

# Community Call

August 2025



# Agenda


- AI Agents
- Objective and Key Results
- Scorecards
- Workstreams
- Performance Management
- Account & Preferences
- Join the Conversation!




# AI Agents


# Supercharge your leadership capacity with AI Agents

**Meet your new AI team members.**  
Included in your WorkBoardAI plan!

**John** 8:00 AM  
Scorecard for the Digipay launch

Objective	Key Result	Actual	Target	Source
Launch 4 Digipay voice assistants	Integrations (Google Assistant, Alexa, Siri, Cortana)	2	4	Reggie Smith


 Highlight wins, suggest and send kudos >


 Raise potential issues and draft talking points >








## WorkBoardAI Agents

### Chief of Staff Agent

**Hi, I'm Luisa!**  
Delegate work to me...





 Start Now






-  Coordinate your OKR cycle
-  Identify cross-functional alignment opportunities
-  Create and distribute scorecards
-  Send pre-reads ahead of meetings
-  Prepare a Monday memo to kickstart your week
-  Nudge people for facts so you don't have to
-  Help close out last quarter's OKRs

### Leadership Coach Agent

**Hey there, I'm Sofia!**  
I can help you show up prepared...



 Start Now

-  Frame constructive feedback so it's less stressful, more impactful
-  Pre-read for 1on1s with person's progress, challenges and key topics
-  Assess your progress and suggest what needs your attention
-  Thought partner on leadership
-  Suggest victories and kudos

# Meet John, AI Chief of Staff

AI chiefs of staff can help people leaders orchestrate their team operating rhythm and execute at their best by:

- ✓ Coordinating OKRs
- ✓ Creating scorecards
- ✓ Sending meeting pre-reads
- ✓ Updating them on progress
- ✓ Alerting them to risks as early as possible
- ✓ Adding risky KRs to meeting agendas

## Identify risks and blockers



John 10:19 PM

Get me status on Digipay launch

2 of 12 - **Migrate 12 apps to the cloud**  
- Enterprise Infrastructure

11% of 20% - **Shift another 20% of our non-mfg workload to the cloud** - Information Technology

Would you like me to create a relationship between those 2 results?

## Identify cross functional alignment opportunities



John 8:00 AM

I've identified potentially related items for **Launch 4 Digipay voice assistant Integrations** (Google Assistant, Siri, Alexa, Cortana)

- Chatbot 3.1 users stories are ready for launch *Key Result*
- Digipay issues in progress *Workstream*

## Send pre reads ahead of meetings



John 10:05 AM

Here is your pre-read for the 4pm meeting today

### Suggested topics

1. **HR Process Automation:** Progressing slower than expected, with only 11/43 locations completed (25.6%). Flagged as high risk, requiring acceleration.
2. **Visa and Passport Automation:** Behind schedule, only 8/43 locations completed (18.6%).

Send to the team

Add to agenda

## Prepare a Monday memo with facts and focus start to the week



John 8:00 AM

Hi Danielle, here is your **Monday Memo**. I also sent it to the IT leadership team.

### Key Objectives:

- Increase Website Traffic: 85%
- Achieved a 15% growth in social media followers through engaging content and interactive posts.

### Key Wins:

- Secured a high-profile partnership with ABC

## Nudge people for facts so you don't have to



John 2:34 PM

Would you like to send a mass ping notification to the Digipay team to update this stale key result?

**75% of new logo ARR is customers in Tier 1 and Tier 2 segments**

*Total number of people receiving ping: 8*

Send Ping

## Create and distribute key initiative scorecards and briefings



John 8:00 AM

Scorecard for the Digipay launch

Objective	Key Result	Actual	Target	Source
	Launch 4 Digipay voice assistant Integrations (Google Assistant, Siri, Alexa, Cortana)	3	4	Roger Smithson
Digipay is delightfully fast for our customers	Cut transactions processing time by 4.5 seconds	0.4	4.5	
	Users see 0 seconds of spinning wheel in transaction flow (as reported by users - from 2 seconds)	0	0	Barry Bousser
Onboarding is easier than associates' favorite consumer app	Chatbot system addresses 50% of customer inquiries without the need of a support rep	46.94%	50	
Revolutionize the digital payments landscape with Digipay, delivering seamless and secure transactions	Launch Digipay app with at least 50,000 downloads and 4-star rating on app stores	30%	100%	

# Meet Sofia, AI Leadership Coach

AI leadership coaches can help managers perform at their best by:

- ✓ Helping them tune in to team sentiment
- ✓ Drafting 1on1 agendas and messages
- ✓ Helping to frame challenging feedback
- ✓ Brainstorm on Leadership topics

## ✦ Provide coaching and help set individual OKRs



Sofia 8:00 AM

Your pre-read for the 1on1 with Roger today

### Suggested topics:

1. **Digipay step reduction** is behind - 25%
2. **The chatbot handles 47.42% of inquiries** (50% goal) needs a final push.
3. Cortana integration for Digipay is at risk, unlikely to meet the 3-week timeline, impacting voice assistant goals.

Add to agenda

## ✦ Prepare for performance conversation and check-ins



Sofia 8:00 AM

I can help you give feedback using SBI framework - situation, behavior, impact.

What kind of feedback is it?

Constructive

Difficult

# Create and close out objectives right in chat

- ✓ Brainstorm and co-draft OKRs, then publish them right in WorkBoard.
- ✓ Close out OKRs from past quarters
- ✓ Start of quarter, get **proactive reminders** to close out OKRs and reset new ones

The screenshot displays a chat window with a sidebar for John, AI Chief of Staff. The main chat area shows a conversation where Jackie Shafer asks for help drafting an OKR for the Product Development team. John provides a draft OKR for Q3 2025, focusing on accelerating product innovation while maintaining quality standards. Jackie then asks for help closing out OKRs from previous quarters. John confirms that he has successfully closed 2 OKRs from previous quarters and that the objectives are now properly organized and up to date.

