

WorkBoard  AI

Accelerate 2026

SEPTEMBER 23-25
FRISCO, TEXAS

Accelerate 

2026 WorkBoard



Deidre Paknad

CEO & Co-founder, WorkBoard

WorkBoard  AI

WorkBoard Keynote: Meeting the Future

Deidre Paknad has founded and led three tech startups, navigated acquisitions on both sides, and led a high-growth business group at IBM. These give her a rare lens on how to use speed *and* scale to drive value. As CEO of WorkBoard, she partners with senior leadership teams at the world's largest companies to clarify and accelerate strategic priorities.

She is host of a popular podcast, a frequent speaker on outcome mindset and entrepreneurship, and guest lecturer at Stanford Graduate School of Business. Deidre holds over a dozen patents and has twice been inducted into the Smithsonian Institution for Innovation and featured in five books on leadership and entrepreneurship.



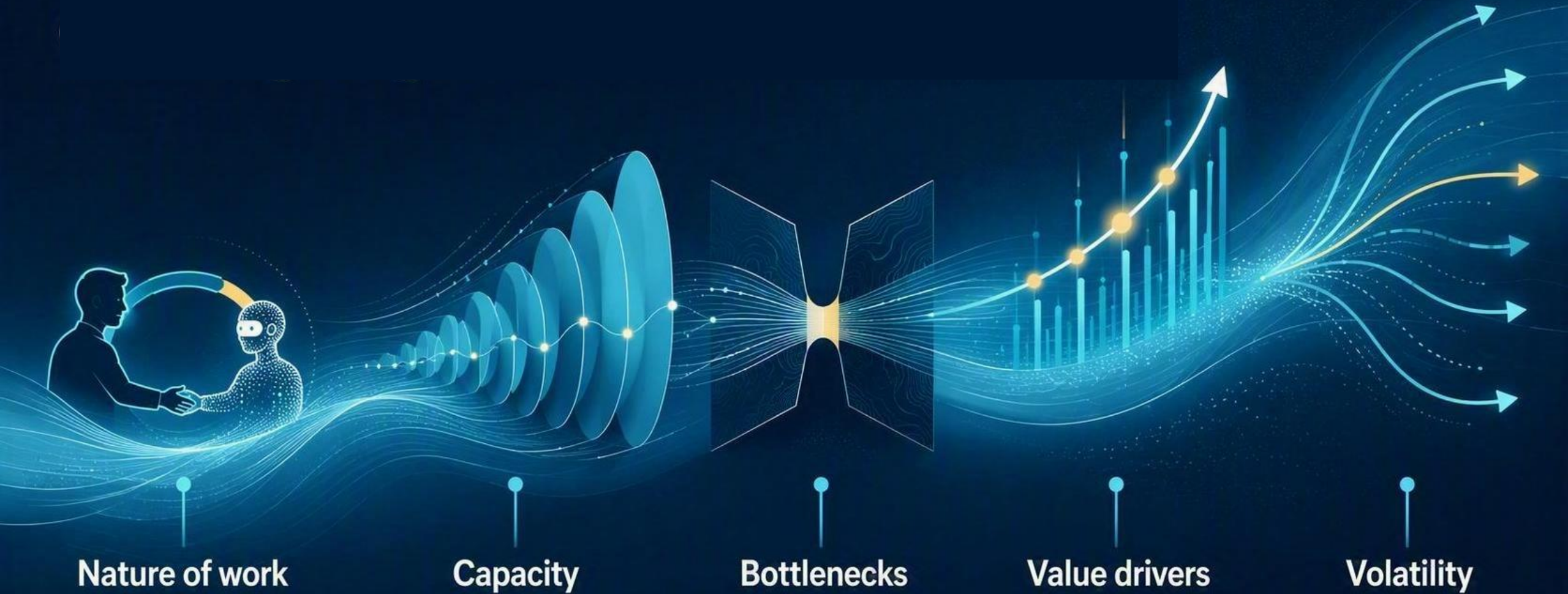
Our greatest risk now may be
a failure of imagination.

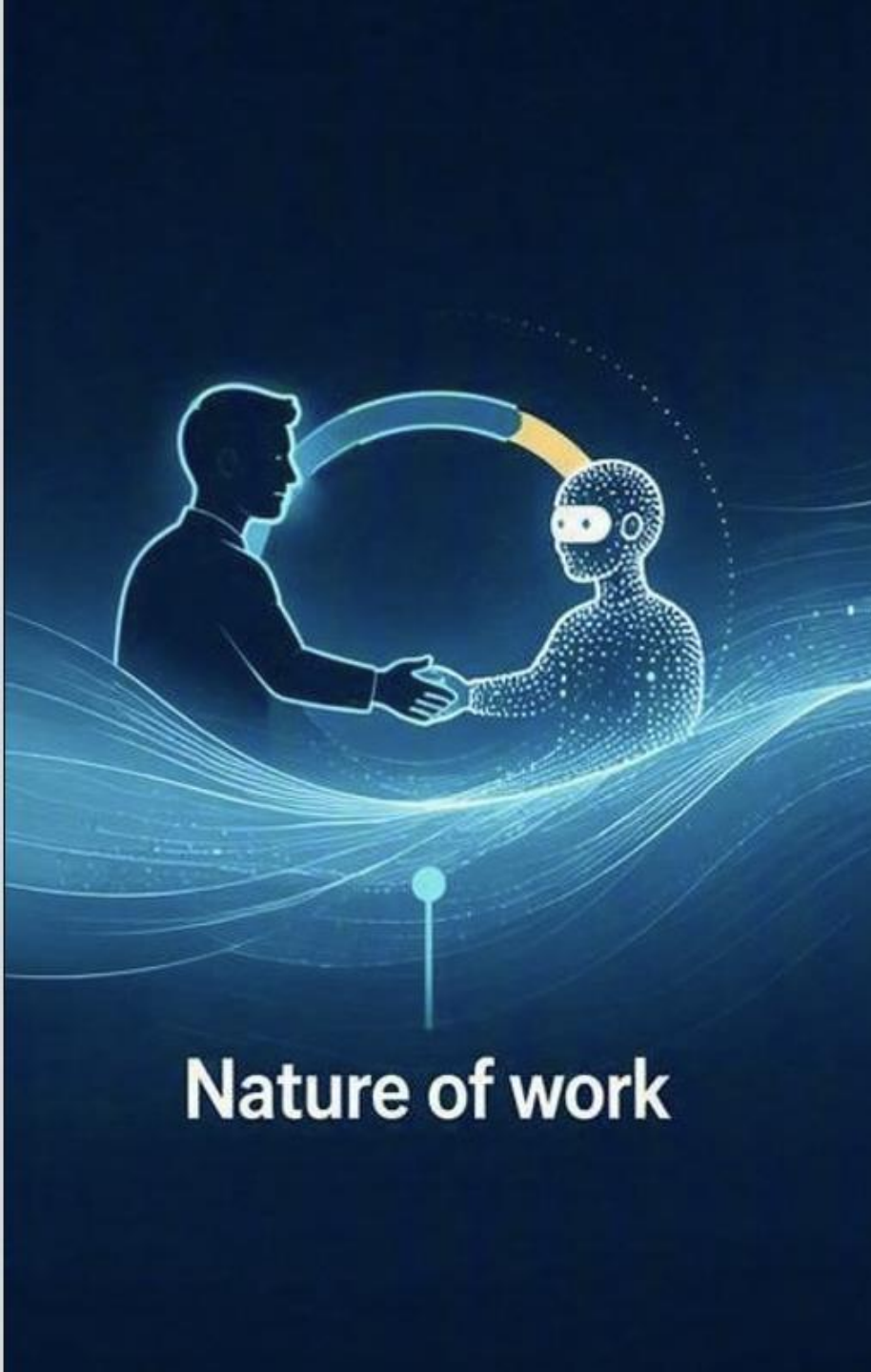
Deidre Paknad
CEO & Co-Founder WorkBoard

What's true now...



What's shifting...



