



WorkBoard Community Call

August 2022



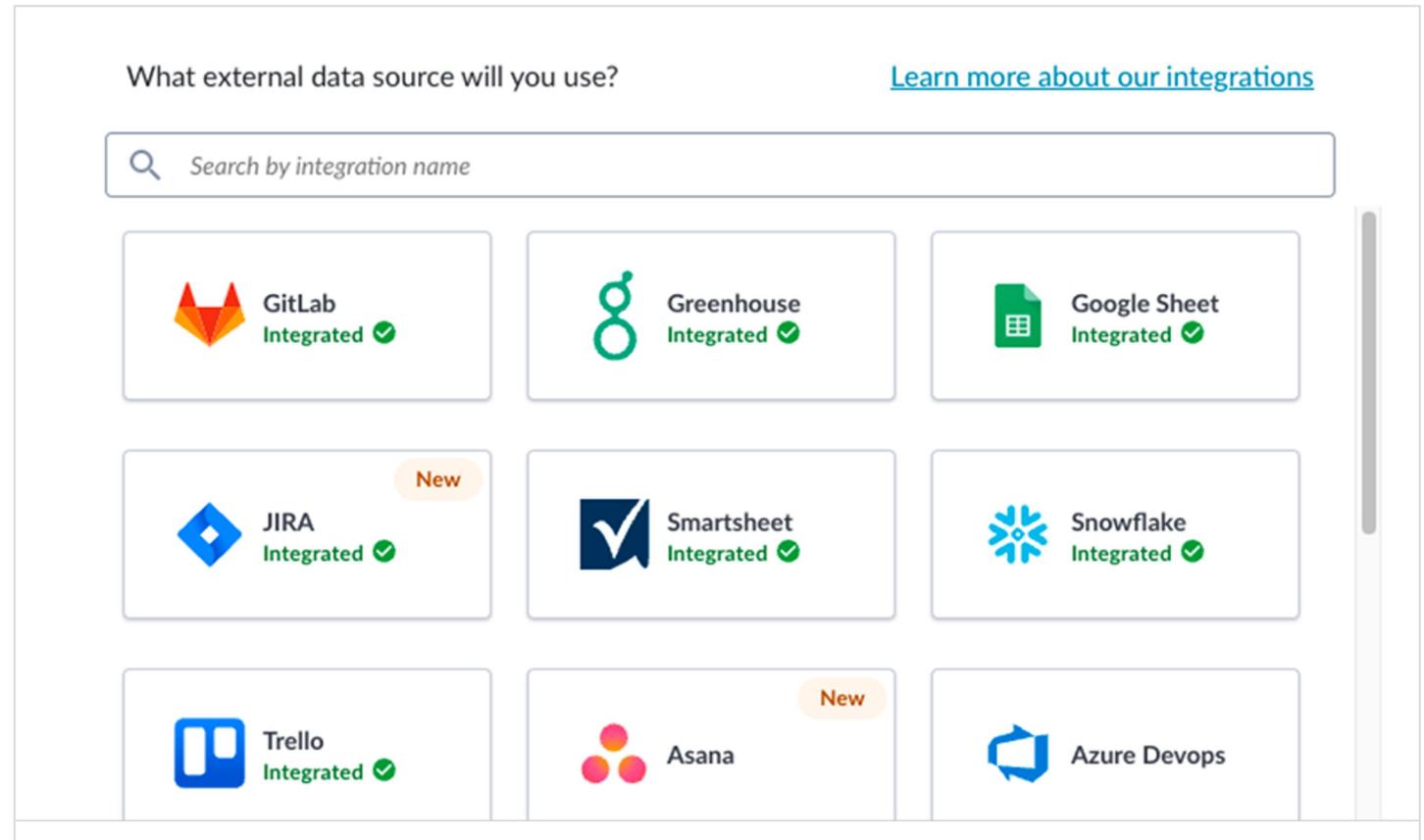
Agenda

- Key Result Automation
- Weekly Rituals
- Objective and Key Result Enhancements
- Team Experience Changes
- Alignment Analytics
- On the horizon with Biz Reviews

Key Result Automation

Enterprise grade enhancements across key result integrations

1. Robust use cases
2. Simplicity
3. Authentication



Leveraging self-serve connectors

Key result name
85 Tier 1 and Tier 2 logos renewed

press enter when finished
Advanced options

Create 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
 - Mirror one key result
 - Roll-up key results or objectives
- Pull data from external applications**
Integrate with sales, customer growth, retention, R&D, operations, or other KPIs

COLLECT DATA FROM MULTIPLE PEOPLE

- Survey a group of people**
Run a group survey to get multiple sources of data

Cancel Save

Select integration

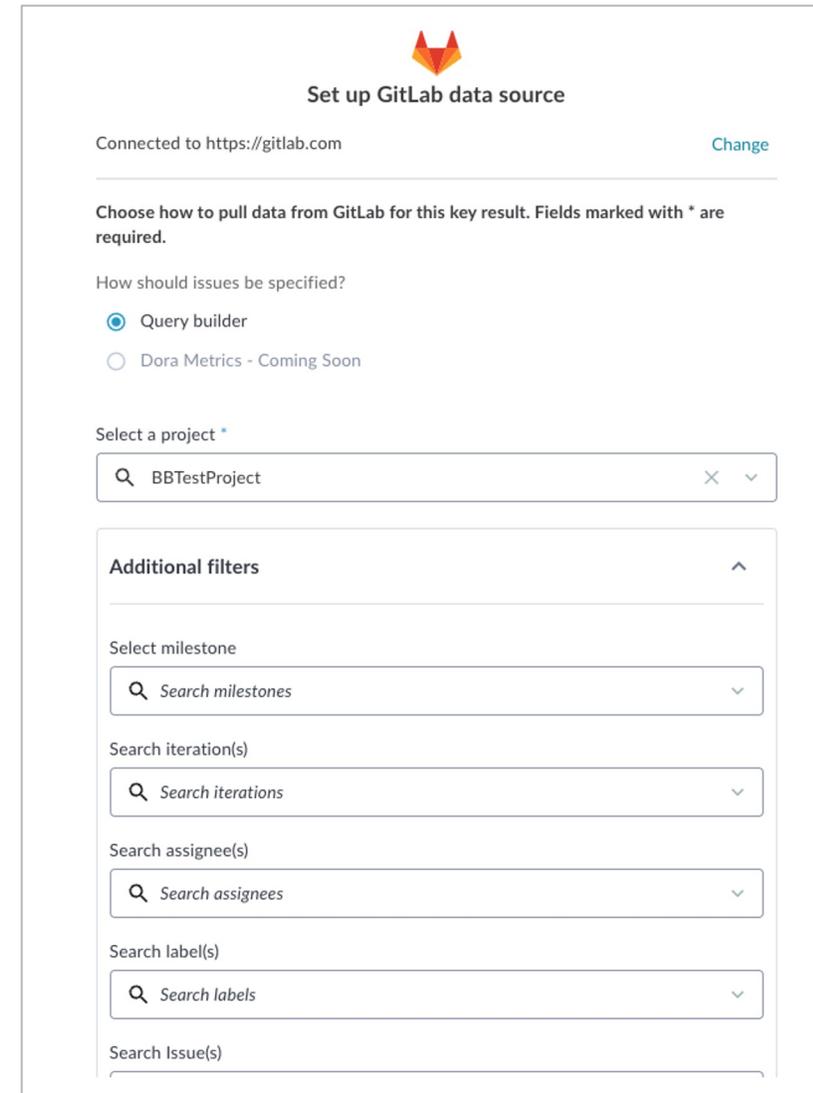
What external data source will you use? [Learn more about our integrations](#)

Search by integration name

Azure Devops Integrated ✓	Excel Integrated ✓	Google Sheet Integrated ✓
PowerBi Integrated ✓	Salesforce Integrated ✓	Smartsheet Integrated ✓
Snowflake Integrated ✓	Tableau Integrated ✓	Asana

New Key Result Automation From GitLab

- Automate Key Result progress based on data extracted from GitLab.
- GitLab is a code repository & update tracking system for engineering teams; connecting key results can help your engineering teams measure and track the number, frequency, and quality of changes in GitLab.




Set up GitLab data source

Connected to <https://gitlab.com> [Change](#)

Choose how to pull data from GitLab for this key result. Fields marked with * are required.

How should issues be specified?

