

Welcome WorkBoard Community!



Upcoming WorkBoard Features

June 2020



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Sr. Director & Practice Leader
Strategy Solutions

1

News, events and resources

2

Ready for you now

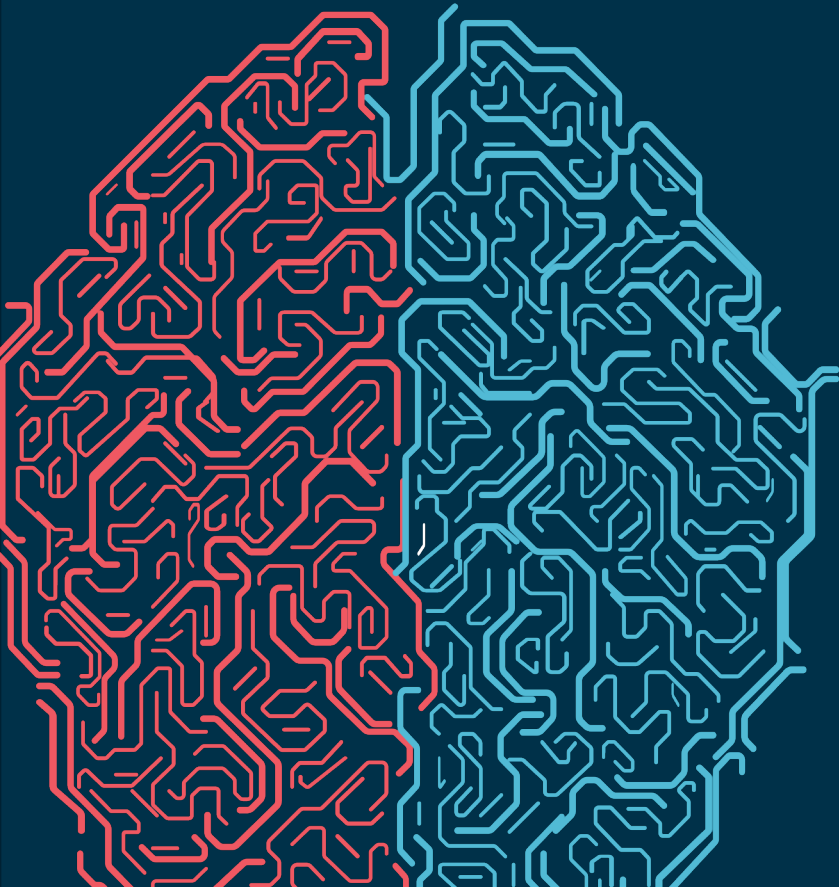
3

What's coming



WorkBoard User Group 2020

Resources and Insights



The OKR Brain Trust was out in full force!

The WorkBoard User Group last month was a terrific way to hear and learn from other customers' experience — ask your CSM for the proceedings login so you can check out **Microsoft, Workday, IBM, Comcast** and all the sessions you missed.

You might find these interesting ...

Video meetings alone can't drive **business resilience and results.**



Alignment and accountability are the job of leading.

Courtesy of WorkBoard Inc.



WorkBoard

retro & reset
quarter OKRs

- 1 RIGHT OBJECTIVES?**
Did our objectives capture our team intent and direction for the quarter?
- 2 RIGHT KEY RESULTS?**
Did we set the bar too high? Too low? Measure the wrong results?
- 3 RIGHT FOCUS?**
Did we drive attention, and execute for to the results we were driving week over week?



