

Welcome WorkBoard Community!



WorkBoard Community Call

February 2021



Sameera Moinpour
Sr. Director & Practice Leader
Strategy Solutions

1

News, events and resources

2

Ready for early access

3

Coming soon

4

On the horizon



Latest News from **WorkBoard HQ**

The WorkBoard team is growing fast!

In the past six months, our team has grown:

+25% Company Wide

+100% Product & UX

+30% Engineering & QA

We welcomed two new board members in January!



Margo Georgiadis
Former CEO Ancestry and
President, Google Americas



Cathy Benko
Former Vice Chair
Deloitte Consulting

The Community is reaching new heights!

**3450+ OKR Coach
Certification Graduates
across 200+ companies**

**900+ attendees from
600 companies at the
Fall Results Summit**



RESULTS FOUNDRY

at WorkBoard

The Results Foundry provides community, courses, content, and certifications for results management leaders, OKR advocates and business leaders.



Executive & Expert Courses

Achieve your best results with our OKR Coach certification program, Results Management Leader certification, and executive seminars led by true experts.



Vibrant Community

Join 5,000 experts and advocates in bi-annual Summit, Slack community, and meet ups with asset and insight sharing.





Library & Learning

Everything you need to start your journey and expand business results over time, including a monthly newsletter and [OKR Journey Center](#).

Join the Results Foundry at
www.workboard.com/results-foundry

You might find these interesting ...

 WorkBoard

 SOUND BITES

Build From Your New Set Point

DEIDRE PAKNAD
CEO of WorkBoard

The OKR Podcast Hosted by Deidre Paknad, CEO of WorkBoard

Time is Scarce - Use it Wisely

TONY MERRITT
Managing Principal, Secureworks



Executive eBook

Smarter Strategy, Less Friction, Faster Results

 WorkBoard



Insights and Stories

New posts every week!

www.workboard.com/blog

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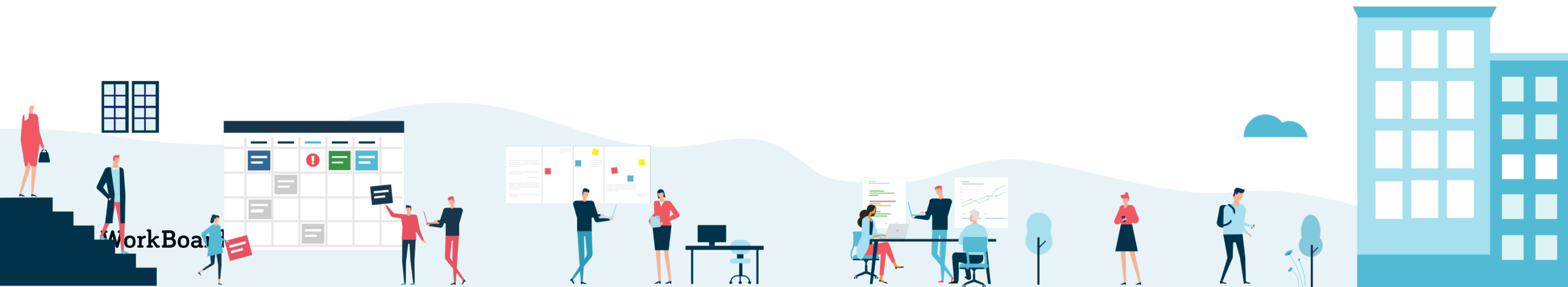
4

On the horizon



Ready for early access!