Query builder

Dora Metrics - Coming Soon

Select a project *

Additional filters 

Select milestone

Search iteration(s)

Search assignee(s)

Search label(s)

Search Issue(s)

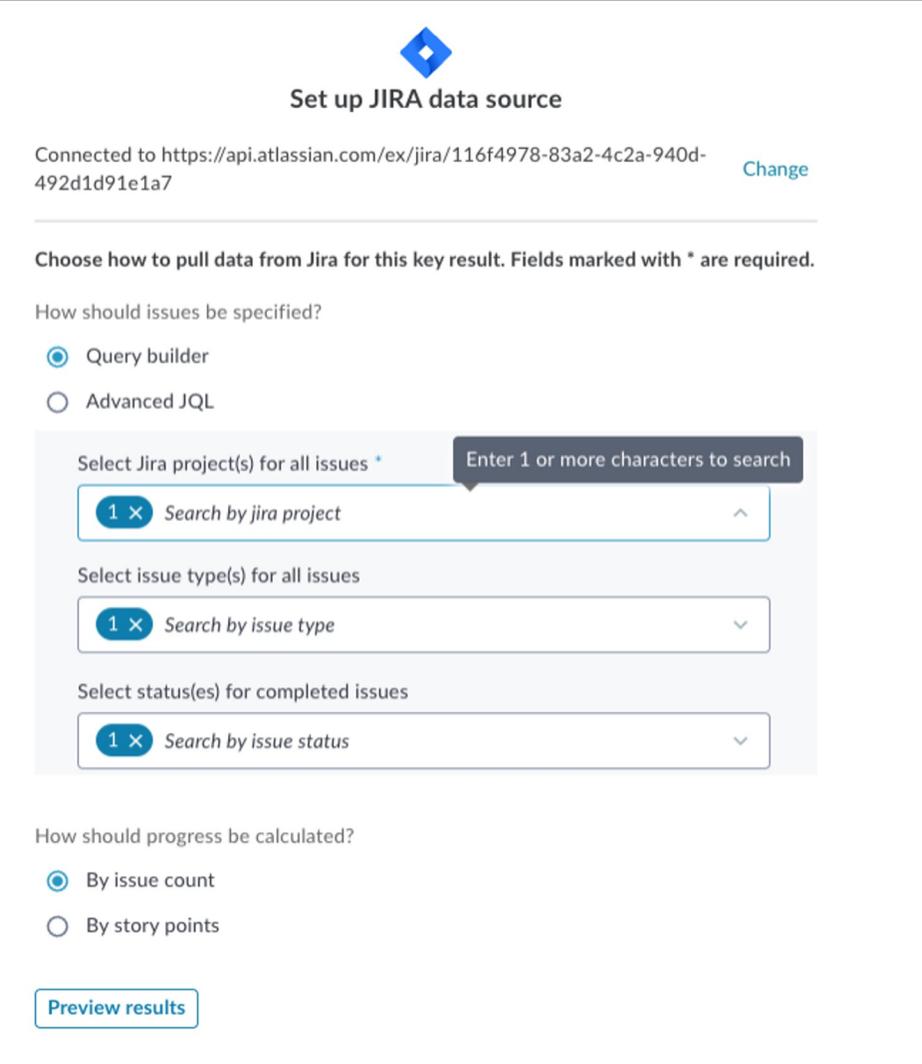
Improvements to Jira Connector

What's new

- Improved selection experience with easier self-service query builder
- Option to calculate progress for results based story points
- Smoother login process (especially for OAuth, so that admin rights are not required to log in)

Noteworthy

- Advanced JQL option is still available for advanced use cases
- Key results set prior to these changes will remain intact and continue to use the legacy interfaces.



The screenshot shows the 'Set up JIRA data source' configuration page. At the top, it displays the Atlassian logo and the title 'Set up JIRA data source'. Below this, it shows the connection URL: 'Connected to https://api.atlassian.com/ex/jira/116f4978-83a2-4c2a-940d-492d1d91e1a7' with a 'Change' link. The main section is titled 'Choose how to pull data from Jira for this key result. Fields marked with * are required.' Underneath, it asks 'How should issues be specified?' and provides two radio button options: 'Query builder' (selected) and 'Advanced JQL'. Below the radio buttons are three search input fields, each with a '1 x' icon and a search button. The first field is 'Select Jira project(s) for all issues *' with a search button that says 'Enter 1 or more characters to search'. The second field is 'Select issue type(s) for all issues' with a search button that says 'Search by issue type'. The third field is 'Select status(es) for completed issues' with a search button that says 'Search by issue status'. At the bottom, it asks 'How should progress be calculated?' and provides two radio button options: 'By issue count' (selected) and 'By story points'. A 'Preview results' button is located at the bottom right of the form.

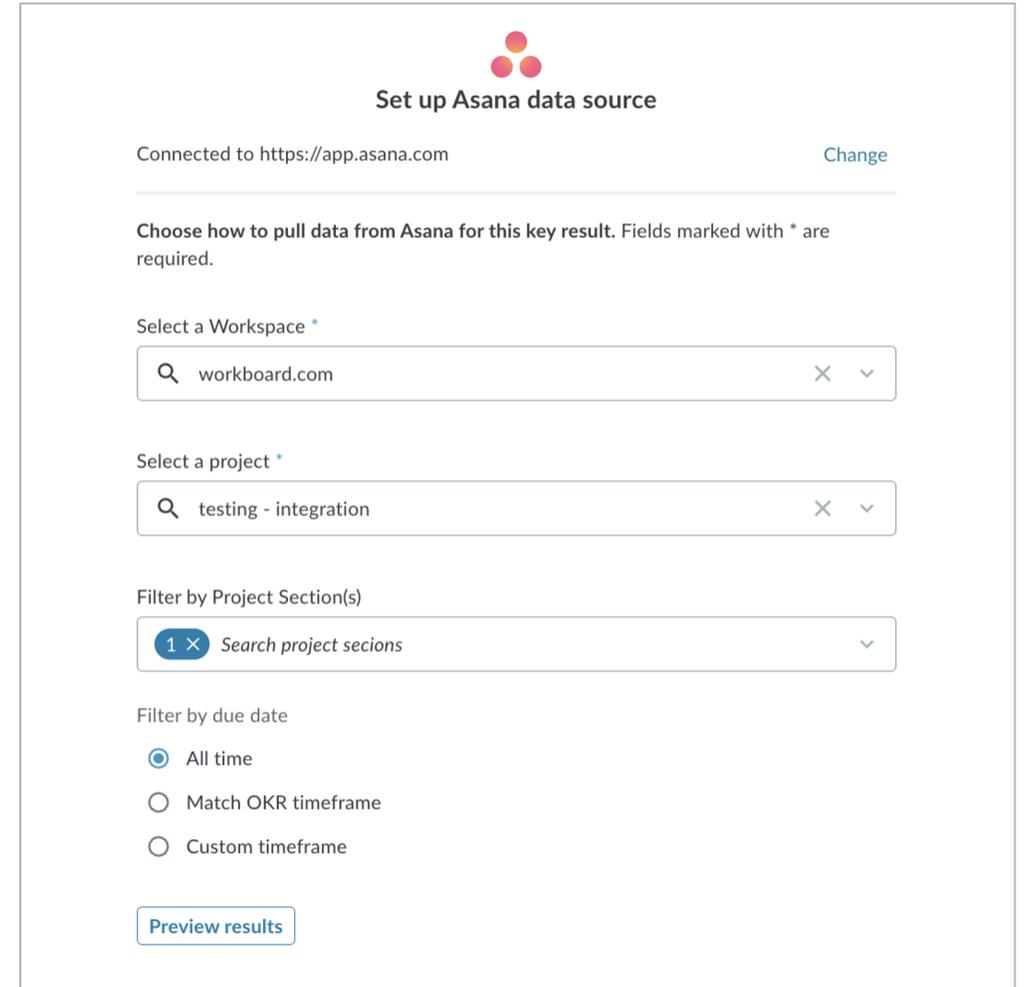
Improvements to Asana Connector

What's new

- Improved project selection and search experience
- Smoother login process (especially for OAuth)

Noteworthy

- Key results set prior to these changes will remain intact and continue to use the legacy interfaces.




Set up Asana data source

Connected to <https://app.asana.com> [Change](#)

Choose how to pull data from Asana for this key result. Fields marked with * are required.

Select a Workspace *

✕ ▼

Select a project *

✕ ▼

Filter by Project Section(s)

1 ✕ ▼

Filter by due date

All time

Match OKR timeframe

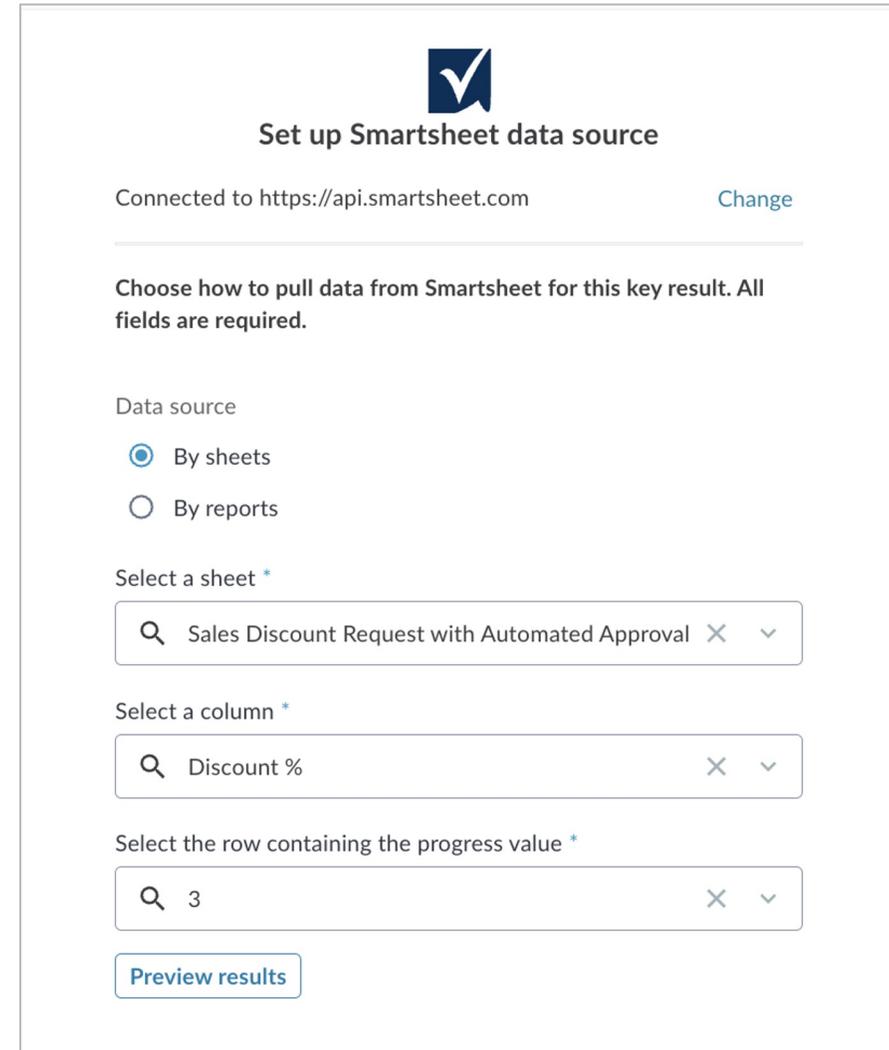
Custom timeframe

[Preview results](#)

Improvements to Smartsheet Connector

What's new

- Improved selection criteria, so you can automate results from “Reports” within Smartsheet
- The new reports measurement option unlocks the ability to aggregate data across multiple sheets and roll them into your key results.



