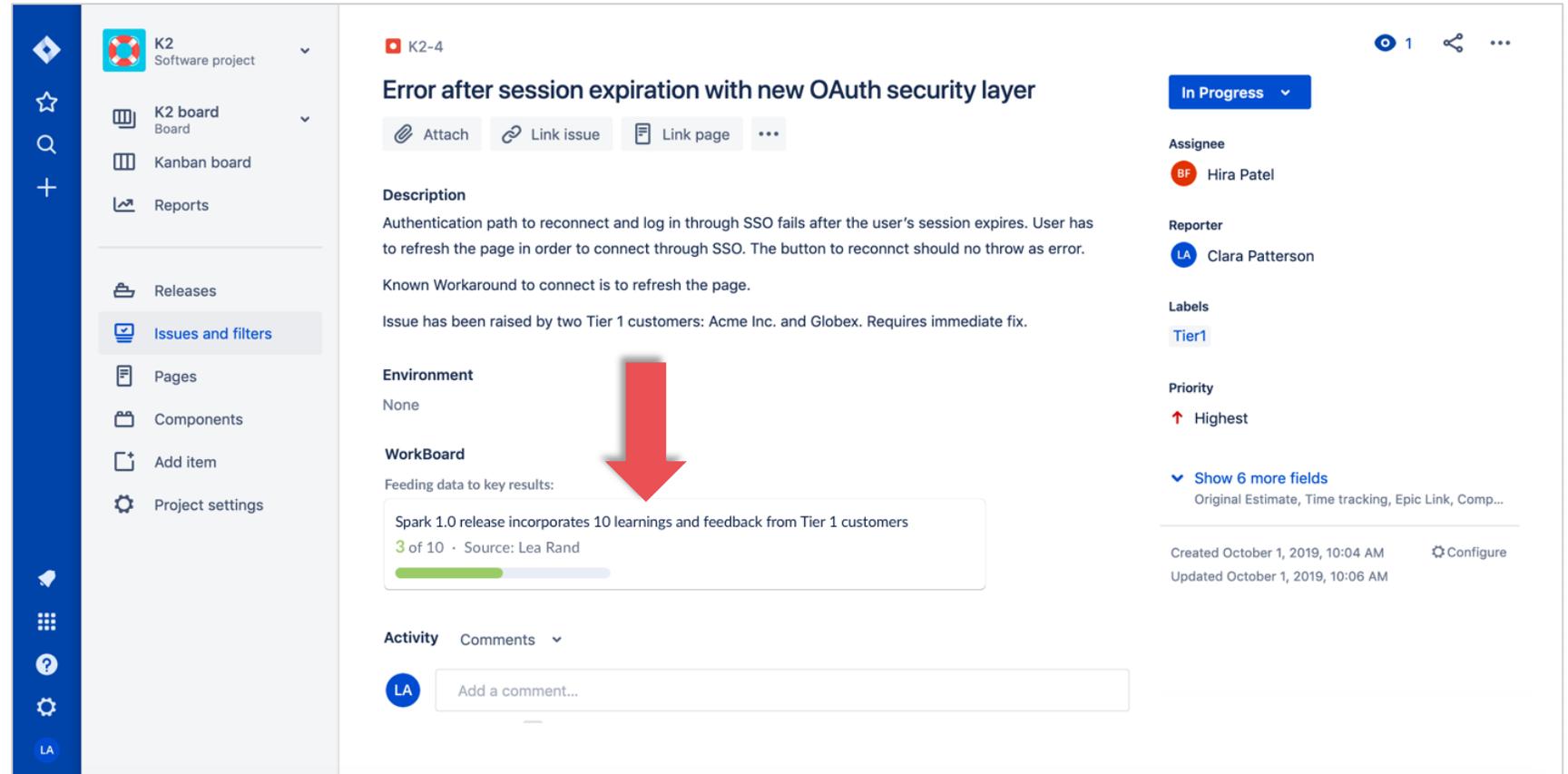
# Jira integration to see key results connected to work

Jira issues will display key results they are contributing to, so the team working on issues in Jira can see how their work is moving the needle on strategic priorities!

Note: Menu item name for **Key Results I Update** has changed to **Manage Key Results**

Access this by:

1. Any issues that have been set to automatically update key result progress will display the key result on the issue.
2. Click on the key result card to see the full details in WorkBoard



The screenshot displays a Jira issue page for 'K2-4' titled 'Error after session expiration with new OAuth security layer'. The left sidebar shows the navigation menu with 'Issues and filters' selected. The main content area shows the issue details, including the description, environment, and a 'WorkBoard' section. A red arrow points to a key result card in the WorkBoard section, which displays 'Spark 1.0 release incorporates 10 learnings and feedback from Tier 1 customers' with a progress bar showing '3 of 10' and 'Source: Lea Rand'. The right sidebar shows the issue's status as 'In Progress', assignee 'Hira Patel', reporter 'Clara Patterson', and priority 'Highest'.

# Search for work in Jira driving Key Result progress

Issues contributing to key results can be queried through JQL, making it possible to quickly search for issues that are contributing to strategic priorities.