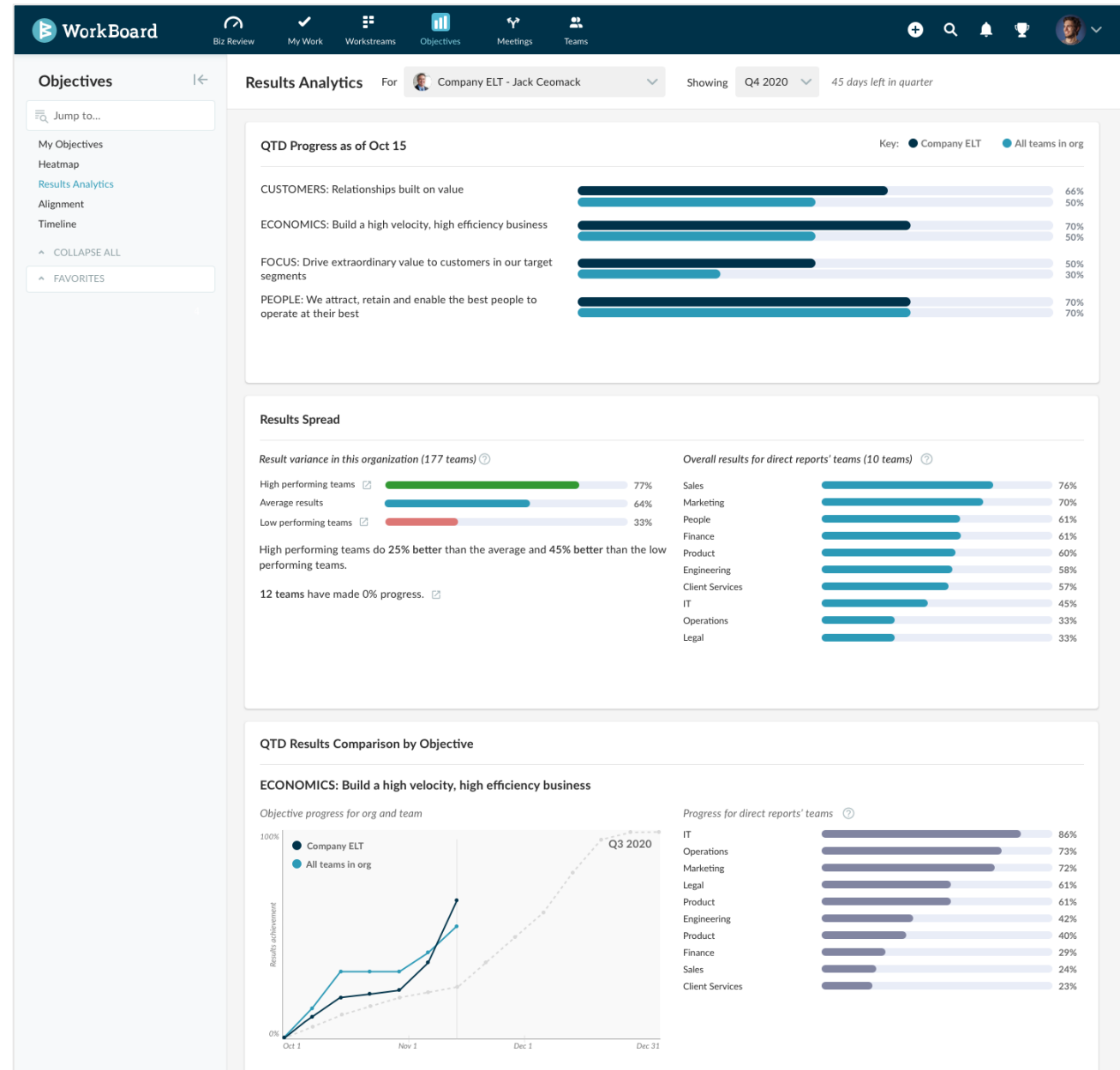
1. Results Analytics
2. EOQ key result prediction
3. Confidence ratings
4. And more!



Results Analytics

We are adding analytics and using AI to harness OKR data, so leaders can make in-quarter and systemic results improvements:

- Aggregate results progress by objective, org branch, leader and time
- Analyze which teams have the best and worst results
- Identify which teams and managers aren't contributing
- Compare progress by leader/function and team by objective
- Compare current period progress on an objective to prior period



Objectives



Jump to...

My Objectives

Heatmap

Results Analytics

Alignment

Timeline

COLLAPSE ALL

FAVORITES

Results Analytics

For Company ELT - Jack Ceomack

Showing Q4 2020

45 days left in quarter

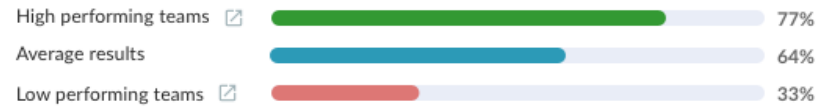
QTD Progress as of Oct 15

Key: ● Company ELT ● All teams in org



Results Spread

Result variance in this organization (177 teams) ?



High performing teams do 25% better than the average and 45% better than the low performing teams.

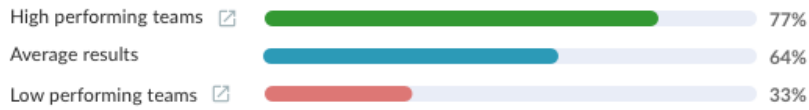
12 teams have made 0% progress.

Overall results for direct reports' teams (10 teams) ?