The screenshot shows the 'Set up Smartsheet data source' configuration page. At the top, there is a Smartsheet logo and the title 'Set up Smartsheet data source'. Below the title, it indicates the connection status: 'Connected to https://api.smartsheet.com' with a 'Change' link. A horizontal line separates this from the main configuration section. The main section starts with the instruction: 'Choose how to pull data from Smartsheet for this key result. All fields are required.' Underneath, there is a 'Data source' section with two radio button options: 'By sheets' (which is selected) and 'By reports'. Below this is a 'Select a sheet *' dropdown menu containing the text 'Sales Discount Request with Automated Approval'. The next section is 'Select a column *' with a dropdown menu containing 'Discount %'. The final section is 'Select the row containing the progress value *' with a dropdown menu containing the number '3'. At the bottom of the form is a 'Preview results' button.

Poll 1

**Do you automate data for your key results today
using the KPI marketplace?**

Poll 2

Which areas of the business do you need key result integrations for?

Poll 3

What key result integrations would be most helpful for your organization?

Weekly Rituals

OKRs are first on team meeting agendas

YOUR CHECKLIST:

Run an efficient Monday huddle.

1. Put specific KRs and actions on the agenda for fact-based conversations (and make them recurring).
2. Use smart bullets to memorialize important discussions and decisions.
3. Cut to last meeting actions for easier follow through

Make meeting follow through easy

1. Capture meeting actions and assign them to team members in WorkBoard.
2. Create a Team Meeting workstream to track all action items from recurring meetings.

Don't let this be you or your team...

“We set great OKRs ... then spent our time on other things.”

“We only looked at OKRs monthly – too late to really achieve our best possible.”



Digipay Discussion

Wed, May 11 - 7:10am - 7:40am



Send Summary



Meeting Details



ADD:

Put actions in: [Set Workstream](#) X

Topics for Discussion

Add topics here

Performance re-factor -- options to get to our proc time target

Roger Smithson 07:12 am May 11

Takeaways

Add takeaways here

We identified 3 avenues:

Jun 14

Rewrite the primary pages -- longest path, most sustainable Push the source elements to the back end and delay the call -- might be a quick fix, need to validate Refine all the queries -- we should do this regardless, global gain and we would need to ensure it doesn't get deprecated to shinier stuff

Personal Stream : Roger Smithson

Added by: Roger S

+ Add another

Cut transaction processing time 4.5 seconds **1.65 of 4.5**
by Roger S

MAU increases 8% from 32% to 40% (about 4k users) **35.62% of 40%**
by Roger S

Victory lap - step reduction was huge improvement!!
Roger Smithson 07:12 am May 11

Reduce 4 user steps in Digipay transaction flow this quarter **6 of 4**
by Roger S

INFORMATION TECHNOLOGY

Foster a culture of ambition and creativity that fuels Acme 2030



29% of 35%

35% of novel tech experiments are initiated at front line teams

298 of 320

An additional 25% of team members have completed all house agile courses (320 team members)

79 of 90

45% of our teams are using OKRs to define and measure business outcomes (90 teams)

L&D

Create meaningful opportunity for employee growth and development

30% of 75%

75% of Directors observe demonstrated progress against individual manager development plan

0 of 1

Approved plan and budget sign-off for global leadership development

77.5% of 100%

100% of managers have bi-weekly 1:1 with direct reports using PACE meter

40% of 100%

100% of team members attend a unconscious bias training

16.67%

Establish talent development programs for leaders, young technical talent and FE&PO

2 of 3

Build program roadmaps for ISD, Professional Development & our Help Center

5 of 6

Build out learning paths for our key personas and include them in our Roadmap by end of quarter.

DYNAMICS ENGINEERING

Our team is agile, awesome, and reliable

0 of 6

6 team activities this quarter

100 of 80

80% participation of engineering and QA for each new feature

2 of 21

Hire 21 software engineers

27 of 50

Increase engineering chat function monthly active usage (MAU) from 25% to 50%

0 of 50

Migrate 50 documents

CUSTOMER ACCESS

Digipay is delightfully fast for our customers

1 of 4

Reduce 4 user steps in Digipay transaction flow this quarter

1.13 of 4.5

Cut transaction processing time 4.5 seconds

0 of 0

Users see 0 seconds of spinning wheel in transaction flow (as reported by users)

34.8% of 37%

MAU increases 5% from 32% to 40% (about 4k users)

2 of 3

Launch 3 Digipay voice assistant Integrations (Siri, Alexa, Cortana)

GLOBAL SUPPLY CHAIN

Our Supply Chain Org is a lean, outcome-focused business where people want to work

3 of 4

Stand up 4 Centers of Excellences to support our people's learning and enablement

72.68 of 80

Maintain an average score of >80 across our Employee Engagement Pulse Surveys

92.75% of 100%

100% of People Leaders hold 1on1's with each direct monthly, centered on career development

10 of 12

Hire 12 best-in-class Data Analysts to accelerate data-driven decision-making for our business

DIGITAL TECHNOLOGY LEADERSHIP

Our teams have the right skills to be awesome

2 of 3

Close the top 3 skill gaps across each IT department

16 of 42

42 new IT leaders hired

106 of 458

Every IT employee has a 5 year professional growth plan in place (458 including new projected hires for next quarter)

1 of 3

One IT all hands meeting per month inspires and motivates us to show up at our very best

GLOBAL SERVICES

We are a world-class accounting team that amplifies value for the company

0 of 100

100% of new purchases go through the procurement process

TALENT ACQUISITION

Embrace the OKR Revolutions

9 of 20

B. 20 OKR Facilitators have been trained and are certified for the Level 1 by the end of Q1

Tue, May 12 · 2:30pm - 3:30pm

View Series

72% of employees think their performance would improve with more feedback. Learn more

Meeting Details

PACE (performance, alignment, competence, engagement)

Objectives

ADD: [Bar chart icon] [Pie chart icon] [Waves icon] [Checkmark icon] [Link icon] [List icon]

Put actions in: Marketing General Activities Workstream

Topics for Discussion

Add topics here

We achieve at least 75% companywide attendance for all company lunch & learns 0% of 75% by Jack C

What were your blockers this week? Jack CEO Mack 08:42 am May 06

We need to discuss John's performance Jack CEO Mack 07:38 am Apr 01

Be sure to highlight the success your team had last week in driving up NPS! What did we learn from it that can be replicated elsewhere? Jun 16 by Jack C

Please take a look at next steps for Tier 1 and Tier 2 customers and present at the next staff meeting May 20 by Jack C

Takeaways

Add takeaways here

here is a task that you need to do from our 1:1 Jun 01 Added by: Jack C

+ Add another

Yes, I've had a 1:1 with John and he has a remediation plan. Jack CEO Mack 07:39 am Apr 01

+ Add another

Calibrate on Mondays; Celebrate on Fridays

YOUR CHECKLIST:

Fridays: Identify and celebrate your wins

1. Ping KR owners for updates for the full achievement picture
2. Comment on OKRs for public acknowledgement
3. Send Badges to individuals who deserve that personalized pat on the back

