Community Call

December 2025

WorkBoard

©2025 WorkBoard Inc.

Agenda

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

©2025 WorkBoard Inc.

KPIs

 ©2025 WorkBoard Inc.

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

©2025 WorkBoard Inc.

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:

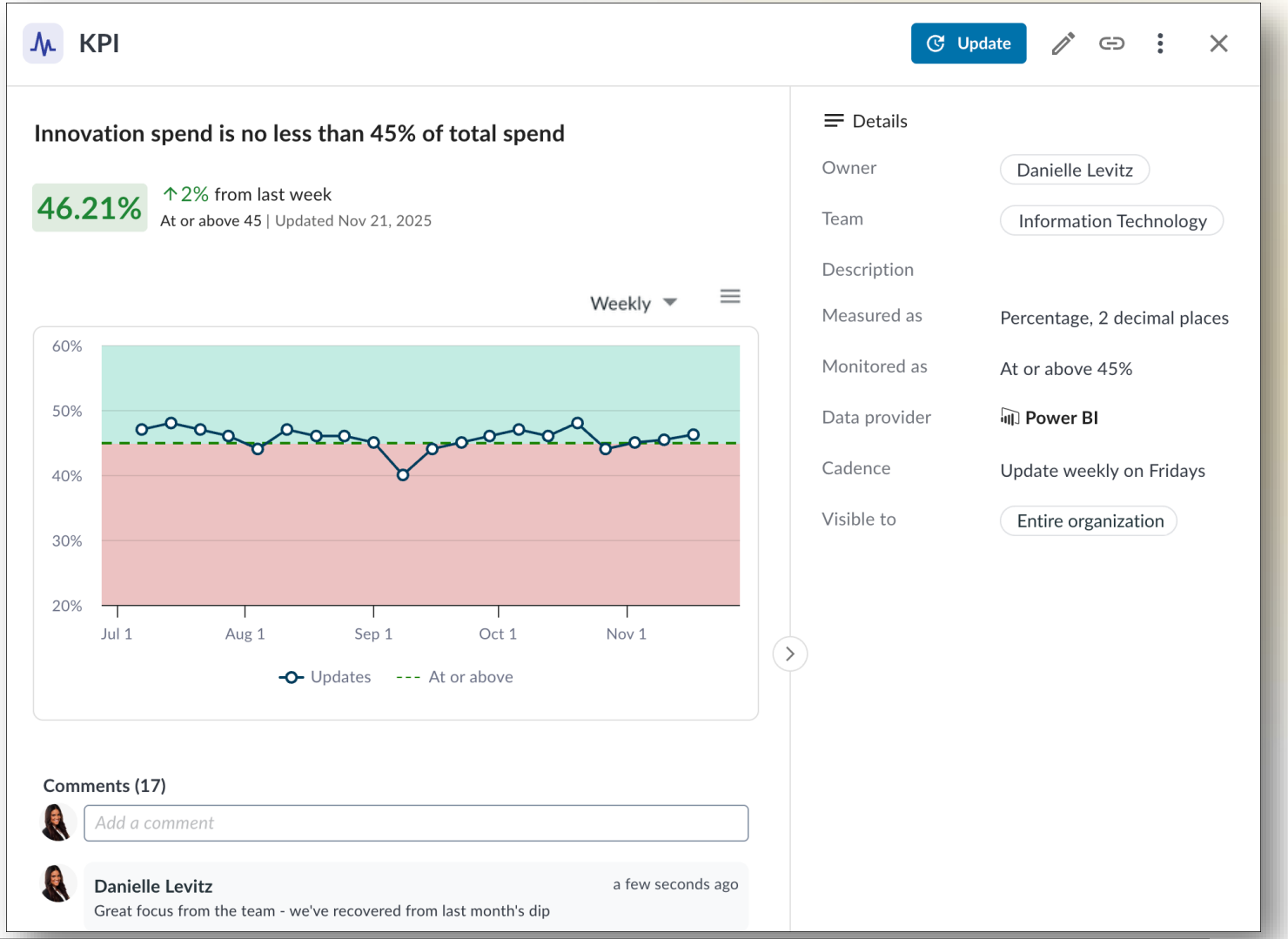
	KPI	OKR
Purpose	➢ Monitoring performance of ongoing processes or business activities	➢ Drive change and improvement toward goals
Timeframe	➢ Continuous	➢ Quarterly / Yearly cycle
When to Use	➢ Tracking performance / metrics	➢ Launching new activities ➢ Aligning strategy and execution

 ©2025 WorkBoard Inc.

Coming next week!

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



WorkBoard AI ©2025 WorkBoard Inc.

Coming next week!

Creating KPIs

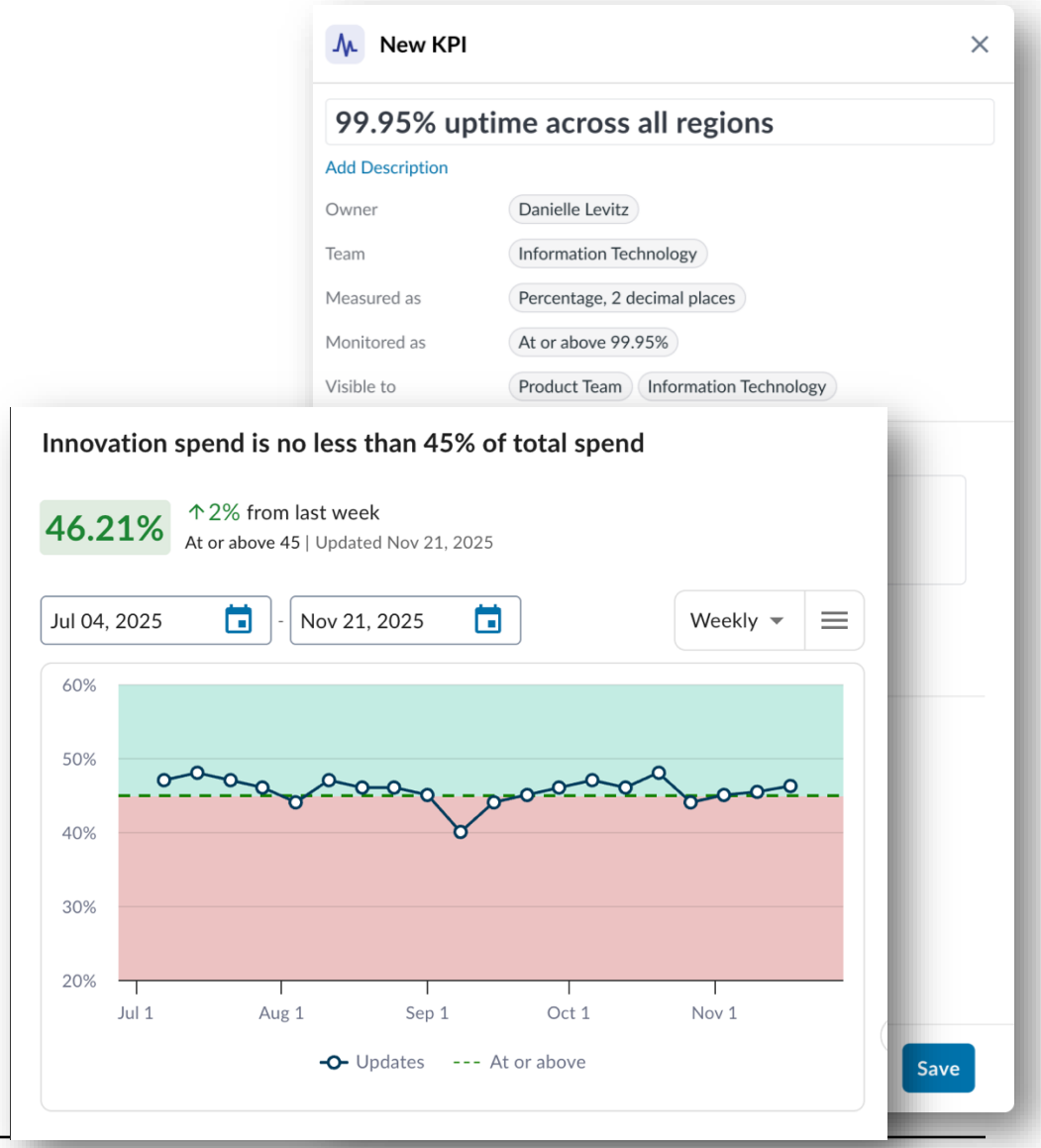
Create KPIs for Teams or Individuals

- 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.



WorkBoard AI ©2025 WorkBoard Inc.

Coming next week!

