

Community Call

December 2025



Agenda

- KPIs
- Key Results Measurement Enhancements
- Customize Your Project and Intake Flows
- AI Agents
- Join the Conversation!



KPIs

KPIs and OKRs - One Operating Lens

Current Challenges

- OKRs and KPIs sit in different solutions creating silos and delayed visibility
- Leaders lack a single, connected and continuous view of business performance
- Teams spend valuable time manually reconciling data across systems instead of acting on insights.

Opportunity unlocked by tracking KPIs in WorkBoard

- Give leaders a unified lens and **single operating system** that **combines** OKRs (where we're going) with KPIs (how we're doing)
- See how OKRs influence key KPIs — making it clear which priorities are driving KPI performance.
- Easier to spot and decide which KPIs need strategic focus — signaling where an OKR could accelerate performance on key KPIs.
- Reduce the need for manual reconciliation and creating combined slideware

When to Use Each - KPI vs OKR

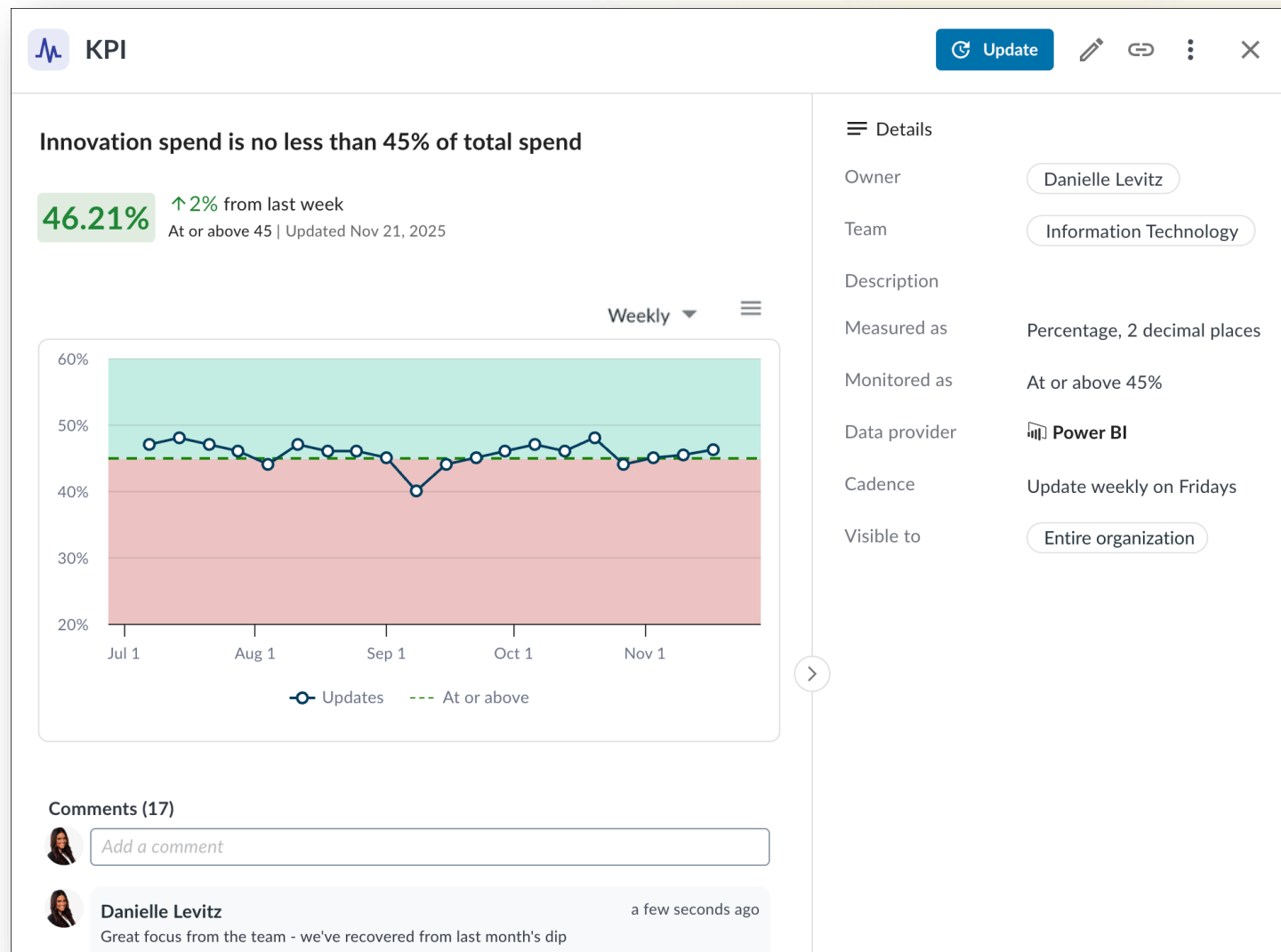
KPIs track performance and show how effectively key areas operate, while OKRs are used to define objectives that align teams with the organization’s strategic direction and desired outcomes.

Together, they connect day-to-day performance with long-term goals. The table below highlights some of the main differences:

	KPI	OKR
Purpose	<ul style="list-style-type: none">➤ Monitoring performance of ongoing processes or business activities	<ul style="list-style-type: none">➤ Drive change and improvement toward goals
Timeframe	<ul style="list-style-type: none">➤ Continuous	<ul style="list-style-type: none">➤ Quarterly / Yearly cycle
When to Use	<ul style="list-style-type: none">➤ Tracking performance / metrics	<ul style="list-style-type: none">➤ Launching new activities➤ Aligning strategy and execution

KPI Solution

- ✓ **Create KPIs** for teams or individuals - separate from Objectives
- ✓ **Set up once** and continue monitoring ongoing health
- ✓ **Set thresholds** to monitor health
- ✓ **Integrate with external data sources** to automate updates
- ✓ **Use KPIs as a source for Key Results** to improve or move from a baseline to goal
- ✓ **Add KPIs to Biz Reviews** so everyone can visualize and track performance trends