**John** AI Chief of Staff

**About Me:**  
Proactive organization is my jam and making you look like a superstar is my peanut butter!

**Manage Responsibilities**

**Jackie Shafer** 04:05 PM  
Help me draft an OKR for the Product Development team

**John** 04:05 PM  
I would be happy to help you set OKRs for the Product Development team

- Brainstorm and co-draft an OKR with coaching
- Create a Canvas for your team to collaboratively draft
- Give you OKR ideas to start with and refine

**Jackie Shafer** 04:05 PM  
Give me ideas

**John** 04:05 PM  
I'll provide a draft OKR for the Product Development team for Q3 2025 (Jul - Sep 2025) as a starting point for discussion. Whenever you are happy with the results, let me know and I'll create the OKR in WorkBoard.

**Objective: Accelerate product innovation while maintaining exceptional quality standards**

- Key Result 1: Increase feature delivery velocity from 6 to 10 features per sprint while maintaining a bug escape rate below 2%
- Key Result 2: Improve user satisfaction score from current NPS of 45 to 60 through enhanced product capabilities and performance
- Key Result 3: Reduce average time-to-market for new features from 45 to 30 days through improved development processes
- Key Result 4: Achieve 99.99% system uptime while increasing system performance by 25%

This OKR focuses on balancing innovation speed with product quality, emphasizing measurable improvements in delivery, user satisfaction, and system performance. Would you like me to:

- Adjust any of the metrics or targets?
- Suggest a different objective focus?
- Create this OKR in WorkBoard?

**Jackie Shafer** 04:05 PM  
Create the OKR

**John** 04:05 PM  
🎉 OKR Set Complete for Product Development

I've saved your OKR and set the visibility to your team only so you have a chance to review it. You can find it [here](#).

**Jackie Shafer** 08:38 AM  
Help me close out OKRs

**John** 08:38 AM  
I found 2 open OKRs from previous quarters across 1 team(s):

**Product Development**

- Digipay is delightfully fast for our customers (Q2 2025)
- Onboarding is easier than associates' favorite consumer app (Q2 2025)

These OKRs are from past quarters and should typically be closed to keep your objectives organized. Would you like me to help close them?

**Jackie Shafer** 08:38 AM  
yes

**John** 08:38 AM  
I'll help you close those OKRs from the previous quarter.

**John** 08:38 AM  
✅ Success! I've successfully closed 2 OKRs from previous quarters. Your objectives are now properly organized and up to date.

Ask me anything...



# Drive execution right from chat

- ✓ Ask agents about any OKR to which you have access —your own or others’—directly in chat
- ✓ Add comments, make updates, or ping teammates without leaving the conversation

The screenshot shows a chat window with a sidebar for 'John' (AI Chief of Staff) and a main chat area. The chat history shows Robert Fox asking for key results, and John responding with a detailed view of those results.

**John**  
AI Chief of Staff

**About me:**  
Proactive organization is my jam and making you look like a superstar is my peanut butter!

**Key Results**

Category	Progress	Goal	Owner	As of
APPLICATIONS ENGINEERING	53% of 100% ▲	Percentage of client transactions using APIs	Robert Fox	As of May 22
INFORMATION TECHNOLOGY	45% of 95% ▶	Achieve 95% unit and integration test coverage for all new features delivered in this cycle	Robert Fox	As of May 22
	33% of 40% ▼	MAU increases 8% from 32% to 40% (about 4k users)	Robert Fox	As of May 22
	71.5% of 100% ▲	Launch 100% of Q3 roadmap features to production by the end of the quarter	Robert Fox	As of May 22

Manage responsibilities

Ask me anything...



# More AI Agent Capabilities!

## Available now from the AI Chief of Staff:

- ✓ Create reminder action items
- ✓ List this week's action items
- ✓ Find scorecards by name
- ✓ Add or remove scorecard columns
- ✓ Share details of who is on another team

## Coming soon:

- ✓ Weekly suggestions for team kudos from the AI Leadership Coach
- ✓ Display scorecards right in chats
- ✓ Team co-managers will be able to engage AI Agents!

**Jackie Shafer** 01:41 PM  
show me my at-risk results

**John** 01:41 PM  
Here are your current at-risk Key Results:  
At-Risk Key Results

- MAU increases 8% from 32% to 40% (about 4k users)
  - Progress: 0%
  - Confidence: No Confidence Rating
  - Target Date: October 30, 2025
- Achieve 95% unit and integration test coverage for all new features delivered in this cycle
  - Progress: 44%
  - Confidence: No Confidence Rating
  - Target Date: October 30, 2025

**Jackie Shafer** 01:41 PM  
Remind me to connect with product marketing on tactics to increase MAU

**Create new action**

Connect with product marketing team to discuss tactics for increasing MAU from 32% to 40%

**Jackie Shafer** **Aug 23** **Select workstream**

**Create**

Ask me anything...

# Objectives & Key Results (and KPIs)

# New and updated data connectors

- ✓ Integrate to Power BI using a point-and-click interface – without writing DAX queries
- ✓ Update progress on sales pipeline, marketing campaign, product roadmap, or project management key results with data from **Hubspot** or **Monday.com**.

The screenshot displays the WorkBoard interface with a 'Select Data Element to Connect' dialog box. The background shows a dashboard with charts for 'Close % by Product category' and 'Revenue Won by Product'. The 'Tablets' category is highlighted in the 'Revenue Won by Product' chart.

**Select Data Element to Connect**

**Choose a Measure to connect**

Measure to connect: Revenue Won

Aggregation: Actual Value

Current value: 4106300

DAX Query (Filters and slicers affecting this value )

```
EVALUATE ROW("Value", CALCULATE([Revenue Won], 'Products'[Product] = "Tablets"))
```

**Set up Monday.com data source**

Choose how to pull data from Monday.com for this key result.

Board: Digipay FY26 2H Roadmap

Group: Q3 FY26

Assignee: Search for Assignee

Column: Status

Select labels mapping to completed items

Done

How would you like to measure this?

☒ Percentage of completed items

☐ Count of completed items

Preview results

**Set up HubSpot data source**

Select Primary HubSpot Object

Deals

Specify the Numerical Value

Define what to measure

☐ Count Deals

☒ Measure from a numerical field of Deals

Select the Numerical Field

Amount

Aggregation type

Sum

Apply filters (Optional)

Define conditions to narrow down your data set. Filters are combined with AND logic by default.