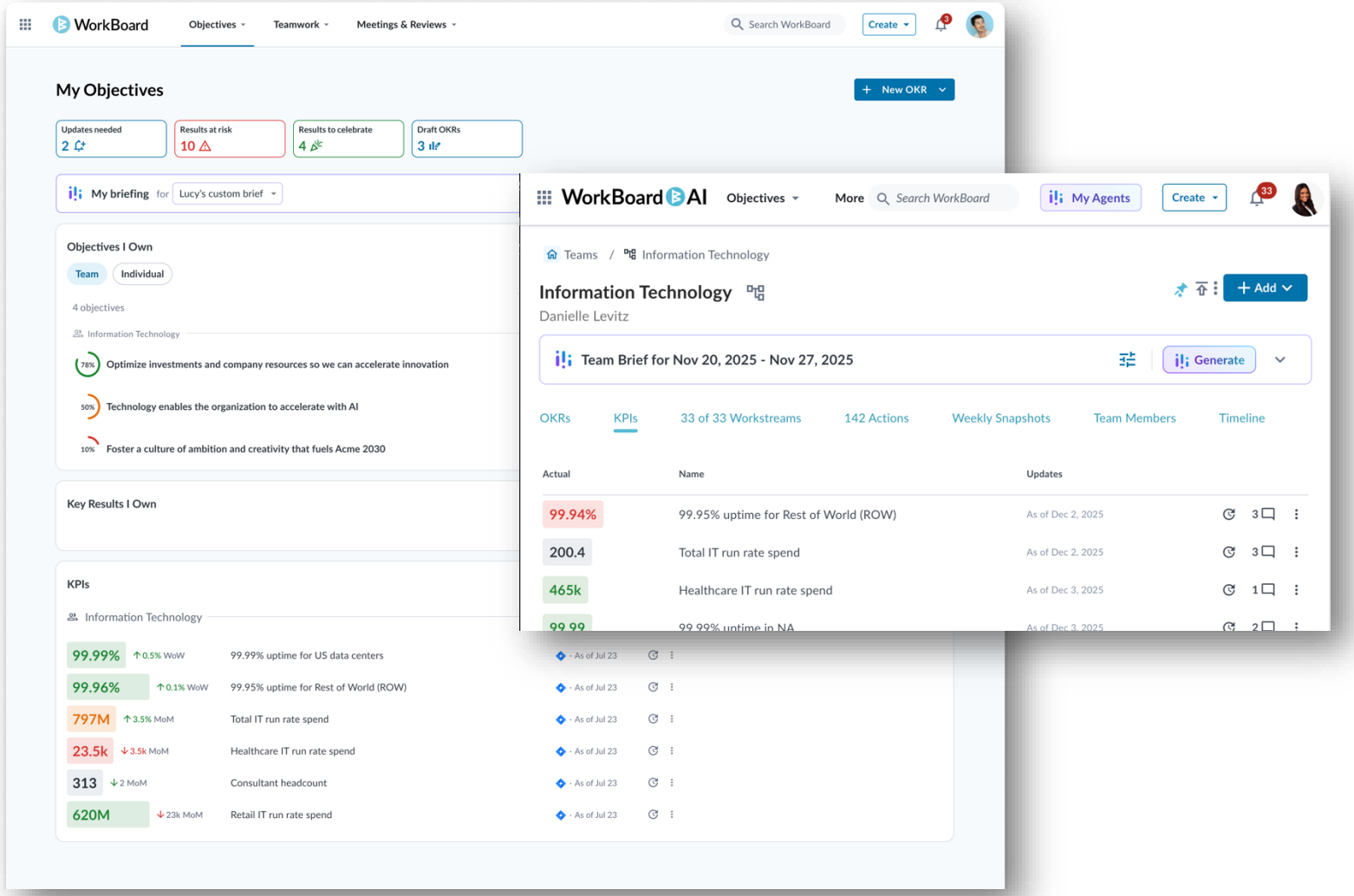
KPIs on the My Objectives and Teams pages

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.



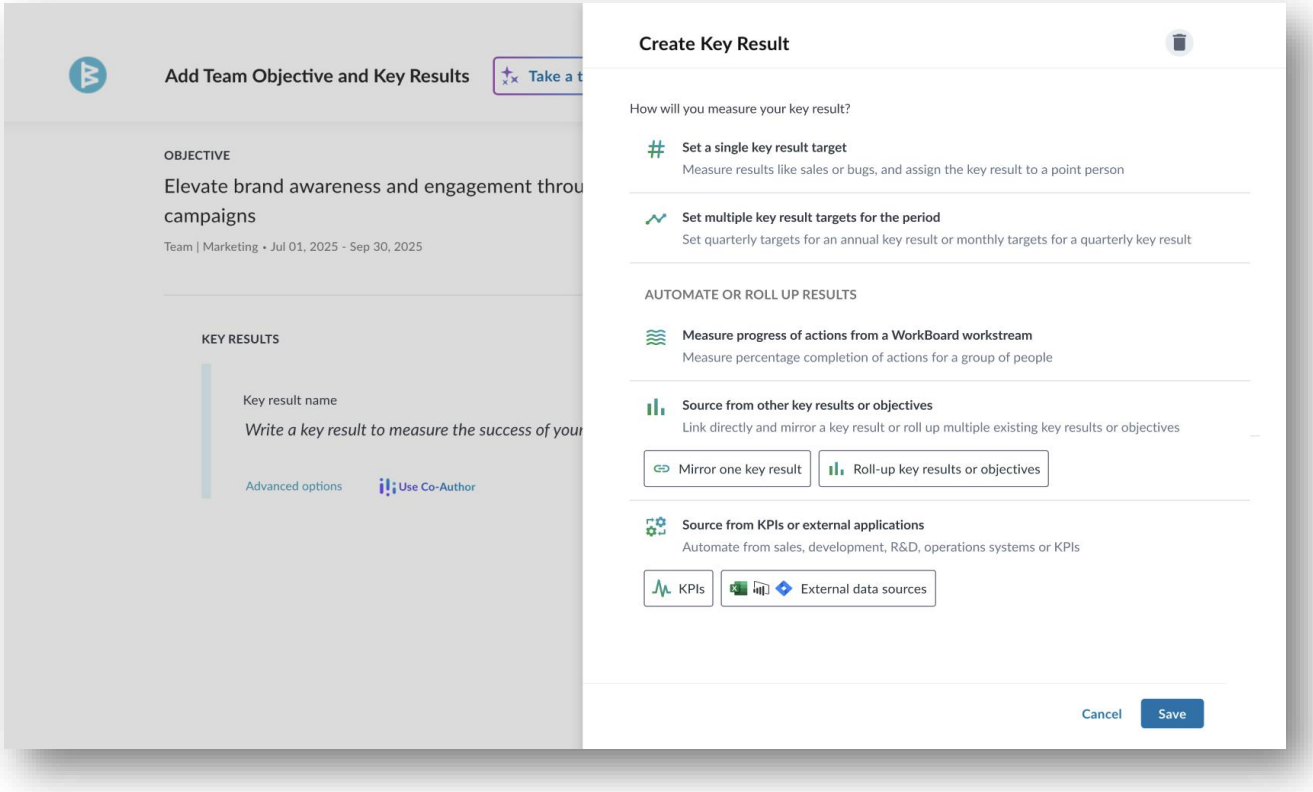
 ©2025 WorkBoard Inc.

Coming next week!

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!