Creating KPIs

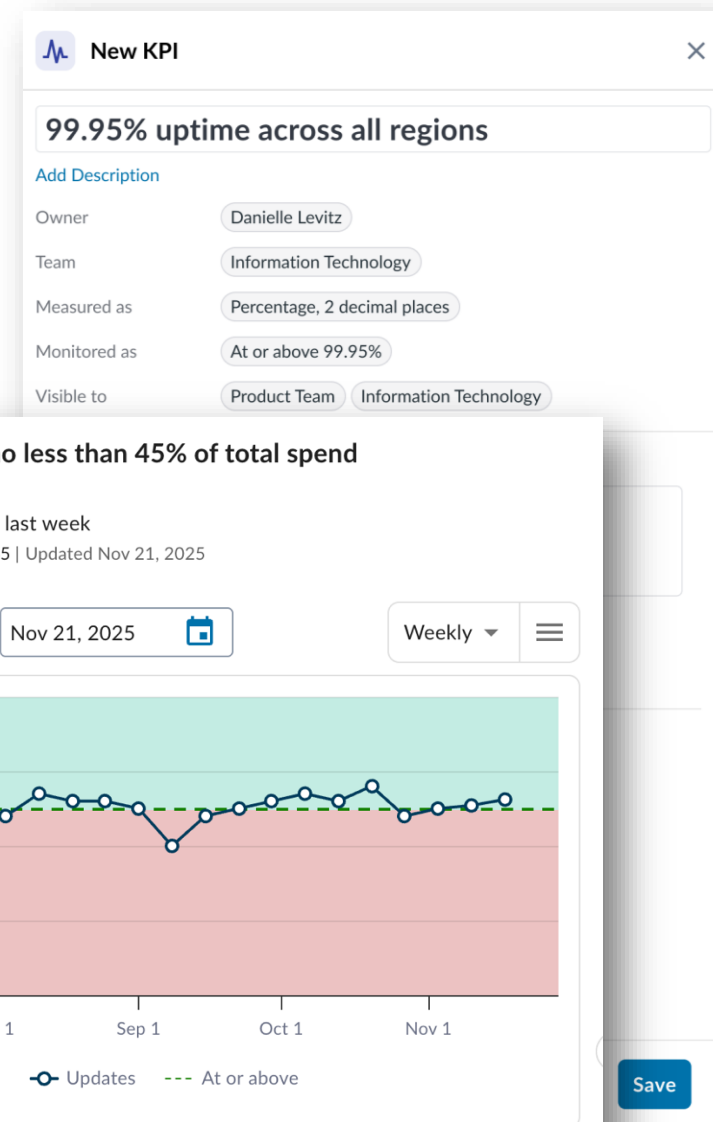
Create KPIs for Teams or Individuals

- KPIs can have owners and co-owners
- Visibility and access can be adjusted for each KPI

Setting Risk Thresholds:

Define conditions under which a KPI is considered *healthy*, *at risk*, or *off track*. Threshold type will include:

- **Stay at or Above**
- **Stay Below**
- **Stay in Between**
- **More Is Better / Less Is Better** — define success or risk based on the direction of the trend.
- **Just Tracking** — no risk thresholds; KPI is monitored without red/yellow/green status.



KPIs on the My Objectives and Teams pages

Teams page:

- See the KPIs for a team as a separate tab from OKRs to help differentiate the two!

My Objectives page:

- Each person can see all KPIs they own or co-own, whether those KPIs are assigned to a team or to an individual.

My Objectives

Updates needed: 2 Results at risk: 10 Results to celebrate: 4 Draft OKRs: 3

My briefing for: Lucy's custom brief

Objectives I Own

Team Individual

4 objectives

- Information Technology
- Optimize investments and company resources so we can accelerate innovation (78%)
- Technology enables the organization to accelerate with AI (50%)
- Foster a culture of ambition and creativity that fuels Acme 2030 (10%)

Key Results I Own

KPIs

Information Technology

Value	Trend	Measure
99.99%	↑ 0.5% WoW	99.99% uptime for US data centers
99.96%	↑ 0.1% WoW	99.95% uptime for Rest of World (ROW)
797M	↑ 3.5% MoM	Total IT run rate spend
23.5k	↓ 3.5k MoM	Healthcare IT run rate spend
313	↓ 2 MoM	Consultant headcount
620M	↓ 23k MoM	Retail IT run rate spend

WorkBoard AI

Objectives More Search WorkBoard Create

My Agents 33

Teams / Information Technology

Information Technology

Danielle Levitz

Team Brief for Nov 20, 2025 - Nov 27, 2025

Generate

OKRs **KPIs** 33 of 33 Workstreams 142 Actions Weekly Snapshots Team Members Timeline

Actual	Name	Updates
99.94%	99.95% uptime for Rest of World (ROW)	As of Dec 2, 2025
200.4	Total IT run rate spend	As of Dec 2, 2025
465k	Healthcare IT run rate spend	As of Dec 3, 2025
99.99	99.99% uptime in NA	As of Dec 3, 2025

KPIs as Data Source for Key Results

If a KPI is underperforming, or if there is an opportunity for improvement, create a key result with a clear, measurable target to drive strategic focus.

Set the KPI as the data source for your key result so you only need to update in one place!

The screenshot displays the WorkBoard interface. On the left, the 'Add Team Objective and Key Results' page shows an objective: 'Elevate brand awareness and engagement through campaigns' for the Marketing team, spanning from July 01, 2025, to September 30, 2025. Below the objective, there is a section for 'KEY RESULTS' with a placeholder for the key result name and a prompt to 'Write a key result to measure the success of your objective'. There are links for 'Advanced options' and 'Use Co-Author'.