2 Minutes to Smarter Results

with Deidre Paknad
CEO and co-founder of WorkBoard

www.workboard.com/sound-bites

1

News, events and resources

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Ready for you now

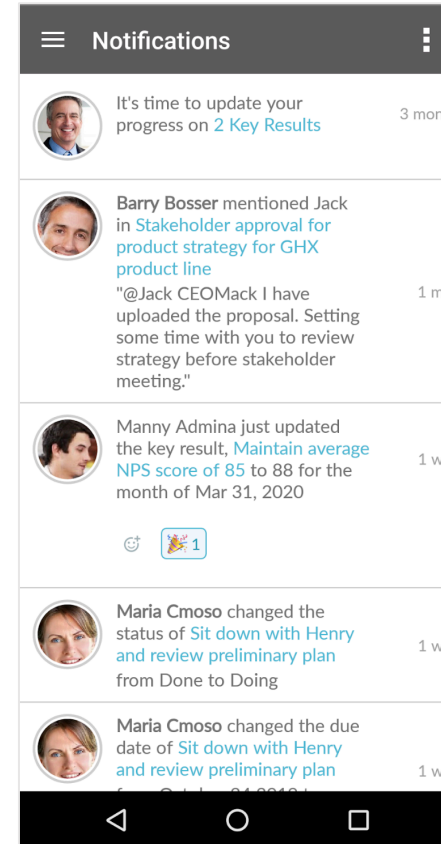
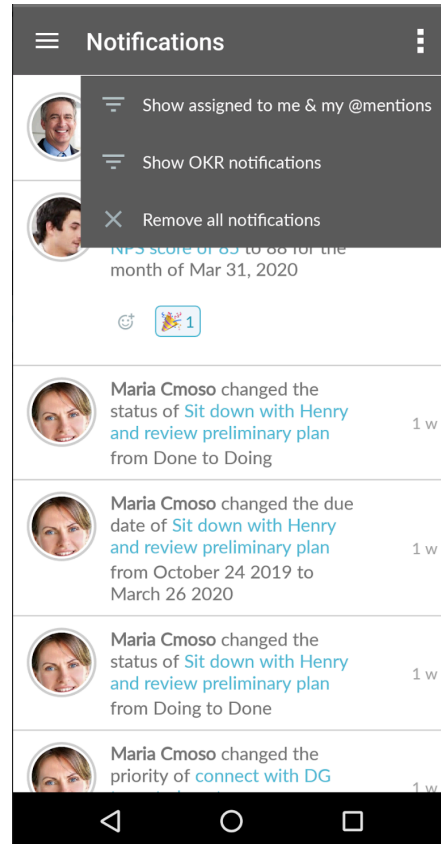
3

What's coming



Mobile updates on Android and IOS

- ✓ Comments and reactions on key results
- ✓ Quick filters on notifications
- ✓ Browse Org Objectives by teams
- ✓ Look and feel improvements across the app



Publish Biz Reviews

- ✓ Email, print or slack snapshots of the business.
- ✓ Choose to include all or latest narrative on results for context.

The screenshot displays the WorkBoard interface for a 'Marketing Weekly Biz Review' by Maria Cmoso. The review is titled 'DEMAND GENERATION' and includes a 'LATEST UPDATE' section with the following content:

EMEA Messaging and Product Packaging

- Working with EMEA team to reframe message to match market segment
- Completed win/loss analysis with top 6 reps in EMEA

The 'Targets Reached by Source' chart shows data from Jan 31, 2020 to May 30, 2020. The chart is a stacked bar chart with three categories: Email (dark blue), Webinar (pink), and Advertising (light blue). The y-axis represents the number of targets reached, ranging from 0 to 75k. The x-axis shows dates from Mar 6 to May 29.

The preview below shows the published version of the review, including the 'Latest Update' section and the 'Targets Reached by Source' chart. The chart in the preview shows data from Feb 01, 2020 to May 31, 2020.

Persistent time period filters on My OKRs page

Your time period filter selection on the My OKRs page will be saved from visit to visit.