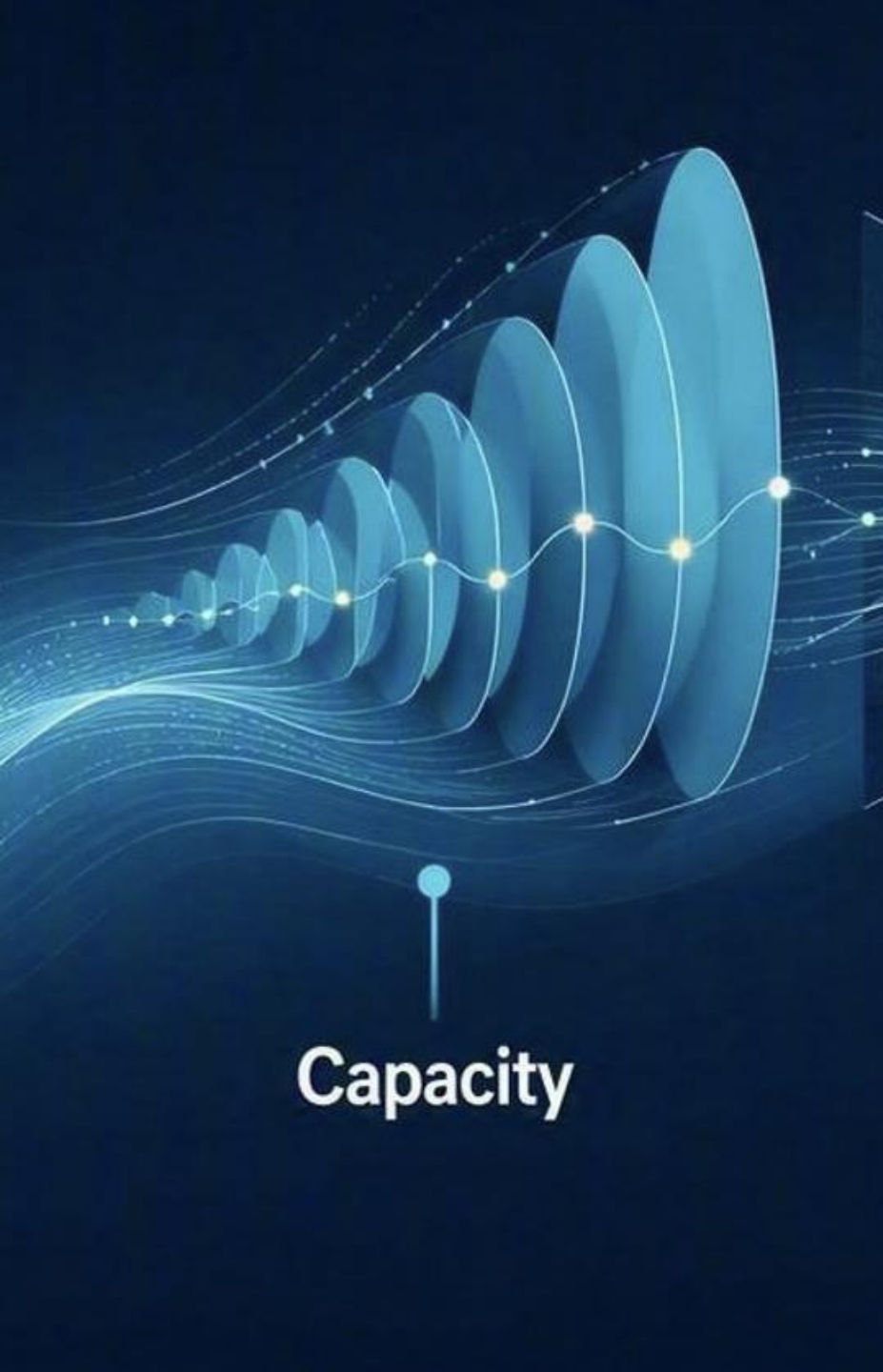


Nature of work

Outcomes and an outcome mindset are essential to unlocking AI benefits

- AI will do the tasks and will figure out to do them; people need to be able to *describe* the outcome and what success looks like.
- They'll have a conversation with agents; the agents will figure out how to do the task

Your investment in teaching people to think in outcomes was strategic!



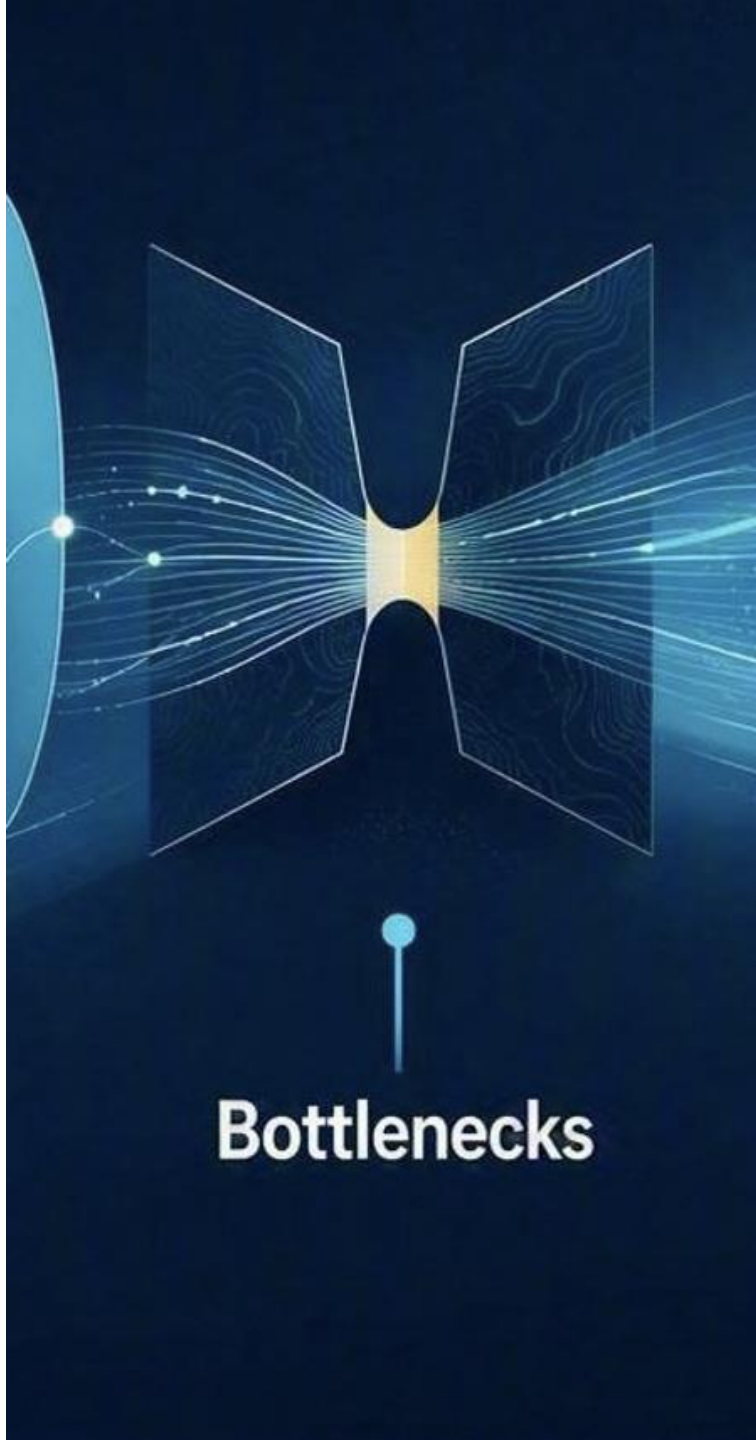
Capacity went from rigid and fixed to expansive and dynamic

The possibilities change dramatically; what fits in the budget does too as a result.

In 2025, developers pushed 1 billion commits to [GitHub](#). In August, it was 2.9 billion *per month*.

At OpenAI, there are 3.1 agent workdays for every 1 person workday.

That's 35x or 3500% more capacity!

