



# May Community Call

May 2022



# Agenda

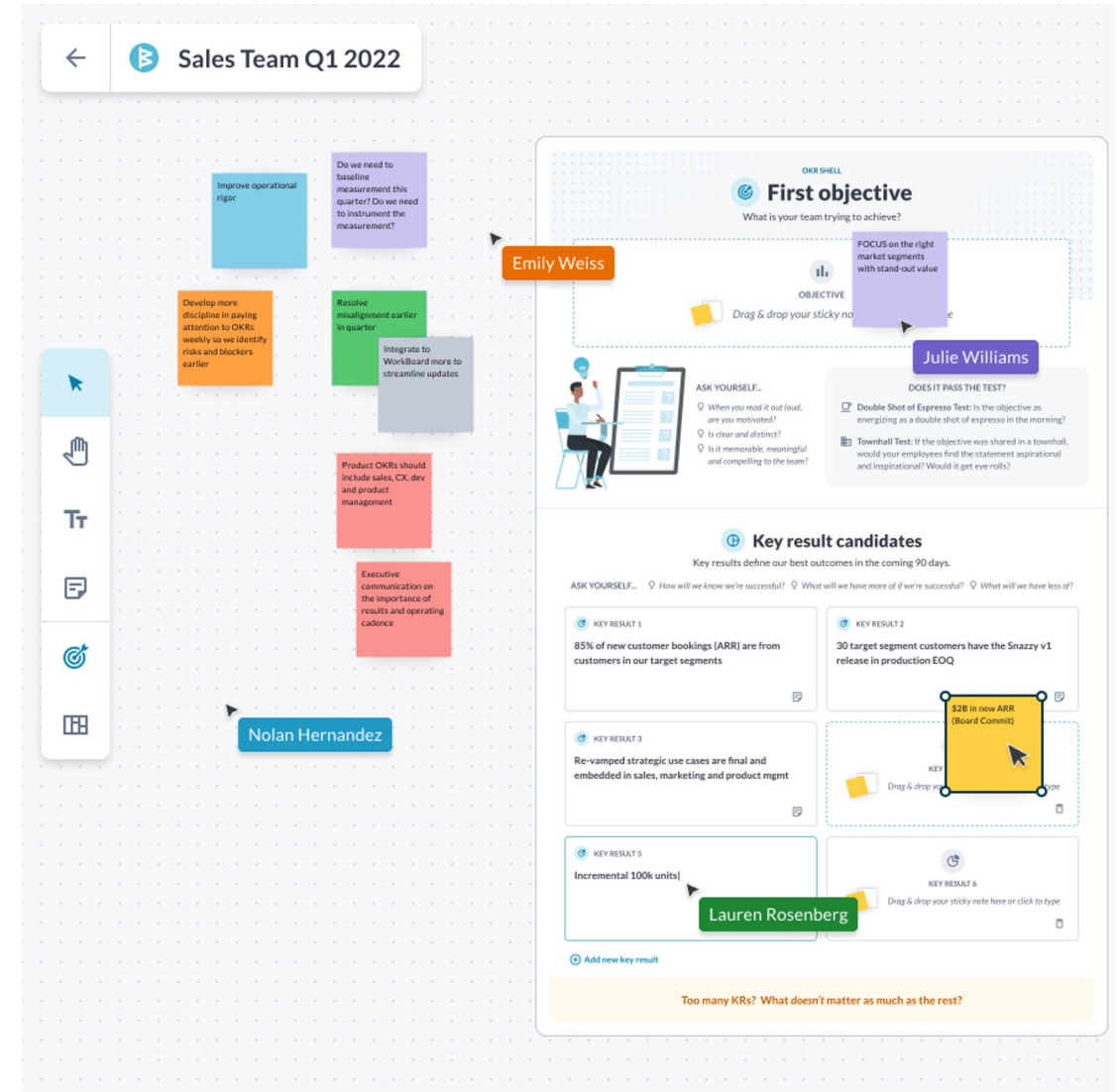
- OKR Canvas & recent enhancements
- New integrations to automate your Key Results
- Biz Review enhancements
- Sneak peek: New Biz Review Landing page & Collections

# OKR Canvas

# Recently launched

WorkBoard's OKR Canvas is an enriched whiteboard that helps teams set and align higher quality OKRs faster