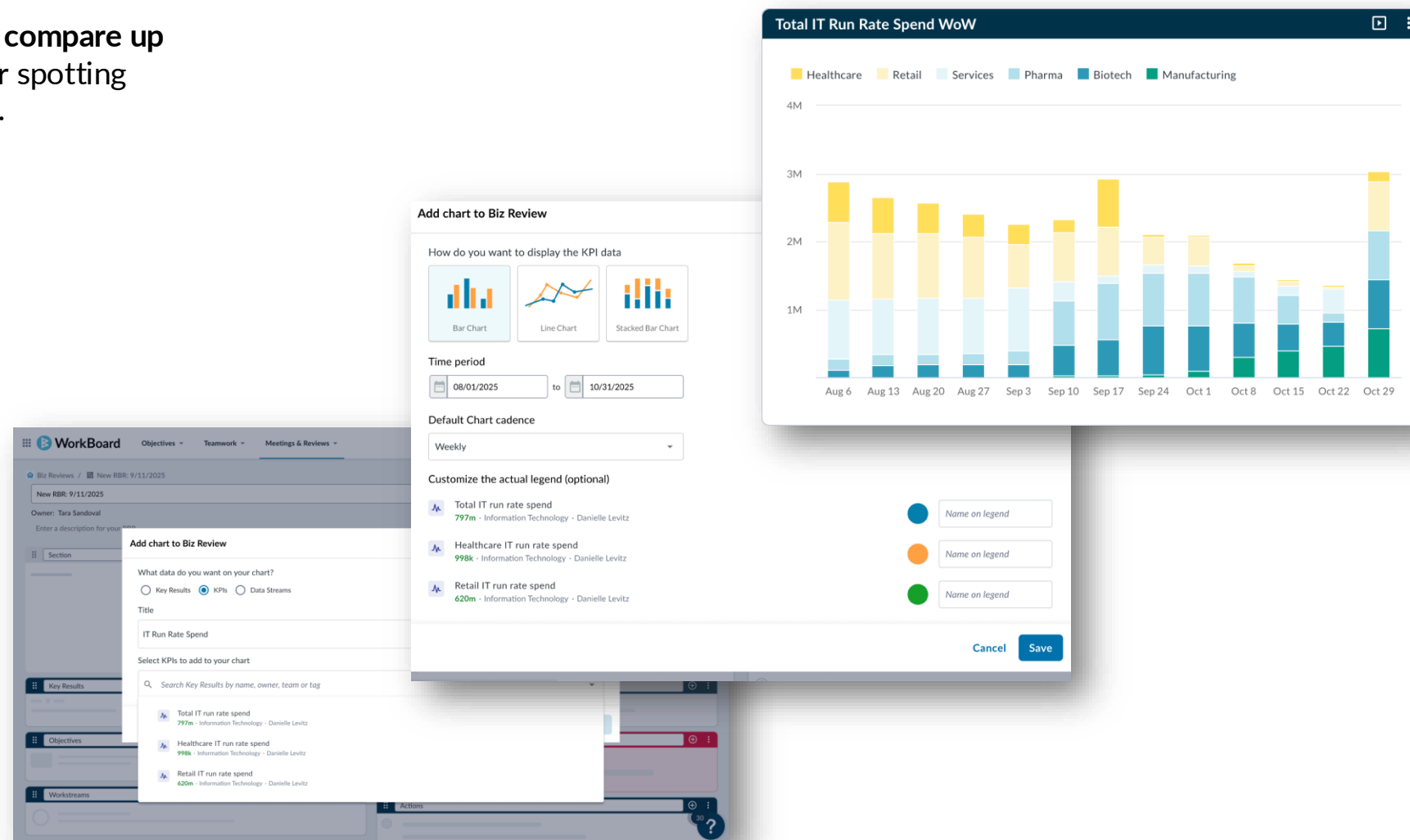
On the right, the 'Create Key Result' dialog is open. It asks 'How will you measure your key result?' and offers three options:

- Set a single key result target**: Measure results like sales or bugs, and assign the key result to a point person.
- Set multiple key result targets for the period**: Set quarterly targets for an annual key result or monthly targets for a quarterly key result.
- AUTOMATE OR ROLL UP RESULTS**:
 - Measure progress of actions from a WorkBoard workstream**: Measure percentage completion of actions for a group of people.
 - Source from other key results or objectives**: Link directly and mirror a key result or roll up multiple existing key results or objectives. This section includes buttons for 'Mirror one key result' and 'Roll-up key results or objectives'.
 - Source from KPIs or external applications**: Automate from sales, development, R&D, operations systems or KPIs. This section includes buttons for 'KPIs' and 'External data sources'.

At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

Visualize Trends & Compare KPIs with Charts

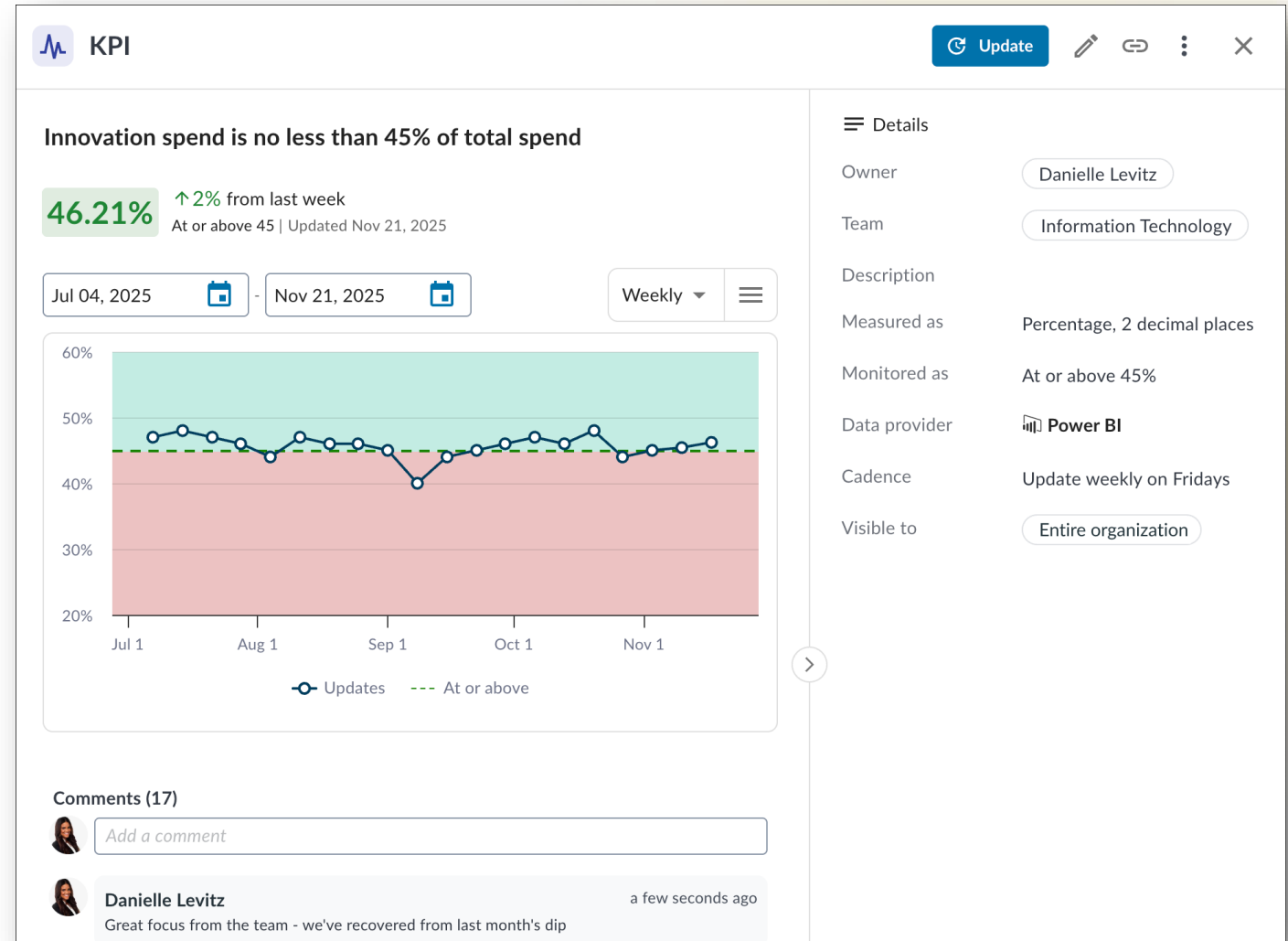
Create charts that **combine or compare up to 8 KPIs** at once — perfect for spotting trends or telling a bigger story.