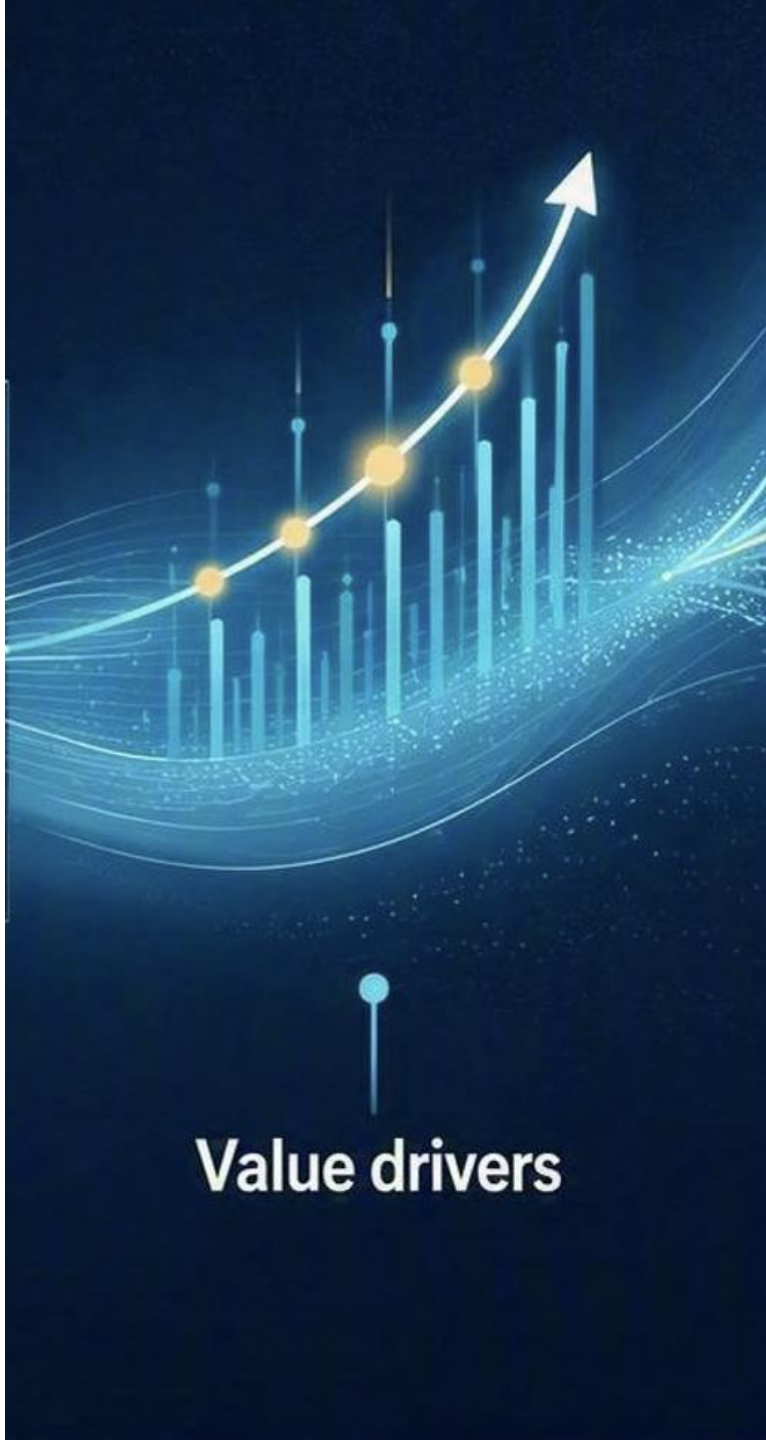


Bottlenecks

Bottlenecks move from producing and building to learning, selling and delivering

- Focus on the final mile because the first 9 miles collapsed to 9 feet! You traverse them faster than gtm teams are prepared.
- X-F orchestration and “working as one” become infinitely more critical.

Rethink what's on roadmaps, what's in initiatives and how you set OKRs!



Value drivers

The most valued companies have very different speed and cost structures

- The top 10 companies in the AI economy have a combined market cap of \$25 trillion
- They capture all of that new capacity, and invest aggressively in creating even more (but not in headcount)

If AI isn't already your way of working, your capacity and cost structure are disadvantages.



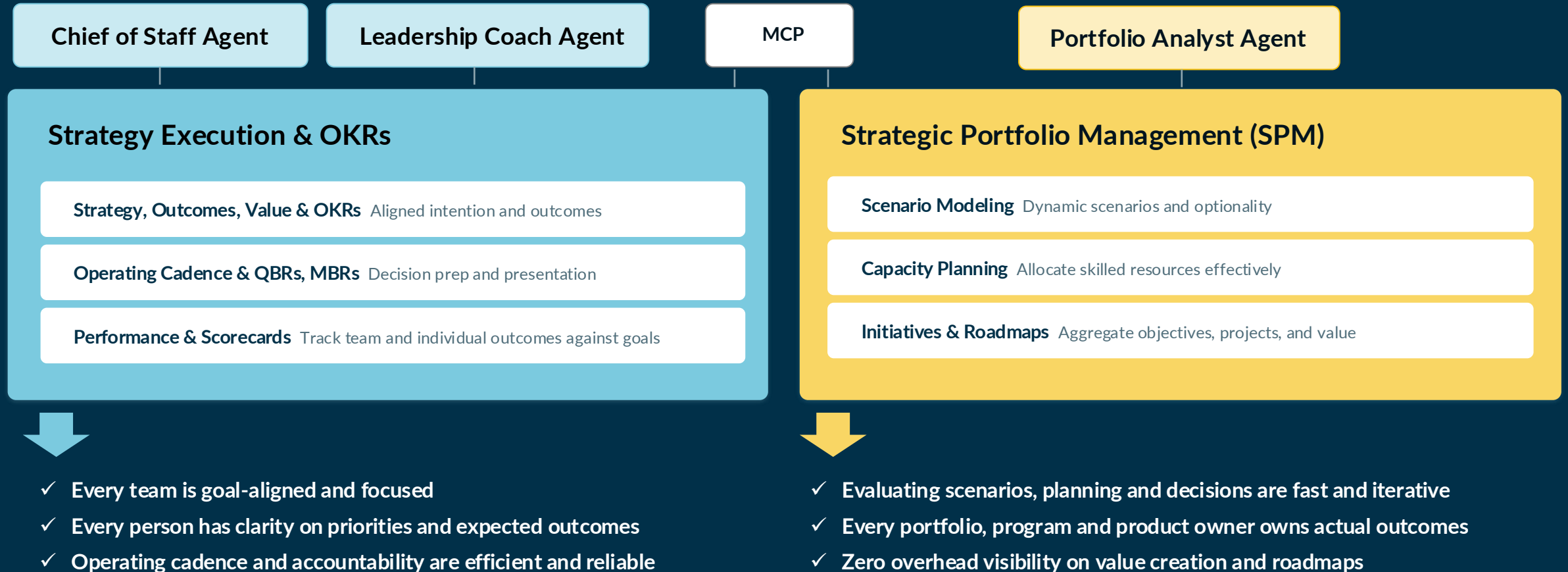
Our ability to predict the future has eroded even further.

- Need to make – and sometimes reverse – harder bets faster
- Need to revisit work in progress: Has it been obviated? Should it be refactored?
- New possibilities mean new demands for capital and capacity, while volatility keeps budgets relatively fixed
- Scenario analysis is now a monthly need, not an annual one
- Strategic planning and resource alignment must be continuous,

We need tighter connection between target outcomes and initiatives with faster analyses


Volatility

WorkBoard is now fully agentic, and extends to Strategic Portfolio Management



Said another way ...

Strategy Execution & OKRs

OUTCOME ALIGNMENT

Strategic Portfolio Management (SPM)

BUDGETS & RESOURCES



Strategy execution and OKRs now completely agentic and chat-driven.



New Agentic Foundation gives agents the capability of Claude.

See more from our speakers and in breakouts!

→

+

📅

🔖

Luisa AI Chief of Staff

Show me the Digipay Scorecard highlights

Here are the highlights and issues you should focus on:

Wins

- MAU on target after steady improvements — 39.4% against 40%

Risks

- Transaction time reduction is stalled with only a 0.5 second improvement vs 4.5 second target.
- Reducing 4 user steps is behind with recent progress; the team is confident it will achieve this result

Jira Context

Georgi and Girish have made multiple code refactoring efforts to reduce transaction time. Their notes and tickets indicate that these have not had any impact on transaction processing speed.

Insights

Adjust Scorecard

More ▾

Ask me anything...

Digipay Scorecard

Key Result	Current	Target	Trend	Relationships	
Reduce 4 user steps in Digipay transaction flow this quarter	3	4		DEPENDENCY FOR	- Front line teams initiative 35% of - Deploy 4 more AI deployment use cycle time and human error Digipay Project
Cut transaction processing time by 4.5 seconds	0.4	4.5		DEPENDENCY FOR	- Deliver Platform MVP to Production 3 product launches with CSAT of 4 - Deploy 4 more AI deployment use cycle time and human error - Chatbot 3.1 user stories are ready
MAU increases 8% from 32% to 40% (about 4k users)	0	0		DEPENDENCY FOR	- Digital workplace uptake drives > 3 points monthly - Increase same-week WAU https://woboco.atlassian.net/browse/
Users see 0 seconds of spinning wheel in transaction flow (as reported by users - from 2 seconds)	46.94%	50		DEPENDENCY FOR	Complete UAT of Digipay 2.0 Digipay Dev Plan (increment) https://woboco.atlassian.net/browse/
Access issue resolution time decreased from 2 hours to 1 hour	30%	100%		BLOCKED BY	Cut security escalation engineering from 1 hour to 15 minutes
Digital workplace uptake drives >30,000 engagement points monthly	60%	100%		BLOCKED BY	MAU increases 8% from 32% to 40%

Agent Gallery

Maximize the work WorkBoardAI Agents do for you with these dashboard and deck prompts, skills and more!