Deal Stage

Equals Closed Won

+ Add filter

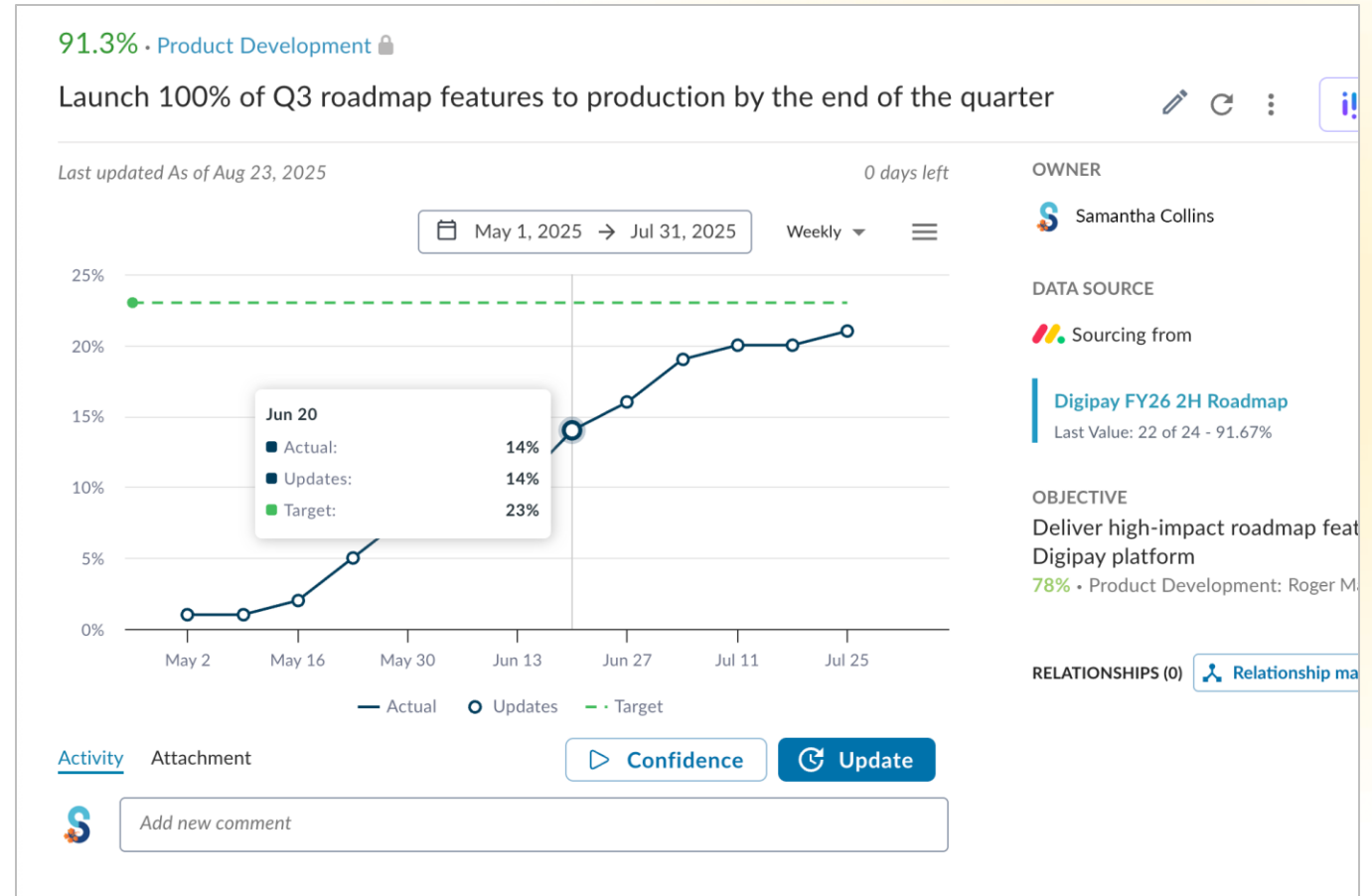
# More Objective and Key Result Capabilities!

## Available now:

- ✓ New Key Result Details chart UI
- ✓ Include images in KR updates
- ✓ Copy and reset mirrored key results, results from a workstream, and results with multi-interval targets – all with custom settings intact.
- ✓ Easily “follow” a team’s objectives on your My Objectives page