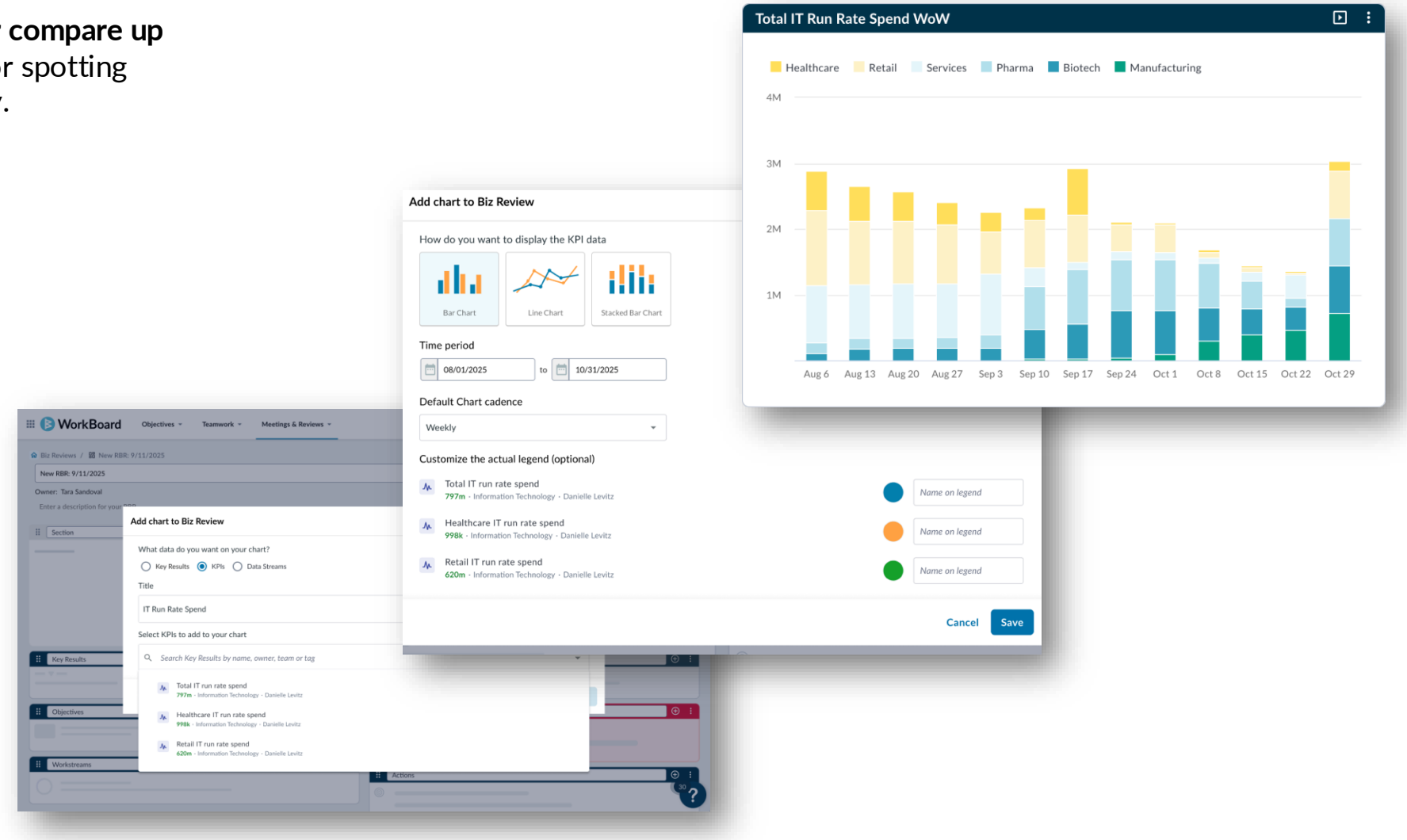


WorkBoard AI ©2025 WorkBoard Inc.

Coming next week!

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.



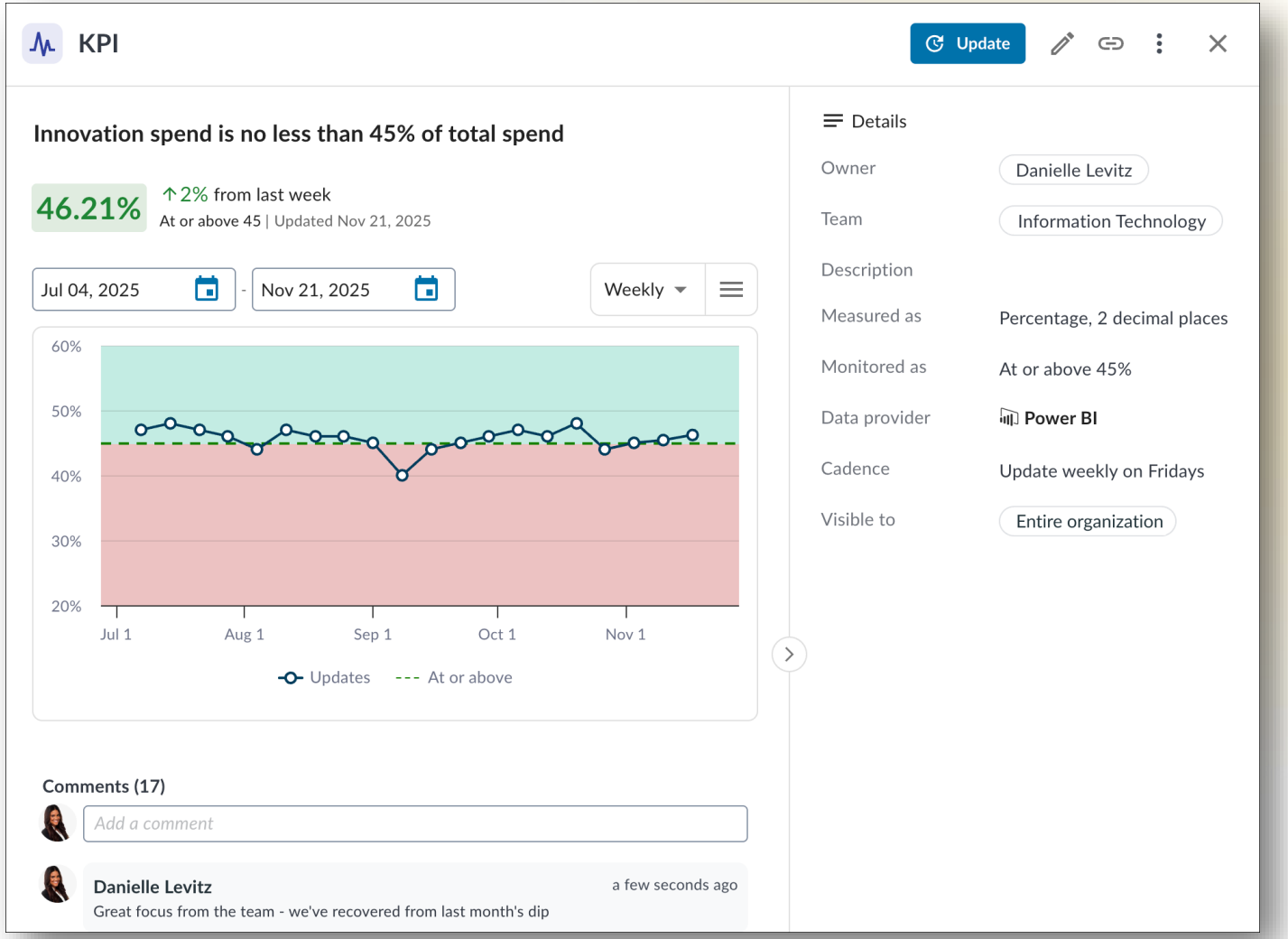
 ©2025 WorkBoard Inc.

Coming later in 2026!

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!



©2025 WorkBoard Inc.

Objectives & Key Results

 ©2025 WorkBoard Inc.

Coming in Dec

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:

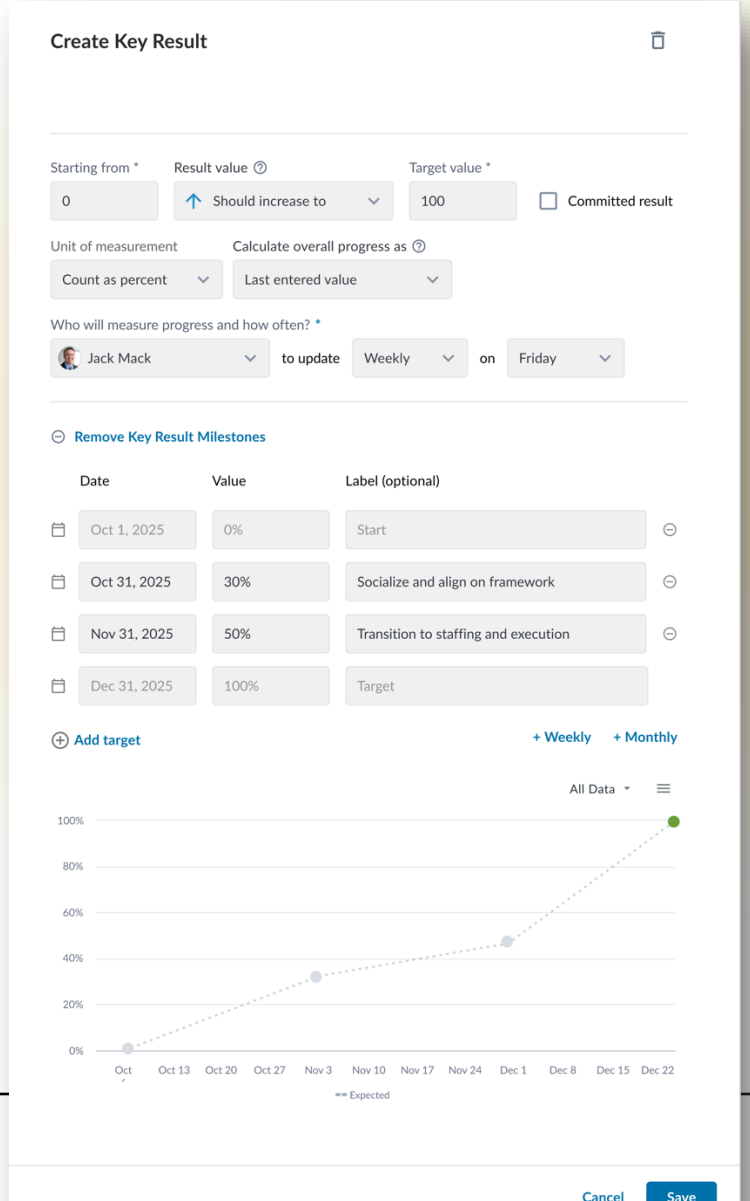
- Key Results that ramp up later in the period (hockey-stick growth, adoption curves, learning curves)
- Front-loaded Key Results that require early de-risking
- Quarter-by-quarter expectations for pipeline, revenue, deployments, or usage