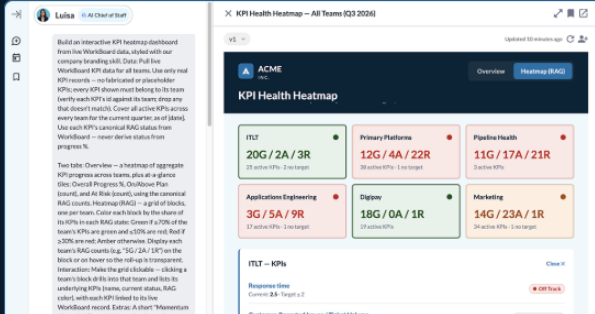
All

Dashboards

Decks

Utilities

Workflows

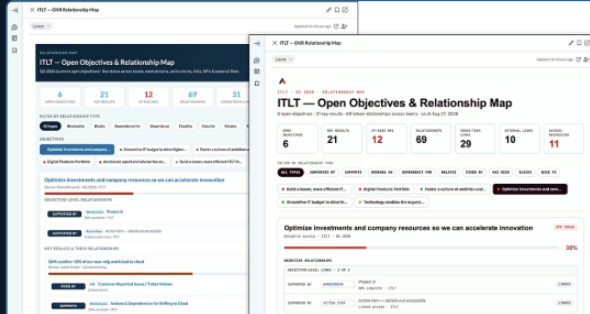


KPI Heatmap Dashboard

Generate an at-a-glance, interactive heatmap of KPI health across the business.

CHIEF OF STAFF

DASHBOARD



Set Your Brand Guidelines

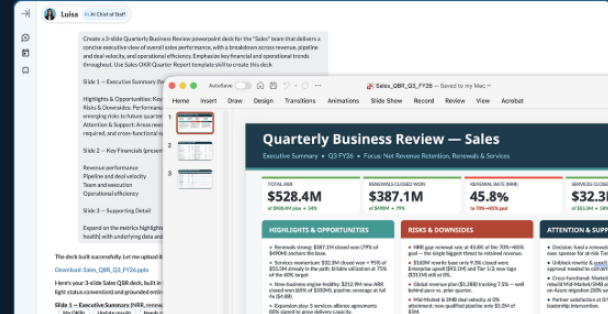
Set your own brand guidelines so all dashboards, decks, pdfs and other materials generated by your Agents use your logos, colors, fonts, and voice.

CHIEF OF STAFF

LEADERSHIP COACH

PORTFOLIO ANALYSIS

UTILITY

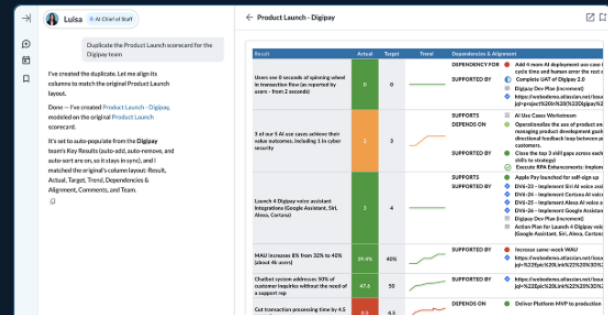
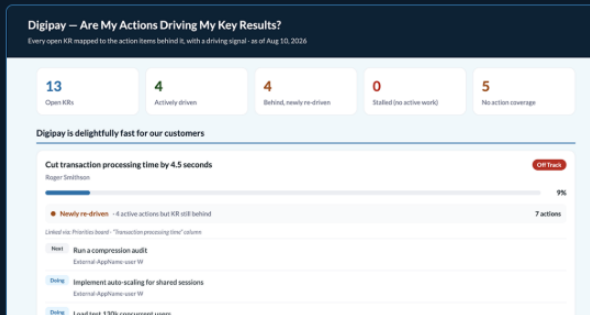
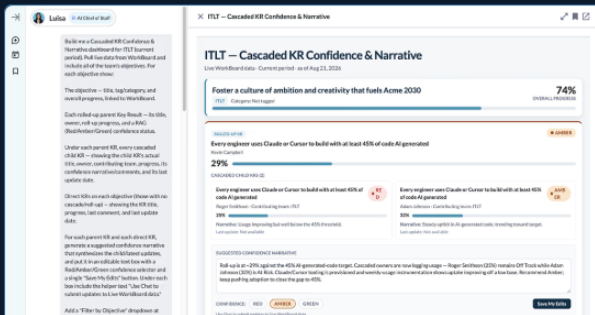


Build a Sales Overview Deck

Generate a downloadable powerpoint deck with highlights, operational risks, and support needed pulled straight from key result updates.

CHIEF OF STAFF

DECK



SPM serves two domains, but the core is the same: Are we making the best bets and delivering the best outcomes?

CORPORATE STRATEGY

Evaluate strategic options more frequently and bet more confidently

- Trade-offs are hard to evaluate but are needed more frequently
- AOP doesn't reconcile actual work done with target outcomes – assumes the right things happen
- Little visibility to value progression on long-range capability builds; high emphasis on activity reporting in high-overhead meetings/decks

PRODUCT & TECHNOLOGY STRATEGY

Deliver the best strategic outcomes for invested capital and capacity

- Budgets and planning often driven by loudest voice, not highest value because current methods make it hard to compare cost and value in a large array of initiatives
- The process from demand intake to prioritization to reporting progress are labor intensive and disjointed
- Focused on staying on budget and time, not on maximizing strategic value for invested capital and capacity

Demand always exceeds
capital and capacity.

SPM ensures allocation
decisions are outcome
driven and you can drive
outcomes more effectively.

Learn more from our speakers and demonstrations!



This week, Accelerate speakers and Award recipients will share how they're driving great outcomes

Beyond foundations to better execution and operational excellence!



Outcomes + Portfolios



AI as Accelerator



Golden Thread in Action

WorkBoard AI

Let's embrace this week's
learnings and the future together!



Strategy at the Speed of AI



Candace Thiele

EVP & Chief Administrative Officer, Axos

Candace L. Thiele serves as Executive Vice President and Chief Administrative Officer at Axos Bank, where she oversees Human Resources, Marketing, and the Office of the CEO. With more than 30 years of experience in financial services, she partners closely with business leaders to drive organizational effectiveness, operational excellence, and strategic growth across the company. Recognized as a strategic and hands on operator, she has implemented initiatives that improve engagement, streamline processes, and enhance enterprise-wide collaboration.



Steve Carney

SVP, Internal Consulting, Axos

Steve Carney is a transformation and operations leader with more than 20 years of experience improving business processes, applying technology to operations, and helping organizations translate strategy into execution. Throughout his career, Steve has worked at the intersection of process, technology, and people, leading efforts to simplify and modernize how work gets done. More recently, his focus has expanded to applying emerging AI capabilities and disciplines to both localized business opportunities and enterprise-wide transformation – exploring not only where AI can improve existing processes, but how organizations can fundamentally rethink work in an AI-enabled environment.

WORKBOARD ACCELERATE 2026

Strategy at the Speed of AI

Our journey from fragmented execution to an AI-powered
Enterprise Strategic Execution

Candace Thiele, EVP, Chief Administration Officer · Steve Carney, SVP, Internal Consulting

Axos Bank

The Execution Gaps We Set Out to Close

Before WorkBoard, strategy struggled to survive contact with day-to-day work — especially across teams.

01

Cross-Functional Alignment

Strategy stalled at the handoffs between teams

02

Transparency

Progress and outcomes were hard to see

03

Accountability

Hard to hold each other to commitments

04

Directionality

Work wasn't visibly tied to outcomes

05

Status Clarity

Couldn't tell where things really stood to act on it

Strategy doesn't cascade to execution, it evaporates

We Chose the Platform That Matched the Problem

THE GAP

Cross-functional alignment

→ Shared OKRs & alignment maps across every team

Transparency

→ Real-time outcome dashboards & scorecards

Accountability

→ Owner-level tracking with regular check-ins

Directionality

→ Work items linked directly to key results

Status clarity

→ Automated roll-ups and status signals

AI in Action Across Our Journey

01

Faster Adoption

Agent/MCP-driven system setup & configuration lowered the learning curve

02

Smarter Content

Outside content sourced with auto-updates; extraction into decks & briefs

03

Stronger Governance

Platform hygiene inspection, standards creation, and shareable skills that enforce conformity

04

Transparency at Scale

Best-practice proof points, plus ferreting out issues across the whole portfolio

CEO Sponsorship Turned Adoption Into Momentum

2

QUARTERS

from kickoff to enterprise-wide execution

1

Top-down mandate

Executive team adopted OKRs & WorkBoard first, before asking anyone else to

Everybody link your meetings into Workboard, now!