Results Spread

Result variance in this organization (177 teams) [?](#)



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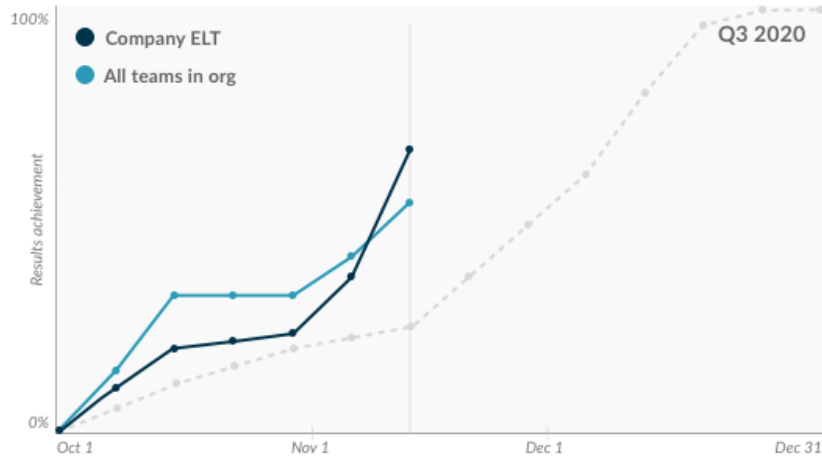
Overall results for direct reports' teams (10 teams) [?](#)