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



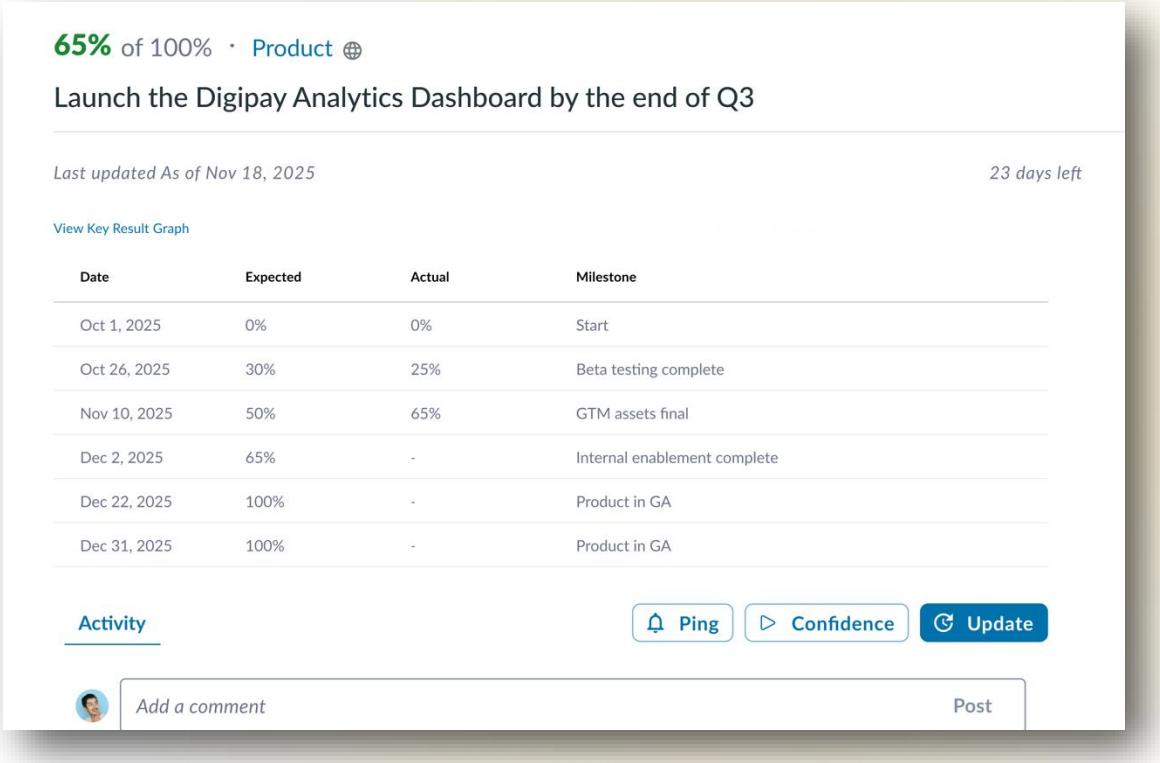
WorkBoard ©2025 WorkBoard Inc.

Coming in Dec

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.

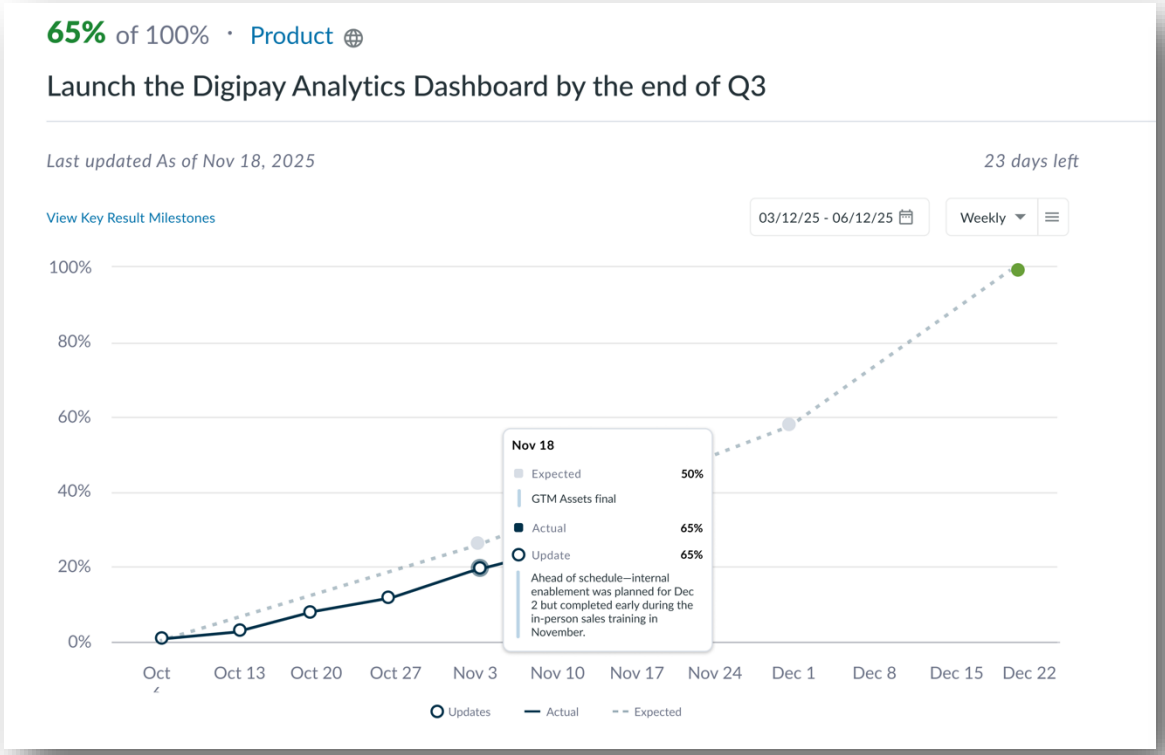


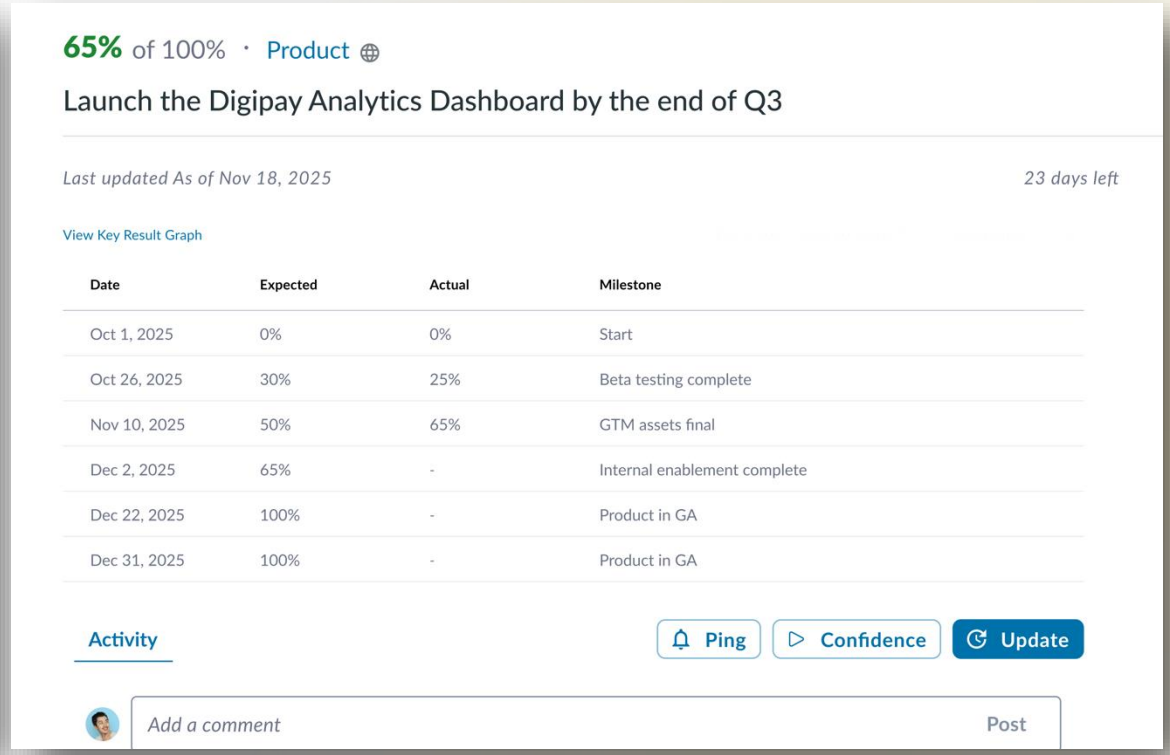
Expert WoBo Tip: *Milestones are a much simpler and lighter weight path to define the expected trajectory than Multiple interval targets*

©2025 WorkBoard Inc.