2

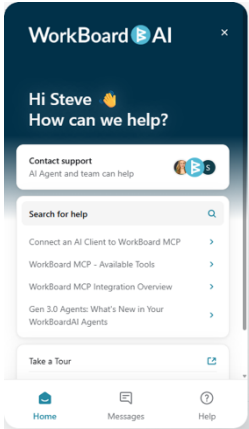
Modeled at the top

Leaders reviewed their own progress transparently, in the open

3

AI + platform, together

AI lowered the effort to adopt; adoption expanded where AI could help



Everybody enable the Workboard MCP into Claude, now!

4 clicks



Super helpful AI chat bot



Claude Skills/Project to Source Updates



Prompt builder

Updates into WoBo reduced from >2 hours to <5 minutes



WoBo Agent Skill Monitors Consistency of Use

⚡ Skills

⚡

OKR Standards & Cascade Reviewer

Custom

by You • edited Aug 17, 2026

Leader	5-theme coverage	Est. conformance	Biggest hygiene flag
Raymond Matsumoto	✅ 5/5	~88%	KR volume runs high (7 KR on Execution, 6 on People/Customer) vs the 4-6 guide
Michael Watson	✅ 5/5	~78%	Duplicate pillar sets — a full annual AI/Exec/Growth/People/Customer set and a parallel "FY27 Q1" set
Brian Swanson	✅ 5/5	~70%	Most pillar objectives backed by a single generic "Roll-up from all business unit objectives" KR rather than measurable KRs
Derrick Walsh	⚠️ ~3/5	~55%	Objectives don't follow the AI/Exec/Growth/People/Customer naming; several are program buckets; no explicit People pillar
Christian Santaniello	✅ 5/5	~55%	Many KRs still hold placeholder targets ("from X to Y", "improve by X%"); most KRs at 0% (stale/not started)
Candace Thiele	⚠️ 1/5	~45%	Only the People theme is represented; KRs are well-formed but all at 0% with no updates logged

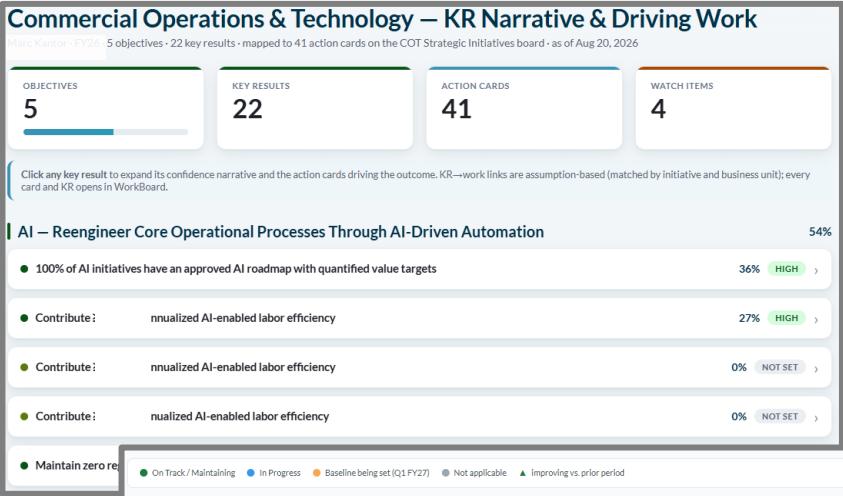
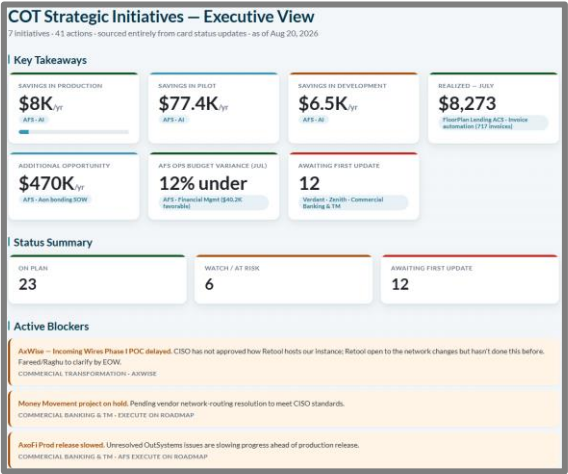


You can't expect 100% of people to do it 100% right, 100% of the time

Dashboards Created Within a 30 Min Meeting

Luisa AI Chief of Staff

build me a consolidated scorecard for every key result across all teams, objectives and key results that is within the current time period window. I am meaning system-wide, not just for key results within my team or functional roll up.



Eight teams - objectives, key results, progress & confidence - as of Sep 1, 2026

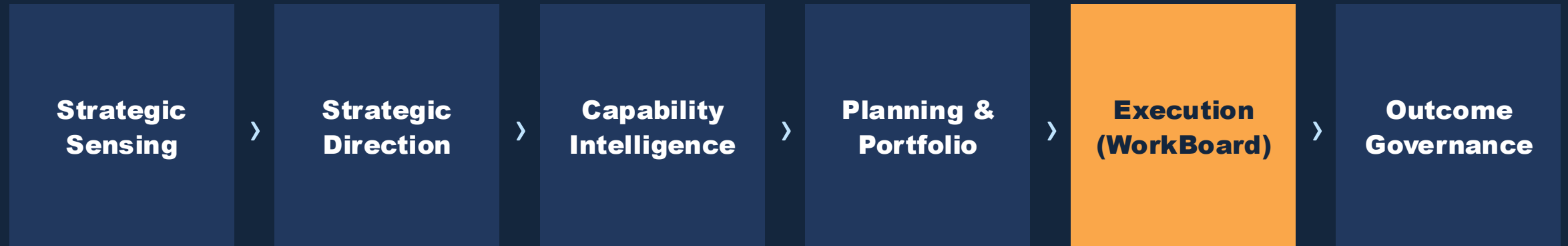
ALL TEAMS	AUTO LENDING	BBLOC+SBLOC	SFR CONSUMER DIRECT	SFR WCPL	UNSECURED LENDING	MORTGAGE BANKING
MARINE LENDING						
TEAM	OBJECTIVES	KEY RESULTS	ON TRACK	OFF TRACK	OVERALL PROGRESS	
Auto Lending	5	10	9	1	20%	
BBLOC+SBLOC	5	9	9	0	39%	
SFR Consumer Direct	5	13	12	1	20%	
SFR WCPL	5	12	10	2	25%	
Unsecured Lending	5	11	11	0	43%	
Mortgage Banking	1	3	3	0	33%	
Marine Lending	5	14	14	0	4%	

Division	Customer — Voice of Customer	Execution — Critical Delivery	AI — Adoption & Roadmap	People — Engagement & Retention	Risk & Compliance
Consumer & Digital	NPS + App Rating	% critical initiatives on-time/on-budget	Approved AI roadmap: priority processes w/ AI	Engagement score - regretted attrition %	0 material findings - % remediated on time
Commercial Lending	Client NPS (baseline)	% critical initiatives on-time/on-budget	Approved AI roadmap: priority processes w/ AI	Engagement score - regretted attrition %	0 material findings - % remediated on time
Commercial & Small Business	SBB NPS + App Rating	% critical initiatives on-time/on-budget	Approved AI roadmap: priority processes w/ AI	Engagement score - regretted attrition %	0 material findings - % remediated on time
Securities, Clearing & Custody	NPS/CSAT baseline - VOC into roadmap	% critical initiatives on-time/on-budget	Transformation / AI roadmap coverage	Engagement score - regretted attrition %	Audit findings + 3 SOX tie-out on time
Office of the CTO / Finance	Internal partner CSAT	% critical initiatives on-time/on-budget	FP&A automation / AI roadmap	Engagement score - regretted attrition %	0 control incidents - close accuracy
Technology & Platform	IT service CSAT	% enterprise-critical delivery within 10%	AI embedded in production workflows	Engagement - hands-on-keyboard %	High-sev incidents - 99.99% uptime
GRC / Risk & Compliance	Internal stakeholder CSAT	% critical initiatives on-time/on-budget	Live automations - verified hours saved	Engagement score - regretted attrition %	0 material findings - days-to-close
Enterprise Marketing	Enterprise VoC / NPS index	% campaigns / launches delivered on time	Reduce manual MBR/QBR production	Engagement score - regretted attrition %	Brand / regulatory review compliance

WHERE WE'RE GOING

Our Vision: An Enterprise Strategic Management System

Coupling strategy end-to-end — sensing, direction, capability, planning, execution, and governance



Today, we live and lead from Execution — expanding outward as our maturity grows.