QTD Results Comparison by Objective

ECONOMICS: Build a high velocity, high efficiency business

Objective progress for org and team

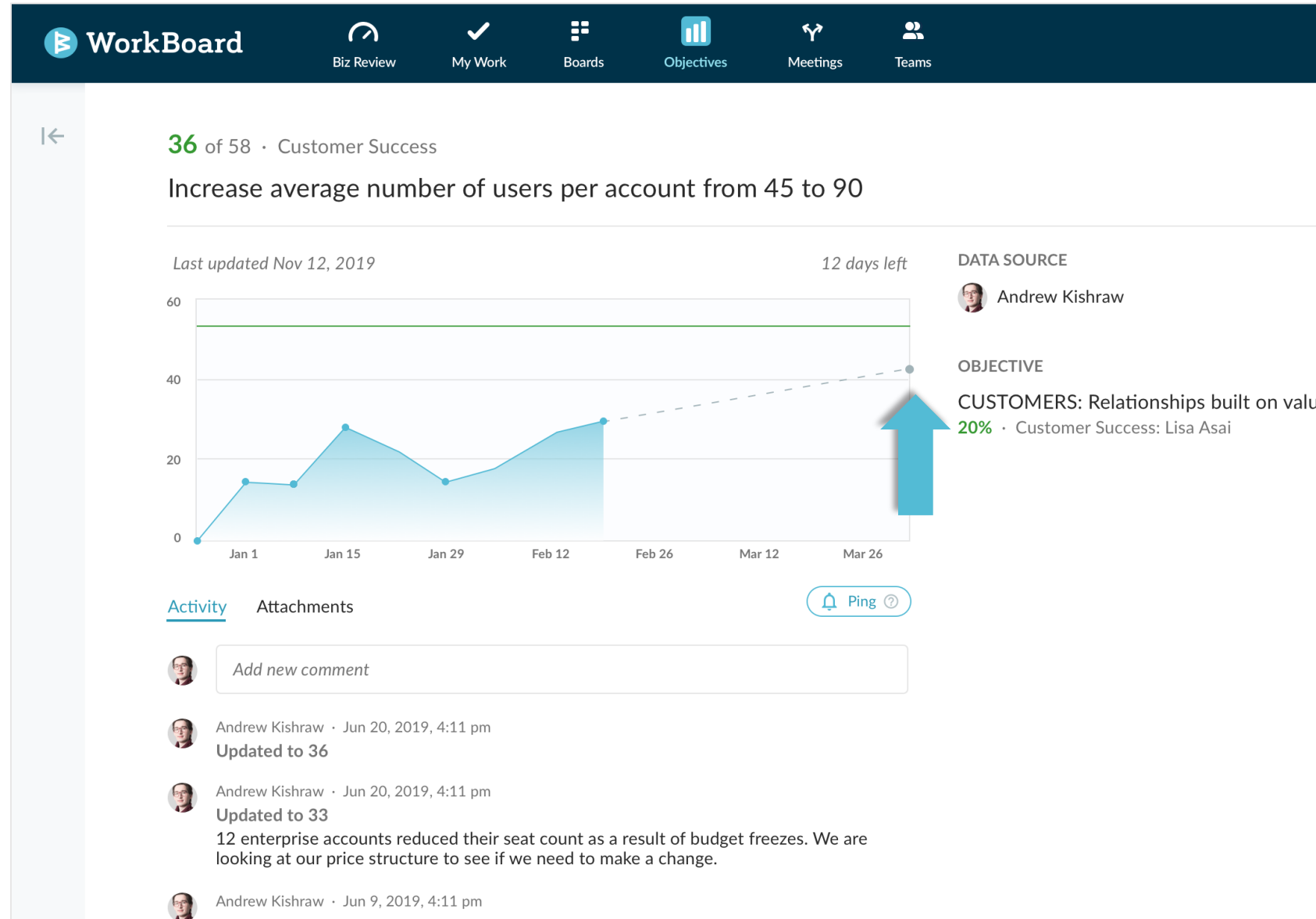


Progress for direct reports' teams [?](#)



Forecast on key results

- ✓ Get a preview of your predicted final score based on current course and speed
- ✓ Impact your quarter end outcomes by taking corrective action earlier



Confidence Rating on Key Results

WorkBoard's objective RAG colors highlight whether a key result is tracking to plan based on current course and speed, given progress to date and time remaining.

Draw attention to hidden risks or opportunities earlier in the quarter with Confidence Ratings that tap into a more subjective perspective of trajectory to plan based on institutional knowledge of risks and recovery initiatives.

The screenshot displays a key result card for 'Company ELT' with the objective 'Increase average number of users per account from 45 to 90'. The card shows a progress bar at 44 of 90, a 'Low' confidence rating (red triangle), and a '71 days left' indicator. A chart shows the current value of 44 over time. The 'Activity' section lists recent updates, including a change in confidence rating to 'Low' on Jan 19, 2021, with a comment explaining the reason. A modal window is open for editing the confidence rating, showing the current 'Low' rating and a text area for a comment.

44 of 90 ▶ · Company ELT 🌐

Increase average number of users per account from 45 to 90

Last updated Jan 19, 2021 71 days left

Jan 01, 2021 - Mar 31, 2021 Weekly

OWNER & DATA PROVIDER
J Jack CEOMack

RELATED WORK ▾

OBJECTIVE
CUSTOMERS: Relationships built on value
50% · Company ELT: Jack CEOMack

Activity Attachment Update Confidence

J Add new comment

J Jack CEOMack · Jan 19, 2021 12:27 am
44 for the week of Jan 22, 2021

J Jack CEOMack · Jan 19, 2021 12:23 am
Changed result confidence flag to low ▶
We will not be able to focus our efforts on the new on-boarding paths that we v
to increase engagement. Two critical team members have been pulled into a crit
roll out.

J Jack CEOMack · Jan 18, 2021 09:38 pm
47 for the week of Jan 15, 2021

Jan 18, 2021 09:38 pm
Starting value set to 45 for the week of Jan 08, 2021

Confidence
▶ Low ▾

Comment *

We will not be able to focus our efforts on the new on-boarding paths that we were targeting to increase engagement. Two critical team members have been pulled into a critical customer roll out.

Cancel Save

And more!

Performance Improvements

Significantly reduced load times for Biz Review and the Heatmap following our migration to Microsoft Azure .