Looking Ahead!

These additional KPI capabilities will be available in 2026!

- ✓ Interact with your KPIs in **conversation with your AI Agents**
- ✓ Add and manage **relationships and dependencies** for your KPIs
- ✓ Monitor KPIs in **Scorecards**, and bring them to **Canvases**, and **meetings**
- ✓ KPI health highlighted in your **AI Briefs** and summaries
- ✓ Define KPI **targets & thresholds over time**
- ✓ Proactive KPI **Notifications** and triggers
- ✓ And much more!



Objectives & Key Results

Milestones for Key Results

Use Key Result milestones to express your **expected trajectory of achieving progress with dated, labeled checkpoints** – creating shared clarity on how progress should unfold over time.

Use Cases:

- Key Results that ramp up later in the period (hockey-stick growth, adoption curves, learning curves)
- Front-loaded Key Results that require early de-risking
- Quarter-by-quarter expectations for pipeline, revenue, deployments, or usage

Pipeline Example

- Q1 Pipeline: \$350K
- Q2 Pipeline: \$700K
- Q3 Pipeline: \$850K
- Q4 Pipeline: \$1M

Product Launch Example

- Beta testing complete: 30% by Oct 26
- GTM assets finalized and approved: 50% by Nov 18
- Internal Launch Enablement complete: 65% by Dec 2
- Product in GA: 100% by Dec 27

Create Key Result

Starting from * Result value ⓘ Target value * ☐ Committed result

Unit of measurement Calculate overall progress as ⓘ

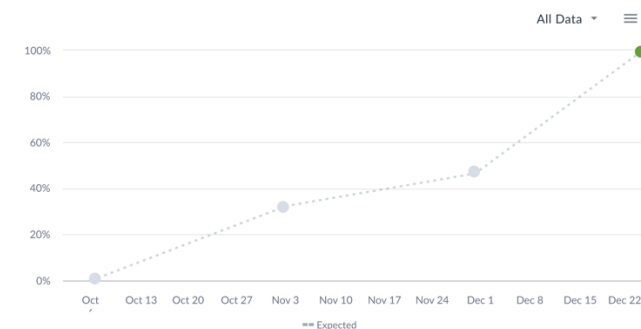
Who will measure progress and how often? * to update on

Remove Key Result Milestones

Date	Value	Label (optional)	
<input type="text" value="Oct 1, 2025"/>	<input type="text" value="0%"/>	<input type="text" value="Start"/>	⊖
<input type="text" value="Oct 31, 2025"/>	<input type="text" value="30%"/>	<input type="text" value="Socialize and align on framework"/>	⊖
<input type="text" value="Nov 31, 2025"/>	<input type="text" value="50%"/>	<input type="text" value="Transition to staffing and execution"/>	⊖
<input type="text" value="Dec 31, 2025"/>	<input type="text" value="100%"/>	<input type="text" value="Target"/>	