Coming in Dec

See Key Result Milestones





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

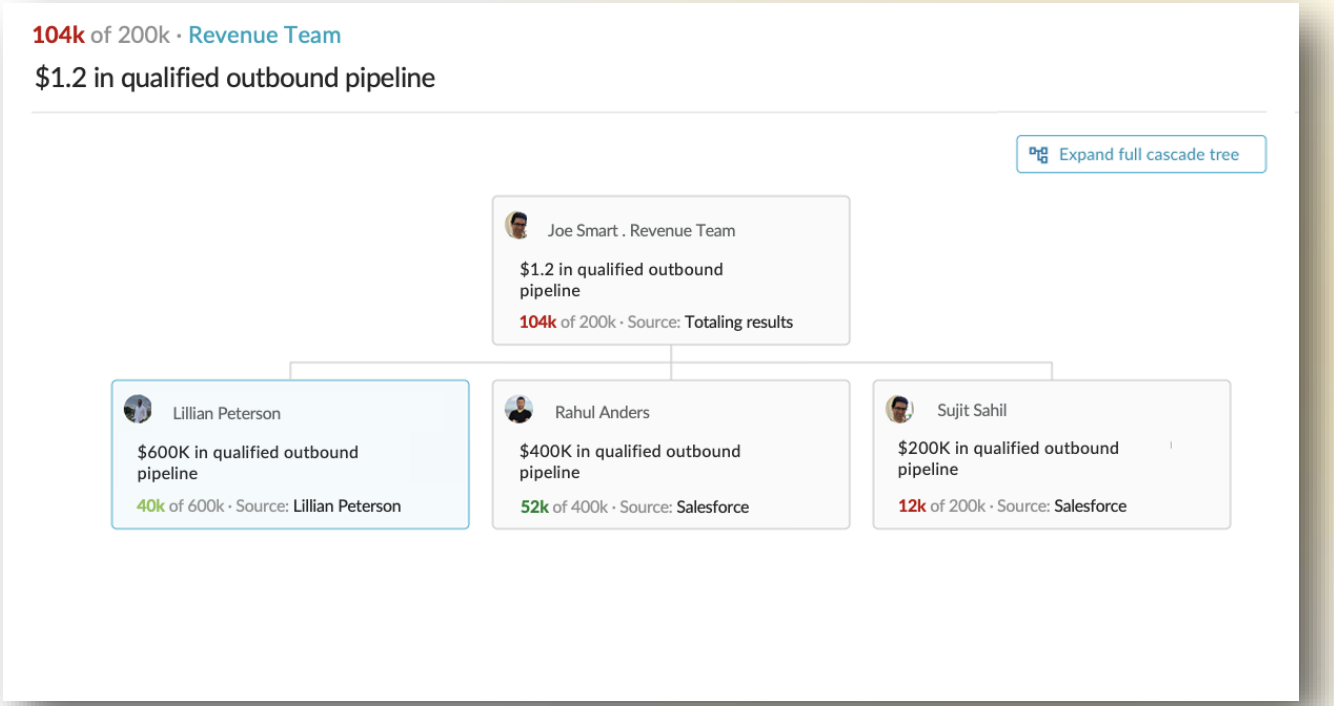
WorkBoard ©2025 WorkBoard Inc.

Coming in Dec

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.

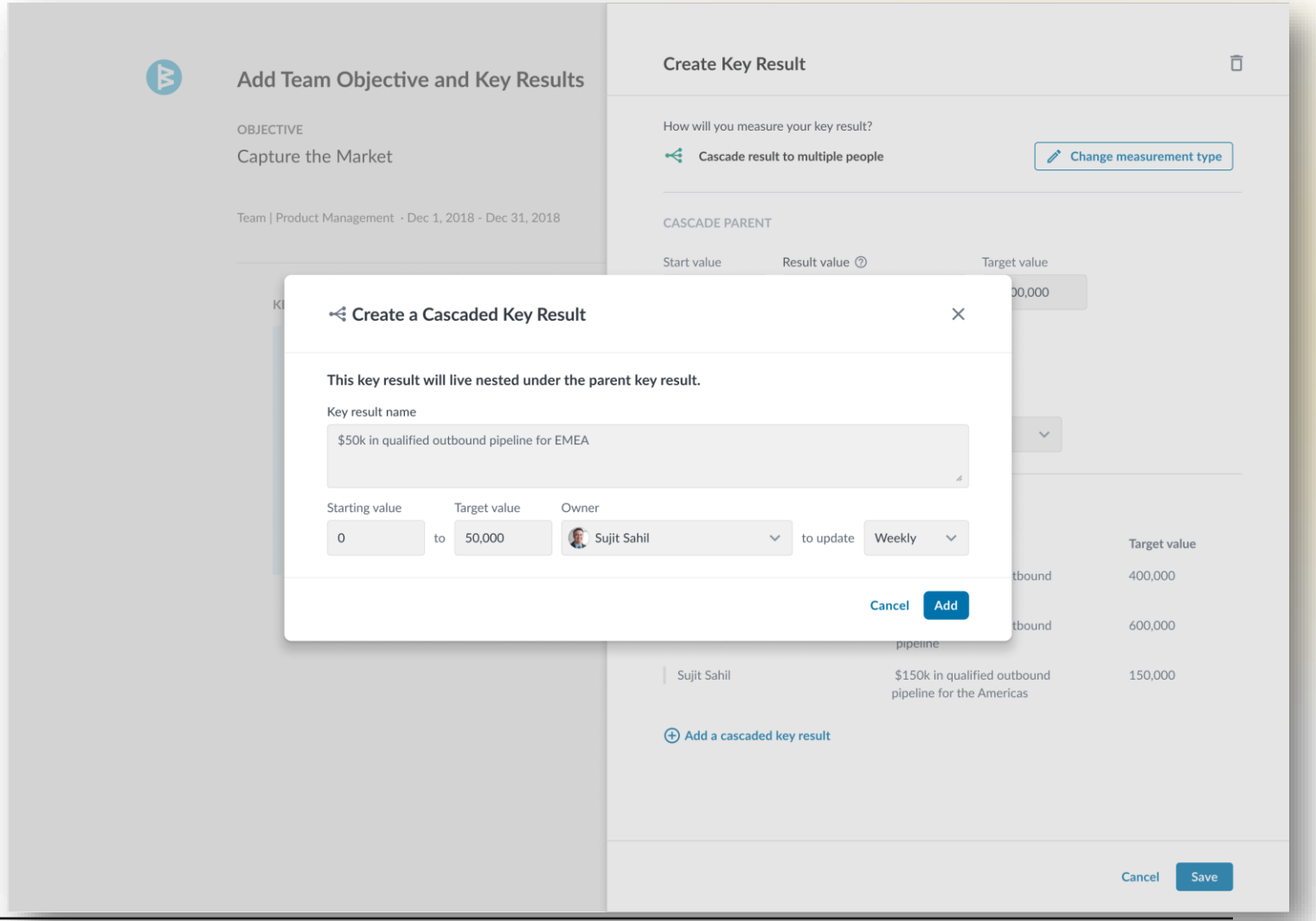


WorkBoard AI ©2025 WorkBoard Inc.

Coming in Dec

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



©2025 WorkBoard Inc.