The screenshot displays the WorkBoard interface for the 'My OKRs' page. The top navigation bar includes 'WorkBoard' and several menu items: 'Biz Review', 'My Work', 'Workstreams', 'Objectives', 'Meetings', and 'Teams'. A large blue arrow points to a filter dropdown menu that is open, showing the following options:

- Show: Q2 2020 (selected)
- Only OKRs with this exact time period
- Open OKRs
- Closed OKRs

Buttons for 'Clear filters' and 'Apply filter' are visible at the bottom of the dropdown. The main content area shows a list of OKRs with progress bars and completion percentages:

- COMPANY ELT**
- CUSTOMERS: Relationships built on value** (47%)
- FOCUS: Drive extraordinary value to customers in our target segments** (57%)
- ECONOMICS: Build a high velocity, high efficiency business** (85%, 29 days left)
- PEOPLE: We attract, retain and enable the best people to operate at their best** (91%, 29 days left)

On the right side, there is a 'My OKR Activity (last 30d)' calendar view and a 'Legend' section with two 'Target Hit!' notifications:

- Jillian Jones updated 85% of new logo ARR is customers in Tier 1 and Tier 2 segments to 59
- Manny Admina updated Drive gross revenue retention (GRR) above 83% to 82

Connect specific Jira items to an OKR (Jira Cloud Plugin update)

- ✓ Jira issues will display connected key results so effort and impact are all in one place!
- ✓ Drill in from results to Jira to see the body of work driving strategic outcomes.

The screenshot displays the WorkBoard interface. At the top, there's a navigation bar with 'Jira Software', 'Your work', 'Projects', 'Filters', 'Dashboards', 'People', 'Apps', and a 'Create' button. A search bar is on the right. Below this, a sidebar shows 'WorkBoard', 'My OKRs', and 'Manage Key Results'. The main area shows a key result: 'We prioritize quality and customer value' by Sophie Barrett: Dynamics Engineering. A modal window titled 'Connect Key Result to Jira Issues with JQL' is open, showing options to 'Link to related work (Jira issues)' and 'Get update data from Jira issues'. Below the modal, a dashboard for '674.57k of 1m · Apps Engineering' is visible, featuring a line chart showing growth from Feb 7 to Apr 10, 2020. The chart shows a steady increase from approximately 200K to 700K. Below the chart, there's an 'Activity' section with an 'Attachment' and a comment input field. The right side of the dashboard shows 'DATA SOURCE' as 'Datastream: Automatic Updates - 1M Downloads' and 'RELATED WORK' as 'Jira: Project = AGEES AND Sprint = 8'. The 'OBJECTIVE' is 'We bring the future to our customers fingertips with ML in all our apps' with a 56% completion rate for Apps Engineering by Irina Marin. On the far right, there's a 'Sync Jira to Wobo' button and a list of contributing data points with 'Enter Update' links.

1

News, events and resources

2

Ready for you now

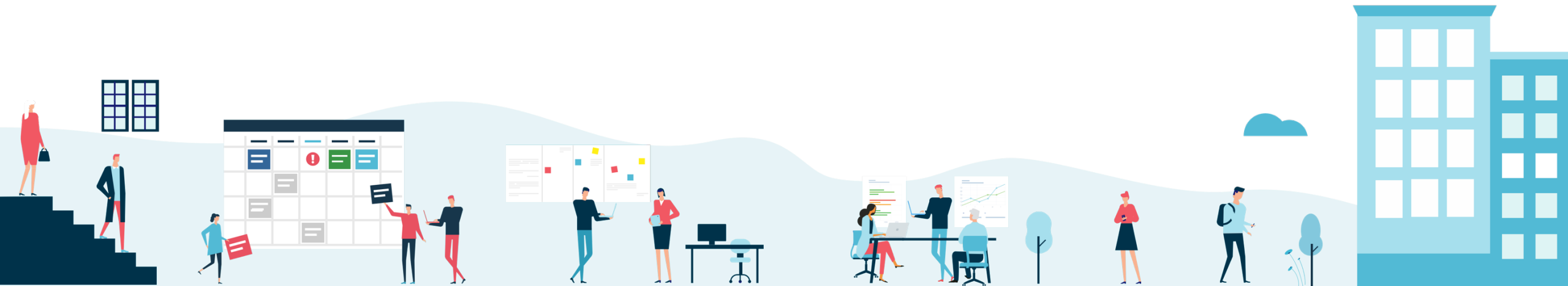
3

What's coming



Coming in June!