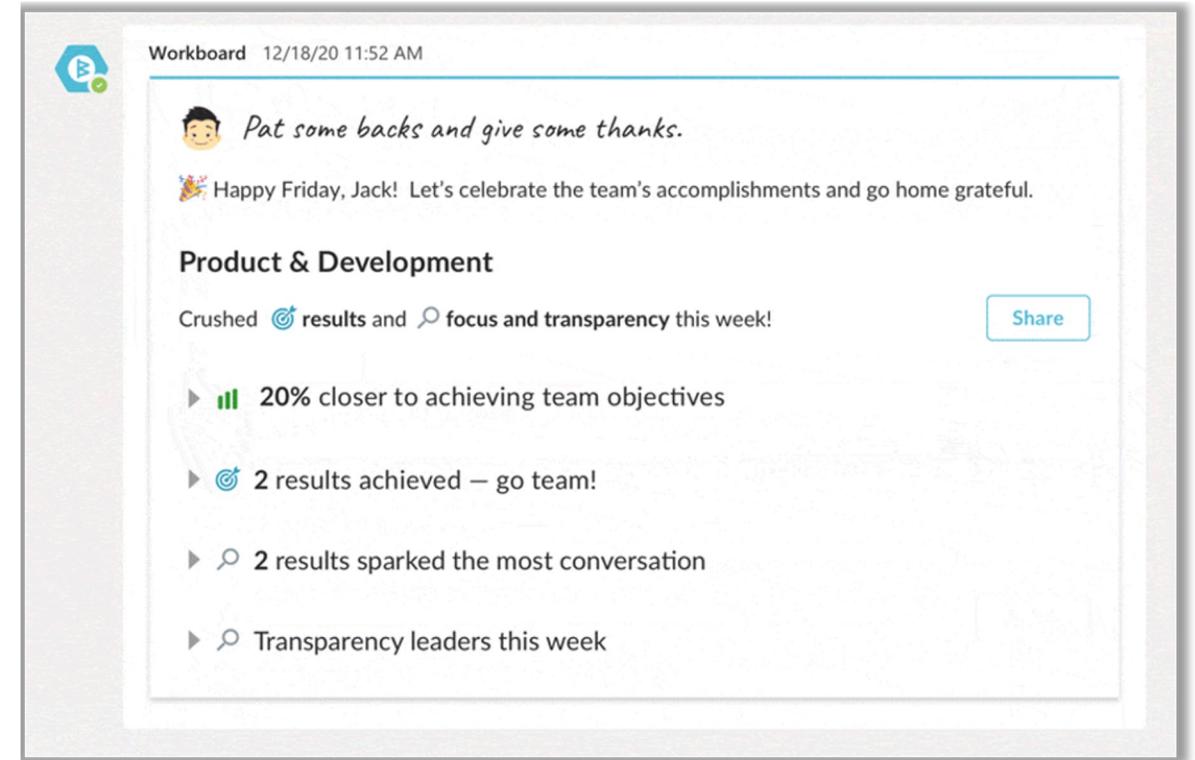
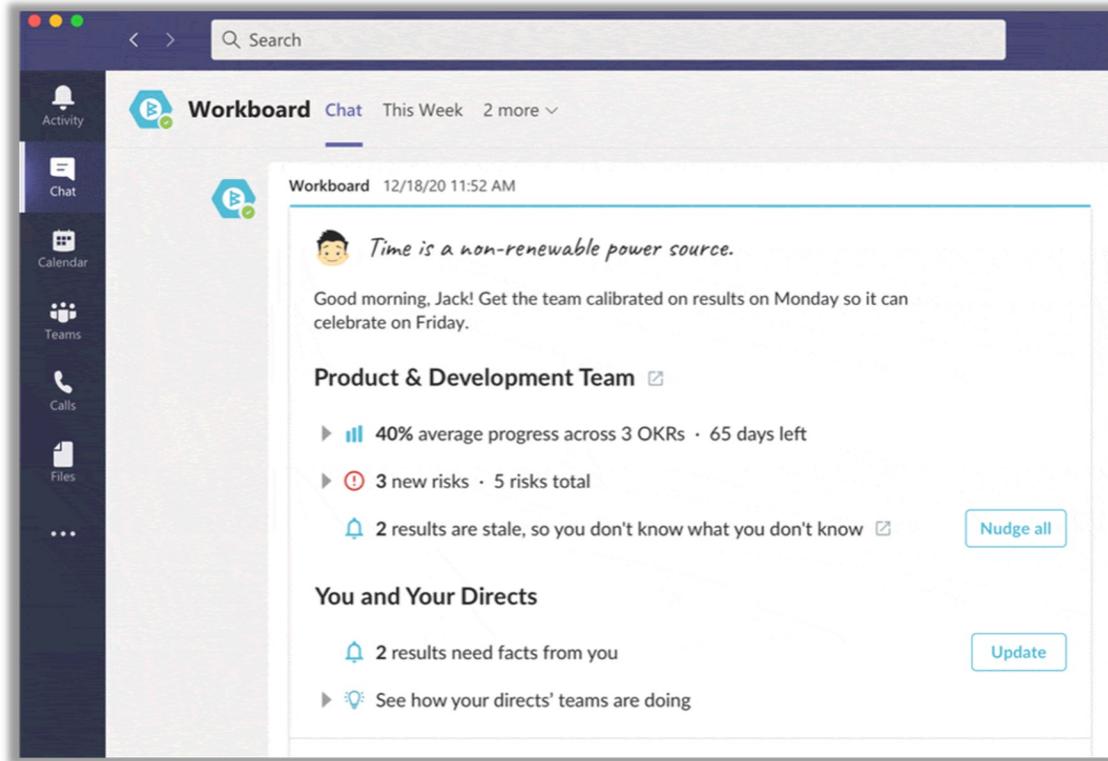
Mondays: Build the action plan for results

1. Use your OKRs in meetings to drive problem solving discussions on KR progress
2. View the in-app RAG status to quickly identify OKRs in amber or red
3. Create action items directly in WorkBoard meetings when actions are memorialized
4. Cut to last meeting actions for easier follow through

Important Questions for Monday Calibration

- We're behind on this KR, what are we going to do this week to ensure we're making meaningful progress on it?"
- "What is preventing us from making progress?"
- "Where do we need leadership's help so we can achieve our OKRs?"

Nudges to replace weekly status reporting

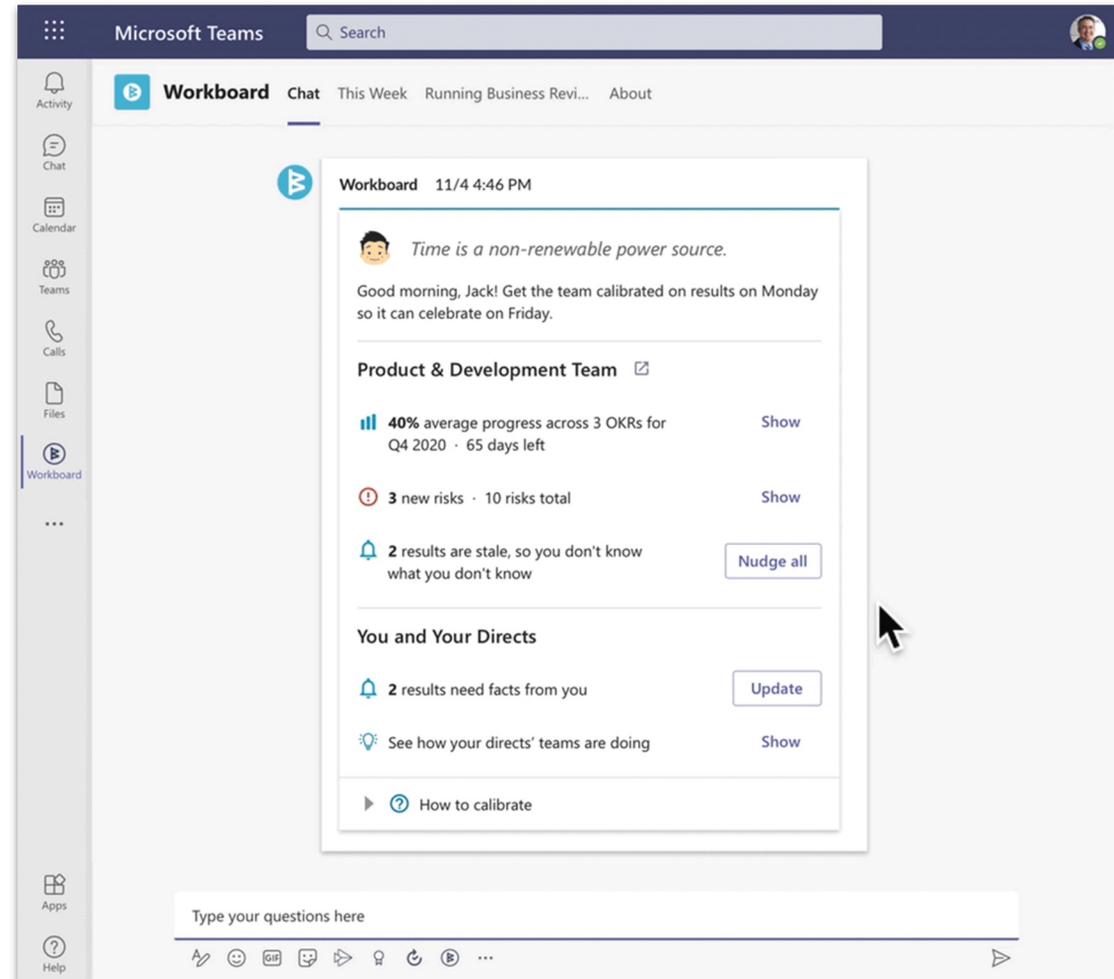


Calibrate: Start the week with the short, sweet list of results that need your focus

Celebrate: End the week with the team's progress and victories

Calibrate and Celebrate: For Co-Managers

Weekly Nudges in Microsoft Teams and Webex.
Co-Managers; stay in the loop with proactive messages on where to calibrate and what to celebrate to help drive a weekly results ritual.



Objectives and Key Results (OKRs)

Annual & Quarterly Key Result Enhancements

- Automate annual and quarterly key results by mirroring or rolling up other KRs
- Directly connect specific quarterly progress to workstream completion or other apps using integrations.
- Leverage the new option to exclude specific quarterly results from the overall annual calculations – when specific quarters are only for baselining or simply don't require a quarter focus on the annual outcome.