+ Add target

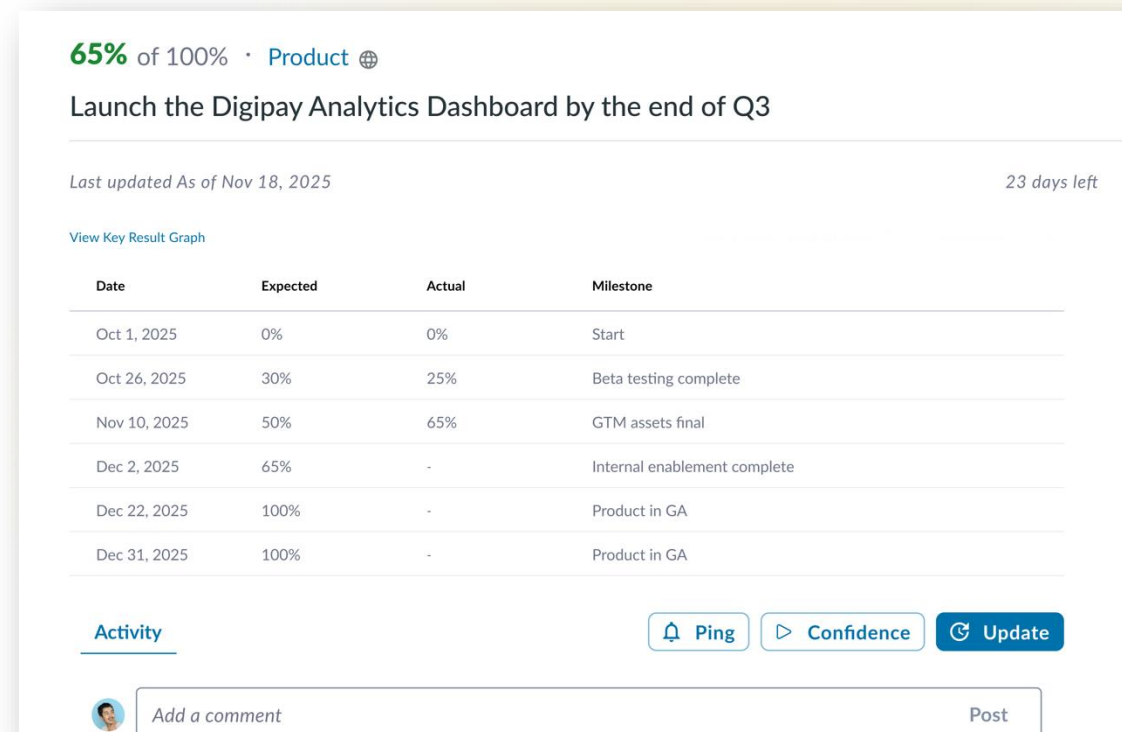
+ Weekly + Monthly



Milestones for Key Results

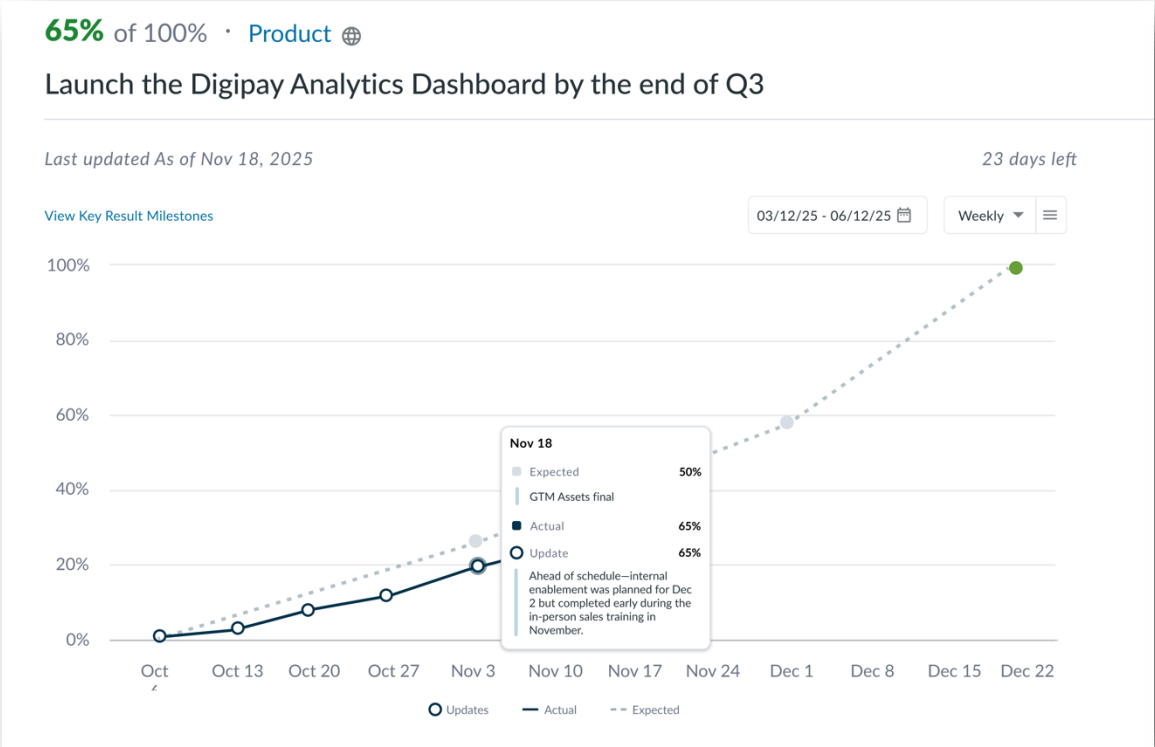
Key Result RAG (Red, Amber, Green) shows risk based on where you *should* be today — not just the final target.

Example: if your year-end target is **\$1.2M**, but you've set a milestone to reach **\$800k by November**, your RAG in November is judged against the **\$800k**, not the **\$1.2M**.



Expert WoBo Tip: Milestones are a much simpler and lighter weight path to define the expected trajectory than Multiple interval targets

See Key Result Milestones



65% of 100% · Product 🌐

Launch the Digipay Analytics Dashboard by the end of Q3

Last updated As of Nov 18, 2025 23 days left

View Key Result Graph

Date	Expected	Actual	Milestone
Oct 1, 2025	0%	0%	Start
Oct 26, 2025	30%	25%	Beta testing complete
Nov 10, 2025	50%	65%	GTM assets final
Dec 2, 2025	65%	-	Internal enablement complete
Dec 22, 2025	100%	-	Product in GA
Dec 31, 2025	100%	-	Product in GA

Activity

Ping Confidence Update

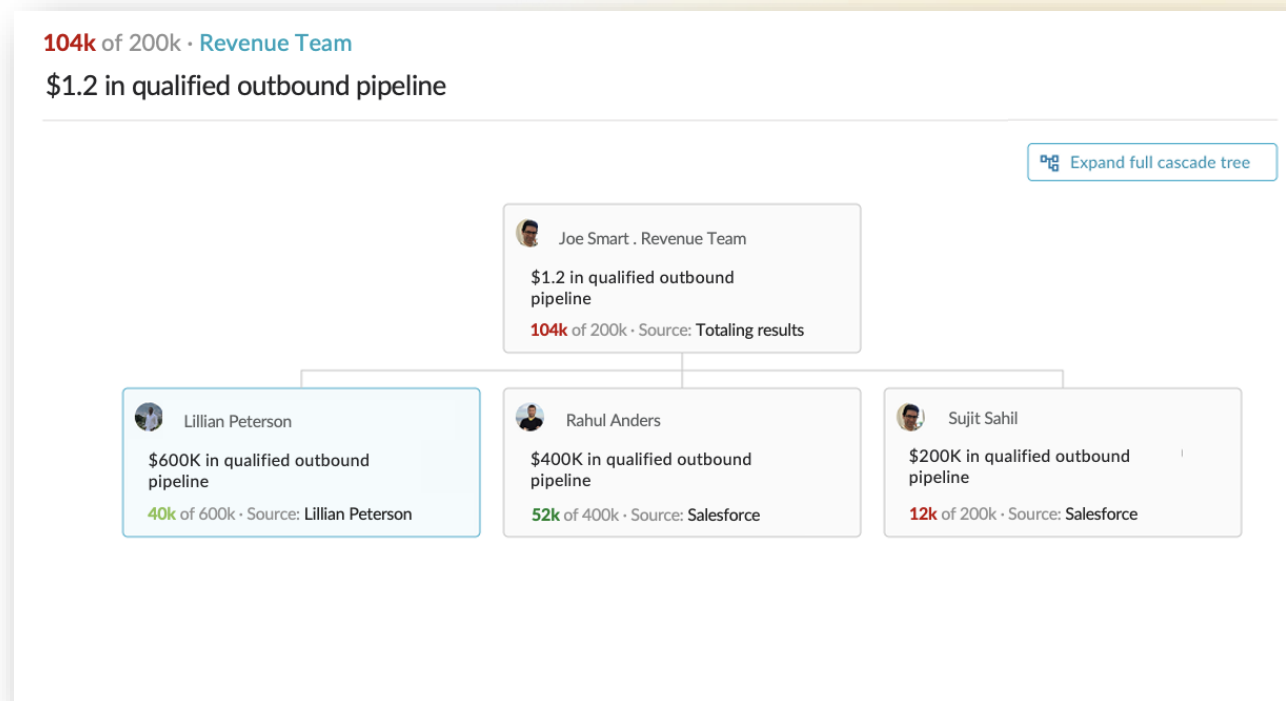
Add a comment Post

See the expected trajectory and milestone labels on result **charts** and **as a table**

Breaking Down Results with Cascades

Sometimes a Key Result requires contributions from many people or teams. Cascaded KRs help you:

- **Break down a metric** so each group or region owns its part of the outcome.
- **Align on shared fate** by giving multiple contributors the same metric to drive collective success.
- **Push a result down multiple layers** when achieving it requires alignment across levels of the organization.