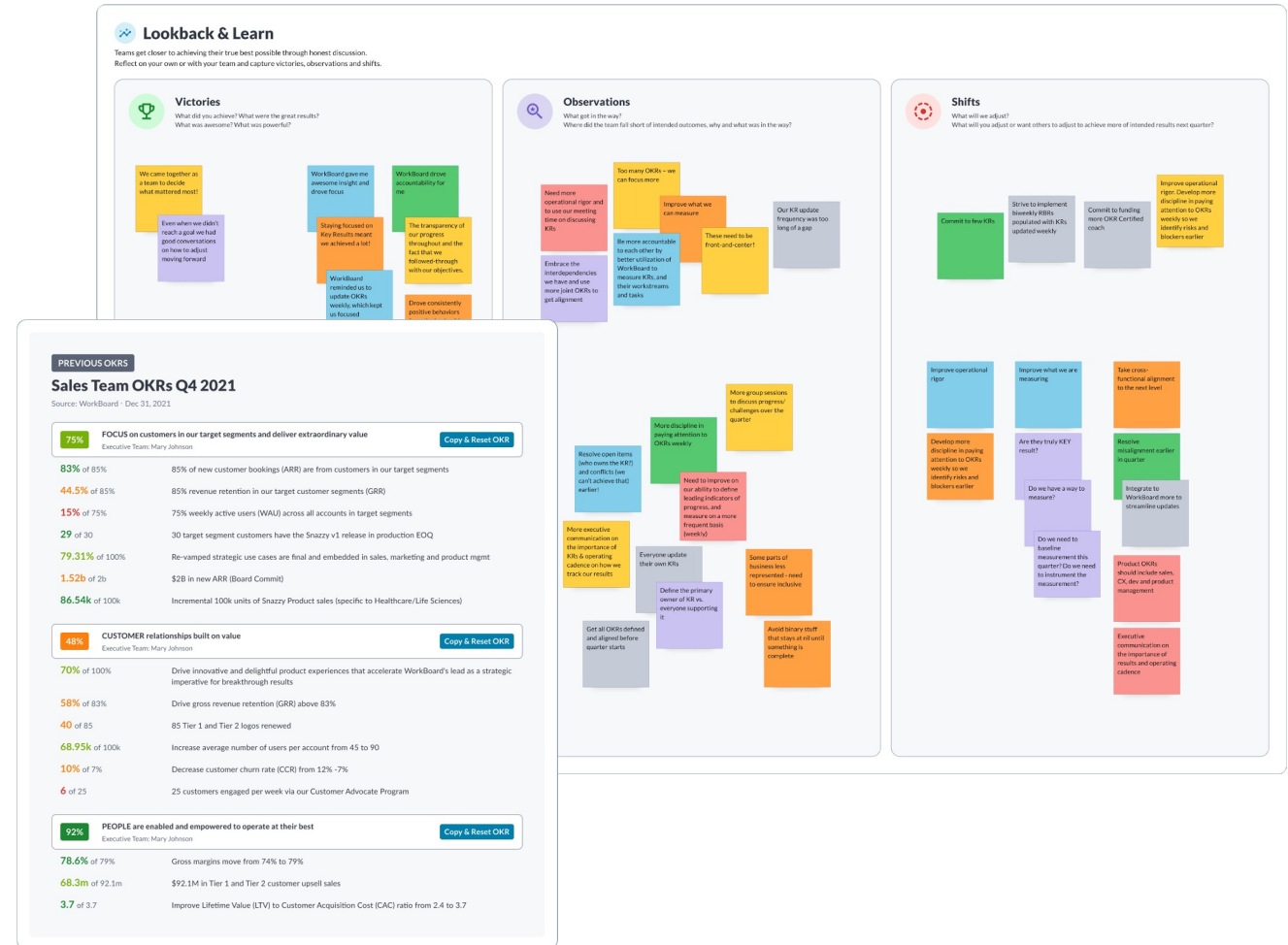
- **Canvas makes OKR brainstorming easy**, collaborative, and inclusive
- **Built in coaching improves the conversation**
- **Seamless publishing from the Canvas**, no manual transcription



# Recently launched

**Notes from retros are important signals** for team as they reflect and and plan for smarter OKRs each cycle

- Celebrate team victories and identify what went well that should be continued
- Observe what got in the way and what prevented the team from achieving intended outcomes
- Plan what to adjust moving forward
- Reference Previous OKRs to easily track last quarter's performance



# New! Pull in OKRs from any team and time period

The screenshot displays the WorkBoard interface for the 'Sales Team Q4 FY22'. The main workspace is a grid. On the left, there's a sidebar with icons for navigation. A modal titled 'Pull in OKRs' is open, showing a search bar and a list of OKRs to import. The modal includes a 'Cancel' button and a 'Pull in OKRs' button. The background shows a grid with a header bar containing a back arrow, the team name 'Sales Team Q4 FY22', and buttons for 'Invite' and 'Publish OKRs'.