1. Faster load time and content selection on Biz Reviews
2. Include narrative on Biz Review charts
3. Copy Biz Reviews
4. Publish Biz Reviews and include key result narrative
5. Connect specific Jira items to an OKR (Jira Cloud Plugin update)
6. Persistent OKR time period filters on My OKRs page
7. Simpler user administration



Faster loading Biz Reviews

- ✓ Faster load times on Biz Reviews
- ✓ Smarter suggestions of relevant content as you build your Biz Reviews
- ✓ Improved search technology for content selection

** Faster content selection modals will also appear when building meeting agendas*

Add Key Results to Tray

Julie

Include closed OKRs

80% Maximize our ability to grow by optimizing our unit economics
Product Development · Leila Alapour · Dec 6, 2018

2.7M of 3.1M \$3.1M in net new ARR
Sheila Quinn

9 of 8 CAC Payback Period for new business deals improves from 10 months to under 8 months
James Johnson

93% Customers for Life
Product Development · Lizzy Klingen · Jun 6, 2018

10 of 30 We meet with all 55K and above customers renewing in the quarter
Sheila Quinn

50 of 90 Increase average number of users per account from 45 to 90
James Johnson

34% We attract, retain and enable the best people to operate at their best
Product Development · Lizzy Klingen · May 6, 2018

10 of 30 Every team has OKRs and achieves 85% of key results
Sheila Quinn

Cancel Add

Include narrative on Biz Review charts

- ✓ Narrative or analysis as a bullet list on charts.
- ✓ Easier consumption of data and context side by side on slideshow mode.

The image shows two parts of the WorkBoard interface. On the left is the 'Add Chart' configuration dialog, and on the right is a 'Biz Review' chart with a narrative overlay.

Add Chart Configuration:

- How do you want to display the key result data?*:
 - PLANNED VS ACTUALS
 - BAR
 - LINE
 - TABLE
 - STACKED BARS
- What time period do you want to display?*: Dec 15, 2018 to Dec 31, 2018
- Customize the actuals legend (optional):
 - Thought Leadership Ads
 - Customer Ads
- Customize the target legend (optional): Target
- Add a narrative or analysis (optional):

Add a narrative or bullet list that will appear side by side with your chart.

Biz Review Chart:

- Chart Title: CODY Cena's Running Business Review
- Chart Type: CHART
- Legend: Cost/SQL (dark blue), Cost/QL (light blue)
- Options: Show data labels, Apr 01, 2020 - Jun 30, 2020
- Y-axis: 0 to 3.5k
- X-axis: Apr 1 to Apr 17
- Narrative: Sales & Marketing Qualified Leads. The retail verticals have nailed their target segments and rocketed both their sales and marketing qualified leads. Lead scoring is important for **three** reasons:
 - To avoid your sales team bothering leads before they are ready to buy
 - To identify which leads require more lead nurturing from your marketing team
 - To allow your sales team to more easily identify leads who are ready to buy

Copy Biz Reviews

- ✓ Drive a uniform operational processes across teams by creating Biz Review templates
- ✓ Save time copying Biz Reviews from quarter to quarter

The screenshot shows the WorkBoard interface for a 'K2 Sell Through Campaign' by Johnny Jackson. The main content area displays the campaign title, author, and a message resonance statement: 'MESSAGE RESONANCE WITH TIER 1 & TIER 2 BUYERS'. Below this is the 'CAMPAIGN PURPOSE' section, which states: 'As we shift our focus to CMOs in Tier 1 and Tier 2 target segments, we are tightening our message to be more specific to these buyers. In this campaign we are experimenting with a series of ads to see what has the highest value to them. The results will drive our website, collateral, sales enablements, and demand gen efforts.' The interface also features four charts: 'IMPRESSIONS', 'CLICKS', 'CTR', and 'COST', each showing data for 'Demo Ads', 'Thought Leadership Ads', and 'Customer Ads' from April 30 to May 28, 2020. A context menu is open over the top right of the charts, with a blue arrow pointing to the 'Duplicate' option.