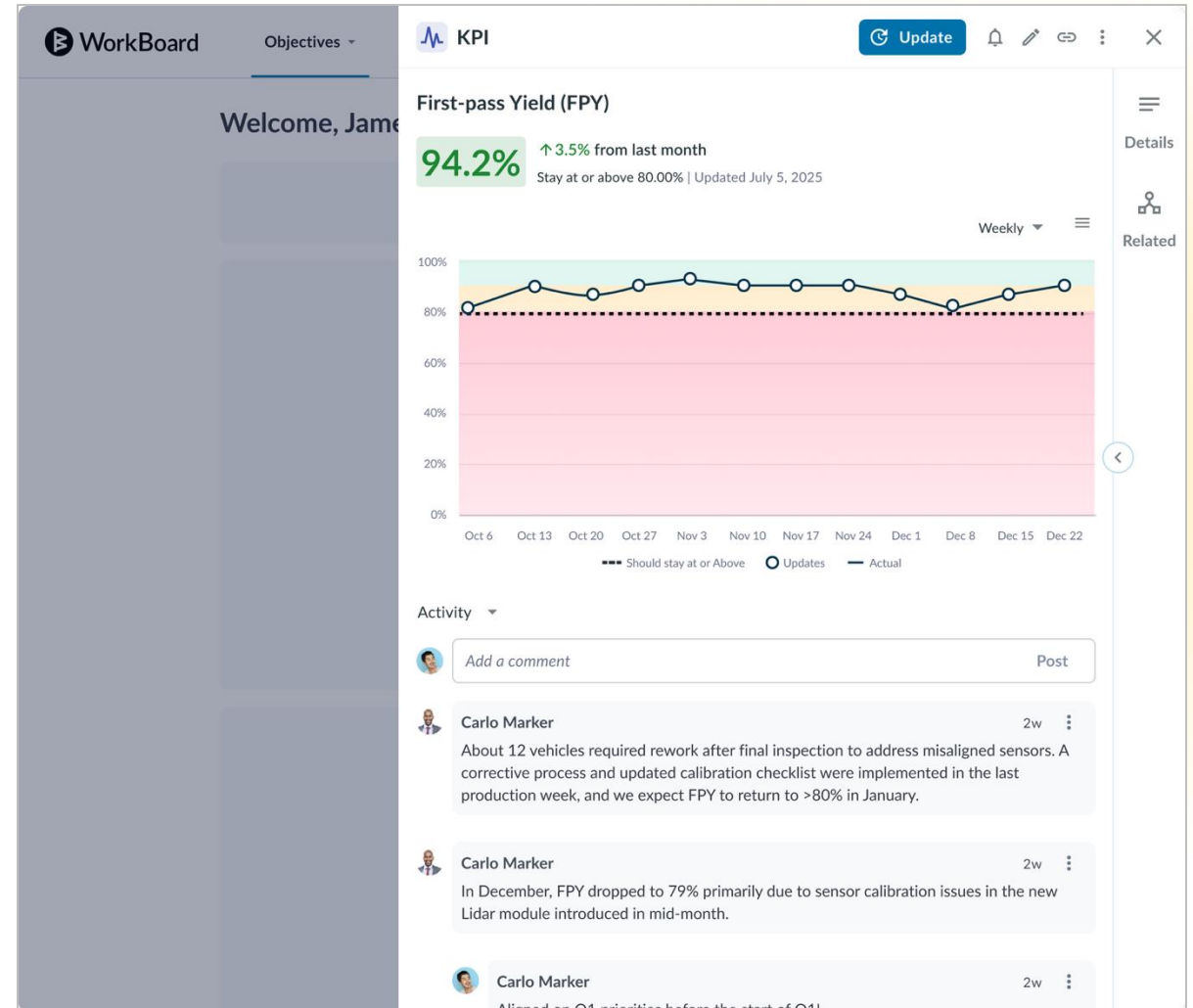
## Coming soon:

- ✓ Easily set OKRs for trimester and half-year periods
- ✓ Cascade key results more easily with an improved workflow



# KPIs and Key Results - One Operating Lens

- ✓ **Create KPIs** for teams or individuals — separate from Objectives
- ✓ **Real-time visibility** into ongoing business health and one place for teams to monitor performance and take action
- ✓ **Integrate with external data sources** to automate updates
- ✓ **Set thresholds** to flag at-risk KPIs
- ✓ **Create Key Results** to improve or move KPIs from baseline to goal
- ✓ **Set up once** and continue monitoring ongoing health

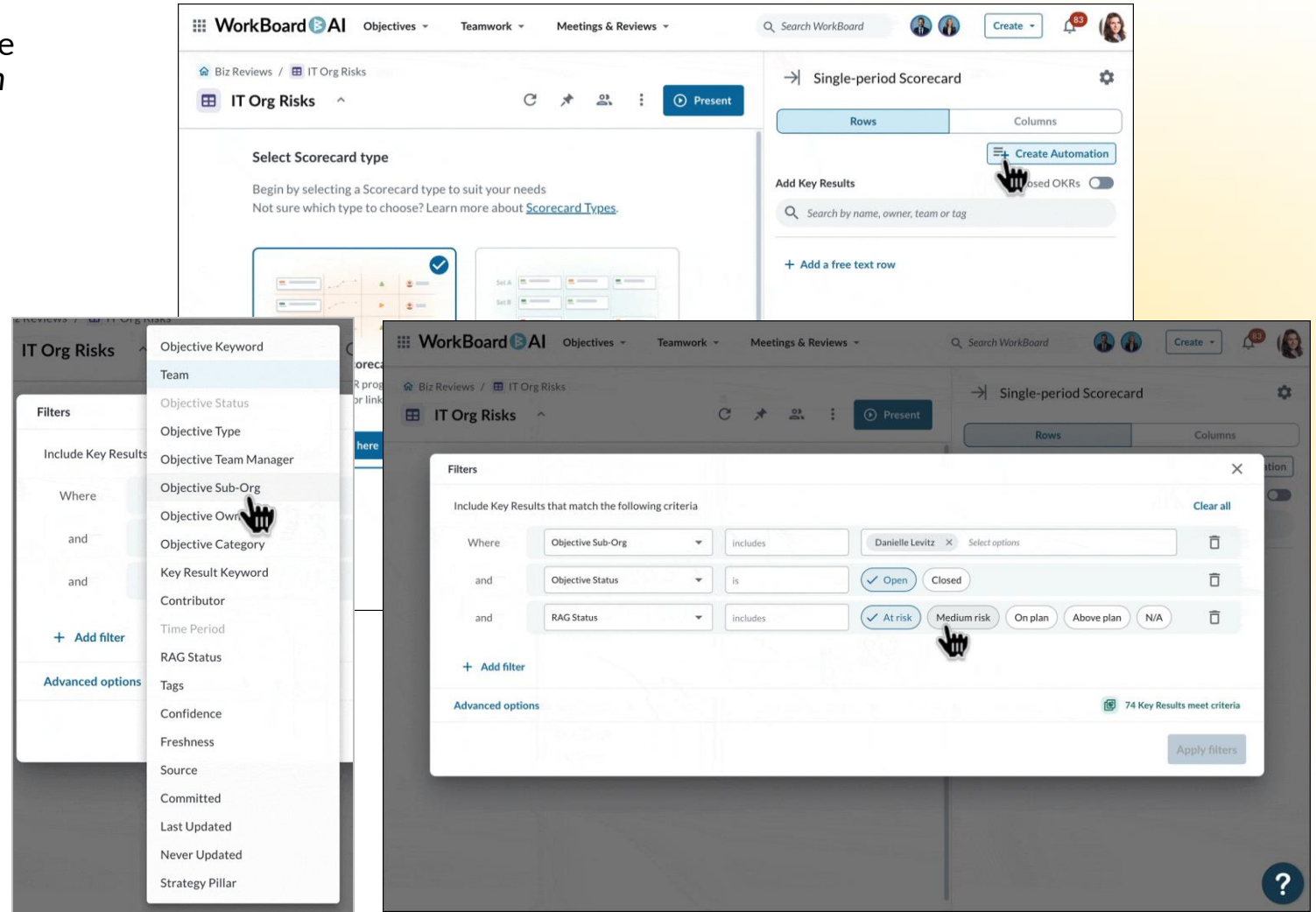


# Scorecards

# Build more powerful automated scorecards

Create dynamic views that instantly surface valuable insights – like *At-risk Key Results in a leader's org*, or *Results that haven't been touched in 20+ days* – by setting filters using any combination of OKR and Key Result attributes:

- Time period
- Update freshness
- Category, Tag and Keyword
- Team and Manager
- Organization Leader
- Confidence & RAG status
- Ownership
- and more





# More Scorecard Capabilities!

Coming soon:

- ✓ Quickly update key results directly from Scorecards
- ✓ Include Strategy Pillars as Scorecard columns
- ✓ Improved Scorecard zoom controls

WorkBoard

AI

Objectives

Teamwork

Meetings & Reviews

Search

Biz Reviews

GenAI Initiative Q2

GenAI Initiative Q2

Scorecard Brief

Objective Name	KR Name	Actual	Confidence flag	Target
Lead the charge in promoting GenAI adoption and innovation in the IT org	Complete 3 GenAI technology training modules	3		3
	Organize and execute a GenAI innovation hackathon with at least 50 participants and generate 10 actionable project ideas	8	High	10
	Host 6 GenAI lunch-and-learn sessions showcasing how teams are using AI in their work	6	Medium	6
Integrate GenAI into our digital payment processing platform	Implement GenAI-driven customer support bot with satisfaction rate	25%	High	90%
	Achieve a 20% reduction in transaction processing time using GenAI	12%		20%
	Develop and deploy GenAI model for fraud detection with 95% accuracy	32%	Low	100%
	AI Drives our future	50%		100%

# Workstreams

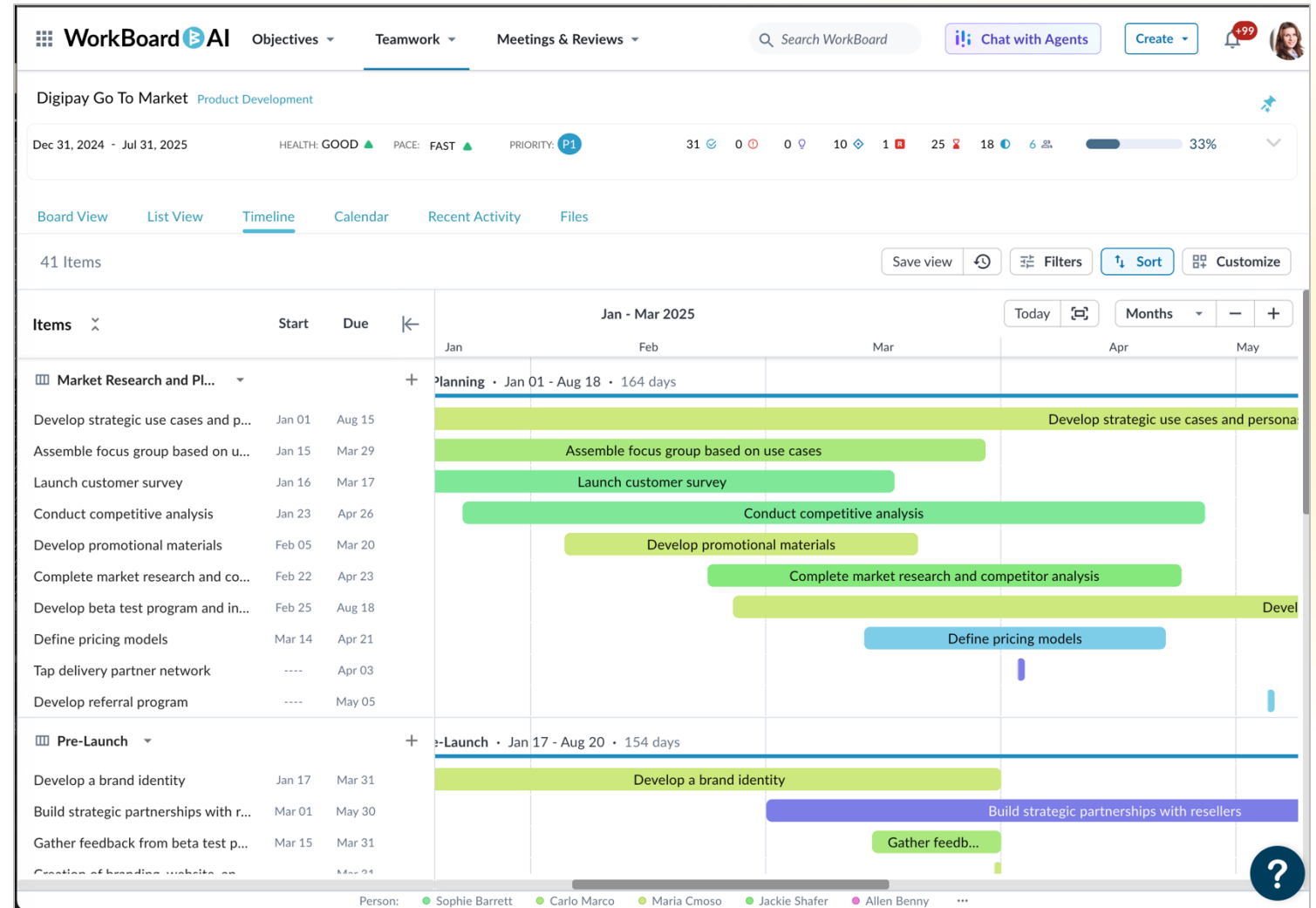
# Easily visualize project timelines

The Timeline view provides a **visual way to track projects and milestones** within and across workstreams.

- ✓ Organize, filter, or color-code displayed items by assignee, status, column, priority, and more.
- ✓ View the project across days, weeks, months, quarters or years.