**Import OKRs**

Your team's previous OKRs  
Pull in your team's OKRs from the previous quarter.

Upline manager's OKRs  
Pull in your manager's OKRs from the current quarter.

Not what you are looking for? [Search for other OKRs.](#)

**Pull in OKRs**

Search for OKRs  
Search for OKR by name, owner, team, or tag

☐ Include closed OKRs

- ☐ 34% When our customers win, we win -- stay hungry and refuse to lose  
Team name - Owner name - Jan 30, 2023  
5k of 10k Lorem ipsum dolor sit amet, consectetur adipiscing elit.  
Owner name
- ☐ 100.55m of 200m Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.  
Owner name
- ☐ 13.24% of 100% Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in.  
Owner name
- ☐ 34% Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sapien, sed varius ligula id at. Ultrices eu elementum facilisis molestie tortor iaculis.  
Team name - Owner name - Jan 30, 2023
- ☐ 34% Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nec conseq  
Team name - Owner name - Jan 30, 2023

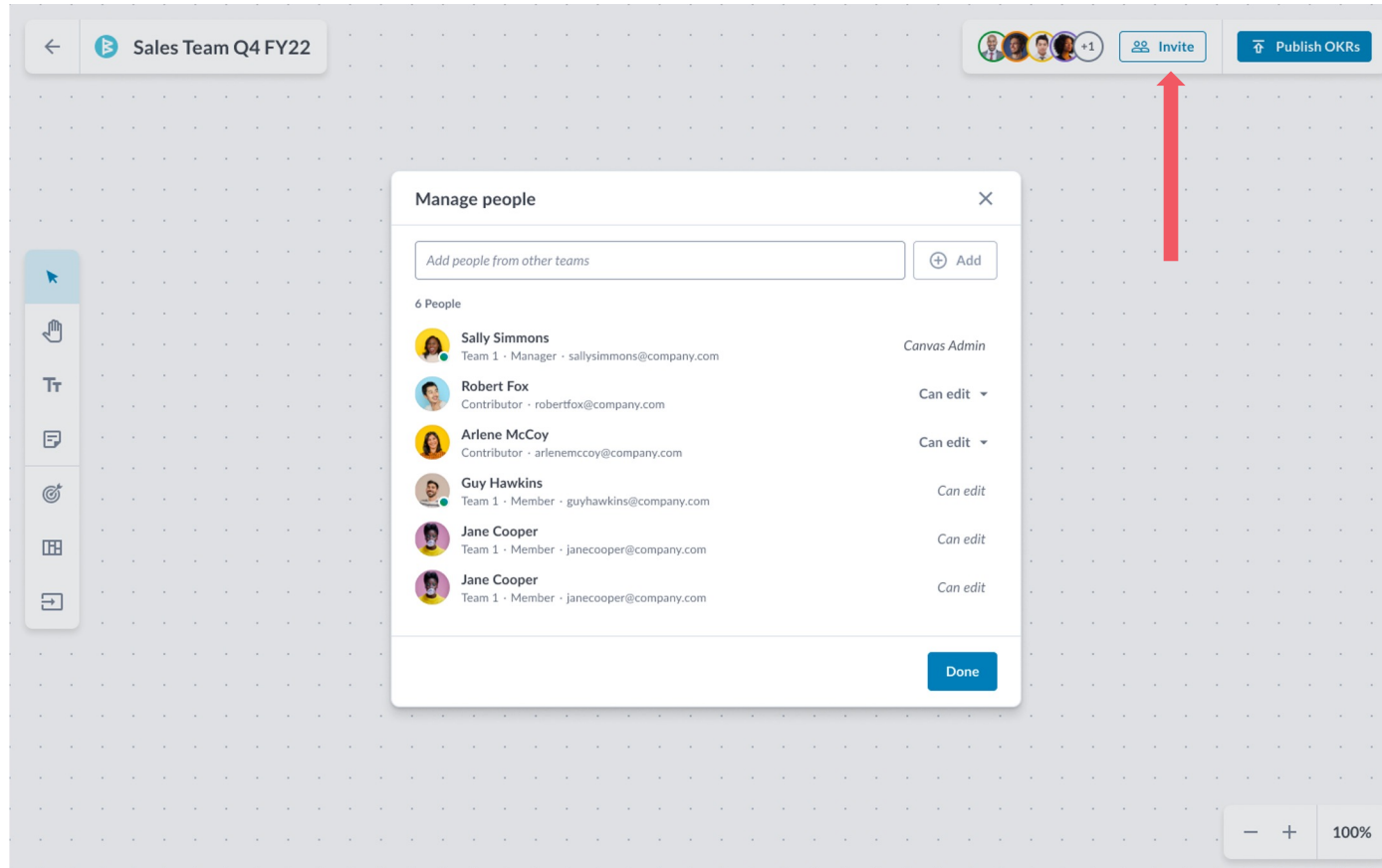
Cancel Pull in OKRs

Simplify lateral alignment by importing cross-functional team OKRs

Search by Team, KR tag, or KR



# New! Add contributors from outside your team



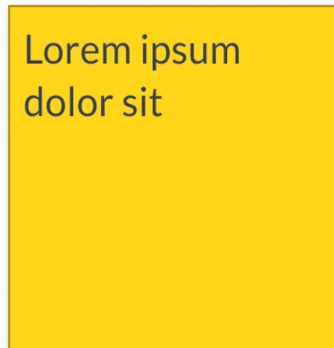
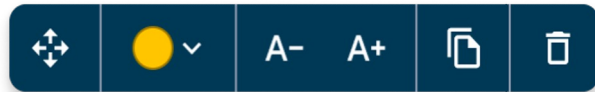
Invite members of other teams for cross-functional collaboration

- Select “Invite” at the top right and search for one or multiple people to add
- All added contributors are given edit access
- Managers & co-managers are able to invite new members and teams

*Note: Default team setup is based on WorkBoard team structure*

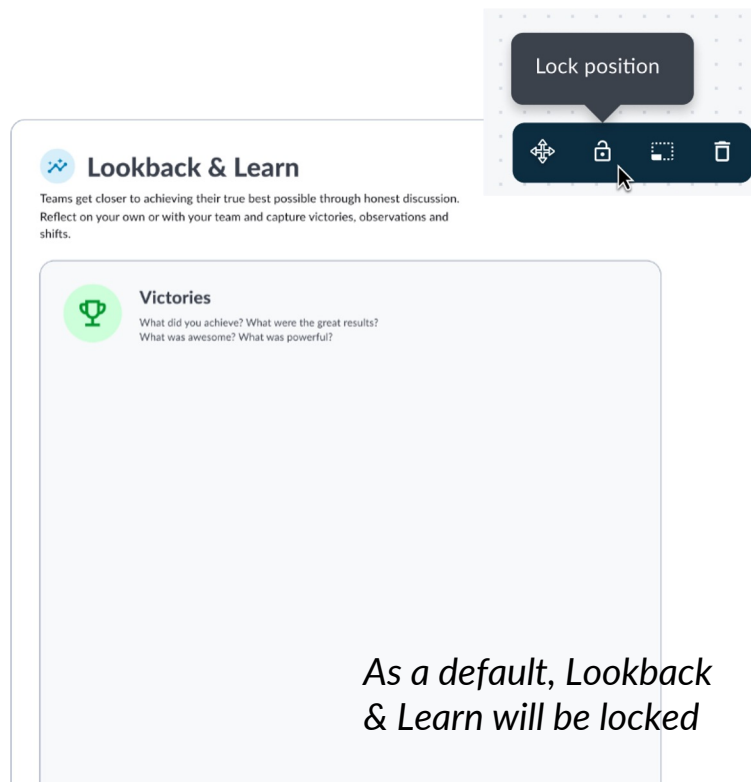
# Even more OKR Canvas upgrades!