Simpler user administration

- ✓ Export a list of provisioned users to Excel
- ✓ Add users to teams right from their directory profile page.
- ✓ Make necessary adjustments to employee's first and last name from their directory profile page

The screenshot displays the WorkBoard user administration interface. The top navigation bar includes 'WorkBoard' and various icons for 'Biz Review', 'My Work', 'Workstreams', 'Objectives', 'Meetings', and 'Teams'. The main content area is titled 'Organization Directory' and contains a list of users. A blue arrow points to the 'Export user list' button in the top right corner. A modal window titled 'Manage User' is open, showing the profile of Alfred Lee. A blue arrow points to the 'Add to team' button in the modal. The 'Manage User' modal includes fields for 'Direct to' (Elizabeth Levine), 'Teams' (Sales - NA), and 'Custom Attributes'. It also displays the user's current team information: 'Team Name: Sales - NA', 'Manager Name: Elizabeth Levine', and 'Team Role: Member'. The 'Organization Directory' list includes the following users:

User	Manager
Adam Johnson wobo-adam@wobodemo.com	Joe Smarts Joe@wobodemo.com
AJ Atwood wobo-AJ@wobodemo.com	Amanda Dinero Amanda@wobodemo.com
Al Davis wobo-al@wobodemo.com	Casey Stevenson wobo-casey@wobodemo.com
Alanna Green wobo-alanna@wobodemo.com	Avery Underwood Avery@wobodemo.com
Alfred Lee wobo-alfred@wobodemo.com	Elizabeth Levine elizabeth@wobodemo.com
Alice Peoples wobo-Alice@wobodemo.com	Jack CEOMack Jack@wobodemo.com

Coming this summer

1. Migration to Azure for hosting all customer data
2. Key Results owners that can configure the data source for key results
3. Connecting work to results (workstreams, and action items or Jira issues)
4. Formatting for meeting topics and takeaway
5. Team archiving



Migration to Azure

More flexible infrastructure as the platform scales to manage performance and powerful data services





Add Team Objective and Key Results

OBJECTIVE

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

Team | Company ELT • Mar 01, 2020 - Jun 30, 2020



KEY RESULTS

80% of people feel we value their growth and development
Jack CEOMack to update percentage

All roles have a defined ramp-up period before placement
Manny Admina to update number of roles

Meet our hiring plan in every quarter
Alice Peoples to update number of hires

Every team has OKRs and is responsible for them

Edit Key Result



What is the result you want to measure?*

[See sample OKRs](#)

80% of people feel we value their growth and development

Owner of this key result

Julie Lam

[Add description \(optional\)](#)

Where will the key result data come from?

Result from a person

[Change data source type](#)



Start value* Target value is ⓘ Target value*

0 ↑ Higher ↓ 80

Unit of measurement

Count as number

Calculate overall progress as ⓘ

Last entered value

Person responsible for updating

Johnny Jackson

to update

Weekly

on

Friday

[Add key result dependencies \(optional\)](#)

← BACK

87 of 88 · Company ELT

Measure eNPS in each function and get an average score of 88 (monthly pulse)



