

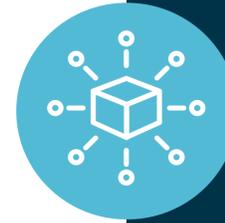
 WorkBoard

# 2021's Race to Customer- Focused Results

Will your management  
model perform?

 Microsoft 365





Only 11% of executives believe their current business model will be economically viable in 2023, according to a 2021 McKinsey study.

## Why? What changed since 2020?

- **Customer Choice:** We learned that customers have moved beyond your product being the gating purchase decision. It's now your customer experience that sets the bar – and customers expect you to meet them where they are and to buy how they want.
- **Speed of Business:** A flood of capital is fueling acceleration as investors put a surplus of returns on digital enterprises to work. New business cycles are now moving faster, and change is bigger in every cycle.
- **Talent Movement:** Talented people now are now untethered from work location. Well-funded companies are embracing flexibility and hire voraciously; they can now tap WFA-enabled workers everywhere.
- **Talent Purpose:** Work needs real purpose and mission-driven companies will have an advantage with younger members of the workforce.

## What do these trends mean for your business?

In this new landscape you are either an incumbent or a disrupter. If you're an incumbent, your advantage lies in your existing customers and partners. They want to stay with you – but you need you need to show them you can keep up. Your scarcity is talent and willingness to risk capital. If you're a disrupter, your advantage lies in technology. You have the talent and access to capital. But your scarcity is customers and partners. You need to show prospective customers you can deliver.

In both scenarios, the one thing you have in common is the need for business agility. You need a fast and nimble management model and operating rhythm. A flexible approach to adjust, align, and measure strategic priorities, and mobilize your organization towards common outcomes.

# Is your management model ready?

For CEOs with a bold vision, the answer is often no. Working with thousands of teams and executives has uncovered seven symptoms that indicate whether your management model is creating growth drag:

**“Our strategy is just a concept.”**

**“The plan is stale, and we iterate on it too slowly.”**

**“We can't see where we are, where we are winning, or where we have risk”**

**“We aren't driving customer value fast enough.”**

**“Employees' activities aren't accretive.”**

**“Even our biggest teams aren't aligned with each other or with the target.”**

**“Teams don't share our urgency or aspiration.”**

For many leaders, these symptoms and growth drag are reality. According to Accenture, just 18% of executives feel they have the agility to make changes smoothly — compared to 40% before the pandemic began.

# WorkBoard's Enterprise Results platform



WorkBoard addresses each of these symptoms by making it remarkably easy to execute and iterate on strategic priorities and OKRs, mobilize teams, accelerate your operating rhythm, and operate with high agility and transparency. Expert coaching services and enablement programs ensure results in one quarter and impact over time.

.With WorkBoard, teams across your org are empowered to adjust, align, and mobilize on strategic priorities. Team members are empowered to work seamlessly across distributed and dynamic teams, provides access to the right data to see real risks and progress, and ultimately empowers teams to make smart decisions in real-time – ensuring the business agility you need to thrive in today's market context.

## In one quarter, WorkBoard helps you:

1. Create Rapid value with clarity, measurement, and rapid iteration
2. Grow, learn and respond faster - quarter power
3. Win as a team: Localize objectives and results to teams so they have clarity, can make good decisions and focus their efforts on value
4. Empower teams to aim for great (not safety), so you can be great
5. Translate authorship into ownership, because ownership is accountability
6. Change from output to outcomes and measure to accelerate
7. Establish lateral alignment as a superpower
8. Provide transparency because If teams can't see the strategy, they can't contribute to it or be motivated by it - transparency kills friction and doubt + breeds trust.

# WorkBoard and Microsoft Teams makes OKR adoption even easier



Organizations must do more than align on outcomes—they need to empower their managers to bring results into their line of sight and ensure the data they need is available where and when they need it.

WorkBoard integrates seamlessly with Microsoft Teams to do exactly that – you do not leave the conversation to focus on your results. **The result? Fluid communication around results, which drives sharp focus and enables great outcomes.**

For leaders, WorkBoard reduces the OKR learning curve even further by making it even easier to focus efforts where they matter most.

**Within Microsoft Teams, managers using WorkBoard are proactively shown where to focus their attention and direction week after week – without needing to dig through messages, spreadsheets, or status reports to know what matters most.**



“The sense of clarity is enormous. People feel like they are putting their energy in the right place”.