Where We're Headed as We Mature

NOW

Execution Vigor

OKRs, accountability, and transparency
running inside WorkBoard



NEXT

Connected Decisions

Coupling execution to strategic planning &
portfolio investment choices



FUTURE

Full Strategic Suite

AI-orchestrated strategy — from sensing to
governance, end to end

What We'd Want You to Leave With

- 1 Execution is the proof of strategy — not an afterthought to it
- 2 Agents belong in the strategy equation now, not someday
- 3 Aligning OKRs alone isn't enough — capital, capacity, people & performance must connect
- 4 Show, don't tell: let agents do the work your teams used to chase manually
- 5 CEO sponsorship and AI adoption compound each other

Thank You

Questions & Discussion

Candace Thiele · cthiele@axosbank.com

Steve Carney · scarney@axosbank.com



Susanna Mikaelyan

VP, Talent Management



From Strategy to Every Seat

Susanna Mikaelyan is VP, Global Talent & Learning at Pax8, where she is helping build the human operating system behind strategy execution. With more than a decade of experience in talent management and organizational transformation, she partners with leaders to align talent, performance, and capability building to accelerate business outcomes. Her work centers on helping organizations redesign how work gets done, building the skills, capabilities, and operating models that enable organizations to continuously adapt and thrive amid constant change.

EVERY SEAT IS A STRATEGY SEAT

The human operating system that makes strategy executable

Susanna Mikaelyan | Pax8 | VP, Global Talent Management

CUSTOMER ZERO

WORKBOARD ACCELERATE | FRISCO 2026

Managed Intelligence changed the direction of the company

Agentic transformation moved from emerging possibility to strategic urgency.

AI BEGAN DOING WORK

Agents performed tasks and coordinated across systems.

MANAGED INTELLIGENCE

Humans, AI, and agents working together to create value.

MISSION • VISION • PURPOSE

A new ambition: a revolutionary AI-driven marketplace experience.

The future arrived quickly. We had to move just as quickly.

We were designed for yesterday's challenges

Our structures, systems, and rhythms were built for a different pace of change.

ORGANIZATION

Built for more stable work

TALENT SYSTEMS

Experienced as separate programs

OPERATING RHYTHM

More episodic than continuous

We could not execute tomorrow's strategy through yesterday's operating model.

Pax8OS is our new OS operating system

The shared way Pax8 turns company ambition into everyday execution.

STRATEGY

EXECUTION

CAPABILITY

LEADERSHIP

HUMAN + AGENT

**A strategy becomes an operating model only when it survives
Tuesday.**

Pax8OS connects direction, ownership, capability, decisions, and how work gets done.

Customer Zero changed the assignment



**BUILD. TEST.
LEARN. EVOLVE.**

Customer Zero was not a victory declaration. It was a commitment to experience the friction ourselves.

**47,000+ partners | 800,000+ SMBs |
~1,800 employees**

WE STOPPED REDESIGNING PROGRAMS

**AND STARTED DESIGNING A
HUMAN OPERATING SYSTEM.**

FRAGMENTATION



ONE EXECUTION SYSTEM

The ecosystem that makes Pax8OS executable



Four constraints we set before we built

01 ONE RHYTHM

Not parallel
processes

02 REAL SKILLS

Visible, not
assumed

03 MANAGER RELIEF

Less coordination

04 ACCOUNTABILITY

Inside the rhythm

A design filter for every process, tool, and agent.

Strategy execution expanded to every team

THE FIRST MOVE WAS NOT AI.

IT WAS OWNERSHIP & LINE OF SIGHT

SENIOR LEADERS

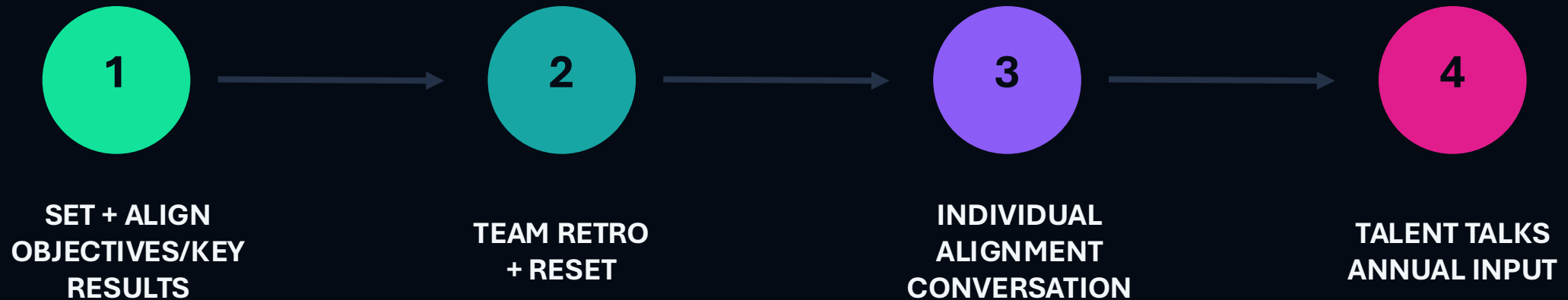


**EVERY TEAM.
GLOBALLY.**

**WORKBOARD + ENTERPRISE
OKRs**

THE BUSINESS RHYTHM

Every quarter. Every team. Every employee.



ESSENTIAL CONVERSATIONS | ONGOING COACHING AND DEVELOPMENT BENEATH EVERY QUARTER

WORKBOARD | OKRs + PERFORMANCE EXPERIENCE IN ONE RHYTHM

From Pax8OS to individual contribution



Traceability turns strategy from an announcement into a working system.

Do we have the skills to execute our strategy?



SKILLS NEWEST + LEAST MATURE LAYER

Support at the moment of leadership



TOOLS + AGENTS + ON-DEMAND DEVELOPMENT

Culture is what the organization repeatedly asks people to do

CLARITY

FEEDBACK

COACHING

ACCOUNTABILITY

REPEAT EVERY QUARTER → “HOW WE WORK”

Evidence the rhythm is taking hold

SCALE

79.3%
active Key Results

96%
**covered through Talent
Talks**

MOMENTUM

58% → 61% → 75%
Alignment Conversations

+17 points
across two quarters

OPPORTUNITY

52.48%
Essential Conversations

46%
active development plans

Adoption evidence, not proof of causality.

Eighteen months ago → today

18 MONTHS AGO

Leader-centered

Annual and episodic

Skills largely invisible

Separate rhythms



TODAY

Distributed ownership

Continuous coaching

Skills tied to jobs

One connected ecosystem

THE NEXT TEST

SALES GIVES THE SYSTEM NOWHERE TO HIDE.

27 PEOPLE

LIVE PRESSURE
TEST

Can better coaching increase consistency
without weakening accountability?

The evidence gives us confidence. The friction keeps us honest.

ADOPTION

Different speeds by team and region. A new rhythm can feel additive before it feels simpler.

CAPABILITY

A process does not create coaching skill. Managers need practice, confidence, and support.

EXPERIENCE + INTEGRATION

WorkBoard and Workday connections, reporting, and administration still need simplification.

Four lessons that can travel

01

DEMOCRATIZE

Strategy first –
ensure line of sight
and ownership

02

INTEGRATE

Around one rhythm
with the right
accountability
measures

03

MAKE SKILLS VISIBLE

Tie learning and
development to
work

04

AUTOMATE COORDINATION

Never judgment

Five questions for reflection

- 01 Does every team have line of sight to strategy?