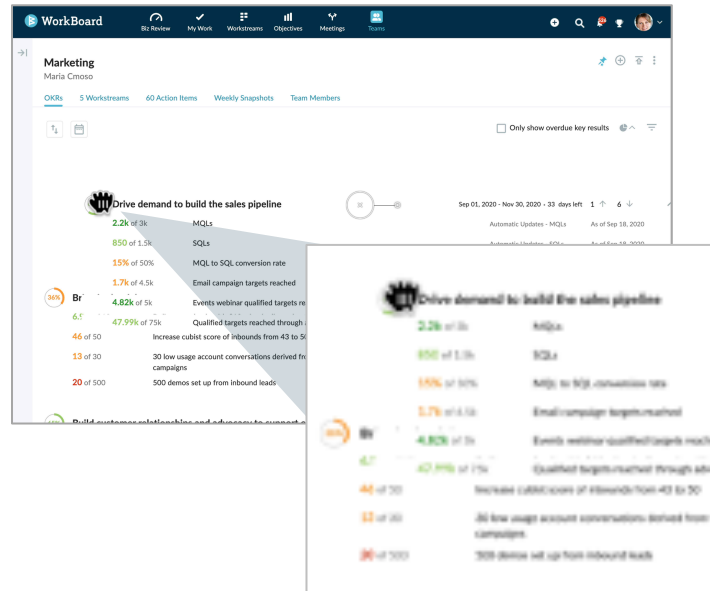
25% improvement in updating KR

35% improvement in loading Biz Reviews

+ More in Alignment Views, My Work and Workstreams

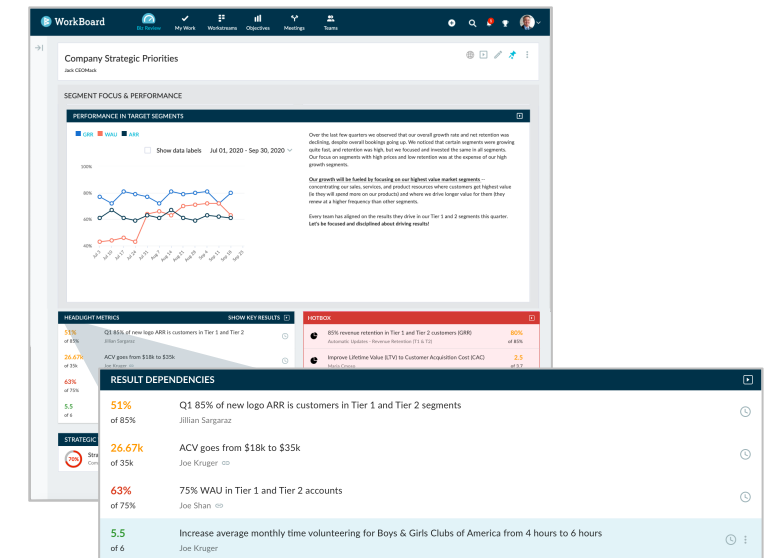
Sort & Share Team OKRs

Override alphabetical sorting of team OKRs to communicate priority or keep related objectives in order.



Improved Biz Review Visuals

See the full names of key results that you add to your business reviews. Long result names will wrap.



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Coming soon!

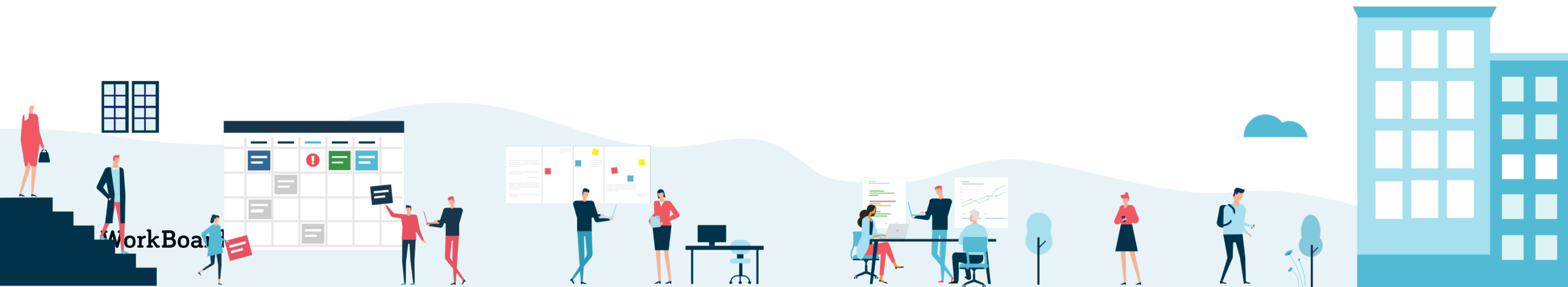
4

On the horizon



Coming soon!

1. Performance & Accessibility improvements
2. Teams integration enhancements
3. Calibrate & Celebrate
4. Seamless meeting sync & calendar integrations
5. In-app engagement reports



Your team's OKRs right in Microsoft Teams

The screenshot displays the Microsoft Teams interface with a WorkBoard embedded in a channel. The WorkBoard is titled 'Company ELT' and is managed by 'Jack CEOMack'. It features a progress indicator of 38% and a list of six OKRs with their respective completion percentages, descriptions, assignees, and due dates.

Progress	Description	Assignee	Due Date
82% of 85%	85% of new logo ARR is customers in Tier 1 and Tier 2 segments	Joe Smarts	As of Feb 01, 2021
81% of 85%	85% revenue retention in Tier 1 and Tier 2 customers (GRR)	Carlo Marco	As of Feb 01, 2021
71% of 75%	75% WAU in Tier 1 and Tier 2 accounts	Barry Bosser	As of Jan 30, 2021
6 of 30	30 Tier 1 and Tier 2 customers have the Snazzy v1 release in production	Barry Bosser	As of Jan 29, 2021
69%	Re-vamped strategic use cases are final and embedded in sales, marketing and product mgmt	Jack CEOMack	As of Feb 01, 2021
1 of 15	15 new case studies from Tier 1 and Tier 2 customers with CMO quotes in them	Jack CEOMack	As of Jan 28, 2021



- Activity
- Chat
- Calendar
- Teams
- Calls
- Files
- Workboard
- ...