## Copy sticky notes



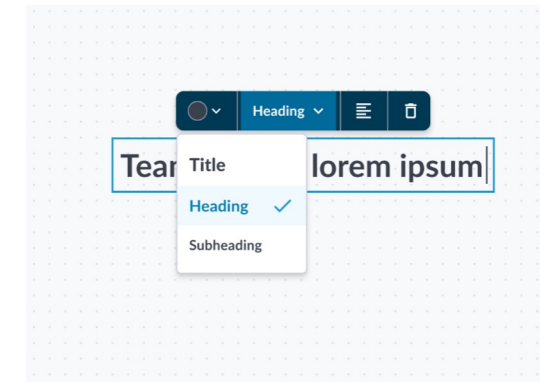
*Shortcut: Ctrl C & Ctrl V*

## Lock object positions



*As a default, Lookback & Learn will be locked*

## Add text headers



*Select preferred color, size and alignment*



# New Integrations to automate Key Results

# Automate Key Result updates with new Data Connectors

## Project Management

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## Datasets & Analytics

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# Biz Reviews

# Sneak Peek!

## Biz Review Landing Page & Collections

# Biz Review Landing Page: A more seamless navigation experience

**Biz Reviews**

+ New Collection + New Biz Review

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▼ Favorites

April 2022 MBR  
You edited in the past week

Active Pipeline by Account  
You edited in the past week

Q4 QBR Planning\_2021  
You edited in the past week

Activations leading indicators  
You edited in the past week

Competitive Intelligence 2022  
You edited in the past week

All Recents Favorites

Search by name or owner Filters

4 Collections, 234 Biz Reviews

Name	Modified	Owner	Access	Actions
Activations Q4	Mar 3, 2022	You	Viewer	
April 2022 MBR		Jenny Bierman	Owner	
Q4 QBR Planning_2021	Dec 25, 2021	Shawn Simpson	Editor	
Q4 Sales_Blitz results and running review	Nov 25, 2021	Kait Smith	Viewer	
Customer Success MBR - April 2022	Apr 9, 2022	Lilly Simmons	Editor	
Business Development MBR - April 2022	Apr 3, 2022	Robert Fox	Editor	
Sales MBR - April 2022	Apr 1, 2022	Justin March	Editor	
BizOps Recruiting Review	Feb 28, 2022	You	Owner	




## Easily curate your list of go-to Biz Reviews


- Pin your favorites directly from your Landing Page list
- Quickly archive older Biz Reviews

## Improved findability

- Search by Biz Review name or owner
- Click on any header to sort alphabetically
- Filter by Active vs. Archived, Collections vs. Biz Reviews


# Take actions on your Biz Review without clicking into it


	Activations Q4	Nov 25, 2021	Nov 25, 2021	Kait Smith	Viewer	
	Customer Success QoQ Business Review	Jan 19, 2022	Jan 19, 2022	Lilly Simmons	Owner	   
	Alignment Analytics	Jan 29, 2022	Jan 29, 2022	Robert Fox	Ed	
	Product and Engineering Alignment RBR 2022	Feb 23, 2022	Feb 23, 2022	Justin March	Vi	
	BizOps Recruiting Review	Feb 28, 2022	Feb 28, 2022	You	Ov	
	Customer Implementations	Jan 3, 2022	Jan 3, 2022	Kait Smith	Ed	
	App Services Onboarding Playbook	Jan 1, 2022	Jan 1, 2022	Robert Fox	Viewer	
	Project Skywalker 2022 Q1 Review	Dec 25, 2021	Dec 25, 2021	Jenny Bierman	Owner	

 Present

 Copy Link

 Add to Collection

 Add to Favorites

 Archive

# Group related Biz Reviews with Collections

The screenshot displays the WorkBoard interface. At the top, a dark blue navigation bar contains the WorkBoard logo and several icons for different views: Biz Review, My Work, Workstreams, Objectives, Meetings, and Teams. Below this, a breadcrumb trail shows 'Biz Reviews'. The main heading is 'Q4-21 Quarterly Business Review (QBR)'. To the right of the heading are icons for pinning, a menu, and a share button, along with a '+ New Biz Review' button. Below the heading, it says '4 Biz Reviews'. A table lists these reviews with columns for Play Order, Name, Modified, Owner, Sharing, and Actions.

Play Order	Name	Modified	Owner	Sharing	Actions
1	Sales Q4-21 QBR	Dec 29, 2021	Lilly Simmons	Owner	⋮
3	Marketing Q4-21 QBR	Dec 29, 2021	Robert Fox	Editor	⋮
2	Product and Engineering Q4-21 QBR	Dec 29, 2021	Justin March	Viewer	⋮
-	Q3-21 Quarterly Business Review (QBR)	Sept 15, 2021	Robert Fox	Owner	⋮

Curate a set of Biz Reviews for important meetings (MBR, QBR, board meeting)

- Share with one link to all stakeholders
- Seamlessly transition between Biz Reviews in a Collection during a presentation
- Archive an MBR Collection at the end of the month and easily revisit