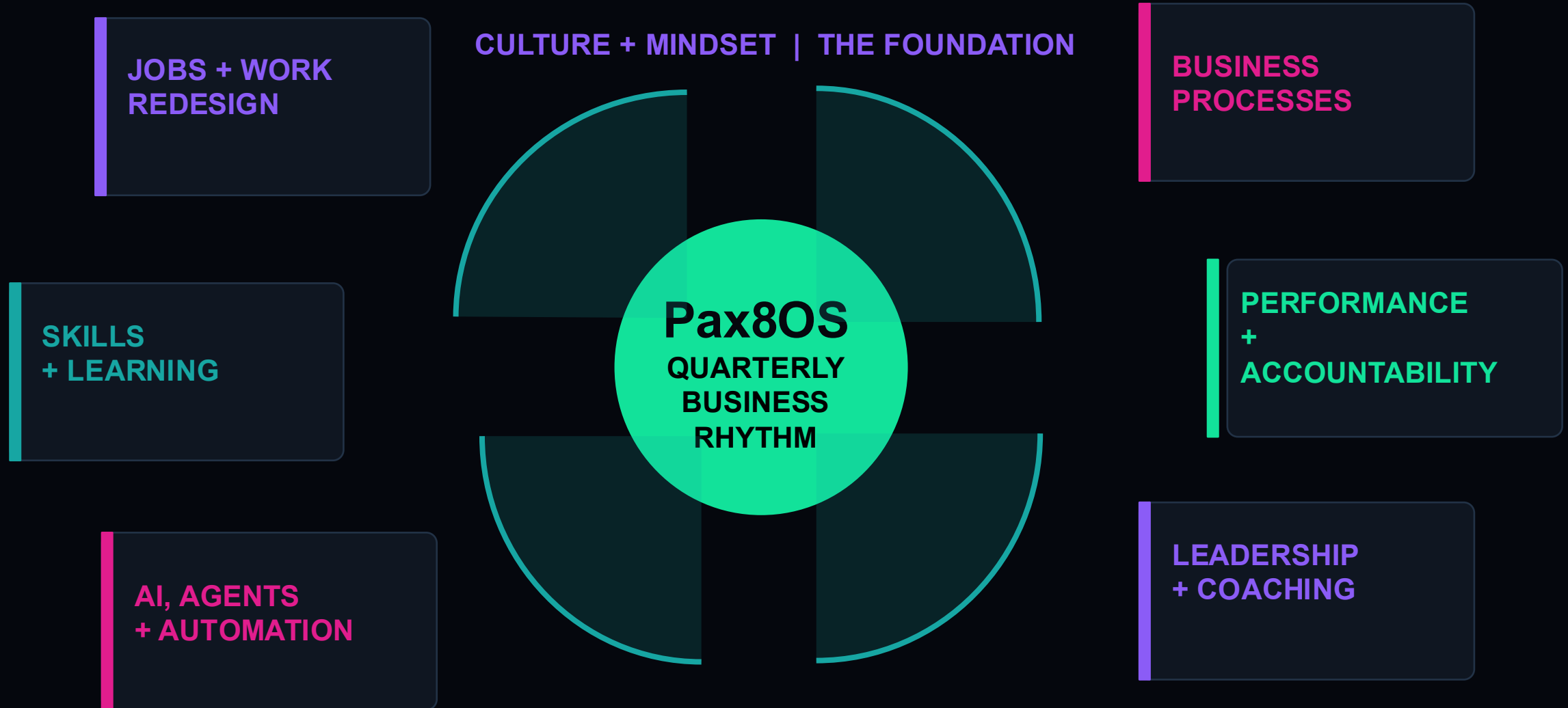
- 02 Do you have the right jobs, org design and the right capabilities in place to enable your strategy?

- 03 Do your talent processes share one rhythm with clear accountabilities in place?

- 04 Are your business processes ready for agents?

- 05 Do you have the right cultural signals coming through the system?

Now the model carries the work inside it



WORKBOARD HELPS US EXECUTE TODAY AND SHAPE THE AGENTIC EXPERIENCE OF TOMORROW



ONE RHYTHM.

ONE INTEGRATED ECOSYSTEM.

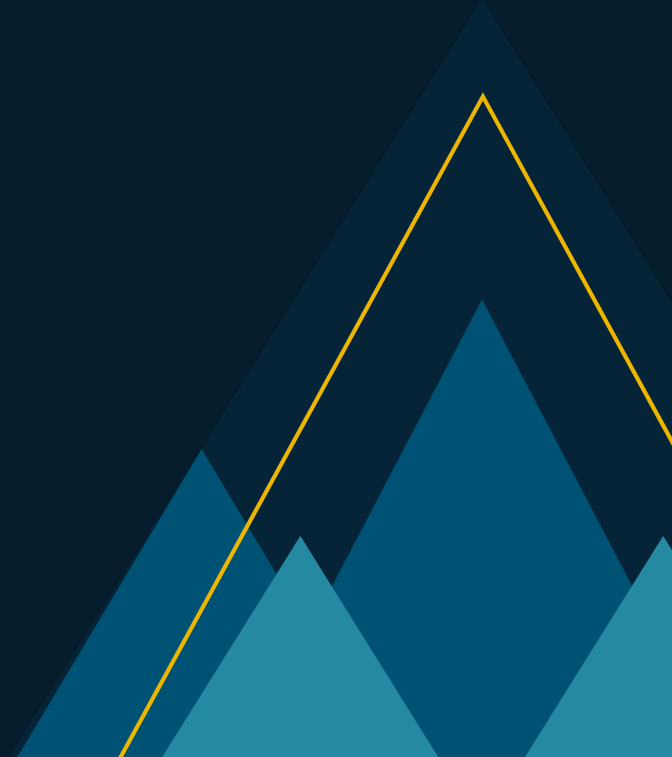
EVERY SEAT EXECUTING PAX80S.

Thank you.

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AI Strategy Execution Summit 2026





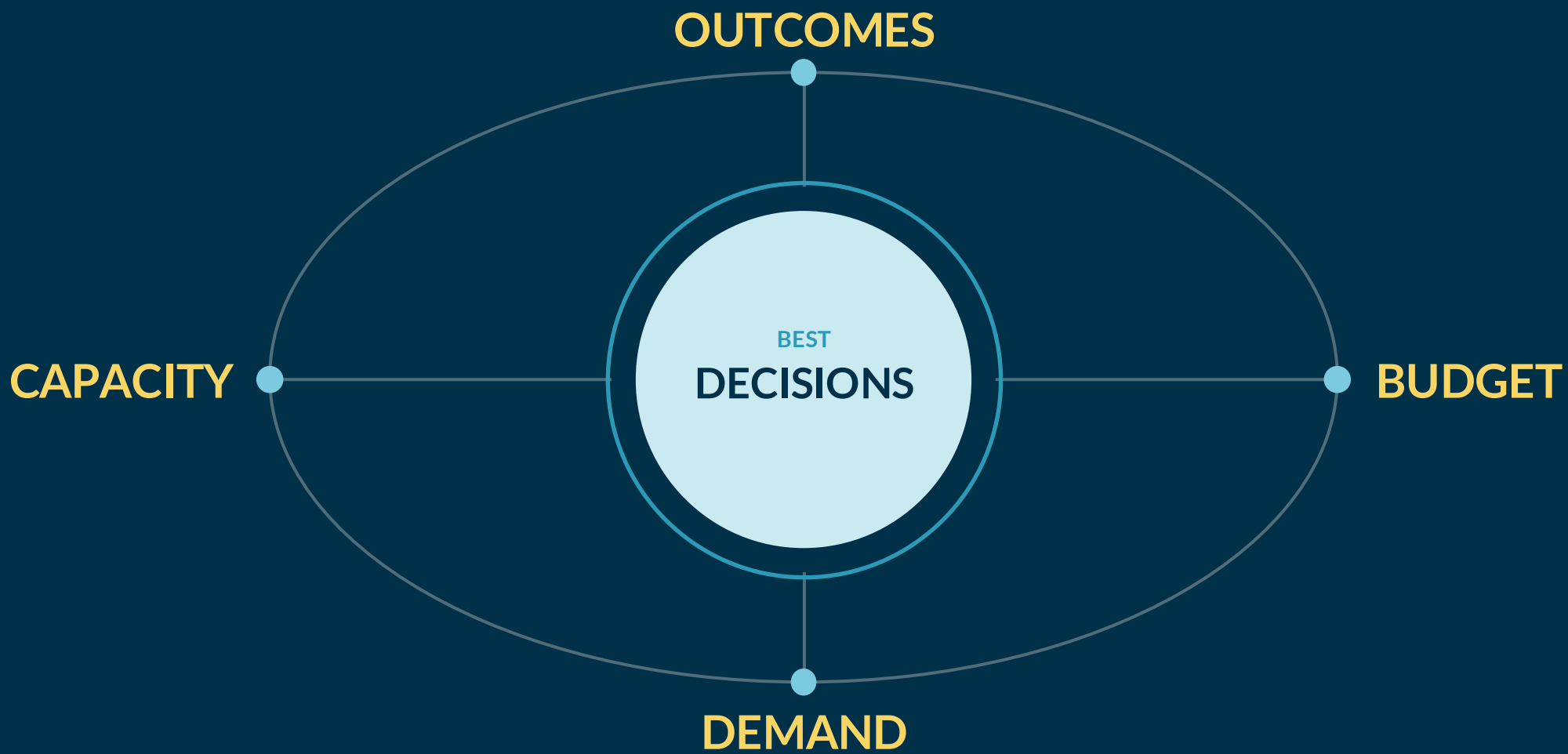
David Chase

President, WorkBoard

WorkBoard AI

WorkBoard SPM: State of the Art

David Chase leads Sales, Marketing, Revenue Operations and Go-to-Market strategy at WorkBoard. Having previously served as WorkBoard's Chief Marketing Officer, David brings extensive experience in Product Marketing, and a record of driving efficient growth with Messaging, Content, Brand and Enablement at the center of the Marketing strategy. He began his career in Sales and while at 8x8 led the Sales Engineering efforts for the European market and many of the company's largest global enterprise clients. Originally from the UK and now living in Silicon Valley, David graduated with honors in Marketing from Coventry University and is an accredited Chartered Marketer from The Chartered Institute of Marketing.