Teams

- Pinned
- Executive Leadership Team Acme
 - Sales Team Acme
- Hidden teams

General Posts Files Jack CEOMack's obje... 9 more +



Workboard

About X

< Back to options Logged in as Jack CEOMack (Log Out)

WorkBoard OKRs

com

- Company ELT's objectives
Jack CEOMack
- Marketing Comms's objectives
Marianne White
- PM Cloud Compute's objectives
Liz Lime
- Security & Compliance's objectives
Karla Queen
- Training Comms's objectives
Gerald Smith
- Publish tab with full WorkBoard navigation

Save



How overdue key results

6 ↓

As of Jan 30, 2021

As of Jan 30, 2021

As of Jan 03, 2021

As of Jan 06, 2021

average
number of
users per

Full WorkBoard inside Microsoft Teams

Microsoft Teams interface showing the WorkBoard feature. The interface includes a search bar, navigation tabs (Workboard, Chat, WorkBoard, About), and a main content area displaying an OKR Heatmap. A red arrow points to the Workboard icon in the left sidebar.

WorkBoard Navigation: Biz Review, My Work, Workstreams, Objectives, Meetings, Teams

OKR Heatmap: Legend, Filter OKRs, Show me, Team (Teams in my org)

Company ELT	Operations	Strategy & Planning	Marketing Content	Global Services	Apps Engineering	Product Management	IT	Digital	Training Strategy	RevOps (EMEA)	PM Cloud Compute	Network Security	Digital Growth	Webinars
Sales	Marketing	Software Engineering	Marketing Comms	Global Sales	Training	Product Engineering	Integrations	Demand Gen	Training Comms	RevOps (Asia)				
Product	Finance	Reporting & Compliance	Legal	Global Information Technology	Sales - NA	Product Delivery	Instructional Design	Customer Marketing	Security Systems	PM UI	SEO	Partnerships	Operational Vulnerability	
Platform X	Exec Chief Of Staff	Purchasing	L&D	FP&A	RevOps	Market Meter Platform Launch Team	InfoSec	Customer Journey	Security Engineering	PM ML and AI	Security Networks	Dynamics Engineering	Digital Campaigns	
Pinterest Company OKR	Client Services	Product Portfolio	Growth	Employee Relations	Professional Development	Knowledge Center	Finance (Corporate)	Customer Access	RevOps (US)	PM Integrations	Security Analytics			
People	Talent Acquisition	Product Marketing	Global Supply Chain Operations	Demand Gen Marketing	Product Subscriptions	IT Projects	Enterprise Infrastructure	Website	RevOps (Services)	PM Data Ingest	Security & Compliance	IT by support		

Showing 79 of 79 teams

Apps Engineering Progress: Nov 30 We think like an owner of our highly competitive and cost-effective platform 61% 25

Nov 30 **70%**

- Recent
- Workboard 12/18
Sent a card
 - Polly 12/14
You can use private conversations to test...
 - Jira Cloud 12/10
Sent a card



Workboard 12/18/20 11:52 AM

Time is a non-renewable power source.

Good morning, Jack! Get the team calibrated on results on Monday so it can celebrate on Friday.

Product & Development Team External

- ▶ 40% average progress across 3 OKRs · 65 days left
- ▶ 3 new risks · 5 risks total
- ▶ 2 results are stale, so you don't know what you don't know External

[Nudge all](#)

You and Your Directs

- ▶ 2 results need facts from you
- ▶ See how your directs' teams are doing
- ▶ How to calibrate

[Update](#)

Type your questions here



- Recent
- Workboard 12/18 Sent a card
- Polly 12/14 You can use private conversations to test...
- Jira Cloud 12/10 Sent a card
- Calendar
- Teams
- Calls
- Files
- Apps
- Help



Workboard 12/18/20 11:52 AM

Time is a non-renewable power source.

Good morning, Jack! Get the team calibrated on results on Monday so it can celebrate on Friday.