SET YOUR TARGETS			
Time period*	Target name* 	Target value*	Source
Q1 FY23	Q1: 4 paid GXT customers	4	 
Q2 FY23	5 paid GXT customers	5	 
Q3 FY23	6 paid GXT customers	6	 
Q4 FY23	5 paid GXT customers		 Edit measurement type  Exclude key result

Teams Experience Changes

Working Groups are renamed to Dynamic Teams

- Working group is renamed to dynamic team for one consistent way we all describe teams
- New icons to differentiate the team types
- Tooltips are included on the new icons for clarity

The screenshot shows the WorkBoard interface for a team named "Market Meter Platform Launch Team" managed by Laurie Luna. A tooltip above the team icon reads: "Dynamic Team - cross-functional virtual team to organize and coordinate initiatives as needed." A red arrow points to the team icon. The team's progress is shown as 8% complete. The main objective is "All the right Platform X buyers in our pipeline", with sub-objectives: "0 of 28m Add \$28M of upsell pipeline from platform marketing campaigns" and "0.82 of 10 10% surge in same-week WAU with every customer marketing campaign".

The screenshot shows the WorkBoard interface for a team named "Applications Engineering" managed by Manny Admina. A tooltip above the team icon reads: "Functional Team - The core teams that reflect your organizational functional hierarchy." A red arrow points to the team icon. The team's progress is shown as 66% complete. The main objective is "Accelerate our platform advantage through our innovative Insights engine", with sub-objectives: "160k of 200k Insights v2.2 is released on iOS with 200K engagements" and "4 of 3 Cut Insights dashboard page load time from 10 seconds to 3 seconds".

Team Visibility Settings: Visible and Hidden Teams

Teams visibility settings **retroactively applied to existing teams** did **not** expose any additional information than what was previously available to users.

Changing permissions

- Managers and co-managers can change a team's visibility settings from the **team settings** (under kebab menu)
- Organizational admins can still see all teams and change a team's visibility setting.

Separate permissions for OKRs and Teams

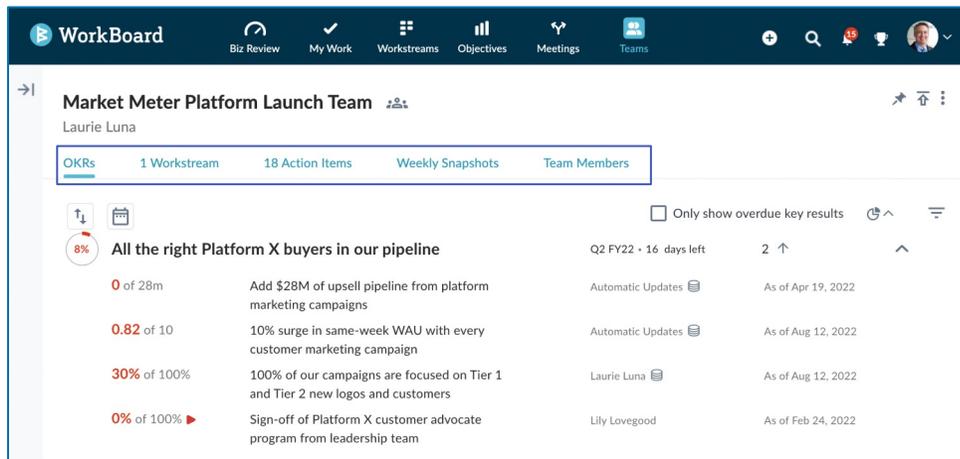
- You have the **same controls** to manage OKR visibility and permissions as you did in the past.
- Making a team hidden doesn't automatically make the team's OKRs private.
- A team can be hidden, and you can still share OKRs permissions with targeted parts of the organization.

The screenshot shows the WorkBoard interface. The top navigation bar includes 'WorkBoard', 'Biz Review', 'My Work', 'Workstreams', 'Objectives', 'Meetings', and 'Teams'. The left sidebar has a 'Teams' section with a search bar and a 'Jump to...' dropdown. The main content area shows the 'R&D GEM Launch' team settings for 'Lillian Frederick'. A tooltip is visible over the kebab menu icon, stating: 'Hidden team - this team is only visible to its members, and it is not discoverable in search results or team lists to non-members. OKR visibility permissions are managed separately from team visibility settings.' Below the team name, there are tabs for 'OKRs', '1 Workstream', and '10 Action'. The OKR section displays three items: 'CUSTOMERS have an exceptional experience with our products and our people' (79% completion, Q2 FY22 - 23), 'ECONOMICS of a high velocity, high efficiency business' (79% completion, Q2 FY22 - 23), and 'FOCUS on the right market segments with stand-out value' (61% completion, Q2 FY22 - 23).

Visible Team: What Do You See?

If they are on the team (same as before)

- Team name
- Team OKRs
- Workstreams
- Action items
- Weekly snapshots
- Team members



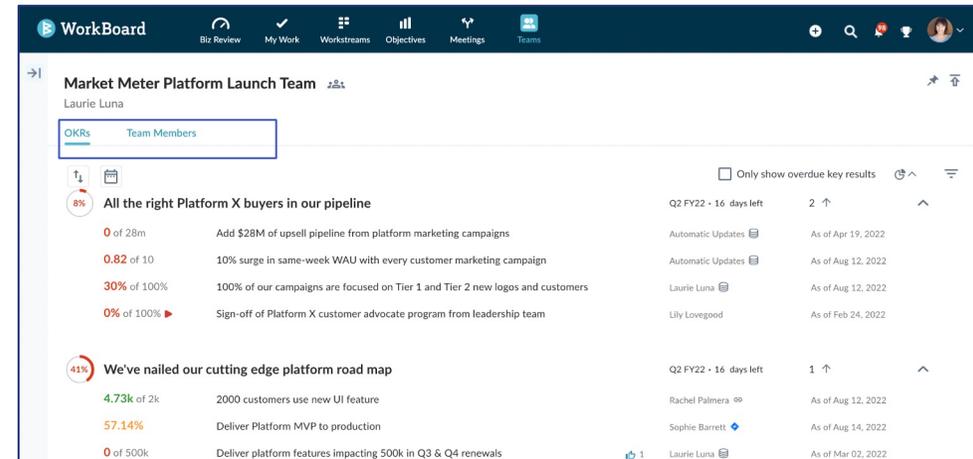
The screenshot shows the WorkBoard interface for the 'Market Meter Platform Launch Team'. The user 'Laurie Luna' is on the team. The 'OKRs' tab is selected, showing a list of OKRs with progress indicators and due dates. The OKRs are:

Progress	Description	Due Date
8%	All the right Platform X buyers in our pipeline	Q2 FY22 - 16 days left
0 of 28m	Add \$28M of upsell pipeline from platform marketing campaigns	Automatic Updates As of Apr 19, 2022
0.82 of 10	10% surge in same-week WAU with every customer marketing campaign	Automatic Updates As of Aug 12, 2022
30% of 100%	100% of our campaigns are focused on Tier 1 and Tier 2 new logos and customers	Laurie Luna As of Aug 12, 2022
0% of 100%	Sign-off of Platform X customer advocate program from leadership team	Lily Lovegood As of Feb 24, 2022

If they are not on the team

- Team name
- Team members
- OKRs that the user explicitly has permission to see

**Prior experience was that the team's page would send user to an error page*



The screenshot shows the WorkBoard interface for the 'Market Meter Platform Launch Team'. The user 'Laurie Luna' is not on the team. The 'OKRs' tab is selected, showing a list of OKRs with progress indicators and due dates. The OKRs are:

Progress	Description	Due Date
8%	All the right Platform X buyers in our pipeline	Q2 FY22 - 16 days left
0 of 28m	Add \$28M of upsell pipeline from platform marketing campaigns	Automatic Updates As of Apr 19, 2022
0.82 of 10	10% surge in same-week WAU with every customer marketing campaign	Automatic Updates As of Aug 12, 2022
30% of 100%	100% of our campaigns are focused on Tier 1 and Tier 2 new logos and customers	Laurie Luna As of Aug 12, 2022
0% of 100%	Sign-off of Platform X customer advocate program from leadership team	Lily Lovegood As of Feb 24, 2022
41%	We've nailed our cutting edge platform road map	Q2 FY22 - 16 days left
4.73k of 2k	2000 customers use new UI feature	Rachel Palmera As of Aug 12, 2022
57.14%	Deliver Platform MVP to production	Sophie Barrett As of Aug 14, 2022
0 of 500k	Deliver platform features impacting 500k in Q3 & Q4 renewals	Laurie Luna As of Mar 02, 2022

Hidden Team: What Do You See?

If they are on the team (same as before)

- Team name
- Team OKRs
- Workstreams
- Action items
- Weekly snapshots
- Team members
- Icon indicating that the team is hidden

The screenshot shows the WorkBoard interface for a hidden team. The team name is 'Manager Development Initiatives' and the manager is 'Alice Peoples'. A tooltip explains: 'Hidden Team - this team is only visible to its members, and it is not discoverable in search results or team lists to non-members. OKR visibility permissions are managed separately from team visibility settings.' The page displays a list of OKRs with progress indicators and a table of team members.