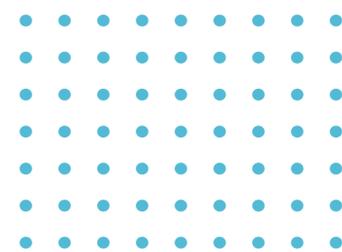
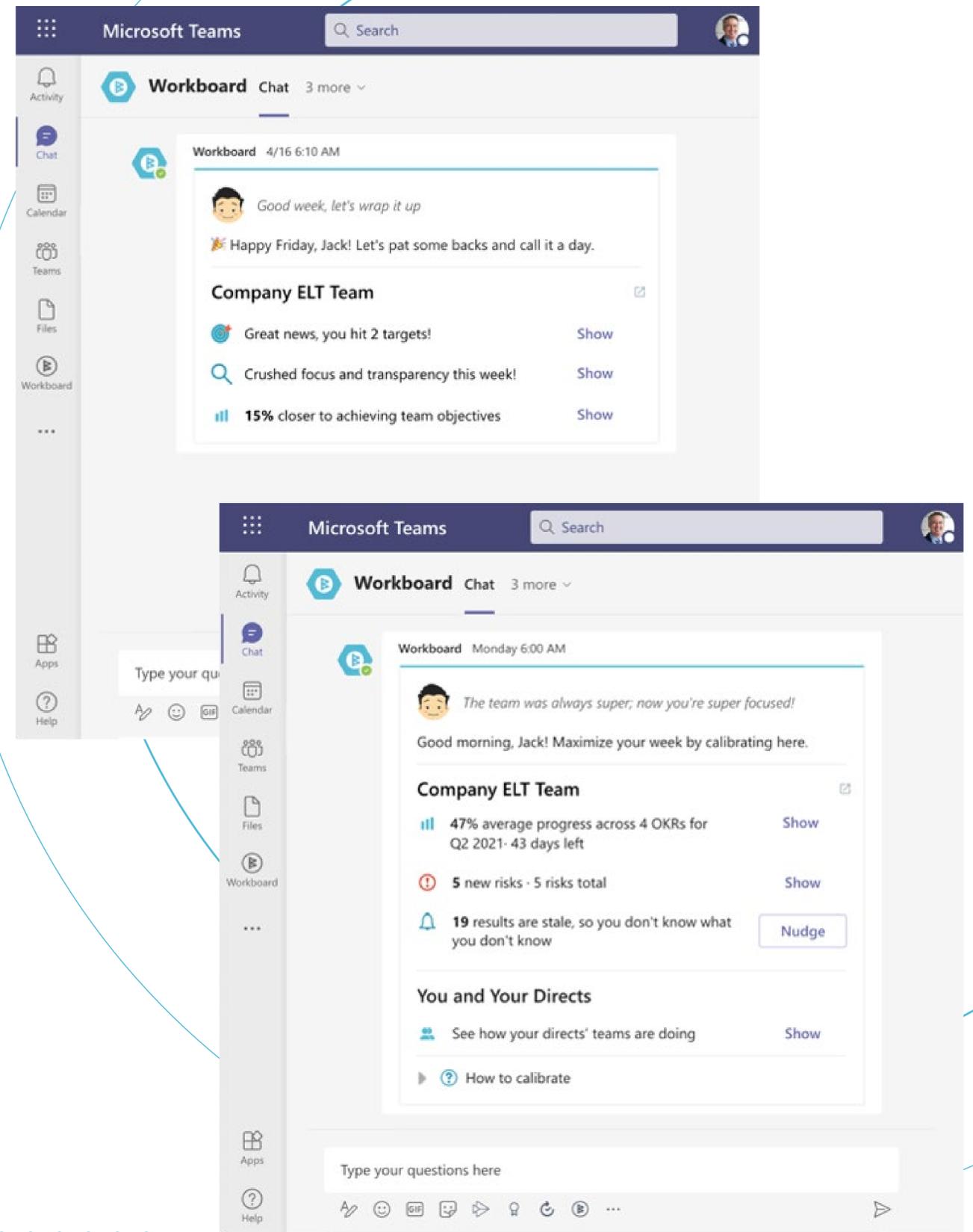
— John Nisi, GM & COO of Microsoft’s US Cloud & Enterprise Business

Every Monday, managers receive a short message with the results that need attention. Progress is highlighted, new risks are escalated, and data gaps are shown so managers can focus their attention where it will have most impact. And on Fridays, managers receive another short message with the results gained for the week, targets hit, and micro-victories to celebrate. **They can easily see where to nudge teams and motivate continued focus on the ambitious results they wanted to achieve.**

Together with Microsoft Teams, WorkBoard provides leaders with the “easy button”—a single click to cheer, nudge, and comment to engage with and motivate their teams to their best possible outcomes.