Expand all

Product & Development Team

▶ 40% average progress across 3 OKRs · 65 days left

▼ 2 new risks · 5 risks total

75% of 85% 85% revenue retention in Tier 1 and Tier 2 customers (GRR)

Jack CEOMack 2

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

Maria Cmoso

10 key results at risk total: 7 in the red and 3 amber

2 results are stale, so you don't know what you don't know

Nudge all

You and Your Directs

2 results need facts from you

Update

▶ See how your directs' teams are doing

Type your questions here

Chat



Workboard Chat This Week 2 more



- Recent
- Workboard Sent a card 12/18
- Polly You can use private conversations to test... 12/14
- Jira Cloud Sent a card 12/10



Workboard 12/18/20 11:52 AM



Pat some backs and give some thanks.



Happy Friday, Jack! Let's celebrate the team's accomplishments and go home grateful.

Product & Development

Crushed results and focus and transparency this week!



20% closer to achieving team objectives

2 results achieved – go team!

86 of 85

85 Tier 1 and Tier 2 logos renewed
Jack CEOMack

91.67 of 90

Increase average number of users per account from 45 to 90
Carlo Marco

2 results sparked the most conversation

60 of 88

Meet our hiring plan in every function
Alice Peoples

76% of 79%

Gross margins move from 74% to 79%
Dan Levitz



Transparency leaders this week

Type your questions here



Mirror your calendar in WorkBoard


→|

Meetings

[Link calendar](#)

 Tue, Feb 2nd - Mon, Feb 8th






< Today >



Link to your calendar client to show your meetings


[Link Google](#) [Link Outlook](#)

Meeting productivity in the last 6 months

-  0 OKRs discussed
-  0 Decisions made
-  0 Action items created
-  0 action items done
-  0 action items to-do

1on1s

Your manager

 **Lily Alipoor**
Next: None

Tuesday
February 2

Nothing planned yet.

Wednesday
February 3

Nothing planned yet.

My Objectives

My OKRs My Key Results My Team OKRs

Show: Teams I manage and co-manage

COMPANY ELT

CUSTOMER relationships built on value



Q1 2021 • 57 days left

FOCUS on customers in our target segments and deliver extraordinary value



Q1 2021 • 57 days left

Jack CEOMack: Company ELT

- 82% 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)
- 71% of 75% 75% WAU in Tier 1 and Tier 2 accounts
- 6 of 30 30 Tier 1 and Tier 2 customers have the Snazzy v1 release in production
- 68% Re-vamped strategic use cases are final and embedded in sales, marketing and product mgmt
- 1 of 15 15 new case studies from Tier 1 and Tier 2 customers with CMO quotes in them

- 1 Joe Smarts As of Feb 01, 2021
- Carlo Marco As of Feb 01, 2021
- Barry Bosser As of Jan 30, 2021
- 1 Barry Bosser As of Jan 29, 2021
- 1 Jack CEOMack As of Feb 02, 2021

Jack CEOMack 1 4

- Edit settings
- Results history
- Add to meeting**
- Add to 1on1

ECONOMICS of a high velocity, high efficiency business



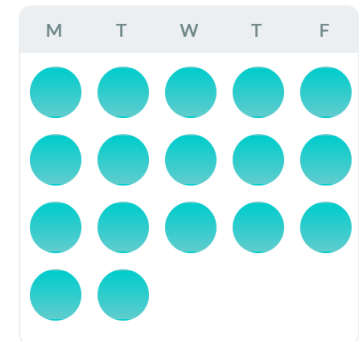
Q1 2021

PEOPLE are enabled and empowered to operate at their best



Q1 2021 • 57 days left

My OKR Activity (last 30d)



Legend



Alice Peoples sent you a status ping on Maintain average NPS score of 85



Target Hit! Alice Peoples updated All teams are using WorkBoard to manage OKRs and drive progression of strategic objectives to 100