OKR	Progress	Description	Manager	Last Updated
22% of 1	0 of 1	Approved plan and budget sign-off for global leadership development	Andrea Williams	Never updated
--	--	Establish talent development programs for leaders, young technical talent and FE&PO development plan	Alice Peoples	Never updated
70% of 75%	75% of 75%	75% of Directors observe demonstrated progress against individual manager development plan	Alice Peoples	As of Aug 12, 2022
0 of 3	0 of 3	Build program roadmaps for ISD, Professional Development & our Help Center	Me	Update
0 of 6	0 of 6	Build out learning paths for our key personas and include them in our Roadmap by end of quarter.	Me	Update
40% of 100%	100% of 100%	100% of team members attend a unconscious bias training	Alice Peoples	As of Aug 12, 2022
0% of 100%	100% of 100%	100% of managers have bi-weekly 1:1 with direct reports using PACE meter	Andrea Williams	Never updated

If they are not on the team

- Team manager (*prior experience was that the team's page would send user to an error page*)

The screenshot shows the WorkBoard interface for a hidden team. The team name is 'Alice Peoples' and the manager is 'Alice Peoples'. The page is mostly blank, indicating that the user is not a member of the team.

- Team name
- Team members
- OKRs that the user explicitly has permission to see

The screenshot shows the WorkBoard interface for a hidden team. The team name is 'Market Meter Platform Launch Team' and the manager is 'Laurie Luna'. The page displays a list of OKRs with progress indicators and a table of team members.

OKR	Progress	Description	Manager	Last Updated
8%	0 of 28m	All the right Platform X buyers in our pipeline	Laurie Luna	As of Aug 12, 2022
0.82 of 10	0.82 of 10	Add \$28M of upsell pipeline from platform marketing campaigns	Automatic Updates	As of Apr 19, 2022
30% of 100%	10%	10% surge in same-week WAU with every customer marketing campaign	Automatic Updates	As of Aug 12, 2022
100% of 100%	100%	100% of our campaigns are focused on Tier 1 and Tier 2 new logos and customers	Laurie Luna	As of Aug 12, 2022

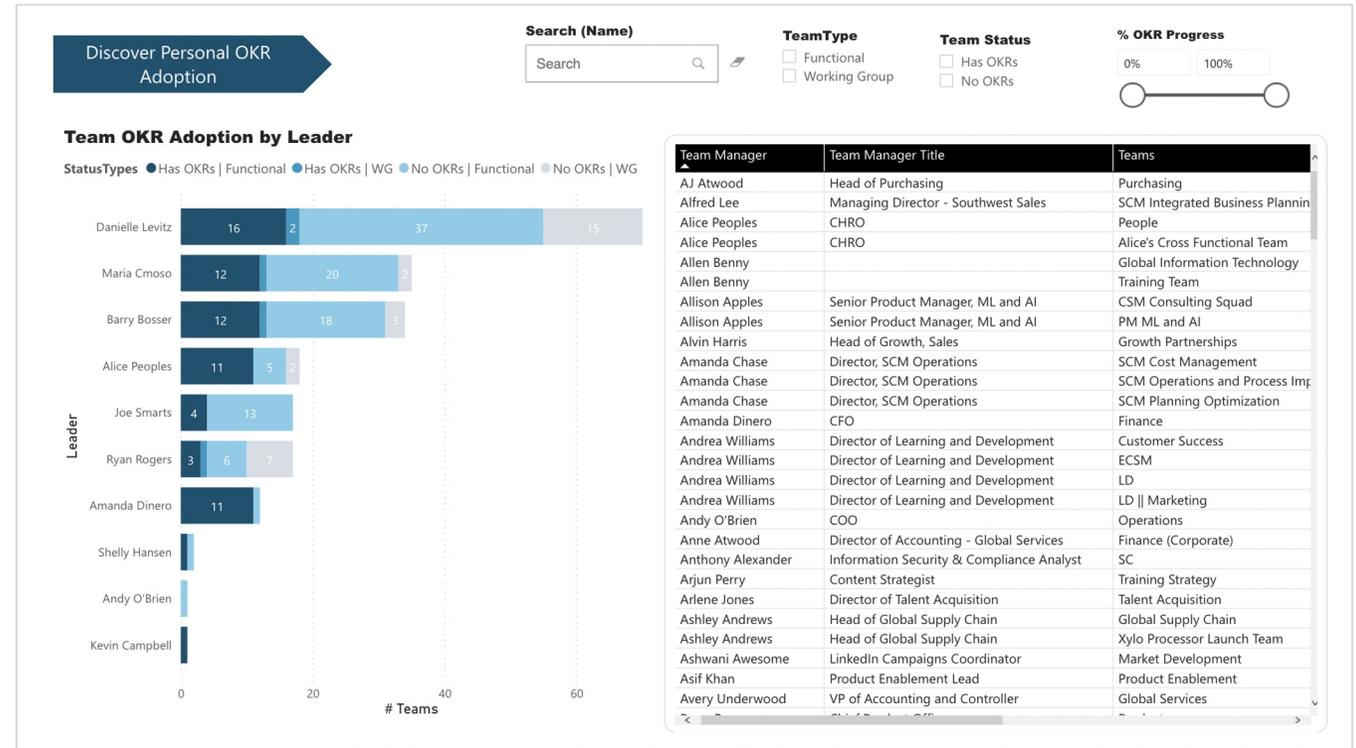
Alignment Analytics

OKR Adoption Analytics: Personal OKRs Lens

The OKR Adoption report paints an overall picture of all OKRs in flight across the organization to help identify pockets within the organization that could use additional help driving quarterly OKR resets.

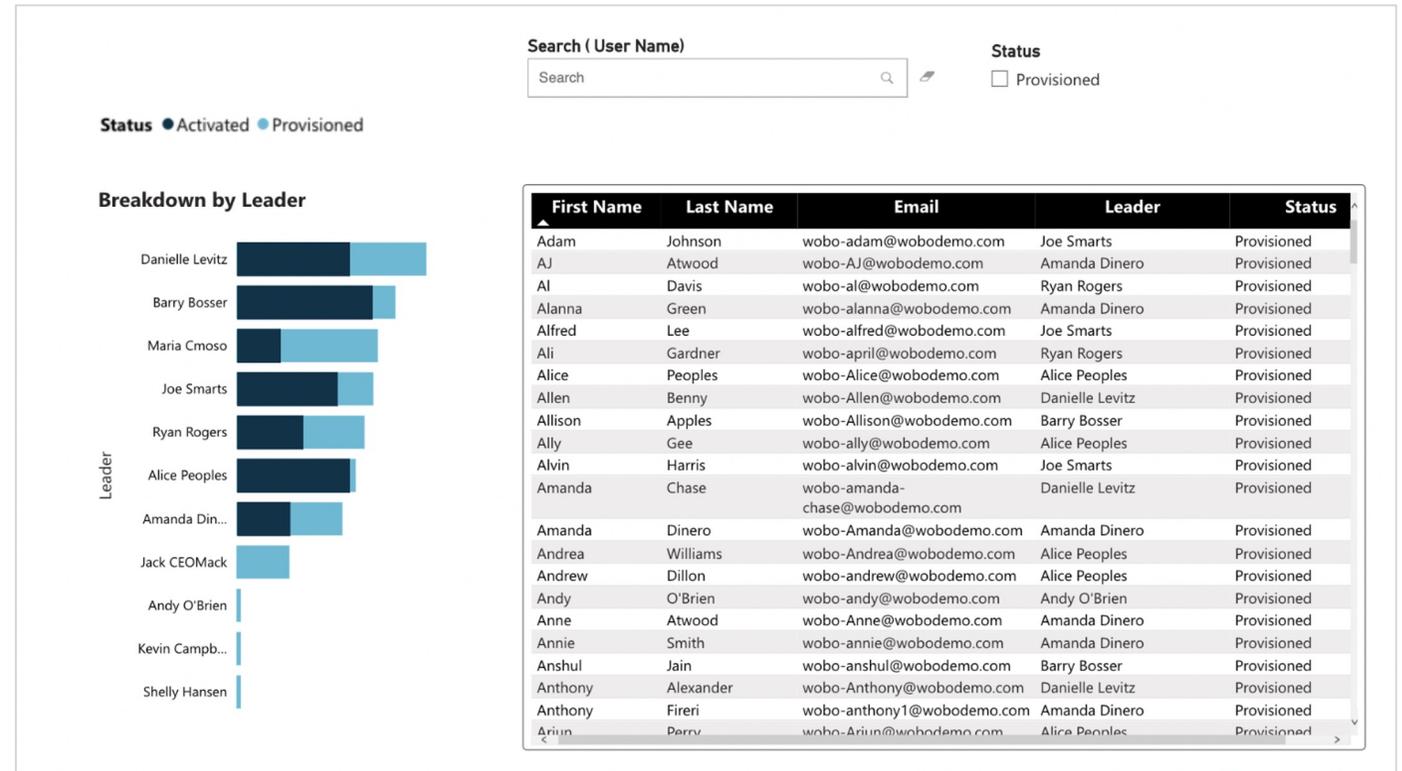
What's new

- The report now includes the added lens of adoption of personal OKRs.
- See a breakdown of personal OKRs in flight across the organization across L2 business leaders.
- Easily toggle between team adoption overview and personal OKRs.
- Reports and breakdown can be exported for further analysis.