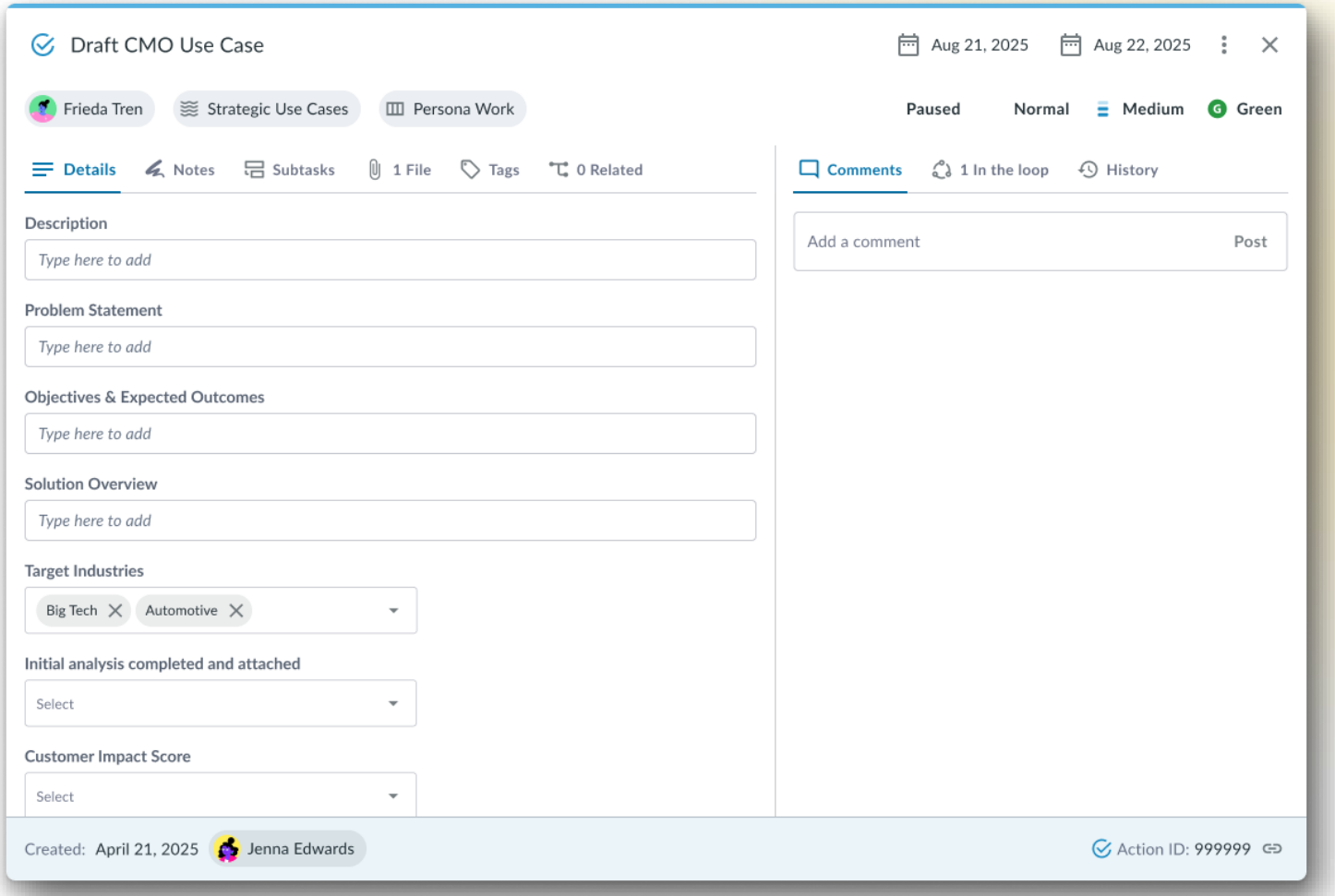
Workstreams

 ©2025 WorkBoard Inc.

Available now!

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



©2025 WorkBoard Inc.

AI Agents

©2025 WorkBoard Inc.

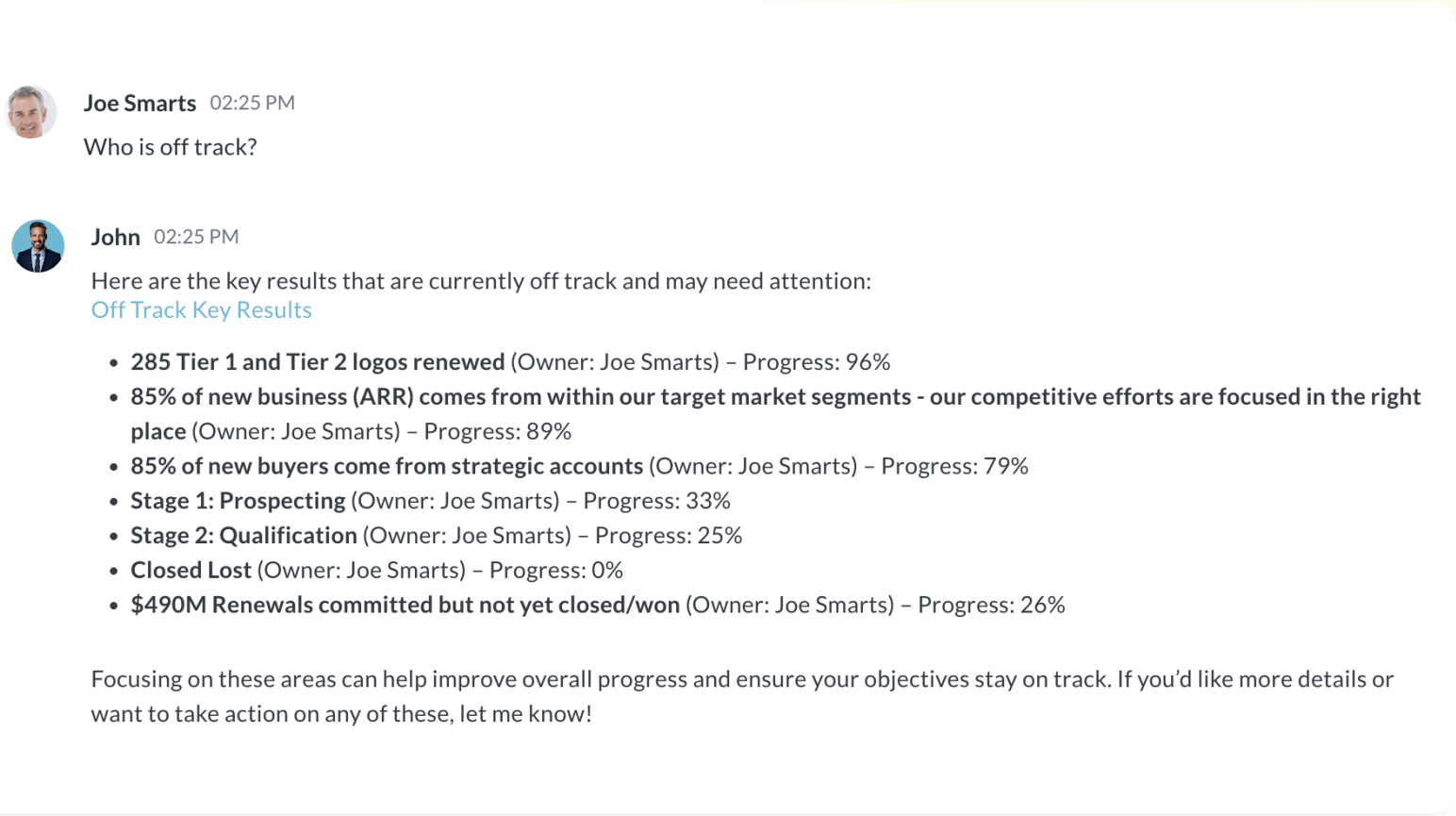
Moving from co-authors to co-workers

©2025 WorkBoard Inc.