Revamped Solution – Cascaded Key Results

- Build a **multi-layer tree** of Key Results *(no longer requires the extra “Accept” step!)*
- Cascaded Key Results **behave like any other Key Result** — owners can update them, change the data source, or cascade them further
- Parent cascades are a roll up of their child results (**sum, average, or average of progress**)
- Easily **mirror** cascaded results into **Team Objectives**
- Cascade multiple results to the same person when their work spans several areas

The screenshot displays the WorkBoard interface for creating and managing Key Results. The main panel is titled 'Add Team Objective and Key Results' and shows an objective 'Capture the Market' for the team 'Product Management' from Dec 1, 2018, to Dec 31, 2018. A 'Create Key Result' dialog is open, showing options to 'Cascade result to multiple people' and a 'Change measurement type' button. A modal titled 'Create a Cascaded Key Result' is also open, showing a key result name '\$50k in qualified outbound pipeline for EMEA', a starting value of 0, a target value of 50,000, and an owner 'Sujit Sahil'. The modal includes 'Cancel' and 'Add' buttons. In the background, a table lists cascaded key results with columns for 'Starting value', 'Target value', 'Owner', and 'to update'.

Starting value	Target value	Owner	to update
0	50,000	Sujit Sahil	Weekly

Workstreams

Define the data you need for Actions & Work Items

- ✓ Define custom fields for actions, milestones, risks, assumptions
- ✓ Governance admins can now define these fields across all work items or only **on specific teams**
- ✓ Map out custom intake workflows or track elements that custom to your flow

Draft CMO Use Case Aug 21, 2025 Aug 22, 2025 ⋮ ✕

Frieda Tren Strategic Use Cases Persona Work

Paused **Normal** **Medium** **Green**

Details **Notes** **Subtasks** **1 File** **Tags** **0 Related**

Description

Problem Statement

Objectives & Expected Outcomes

Solution Overview

Target Industries
Big Tech Automotive ⌵

Initial analysis completed and attached
Select ⌵

Customer Impact Score
Select ⌵

Comments 1 In the loop History

Post

Created: April 21, 2025 Jenna Edwards Action ID: 999999 ↗


AI Agents


Moving **from** co-authors **to** co-workers





WorkBoardAI Agents: Performance super intelligence

Your strategic context and data + natural language conversation

 Use data from WorkBoard, Salesforce Jira, Teams/Slack, Meeting transcripts

 Have context on org structure, strategy, goals and work

 Managers don't need to be great at prompts to benefit from AI

 Permissions and controls ensure right data, right context



Joe Smarts 02:25 PM

Who is off track?



John 02:25 PM

Here are the key results that are currently off track and may need attention:

[Off Track Key Results](#)

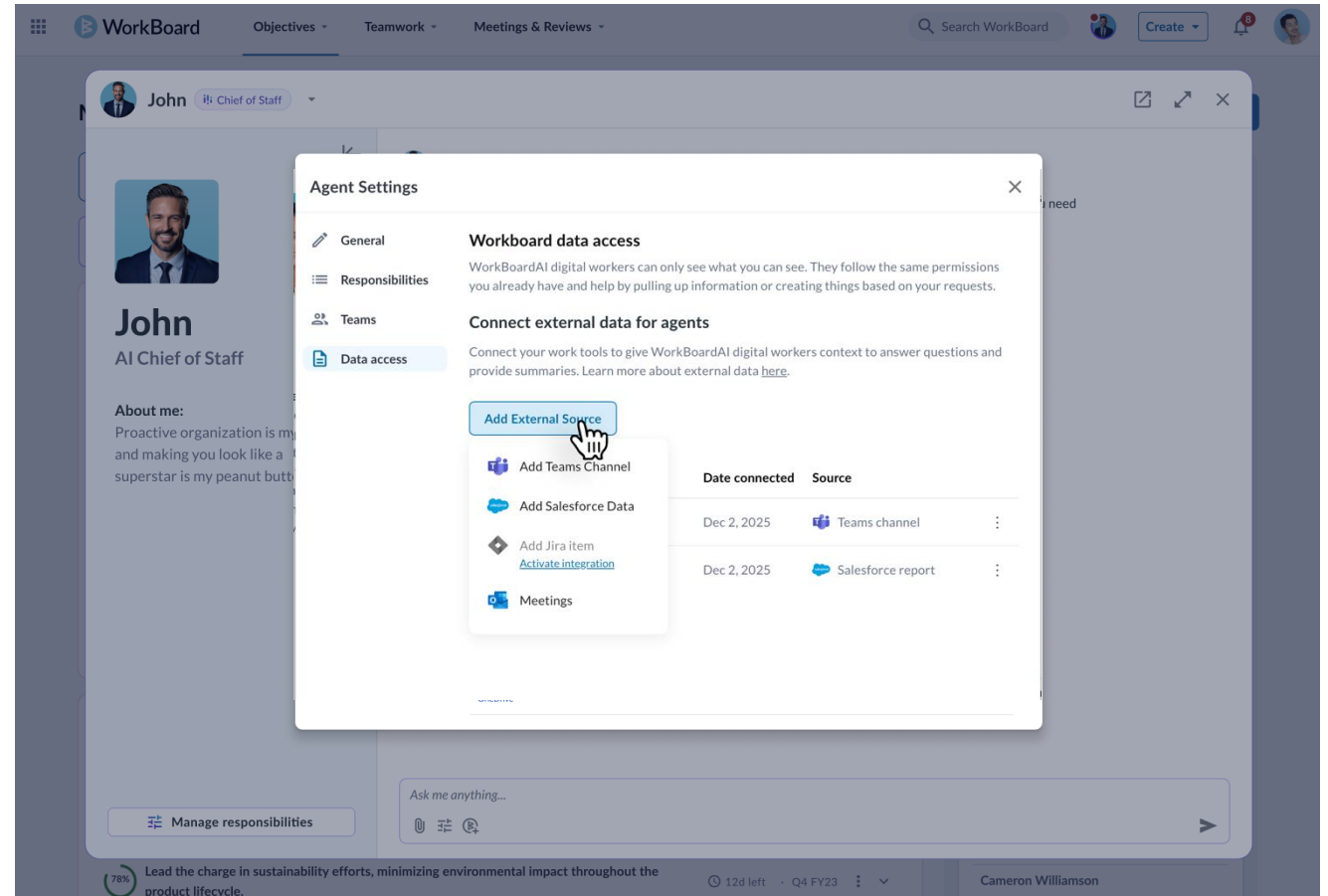
- 285 Tier 1 and Tier 2 logos renewed (Owner: Joe Smarts) – Progress: 96%
- 85% of new business (ARR) comes from within our target market segments - our competitive efforts are focused in the right place (Owner: Joe Smarts) – Progress: 89%
- 85% of new buyers come from strategic accounts (Owner: Joe Smarts) – Progress: 79%
- Stage 1: Prospecting (Owner: Joe Smarts) – Progress: 33%
- Stage 2: Qualification (Owner: Joe Smarts) – Progress: 25%
- Closed Lost (Owner: Joe Smarts) – Progress: 0%
- \$490M Renewals committed but not yet closed/won (Owner: Joe Smarts) – Progress: 26%