User Activation Analytics Report

- Create an onboarding roadmap with better visibility into breakdown of activated users in comparison to provisioned users
- Quick overview of breakdown by L2 business leaders
- Report can be easily exported



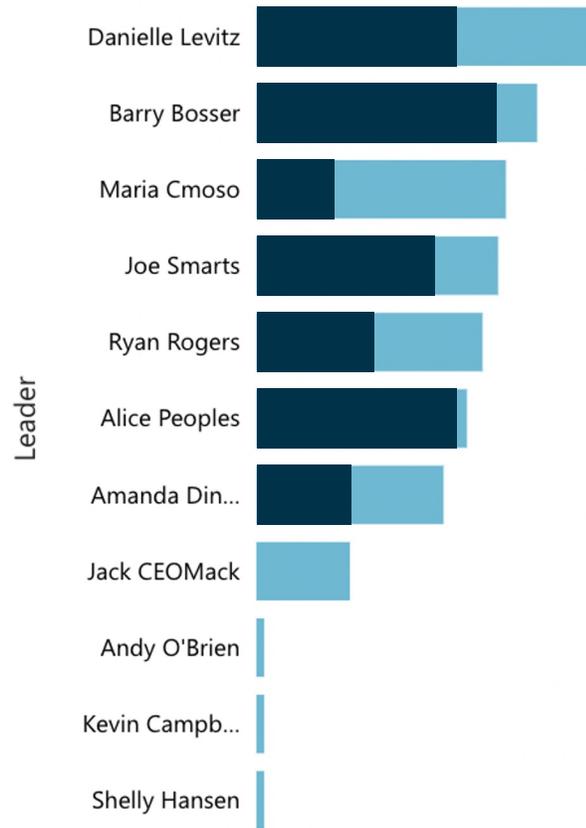
Search (User Name)

Status

 Provisioned

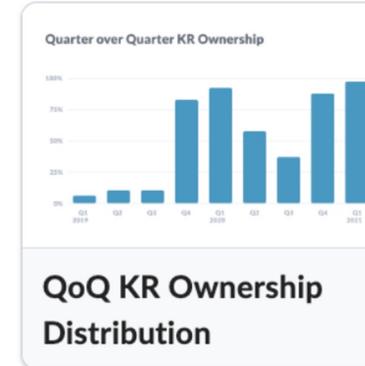
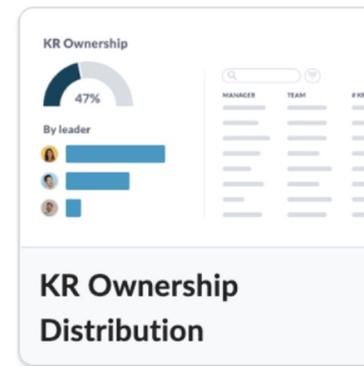
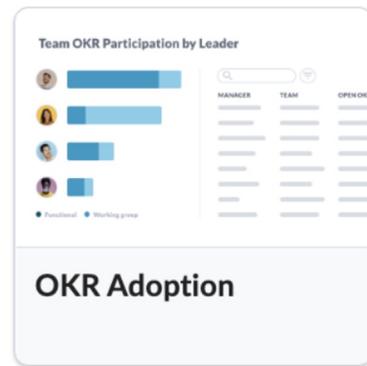
Status ● Activated ● Provisioned

Breakdown by Leader



First Name	Last Name	Email	Leader	Status
Adam	Johnson	wobo-adam@wobodemo.com	Joe Smarts	Provisioned
AJ	Atwood	wobo-AJ@wobodemo.com	Amanda Dinero	Provisioned
Al	Davis	wobo-al@wobodemo.com	Ryan Rogers	Provisioned
Alanna	Green	wobo-alanna@wobodemo.com	Amanda Dinero	Provisioned
Alfred	Lee	wobo-alfred@wobodemo.com	Joe Smarts	Provisioned
Ali	Gardner	wobo-april@wobodemo.com	Ryan Rogers	Provisioned
Alice	Peoples	wobo-Alice@wobodemo.com	Alice Peoples	Provisioned
Allen	Benny	wobo-Allen@wobodemo.com	Danielle Levitz	Provisioned
Allison	Apples	wobo-Allison@wobodemo.com	Barry Bosser	Provisioned
Ally	Gee	wobo-ally@wobodemo.com	Alice Peoples	Provisioned
Alvin	Harris	wobo-alvin@wobodemo.com	Joe Smarts	Provisioned
Amanda	Chase	wobo-amanda-chase@wobodemo.com	Danielle Levitz	Provisioned
Amanda	Dinero	wobo-Amanda@wobodemo.com	Amanda Dinero	Provisioned
Andrea	Williams	wobo-Andrea@wobodemo.com	Alice Peoples	Provisioned
Andrew	Dillon	wobo-andrew@wobodemo.com	Alice Peoples	Provisioned
Andy	O'Brien	wobo-andy@wobodemo.com	Andy O'Brien	Provisioned
Anne	Atwood	wobo-Anne@wobodemo.com	Amanda Dinero	Provisioned
Annie	Smith	wobo-annie@wobodemo.com	Amanda Dinero	Provisioned
Anshul	Jain	wobo-anshul@wobodemo.com	Barry Bosser	Provisioned
Anthony	Alexander	wobo-Anthony@wobodemo.com	Danielle Levitz	Provisioned
Anthony	Fireri	wobo-anthony1@wobodemo.com	Amanda Dinero	Provisioned
Ariun	Perry	wobo-Ariun@wobodemo.com	Alice Peoples	Provisioned

Refresher on Existing RME Analytics Assets

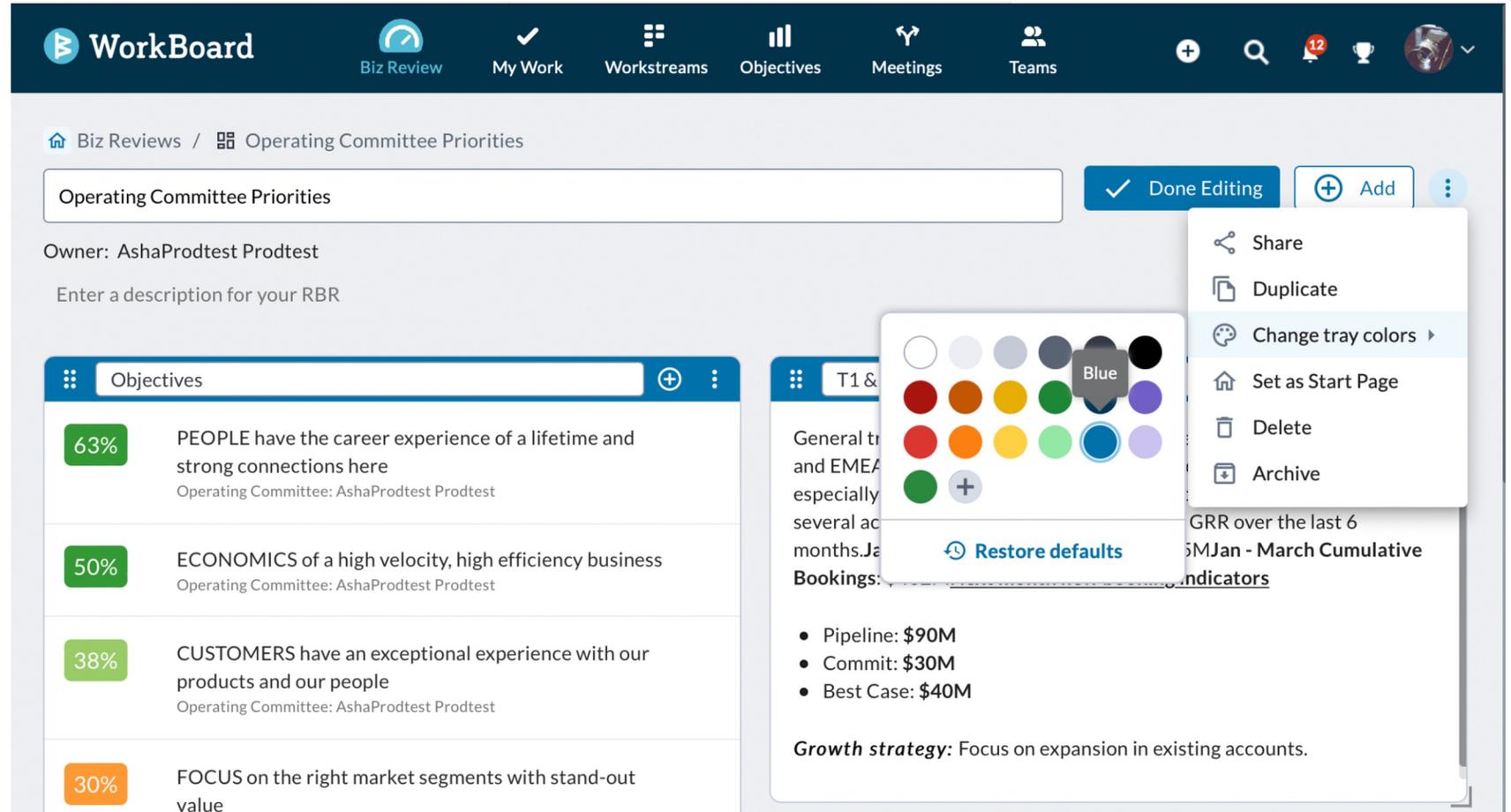
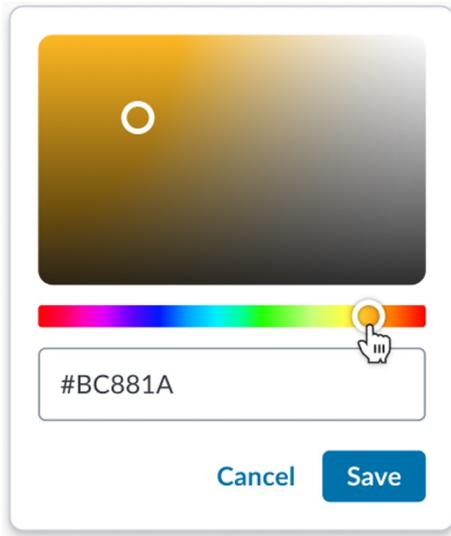


Tip: Search for [RME Analytics](#) in the resource center to get started!