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



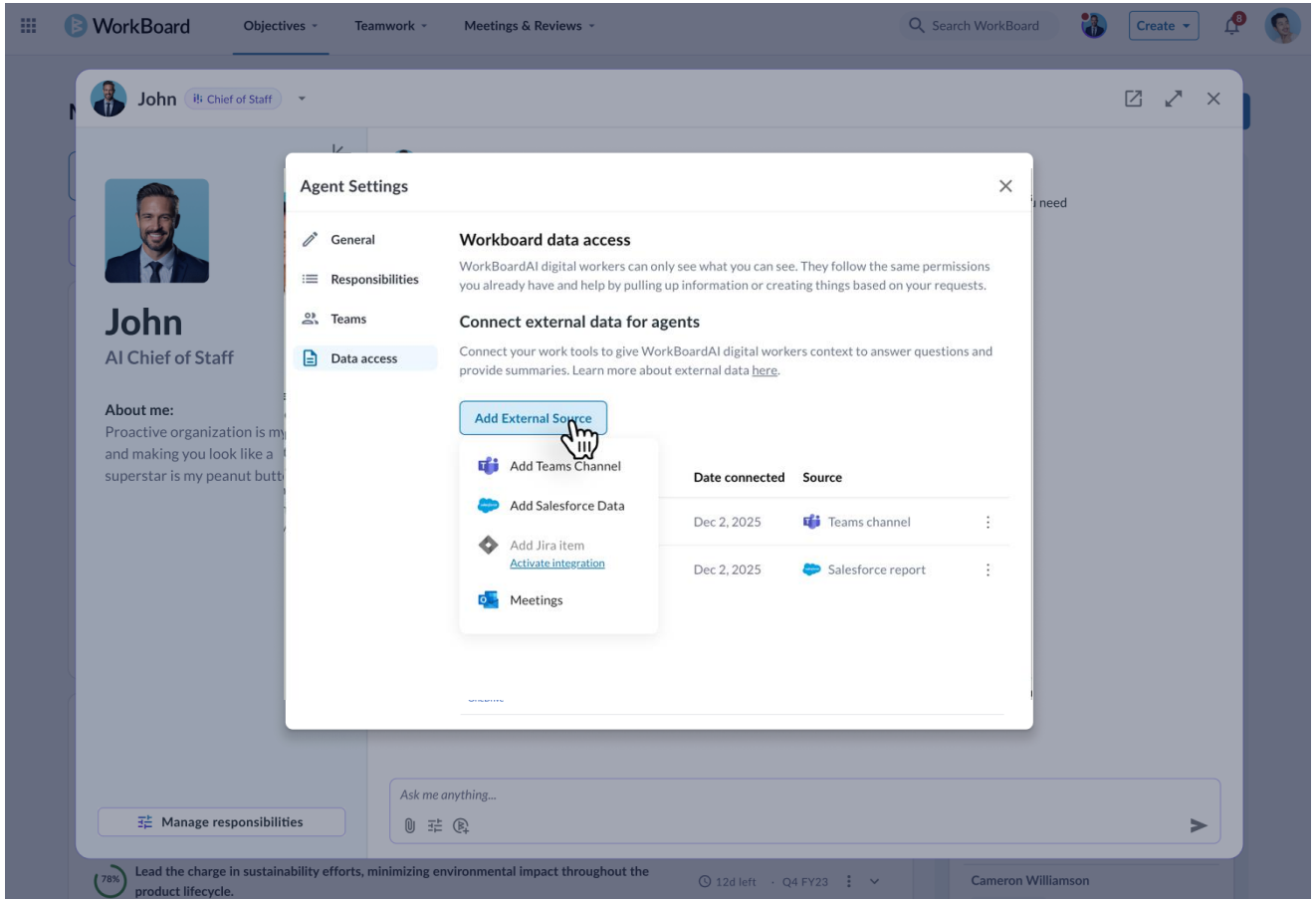
 ©2025 WorkBoard Inc.

Available now!

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 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



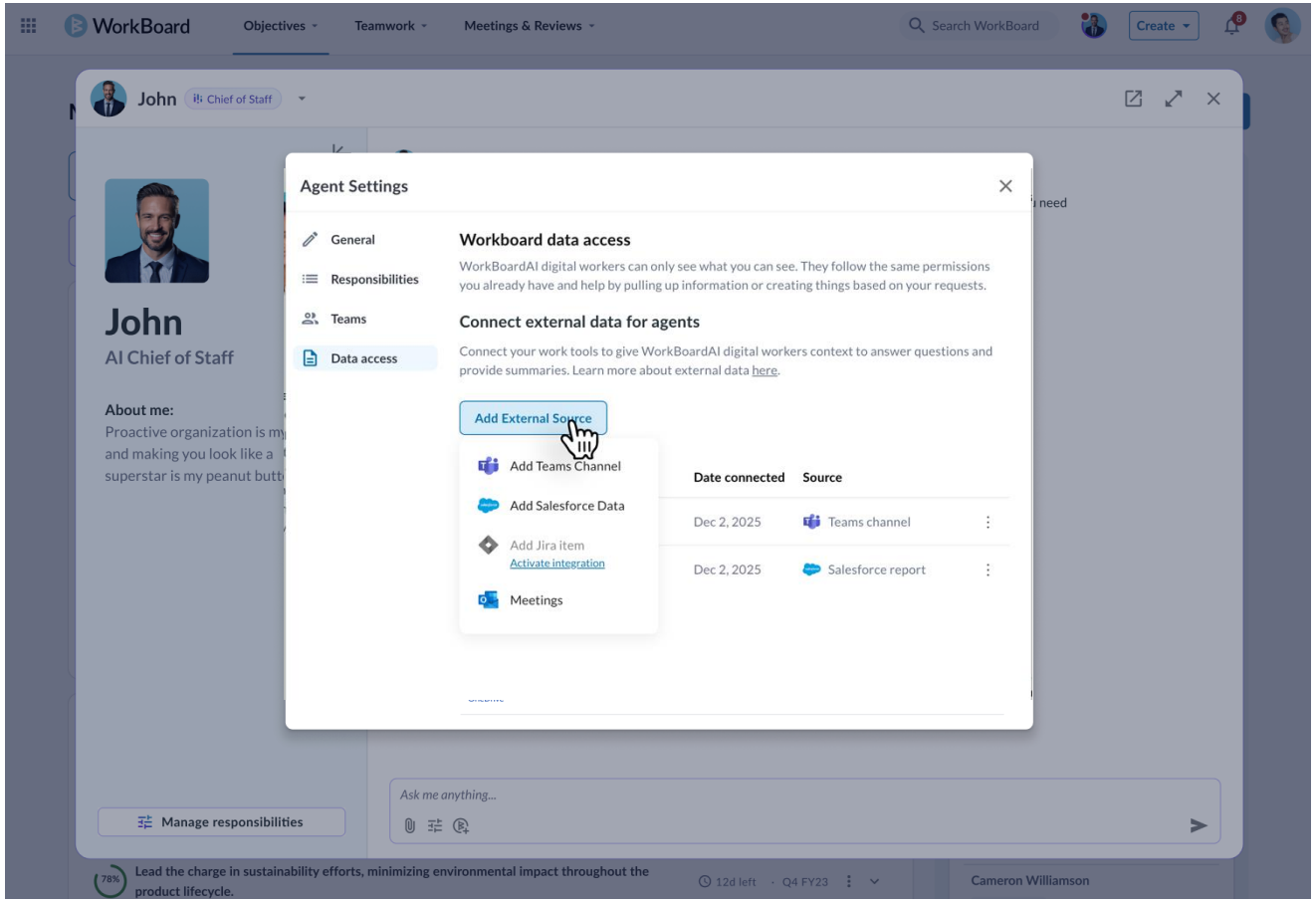
Coming early next year

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?”

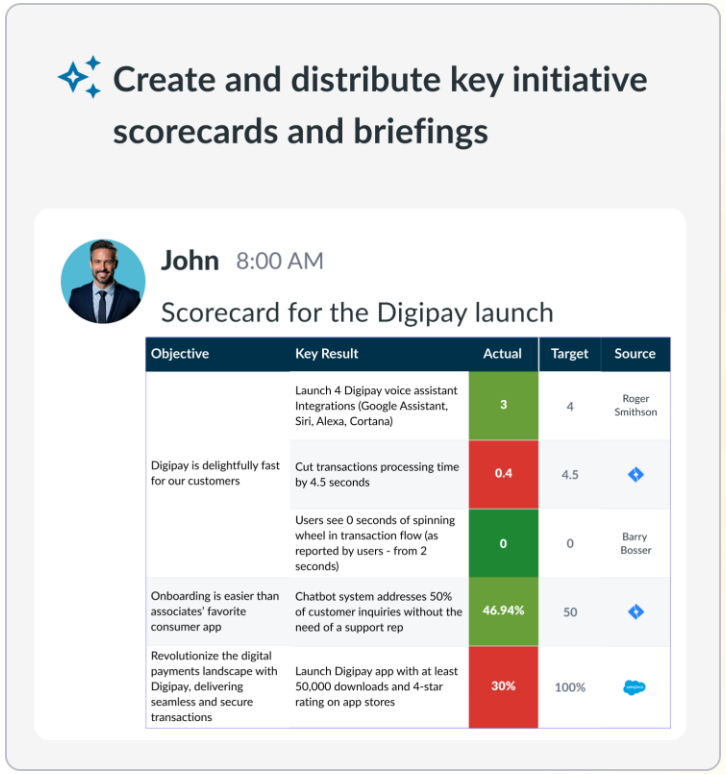
Azure DevOps: Get status and risks with comments from Epics and Projects in agent conversations, 1on1 meetings, action items, pre-reads.