## New updates!

- ✓ Add new action items right from the timeline
- ✓ Drag and drop action items to adjust dates



# Performance Management

# New Check-in Capabilities!

## Available now:

- ✓ Send reminder emails to managers and team members with outstanding Check-ins
- ✓ Customize PACE ratings to meet your organization's needs. Optionally include up to 8 measures.
- ✓ Redesigned PACE graph makes it easier to see trends over time and gaps to discuss.

## Coming soon:

- ✓ Easily access past Check-ins from a current one
- ✓ New manager inherits employee's prior Check-ins

WorkBoard AI Objectives Teamwork Meetings & Reviews Search WorkBoard Chat with Agents Create 31

Governance  
Result Management  
Custom fields  
null  
Mass Ping  
Organizational Engagem...  
Organizational Engagem...  
Key Result Tags & Clusters  
Objective Categories  
Alignment cycle  
HR Management  
Agenda templates  
Check-in cycles

Check-in cycles / Goal Summary - Mid-Year  
Goal Summary - Mid-Year  
Presets Check-ins

Cancel Mark as Complete

Export to CSV  
Sync & Add Check-ins

Send reminder  
Send reminder only to reviewers  
Cancel Cycle  
Export PACE

Agenda Templates  
Choose a template for the Check-in cycle. Select from existing templates or create a new one.

Agenda template  
Goals Summary - Mid-Year + New template

☒ Include Current OKRs  
☐ Include OKRs from a specific time period

Check-in Window  
Select the specific date, time & duration for this Check-in. This will show as a Meeting in WorkBoard Meetings

Cycle start date 03/06/2025  
Cycle end date 03/09/2025  
Check-in deadline 08:00 AM  
Duration 30 min

Check-in participants  
Choose who should be having these Check-ins?

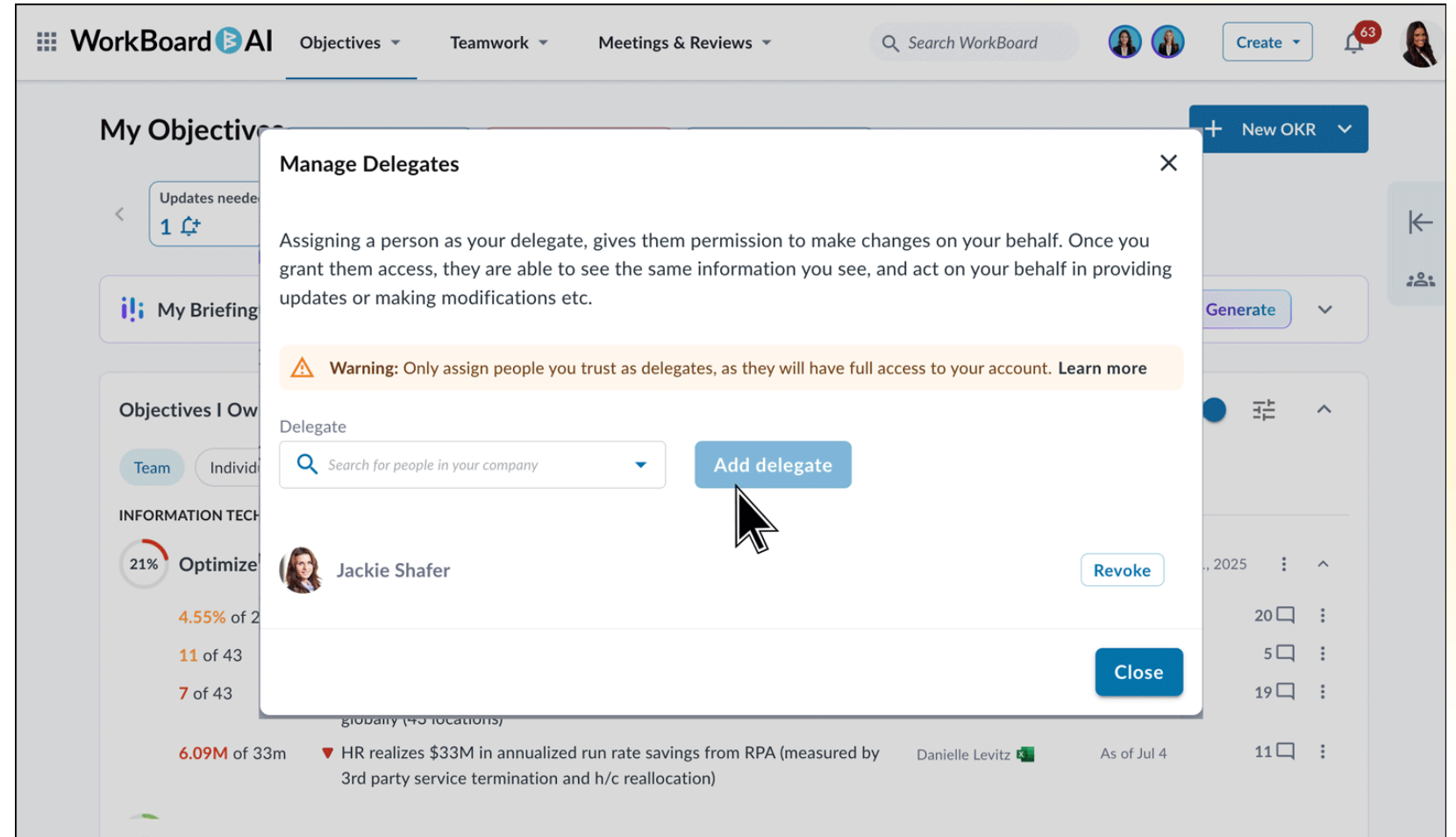
Participants  
Selected leader's sub-organization tree

?

# Account and Preferences

# Delegate access to your account

Going on leave or vacation, or just need help managing day-to-day tasks in WorkBoard? You can now **grant access to your account** to a Chief of Staff, admin, operations partner or other trusted co-worker so they can update your key results, manage your action items, or support your workflows on your behalf.