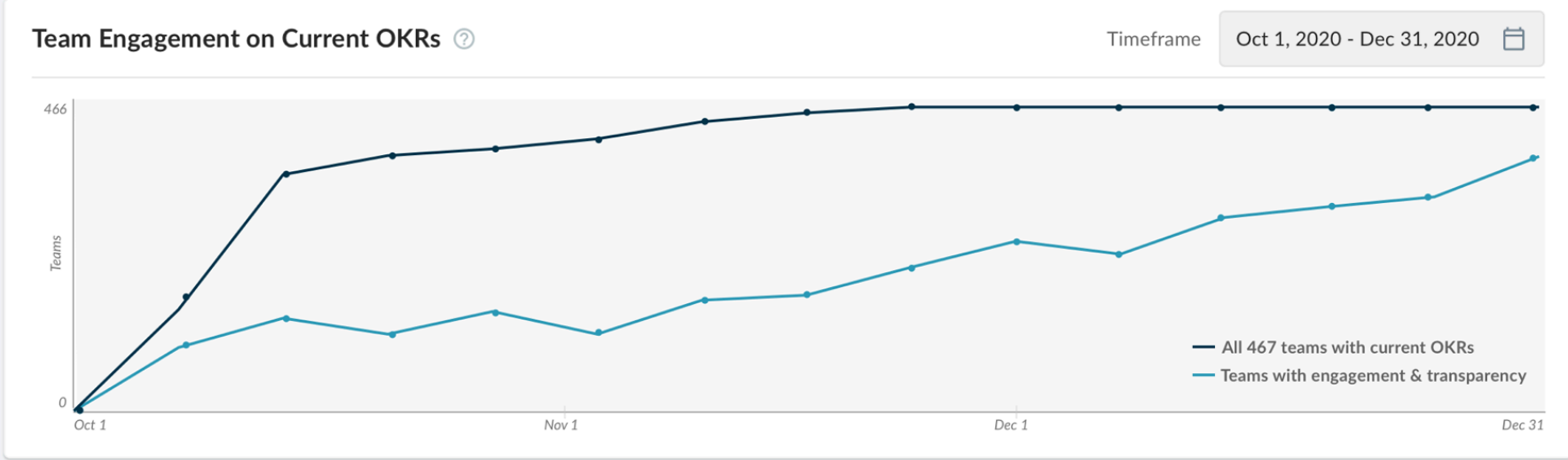


Alice Peoples sent you a status ping on CUSTOMER relationships built on value



Target Hit! Arlene Jones updated To have a

→ **Teams** Showing organization under  Jack CEOMack



Team Breakdown

OKR Period: **Current OKRs**

Team Name	Manager	Level ↓	Members	# OKRs	OKR Progress	# KR's	# KR's Past Due	KR's Never Updated	Expired OKRs	Last Engagement
Executive Team	Jack CEOMack	L1	11	3	70%	14	1	0	0	Oct 8, 2020
Advertising	Don Draper	L2	5	3	60%	11	2	1	1	Oct 8, 2020
Development	Jane Smith	L2	11	4	40%	19	3	4	1	Sep 1, 2020
Growth	Don Draper	L2	3	3	60%	11	2	1	1	Oct 8, 2020
Sales	Marco Sales	L2	11	3	70%	14	1	0	1	Oct 8, 2020
Sales Engineering	Marco Sales	L2	11	3	70%	14	1	0	0	Oct 8, 2020
Sales	Marco Sales	L2	11	3	70%	14	2	0	1	Oct 8, 2020

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Coming soon

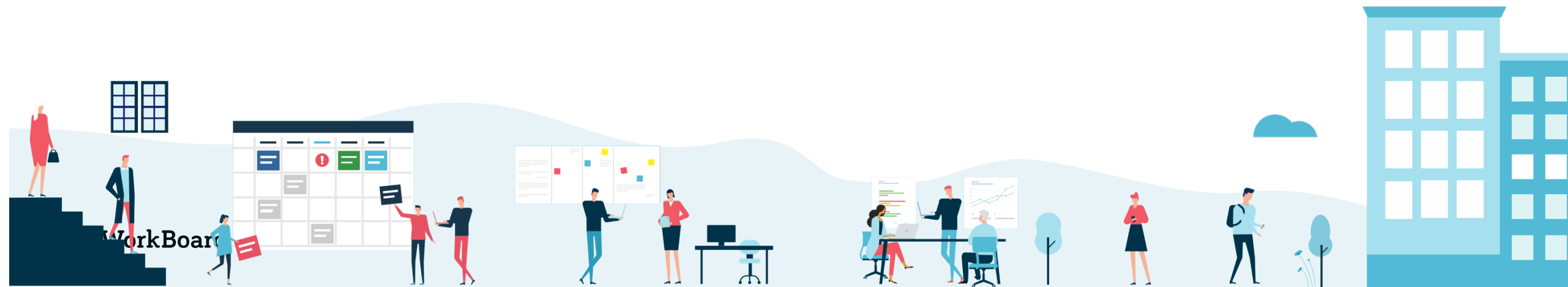
4

On the horizon



On the horizon

1. Notification feeds to MS Teams & Slack
2. Umbrella Organization for Large Enterprise
3. Visualization network of teams & comparative insights
4. Connecting company vision w/ OKRs
5. Notification control management
6. Linking WorkBoard teams with teams in Microsoft Teams
7. Live OKR data in MS-word and PowerPoint



What are you **curious** about?



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