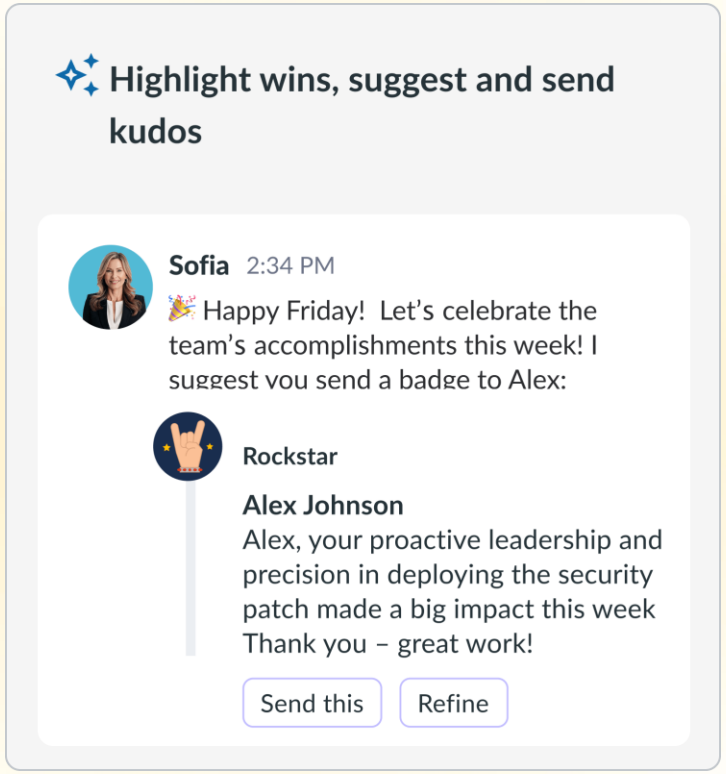


Available now!

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!



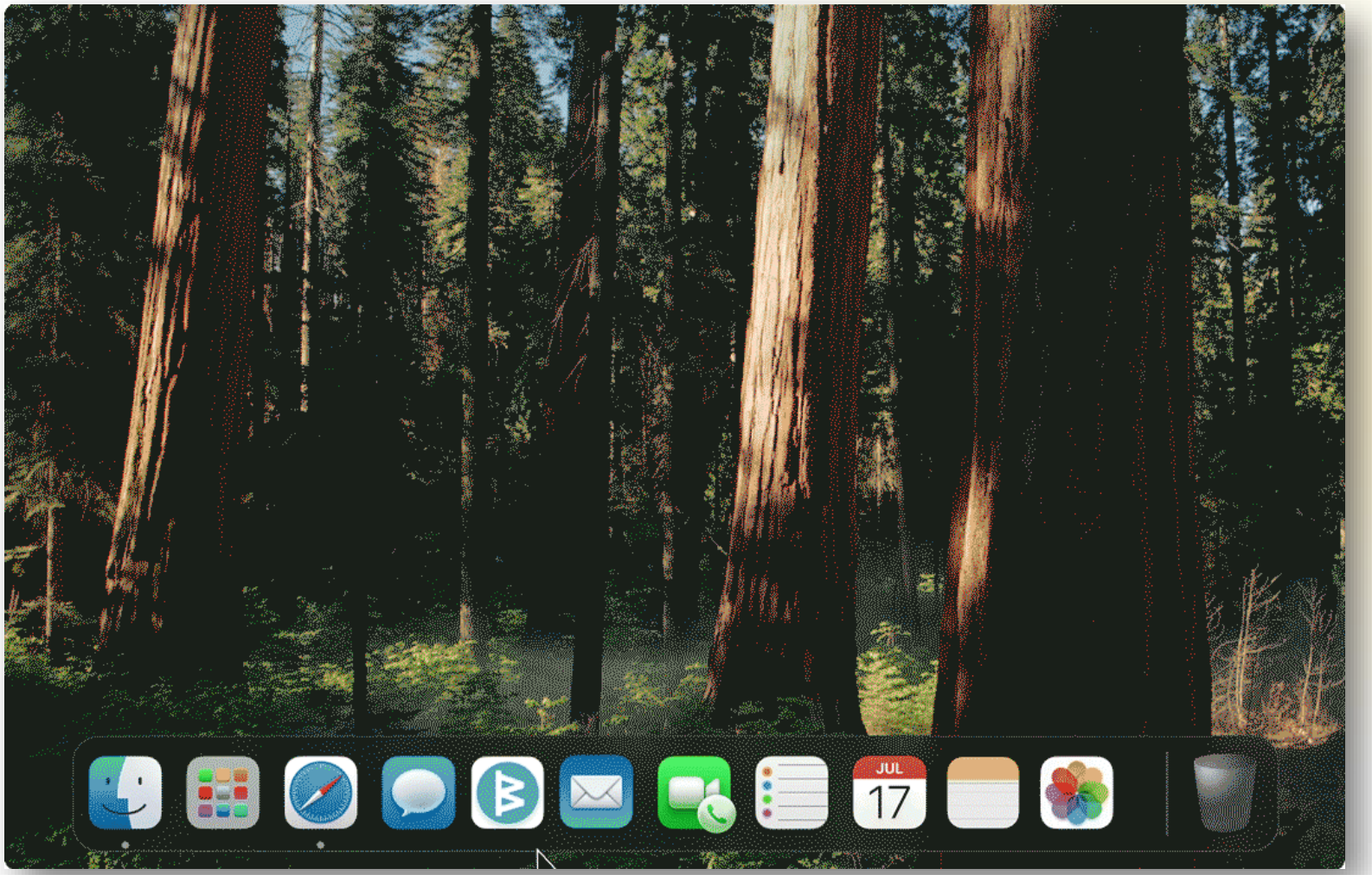


©2025 WorkBoard Inc.

Coming in 2026

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!



WorkBoard AI ©2025 WorkBoard Inc.

Join the Conversation!

 ©2025 WorkBoard Inc.

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!

WorkBoard AI ©2025 WorkBoard Inc.

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.

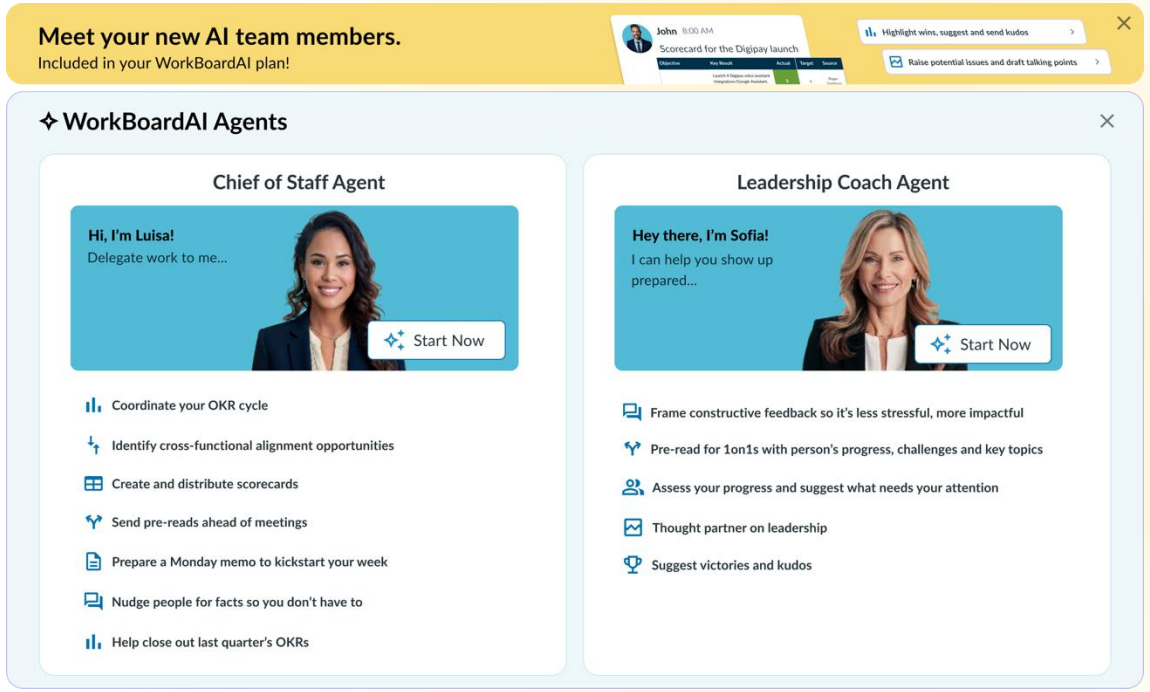
You'll walk away with **practical use cases** you can apply right away to your team(s) — saving hours each week on admin work, meeting prep, and follow-ups.

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/**



WorkBoard AI ©2025 WorkBoard Inc.

What are You Curious About?

 ©2025 WorkBoard Inc.

Thank you!

WorkBoard

©2025 WorkBoard Inc.