# Request view or edit access for Scorecards & Biz Reviews

Org admins can now **request view or edit access** to any Scorecard or Biz Review

And get a list of all scorecards and biz reviews in the org

Scorecard and Biz Review List

Last Modified At

Last ▾ 90 ▾ Days ▾

5/30/2025 - 8/27/2025

Type

☒ Biz Review

☒ Scorecard

Status

☒ Active

☐ Archived

Biz Reviews and Scorecards

Name	Type	Owner	Owner Email	Biz Review or Scorecard ID	Last Modified	Status
Copy of TEMPLATE SCORECARD 2025-08-27 01:39:41	Scorecard	Danielle Levitz	wobo-dan@wobodemo.com	71858	08/27/2025	Active
IT Scorecard   Custom Prompt	Scorecard	Danielle Levitz	wobo-dan@wobodemo.com	71497	08/27/2025	Active
Product & Technology Scorecard	Scorecard	Danielle Levitz	wobo-dan@wobodemo.com	35285	08/27/2025	Active
Template Scorecard	Scorecard	Danielle Levitz	wobo-dan@wobodemo.com	71857	08/27/2025	Active
Dependencies and collaborators	Scorecard	Danielle Levitz	wobo-dan@wobodemo.com	49661	08/26/2025	Active
IT Scorecard	Scorecard	Danielle Levitz	wobo-dan@wobodemo.com	66733	08/26/2025	Active
Business Health FY23	Scorecard	Jackie Shafer	leila+jackienewnav@workboard.com	3513	08/25/2025	Active
Digipay Scorecard	Scorecard	Danielle Levitz	wobo-dan@wobodemo.com	71111	08/25/2025	Active
Digipay Scorecard	Scorecard	Jackie Shafer	leila+jackienewnav@workboard.com	71479	08/25/2025	Active
Product and Technology Leadership MBR	Biz Review	Danielle Levitz	wobo-dan@wobodemo.com	217501	08/25/2025	Active
Untitled	Scorecard	Jackie Shafer	leila+jackienewnav@workboard.com	71567	08/25/2025	Active
Rev Org Biz Review	Biz Review	Joe Smarts	wobo-Joe@wobodemo.com	2443606	08/24/2025	Active
GenAI Initiative Q2	Scorecard	Jackie Shafer	leila+jackienewnav@workboard.com	62009	08/23/2025	Active
Digipay Q1 2024	Scorecard	Barry Bosser	wobo-Barry@wobodemo.com	27954	08/22/2025	Active
Information Technology Scorecard - Q3 FY25	Scorecard	Danielle Levitz	wobo-dan@wobodemo.com	71493	08/22/2025	Active
IT Team	Scorecard	Danielle Levitz	wobo-dan@wobodemo.com	67707	08/22/2025	Active
Kelly Clark - VP Sales - 2H Goals	Scorecard	Joe Smarts	wobo-Joe@wobodemo.com	70837	08/22/2025	Active
Monthly Team KPIs	Scorecard	Ramiro Rioser	winho-Ramiro@wobodemo.com	38345	08/22/2025	Active

[Click here for Biz Review Access History](#)[Click here for Scorecard Access History](#)

WorkBoard

Gain Access to Scorecard or Biz Review

As an admin, you can access this Scorecard or Biz Review. Proceeding will notify the owner of this report. Are you sure you want to continue?

Cancel

Get access

However, as a

Reviews within your organization.

and Business

Return to homepage

Get access

*Note: this is a highly privileged permission so please reach out to your CSM if this is applicable to you*

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# Use WorkBoard in your local language

WorkBoard

Ziele

Teamarbeit

Tagungen & Bewertungen

WorkBoard durchsi

Hire Agents

Erstellen

Einstellungen

←

Profileinstellungen

Einstellungen

Listen und Abonnements

Integrationen

Benutzerdefinierte Integr...

Importieren aus Excel

Profileinstellungen

Kontoinformationen

Vorname

Amanda

Nachname

Chase

E-Mail-Anmeldung

wobo-amanda-chase@wobo-

Bearbeiten

Passwort

••••••••

Bearbeiten

Workboard E-Mail-Adresse

Ihre Workboard E-Mail-Adresse lautet:

wobo-amanda-chase@myworkboard.com

Fügen Sie diese E-Mail zu Ihren Kontakten hinzu, um E-Mails zu senden

Zu Workboard als Probleme. Erfahren Sie mehr.

Foto

Foto ändern

Titel

Director, SCM Operations

Unternehmen

Acme Inc.

Mobile #

Elite-Abonnenten können

Ihre Probleme per SMS

an 650-204-8988

senden.

Zeitzone

(GMT+00:00) Coordinated Universal Time

×

▼

Co-Autorensprache auswählen

German

English

French

German

Spanish

Mandarin

Japanese

✓

Auf alle Plattformbezeichnungen anwenden

30

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# Join the Conversation!



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# Strategy Execution MOUNTAIN RETREAT

PARK CITY, UTAH | OCTOBER 1-3

**ST REGIS**  
DEER VALLEY





“Great balance between speakers, breakouts and networking. Wouldn’t change a thing!”

— Bridget Guerrero, ViaSat

## THIS YEAR’S THEMES

This conference is one a kind – a rare brain trust comes together to advance strategy execution and enterprise performance for public and PE-backed companies. It’s the very definition of thought leadership and this year’s sessions and themes are no exception.