Rather than navigate to an app or search for a spreadsheet, items that need attention and recognition are readily available in WorkBoard. This makes good management effortless and augments managers’ effectiveness on a broad scale across enterprises.

The ultimate result? A management model and operating rhythm that allows you to adjust, align, and mobilize on strategic priorities faster.



# Using OKRs with the Outcome Mindset to accelerate results



Here's how a mature tech organization employing 11,000 individuals was able to iterate, align, and mobilize their employees on strategic priorities more efficiently...

## CEO with a bold vision for the future...



His situation:

- Annual plans aged poorly
- Complacency not urgency
- Vision lost between the layers and silos
- Unfocused efforts not accretive
- Already an agile product shop



His questions:

- How do we ...
- ✓ Iterate on value faster?
  - ✓ Mobilize faster?
  - ✓ Engage more teams in customer outcomes?
  - ✓ Spark higher ambition and ownership?
  - ✓ Measure so we learn faster?

## Overview

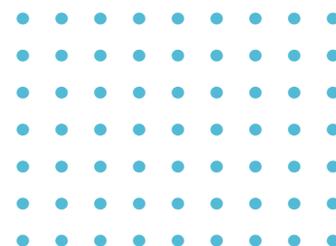
A CEO for a mature tech organization had a bold vision for the future of the company – to win the next decade of their category. To translate that vision into execution, he knew that a new management model and operating rhythm was needed. In collaboration with WorkBoard, the organization was able to dramatically increase confidence, engagement, and motivation through OKRs.

## The Opportunity

Before WorkBoard, the organization faced several challenges related to a lack of alignment and day-to-day, up-to-date insight and clarity on their strategic priorities. Annual plans aged poorly and fostered complacency rather than urgency. Vision was lost between the layers and silos, which in turn led to unfocused efforts and hindered growth. The CEO wanted to iterate on values and mobilize quickly engage more teams in customer outcomes, spark increased ambition and ownership, and accelerate learning by measuring results more accurately.

## The Solution

The organization embraced the WorkBoard Outcome Mindset Method™ (OMM), a proven method for unlocking ambition, fostering inherent ownership of OKRs, elevating thinking and innovation, and mobilizing the organization to achieve the best possible results. OMM provides global local (rather than top down) alignment; quarterly iteration for clarity, urgency, and velocity; framing teams as the engine of value creation; increased communication designed to motivate and mobilize; the ability to establish lateral alignment; and finally, an emphasis—just as important as alignment—on focusing and learning.



# Using OKRs with the Outcome Mindset to accelerate results (continued)



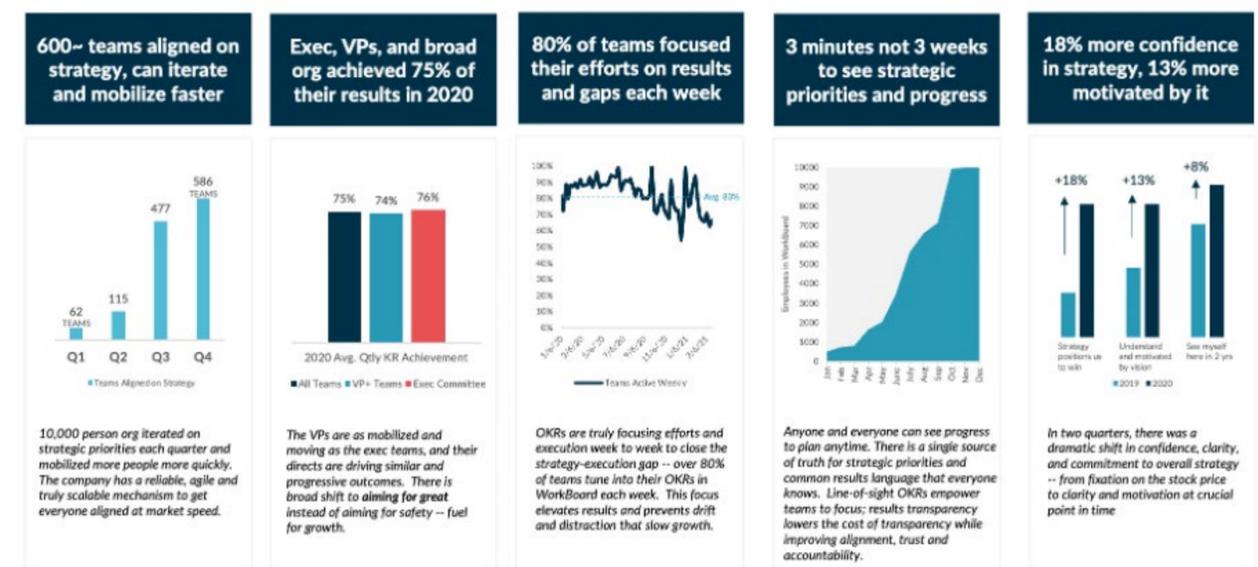
## Results:

- Approximately 600 teams iterated on strategic priorities each quarter.
- In just two quarters, the organization saw an 18% increase in confidence in the strategy and a 13% increase in motivation.
- The company now has a reliable, agile, and truly scalable mechanism to help everyone align at market speed.
- It takes three minutes—not three weeks—to see all strategic priorities and progress.
- VPs are just as mobilized as the exec teams, and their direct reports are driving similar, progressive outcomes.
- 80% of teams focus their efforts on results and gaps each week, which elevates results and prevents the drift and distraction that slow growth.

Leveraging WorkBoard’s platform accelerated growth and strong team outcomes at every level. Anyone and everyone within the organization can see progress to plan at any time. There is a single source of truth for strategic priorities—

and a common results language that everyone knows. Line-of-sight empowers teams to focus, and results transparency lowers the cost of transparency while improving alignment, trust, and accountability.

Teams across the organization can better articulate, align, and measure their OKRs, resulting in faster, team-fueled operating rhythms, accelerated outcomes, and increased enterprise agility.. Within one year, this organization now iterates on locally-owned objects and results with measurable impact. The company has global unity through adopting the quarterly OKR cycle by aligning on outcomes, focusing on outcomes and constant learning and iteration.



# Why WorkBoard?



WorkBoard is the most trusted OKR platform. Hundreds of enterprises use WorkBoard to accelerate their results and operating rhythm, including Microsoft, Cisco, Workday, Juniper Networks, 3M, Astra Zeneca, EXL, and Ascension, and by fast growth companies transforming their market like Avalara, Zuora, Toast, Malwarebytes, Praxis Precision Medicines, Seismic, and others.

WorkBoard's innovative chat-first experience in Microsoft Teams meets managers where they are with the things that need attention and celebrates milestones each week. WorkBoard's integration with Microsoft Teams unlocks the benefits of higher focus more quickly for organizations.

WorkBoard is a pioneer in OKR coaching and helps deliver immediate results. WorkBoard supports thousands of teams to align and measure results, and has certified more than 7,500 OKR coaches in the Outcome Mindset Method™ since launching their OKR Coach Certification program in 2018.



## Microsoft Teams

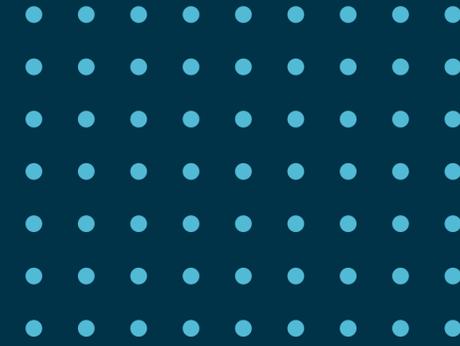
**Microsoft Teams is the centralized hub for the modern workplace where teams chat, share and collaborate on work, and conduct meetings—all in one place.**

**The hub for teamwork:** All your team conversations, files, meetings, and apps live together in a single shared workspace.

**Focused meetings:** As soon as meetings are created, employees can chat with participants about the agenda, share files to review before the meeting, and keep track of meeting notes and to-dos.

**Improve collaboration and communication:** Since Teams is integrated with Microsoft Office 365, you don't need to switch apps to collaborate, and you can immediately share documents with coworkers.

**Stay connected anywhere:** With the Teams phone app, you have immediate access to all your apps and documents. You can easily respond to chats, join meetings, and continue to collaborate regardless of where you are.



# Mobilize faster with WorkBoard and Microsoft Teams

[Get a Demo](#)