Focusing on these areas can help improve overall progress and ensure your objectives stay on track. If you'd like more details or want to take action on any of these, let me know!

Enriching Agent Context with External Data

Grant your agents **selective access** to data from **Microsoft Teams, Jira or Salesforce** to **combine with** WorkBoardAI data for more powerful insights on strategy, target outcomes, risks, and gaps to plan!

- **Salesforce:** Include **reports, account and opportunity data** in briefs, responses, pre-reads, action items, and suggested meeting topics
- **Jira:** Agents can use the status, comments, and changes in your **Epics, Projects, and JQL queries** to prepare you for 1on1s, meeting pre-reads, and surface risks
- **Microsoft Teams:** Include chat content from **specific channels** as data agents can use to inform pre-reads, 1on1 prep and highlighting risks

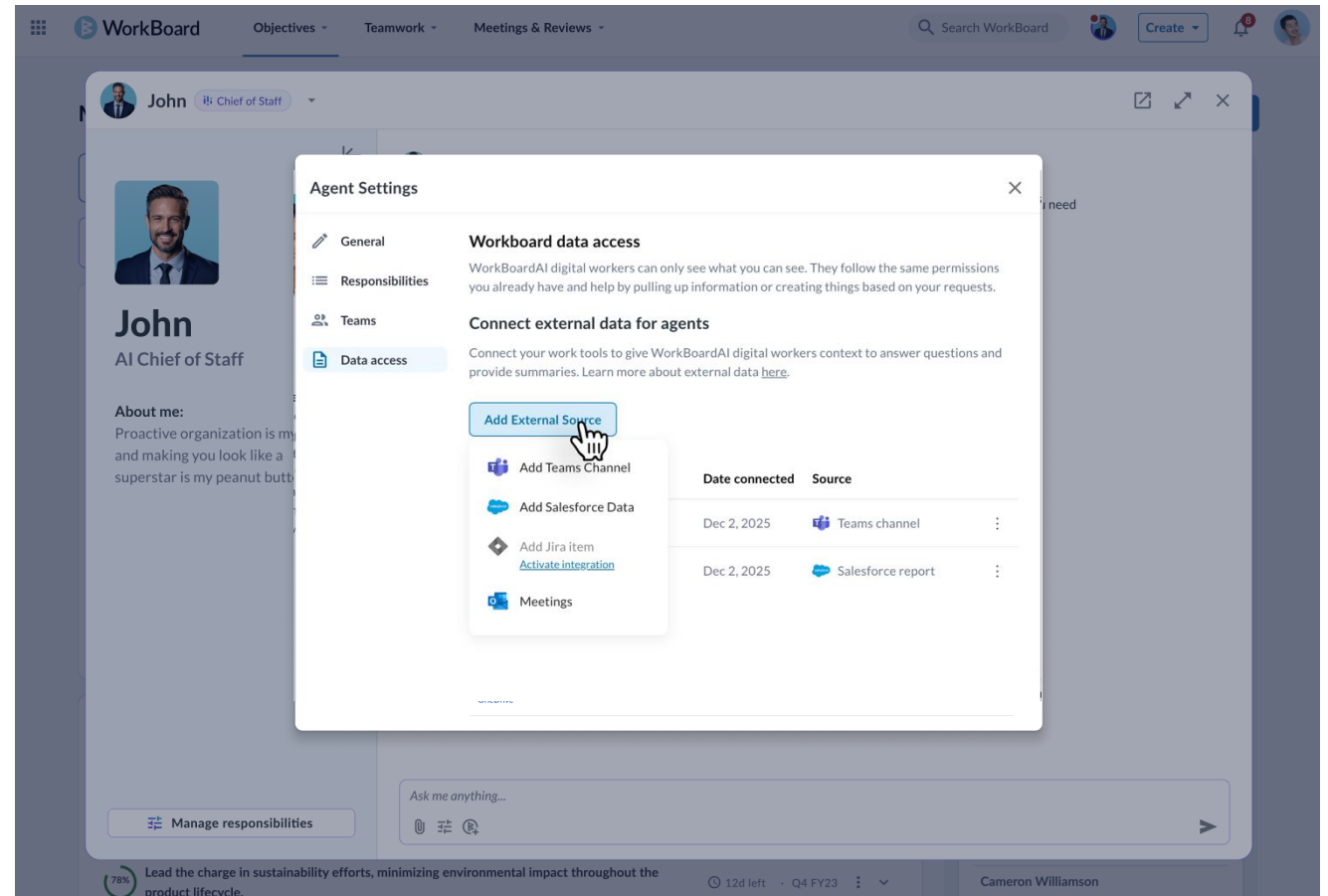


Enriching Agent Context with External Data

Looking ahead to early next year!

Meeting Transcripts: Use transcripts to give Agents more complete data set from teams. “What were the actions from the Digipay team meeting last week?” or “Where does Frank need help?”

Azure DevOps: Get status and risks with comments from Epics and Projects in agent conversations, 1on1 meetings, action items, pre-reads.



Agent Skills & Capabilities Expanding

- Your Chief of staff can find and show your Scorecards in conversation, create new ones and share them!
- Your Leadership Coach can suggest who deserves Kudos – and help you send them! One click from suggestion to feedback on its way.
- Agents are no longer only for team managers -- team **co-managers** can hire their own Chiefs of Staff and Leadership Coaches!