### Speakers will share how they are:

- Achieving strategic agility in the face of supply chain, technology, economic, and company upheaval
- Increasing the CEO’s ability to drive strategy and accountability at scale
- Maximizing value delivery with radical clarity, value transparency, and rapid prioritization
- Systematically threading business strategy through company, team, and individual objectives to create coherence and avoid misaligned incentives or colliding processes
- Orchestrating an operating rhythm that drives strategic velocity, accountability, and agility
- Getting managers in the middle to fulfill their role in alignment, accountability and performance

 **WorkBoard**



**Deidre Paknad**  
Founder and CEO

 **AC Smith.**



**Steven Shafer**  
President and CEO

 **GHX**



**Alexis Kearns**  
Chief People Officer

 **ASSETMARK.**



**Esi Minta-Jacobs**  
EVP, Chief Administrative Officer

 **8x8**



**Joel Neeb**  
Chief Transformation and Business Operations Officer

 **BOEING**



**Priscilla Christopher**  
Information Digital Technology & Security Strategy & Business Operations, Product & Program Management Chapter Leader

 **metropolis**



**Allison Kinney**  
Head of Employee Experience, Metropolis Technologies

 **MARS**



**Beth Dawson**  
Director, Strategic Initiatives

 **GHX**



**Jaclyn Pedersen**  
Director of OKR Strategy and Alignment

 **MARS**



**Amanda Albers**  
Program Manager, Strategic Initiatives

 **Mercedes-Benz**



**Terrence Jones**  
Organizational Transformation Manager

 **BOEING**



**Matthew Rhoads**  
Senior Product Manager



**Register now!**

**Conference pricing**

\$999 Individuals

\$1599 Bring a peer (2 tickets)

[www.workboard.com/accelerate2025](http://www.workboard.com/accelerate2025)

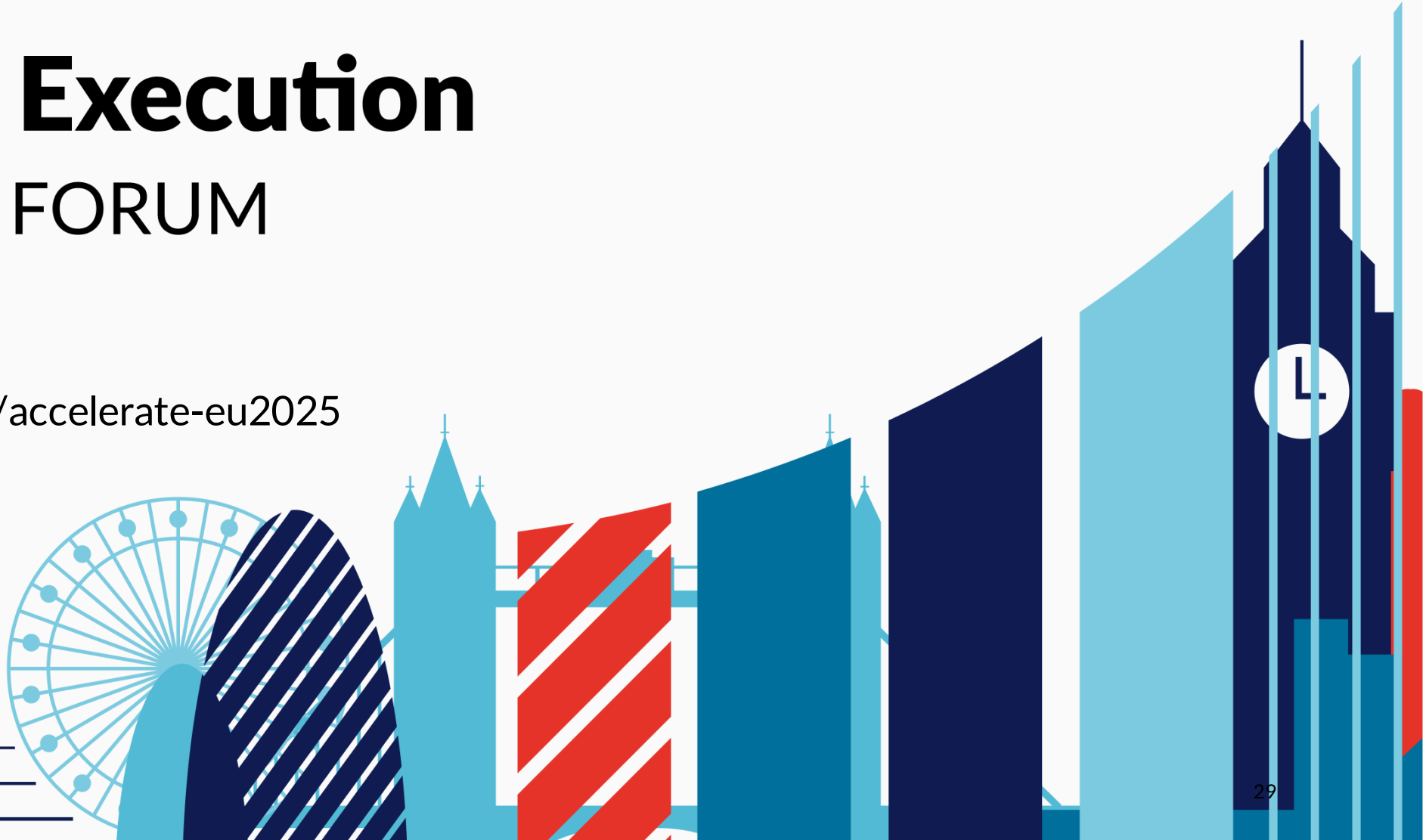


# Strategy Execution

## EXECUTIVE FORUM

**Save the date!**

[www.workboard.com/accelerate-eu2025](http://www.workboard.com/accelerate-eu2025)





# London Speakers on November 13<sup>th</sup>

*More speakers will be added soon*



**Anne Maibom**  
Global Senior Manager  
Solutions Innovation Execution



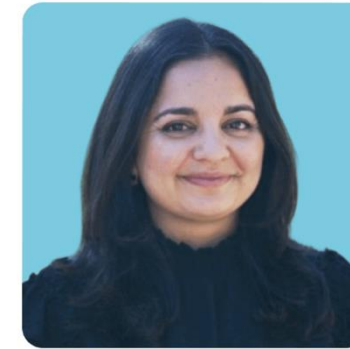
**Milan Červenka**  
Product Line Lead of Strategic  
Management



**Rory Thompson**  
Strategic Initiatives Manager



**Harry Blease**  
Senior Digital Strategy Lead



**Sameera Moinpour**  
Global VP Customer Success &  
Services



**David Chase**  
Chief Marketing Officer



Awesome event, I feel super energized!  
Loved the Gen AI features.

— Jen Lacey, AstraZeneca

Great event, very professional and  
execution was excellent. I would love  
more events like this in the UK!

— Kaspars Jansons, Ford Motor Company



# What are You Curious About?





# Thank you!