Last updated May 13, 2020

28 days left

OWNER

Julie Lam



DATA SOURCE

Datastream: Automatic Updates - Company NPS

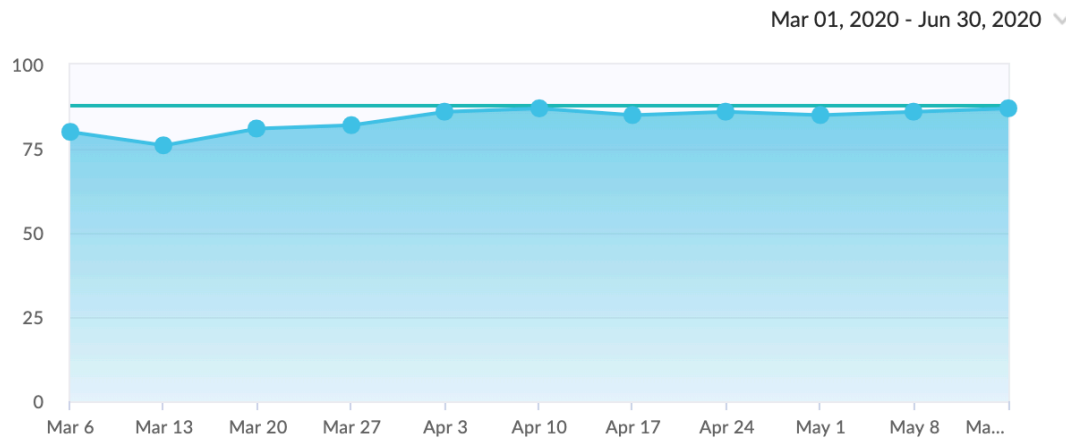
Update

■ Contributes data to 1 key result

[View data flow tree](#)

OBJECTIVE

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



Activity Attachment



Add new comment

KPI Catalogue · May 18, 2020 03:28 pm

Updated to 81 for the month of May 15, 2020

KPI Catalogue · May 18, 2020 03:28 pm

Updated to 81 for the month of May 08, 2020

KPI Catalogue · May 18, 2020 03:28 pm

Updated to 83 for the month of May 01, 2020

KPI Catalogue · May 18, 2020 03:28 pm

Objectives



Jump to...

My Objectives

Heatmap

Alignment

Timeline

COLLAPSE ALL

FAVORITES

Product Management

David Zu



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

2 of 10

100% of Rev Ops requests use Zendesk by Feb 15th

10 of 2k

Define and publish Revenue Ops SLAs

20% of 100%

Deliver quarterly tools usage report value survey



Provide exceptional customer experience that extends customer lifetime

90% of 100%

100% of new accounts active on high-value features at least twice a week

100 of 400

Define and publish Revenue Ops SLAs

20% of 50%

At least 50% of customers use our differentiated features



The Customer Experience team operates at its best

5 of 6

6 new hires hit their first quarter targets

0 of 5

5 new CSMs onboard their first account within 60 days of hire

20% of 50%

Reduce average initial response time on P1 tickets by 50%

Data from rolled-up key results: Averaging achieved values

Darry Bart | Product Delivery
6 of 6 · Source: Leila Alapour
Release notable CMO quality-of-life features every two weeks into production

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6 of 6 · Source: Leila Alapour
Release notable CMO quality-of-life features every two weeks into production

Jason Mraz Updated Nov 18, 2019

Jonathan Krenshaw Never Updated

Jackie Lemie Updated Nov 18, 2019

104 days left 0 4

Abby Krenshaw Updated Nov 18, 2019

John Marcus Never Updated

Louis Johnson Updated Nov 18, 2019

Market Segment Strategy Check Point

View meeting for Mar 31 at 9:45am Count up 00:00

Meeting feedback 😊 😐 😞

Send Minutes



Description

ADD: 📊 📈 🌊 ✅ 🔗 ☰

Put actions in: [Strategic Use Cases](#)

Topics for Discussion

○ Add topics here

🕒 Add \$28M of upsell pipeline from marketing campaigns or tooling in Tier 1 and Tier 2 accounts 12.43m of 28m
by Jack C

📊 Build customer relationships and advocacy to support our market strategy 70%
Marketing: Maria Cmoso by Jack C

🕒 Completed platform V3 launch plan in place EOQ 57% Completed
by Jack C

Takeaways

○ Add takeaways here

🕒 Get the right folks out to 5 of the right industry events in the next 30 days. Launch our own event in Month 2 of the quarter. May 29
Strategic Use Cases: Jack CEOMack Added by: Jack C

+ Add another

✅ Follow up with Maria on the campaign and launch May 19
Strategic Use Cases: Alice Peoples Added by: Jack C