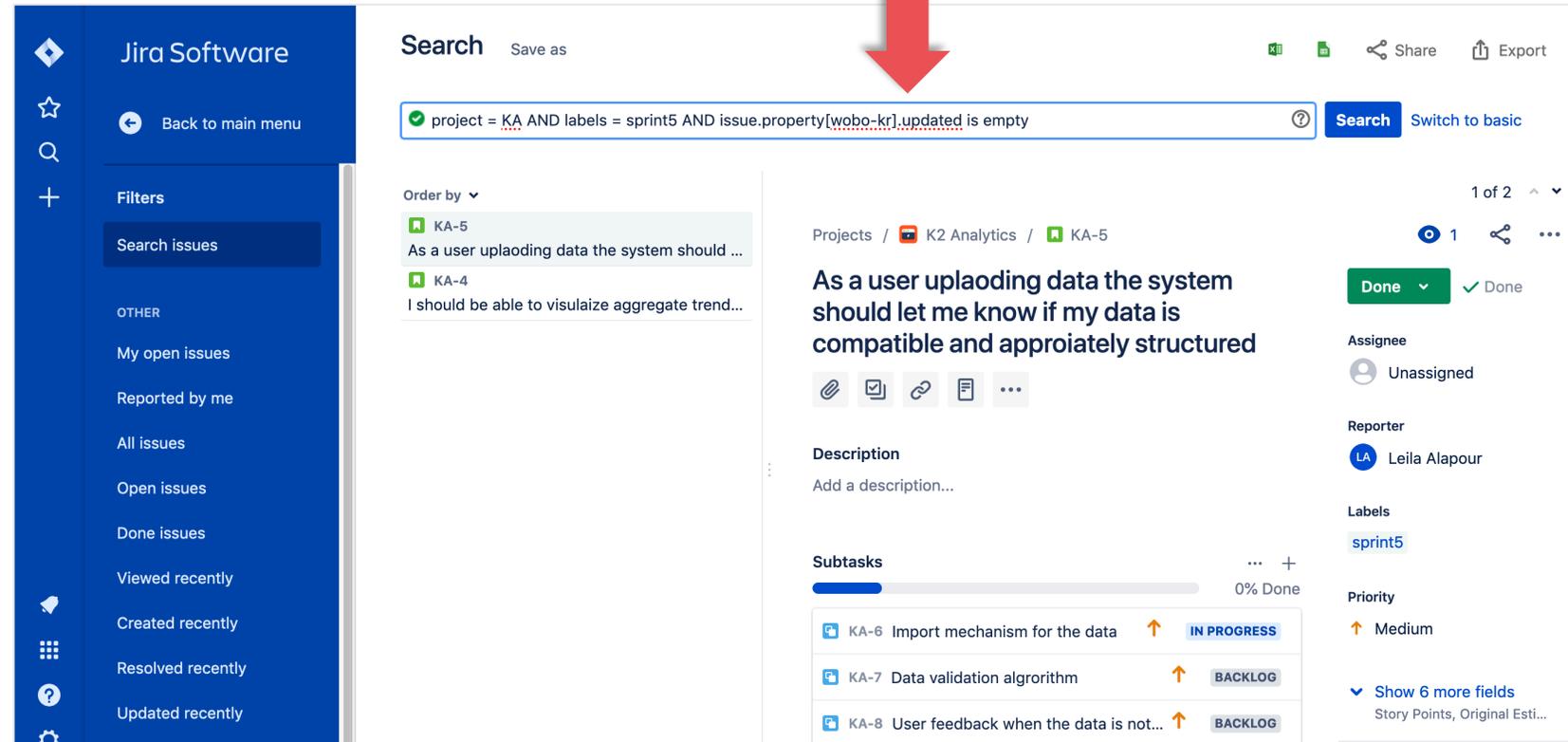
## Access this by:

1. Append the following to any JQL to see issues not connected to Key Results:

```
issue.property[wobo-kr].updated is empty
```

2. Append the following to any JQL to see issues driving Key Results progress

```
issue.property[wobo-kr].updated is NOT empty
```



The screenshot shows the Jira Software interface. On the left is a blue sidebar with navigation options like 'Search issues', 'My open issues', 'Reported by me', 'All issues', 'Open issues', 'Done issues', 'Viewed recently', 'Created recently', 'Resolved recently', and 'Updated recently'. The main content area is titled 'Search' and shows a search bar with the JQL query: `project = KA AND labels = sprint5 AND issue.property[wobo-kr].updated is empty`. A red arrow points to the search bar. Below the search bar, there are two search results:

- KA-5: As a user uplaoding data the system should ...
- KA-4: I should be able to visulaize aggregate trend...

The detailed view of issue KA-5 is shown on the right. It includes the title 'As a user uplaoding data the system should let me know if my data is compatible and approiately structured', the assignee 'Unassigned', the reporter 'Leila Alapour', and the label 'sprint5'. The 'Subtasks' section shows a progress bar at 0% Done and lists three subtasks: KA-6 (Import mechanism for the data, IN PROGRESS), KA-7 (Data validation algorithm, BACKLOG), and KA-8 (User feedback when the data is not..., BACKLOG).