❖ Create and distribute key initiative scorecards and briefings



John 8:00 AM

Scorecard for the Digipay launch

Objective	Key Result	Actual	Target	Source
Digipay is delightfully fast for our customers	Launch 4 Digipay voice assistant Integrations (Google Assistant, Siri, Alexa, Cortana)	3	4	Roger Smithson
	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 Bosser
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%	

❖ Highlight wins, suggest and send kudos



Sofia 2:34 PM

🎉 Happy Friday! Let's celebrate the team's accomplishments this week! I suggest you send a badge to Alex:



Rockstar

Alex Johnson

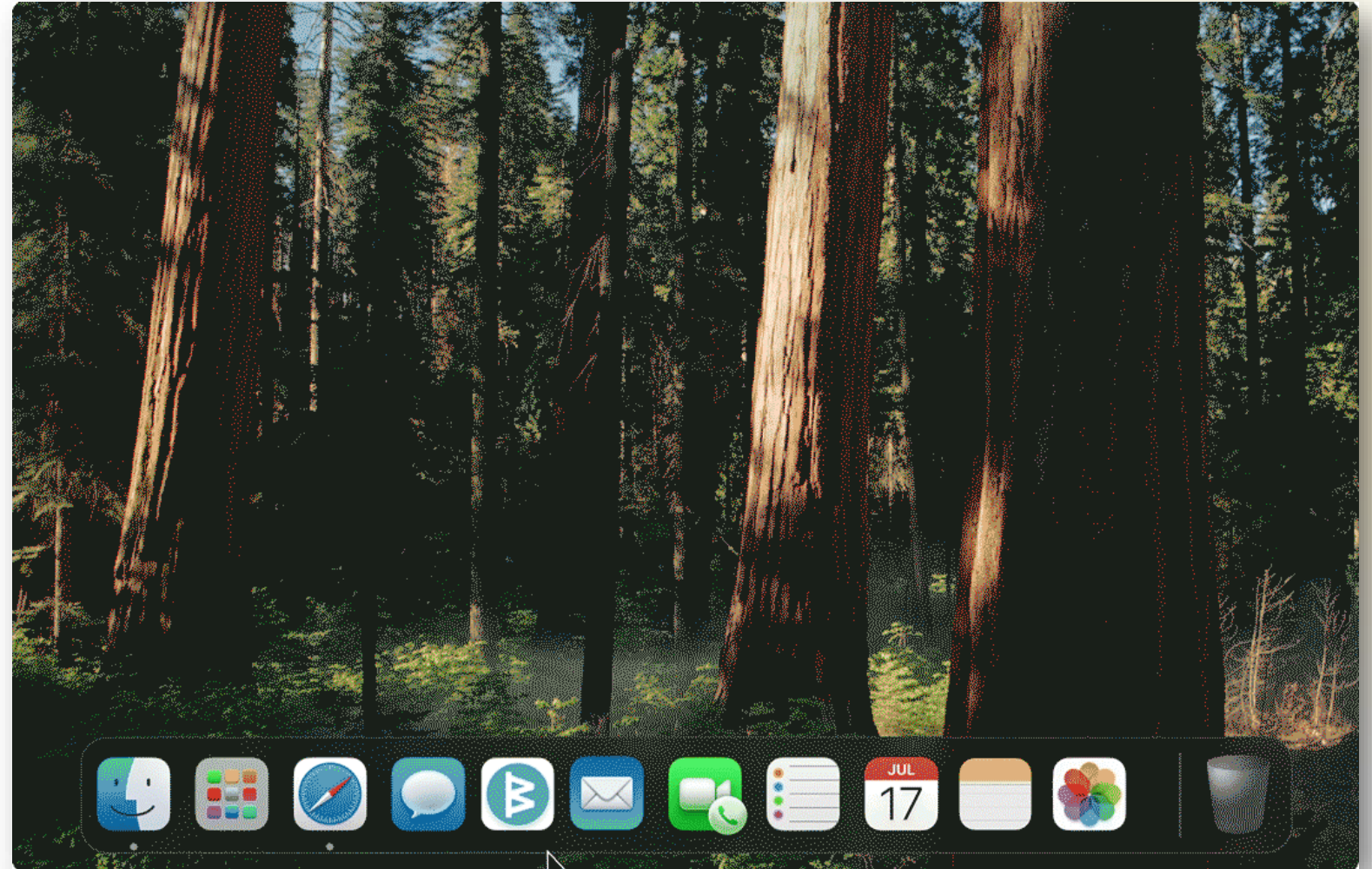
Alex, your proactive leadership and precision in deploying the security patch made a big impact this week. Thank you – great work!

Send this

Refine

AI Agents – Your Personal WorkBoardAI UI

- Install AI Agents on your desktop!
- Bookmark your go-to Scorecards and OKRs for a personalized view
- Agents proactively help you focus on the most important things each day, prep for meetings and 1on1s and follow up
- Tailor Agents with your org's specific context or guardrails
- And much more!



Join the Conversation!

Meet fellow strategy execution leaders in your area!

Join a growing community of peers from companies like Boeing, Mercedes, DaVita, AstraZeneca, CrowdStrike, PDI Technologies, Modivcare, RSM, GHX and more at a regional WorkBoardAI user meetup!

Share tips with fellow strategy execution professionals on how to leverage WorkBoardAI to drive an efficient and productive operating cadence. Members of the WorkBoard customer success team will be on hand to discuss best practices and help answer product questions.

We'll also demonstrate how **WorkBoardAI's new Digital Chief of Staff and Leadership Coach Agents** give every manager the capacity to operate at peak performance.

Upcoming meetups in early 2026 (dates TBD):

- Austin, Texas
- Denver, Colorado
- Atlanta, GA

Invitations will be sent out soon!



Get a quick intro to your AI Chief of Staff and Leadership Coach

New to WorkBoardAI's Agents? Join **Product Engagement Expert Dallen Thomas** for a live 30-minute session to see how your AI Chief of Staff and Leadership Coach help you lead with more clarity, focus, and time back.

You'll walk away with **practical use cases** you can apply right away to your team(s) — saving hours each week on admin work, meeting prep, and follow-ups.

The session includes a **15-minute interactive Q&A**, where you can ask anything and see how AI Agents become true partners in how you lead and manage work.

Upcoming sessions:

- December 8 - 12pm GMT
- December 8 - 12pm EST
- December 12 - 12pm GMT
- December 12 - 12pm EST

Sign up at workboard.com/agents-officehours/

The screenshot displays the 'WorkBoardAI Agents' interface. At the top, a yellow banner reads 'Meet your new AI team members. Included in your WorkBoardAI plan!'. Below this, two agent cards are shown. The 'Chief of Staff Agent' card features a profile picture of Luisa and lists tasks such as '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', and 'Help close out last quarter's OKRs'. The 'Leadership Coach Agent' card features a profile picture of Sofia and lists tasks such as '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', and 'Suggest victories and kudos'. Both cards have a 'Start Now' button.

What are You Curious About?



Thank you!