+ Add another

● Customer acco|



B *I* U ☰ ☰ 🔗



Objectives

My Objectives

Heatmap

Alignment

Timeline

COLLAPSE ALL

FAVORITES

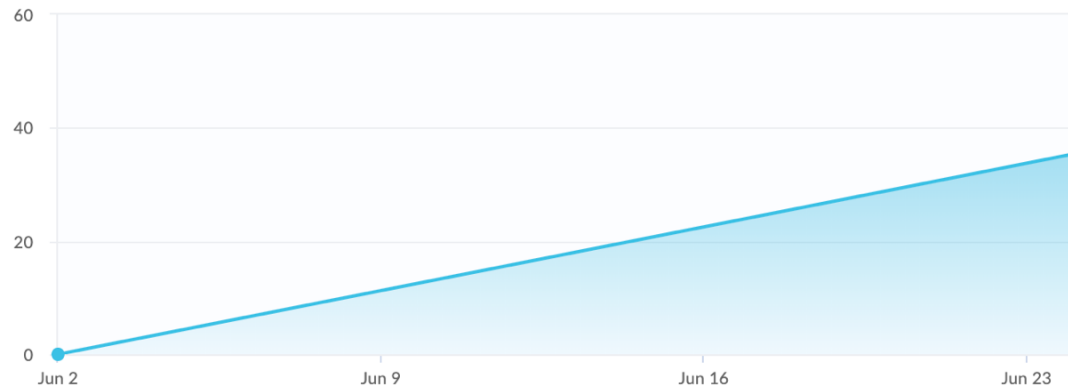
40 of 50 · Product Management

Complete analysis of 10 technology companies and provide a recommendation to close the 7 gaps identified in AI landscape (build/buy/partner)



Last updated Nov 12, 2019

12 days left



DATA SOURCE

Andrew Kishraw



RELATED WORK (1)

Link related work

Workstream: PM Sprint 11 Workstream
Product Management: Lisa Asai

OBJECTIVE

Go-to strategic growth advisor to the business
20% · Product Management: Lisa Asai

Activity Attachments

Andrew Kishraw · Jun 20, 2019, 4:11 pm
Updated to 37

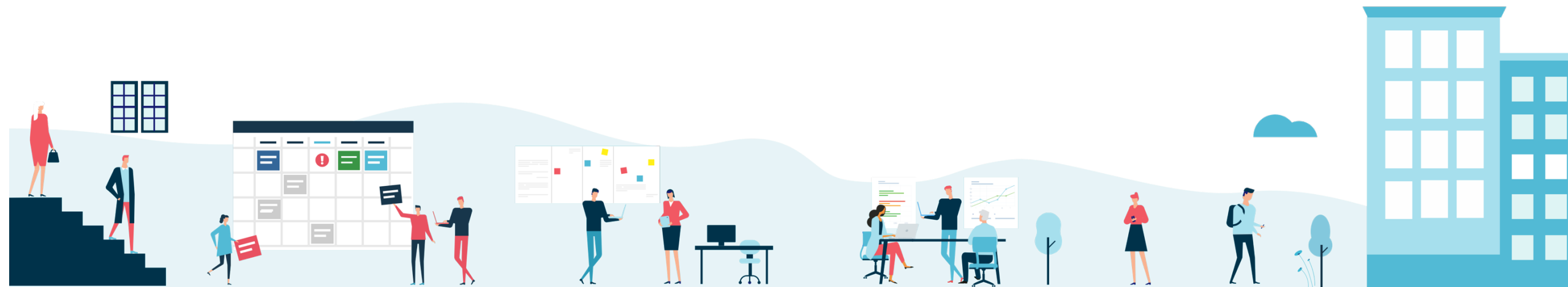
Andrew Kishraw · Jun 20, 2019, 4:11 pm
Updated to 33
12 enterprise user driven features already!

Andrew Kishraw · Jun 9, 2019, 4:11 pm
What a good week!

Jen Dan · Jun 5, 2019, 2:00 pm

On the horizon

1. Performance & user experience
2. Enhanced calendar integrations
3. Deeper integrations with Microsoft Teams
4. Smart auto population of Biz Reviews
5. Key result prediction
6. Connect vision and values to OKRs
7. OKR drafting canvas



What are you **curious** about?



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