On the horizon

Customize Biz Review Tray Colors

- Set the default color for all trays in your Biz Review to match your company brand
- Enter a specific Hex color for an exact match



WorkBoard

Biz Review My Work Workstreams Objectives Meetings Teams

Biz Reviews / Operating Committee Priorities

Operating Committee Priorities

Done Editing Add

Owner: AshaProdstest Prodstest

Enter a description for your RBR

Objectives

- 63% PEOPLE have the career experience of a lifetime and strong connections here
Operating Committee: AshaProdstest Prodstest
- 50% ECONOMICS of a high velocity, high efficiency business
Operating Committee: AshaProdstest Prodstest
- 38% CUSTOMERS have an exceptional experience with our products and our people
Operating Committee: AshaProdstest Prodstest
- 30% FOCUS on the right market segments with stand-out value

Change tray colors

Share Duplicate Change tray colors Set as Start Page Delete Archive

Restore defaults

Blue

General tr and EMEA especially several ac months. Ja Bookings: GRR over the last 6 5MJan - March Cumulative indicators

- Pipeline: \$90M
- Commit: \$30M
- Best Case: \$40M

Growth strategy: Focus on expansion in existing accounts.

Customize Color for Specific Tray or Sections

Choose your color for specific or trays or for a section within your Biz Review

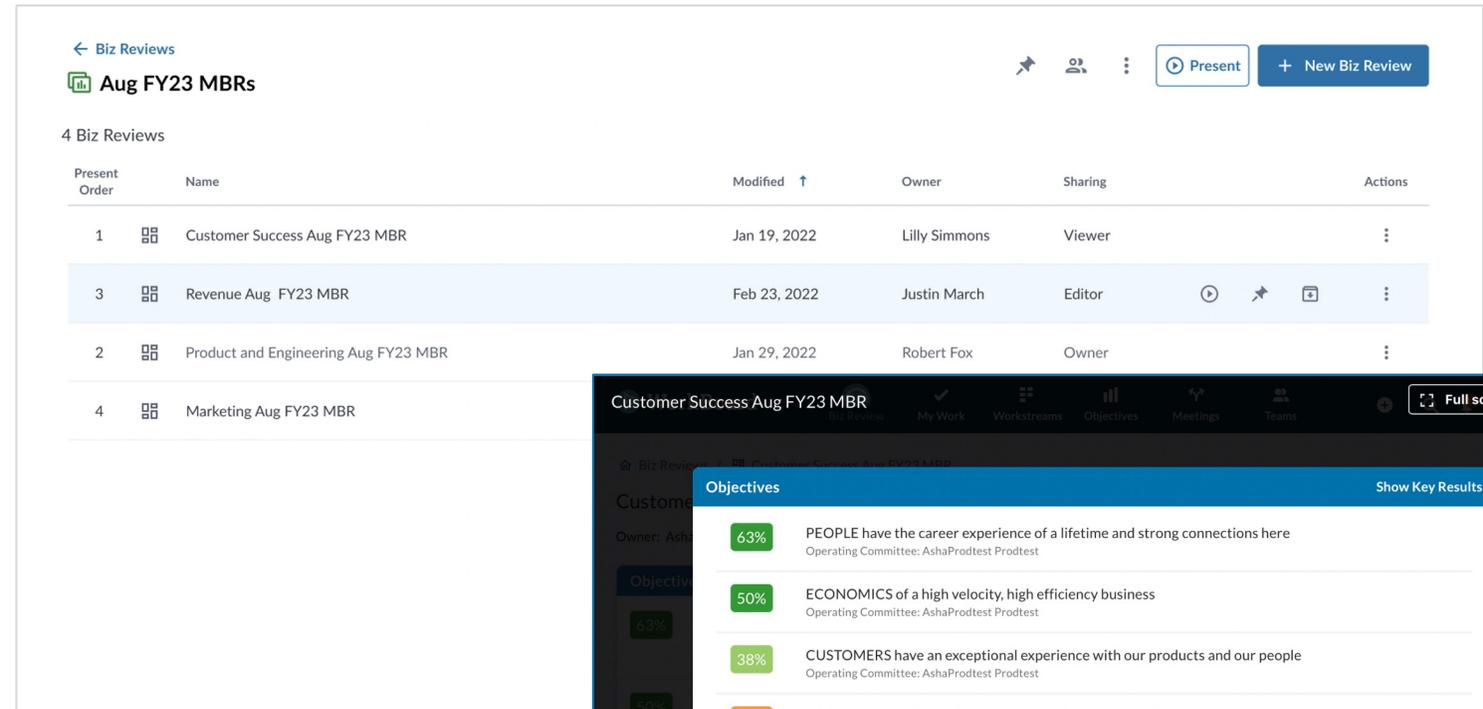
The screenshot displays the WorkBoard interface with a dark blue header containing navigation icons for Biz Review, My Work, Workstreams, Objectives, Meetings, and Teams. The main content area is divided into several sections:

- Objectives:** A list of four objectives with progress bars: 63% (PEOPLE), 50% (ECONOMICS), 38% (CUSTOMERS), and 30% (FOCUS).
- Priority Focus Workstreams:** A list of three workstreams: Leadership Development Pipeline, Staff Ops, and Strategic Use Cases, all at 0% progress.
- T1 & T2 Bookings Performance:** A text-based section with a summary, bullet points for Pipeline (\$90M), Commit (\$30M), and Best Case (\$40M), and a growth strategy.
- Celebration Box:** A section with a color picker overlay. The color picker shows a grid of color options, with 'Green' selected. A menu to the right of the picker offers 'Change tray color' and 'Remove tray' options.

A 'Help' button is visible in the bottom right corner of the interface.

Present an entire Collection of Biz Reviews

- Seamlessly transition between biz reviews in a collection during a presentation
- Define presentation order for your collection



← Biz Reviews

Aug FY23 MBRs

4 Biz Reviews

Present Order	Name	Modified ↑	Owner	Sharing	Actions
1	Customer Success Aug FY23 MBR	Jan 19, 2022	Lilly Simmons	Viewer	⋮
3	Revenue Aug FY23 MBR	Feb 23, 2022	Justin March	Editor	⏪ ⏩ 📄 ⋮
2	Product and Engineering Aug FY23 MBR	Jan 29, 2022	Robert Fox	Owner	⋮
4	Marketing Aug FY23 MBR				⋮

Customer Success Aug FY23 MBR

Objectives

Show Key Results

- 63% PEOPLE have the career experience of a lifetime and strong connections here
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Switch between Biz Reviews while presenting a collection

The screenshot displays a dashboard for 'Customer Success Aug FY23 MBR'. The top navigation bar includes icons for 'My Work', 'Workstreams', 'Objectives', 'Meetings', and 'Teams', along with a 'Full screen' button. A modal window titled 'Objectives' is open, listing four key performance indicators (KPIs) with their respective completion percentages:

- 63% PEOPLE have the career experience of a lifetime and strong connections here
Operating Committee: AshaProdtest Prodtest
- 50% ECONOMICS of a high velocity, high efficiency business
Operating Committee: AshaProdtest Prodtest
- 38% CUSTOMERS have an exceptional experience with our products and our people
Operating Committee: AshaProdtest Prodtest
- 30% FOCUS on the right market segments with stand-out value
Operating Committee: AshaProdtest Prodtest

Below the objectives, a modal window titled 'Biz Review' is open, showing a list of reviews:

- 1 Customer Success Aug FY23 MBR ✓
- 2 Revenue Aug FY23 MBR
- 3 Product and Engineering Aug FY23 MBR
- 4 Marketing Aug FY23 MBR
- 5 Operations Aug FY23 MBR

The 'Biz Review' modal also includes a slide indicator at the bottom: '1 < Slide 1 > ⋮'.

Switch between trays while presenting a Biz Review

The screenshot displays a presentation interface for a Business Review (Biz Review) titled "Customer Success Aug FY23 MBR". The interface includes a top navigation bar with icons for "My Work", "Workstreams", "Objectives", "Meetings", and "Teams", along with a "Full screen" button. The main content area shows a list of objectives with their respective completion percentages:

- 63%** PEOPLE have the career experience of a lifetime and strong connections here
Operating Committee: AshaProdtest Prodtest
- 50%** ECONOMICS of a high velocity, high efficiency business
Operating Committee: AshaProdtest Prodtest
- 38%** CUSTOMERS have an exceptional experience with our products and our people
Operating Committee: AshaProdtest Prodtest
- 30%** FOCUS on the right market segments with stand-out value
Operating Committee: AshaProdtest Prodtest

A "Trays" menu is open, showing the following options:

- 1 Objectives ✓
- 2 Headlight Metrics
- 3 QoQ Progress
- 4 Risks

At the bottom of the menu, there is a navigation bar with "1", "Slide 1", and navigation arrows.

What are you curious about?

Thank you!