01

CONNECTED SYSTEM

Strategy > Outcomes
> Budget > Capacity >
Execution

02

START WITH OUTCOMES

Outcome first with
value creation
at initiative intake.

03

STANDARDIZE INTAKE

Consistent data in.
Consistent criteria to
measure value.

04

DATA YOU CAN RELY ON

Data is live, current
and accurate all the
time.

05

STRATEGIC AGILITY

Faster decisions that
include outcomes,
value, and constraints

END TO END. ALWAYS CURRENT. AGENTS DO THE WORK



WorkBoard  AI

Day 2 Presentations



Can Your People Draw the Line? Strategy Visible at Scale

Brittney Gorham

Chief Business Performance Officer

Optum

Brittney Gorham is Chief Business Performance Officer for Optum Enterprise Imaging, bringing over 25 years of management and leadership experience across healthcare technology, strategic operations, customer success, and enterprise transformation. She leads enterprise strategy execution, business intelligence, AI governance, and business process management. Her focus is turning strategic priorities into measurable outcomes and more effective ways of working. Brittney and her team are responsible for Enterprise Imaging's adoption of WorkBoard and an OKR-based operating model, strengthening alignment, transparency, and accountability across teams.

STRATEGY EXECUTION AT SCALE

*If you polled **ten** employees at random and asked them to draw a line from their Tuesday task list to your five-year strategy — **how many could do it?***

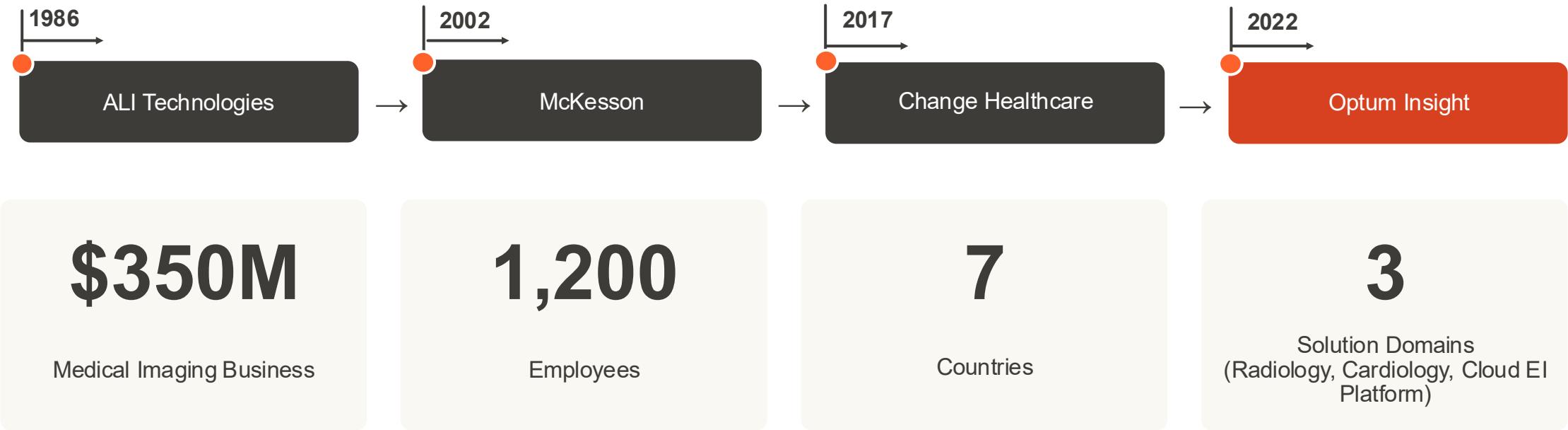
How Optum Enterprise Imaging Built Its North Star — and made execution visible in WorkBoard

Brittney Gorham | Chief Business Performance Officer, Optum Enterprise Imaging

THE SETUP

Why This Was Hard

A MARKET THAT HAS CONSOLIDATED OVERTIME



A leadership change and a major acquisition — mid-flight. A global workforce with legitimate reason to ask whether the mission had survived the transition.

Deliver This Year While Transforming the Next Five

Annual Business Plan

Today's job pulls you into the weeds.

Deliver this Year

Financial Commitment

Customer Delivery

Daily Operating Pressure

Long Range Plan

The five-year plan needs you above them.

Headed in 3-5 years

Year-one Strategic Moves

Investment Plan

Risks and Dependencies Surfaced Early

The common challenge is to manage both through one execution system.

“ Is the North Star still the same? —*was not answered clearly enough.*

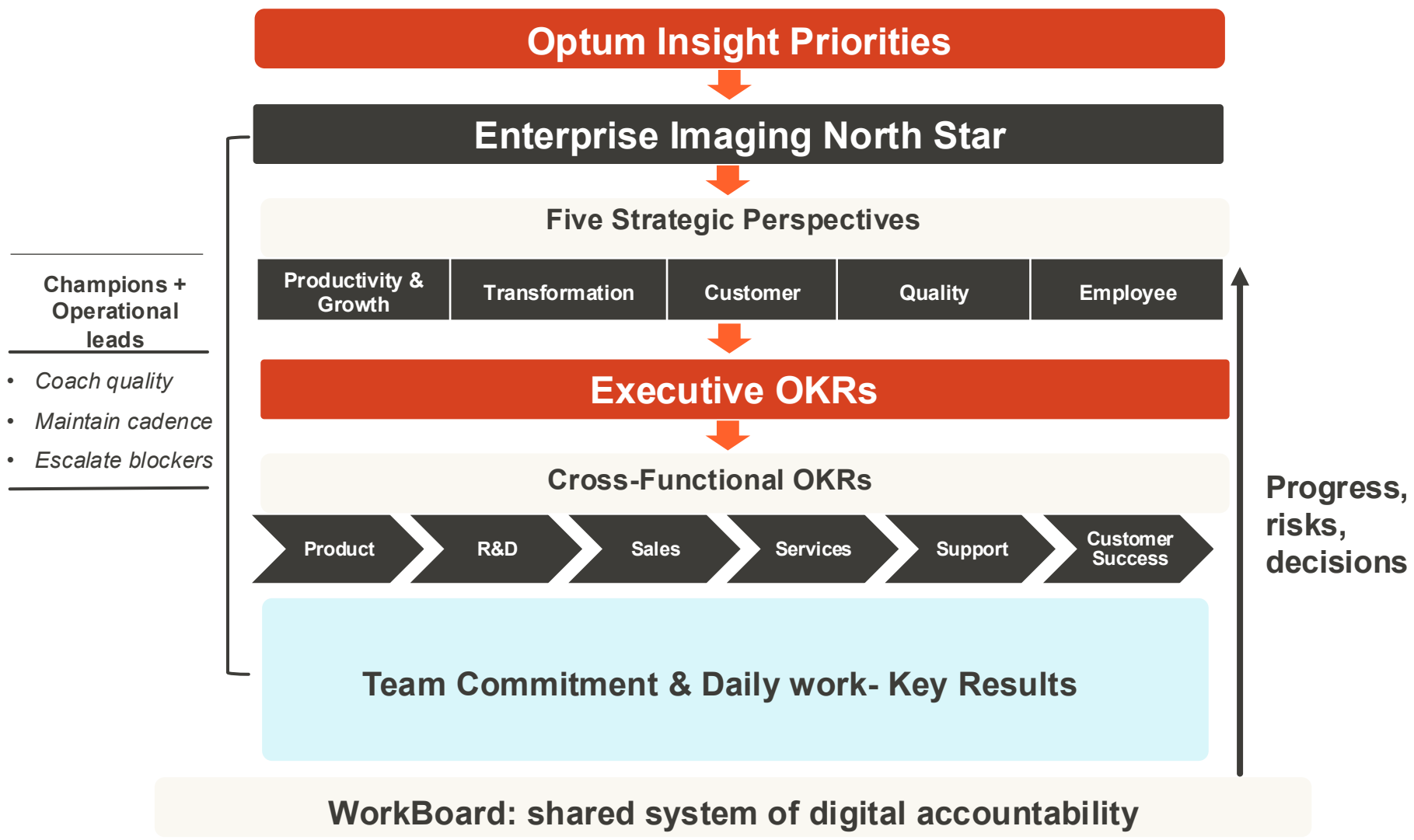
Discovered in an employee experience survey — not a boardroom.

- Daily work lost visible connection to strategy
- A major acquisitions reshaped the business
- New leadership, new direction to interpret

People weren't disengaged — they were disoriented. The issue was not commitment. It was line of sight.

OKR to Optum Insight Strategic Priority Alignment

Our objectives across five pillars map directly to Optum Insight's core strategic priorities — one unified execution framework.



Three Deliberate, Counterintuitive Moves

1

Tightened, not expanded

Focused ownership where strategy is managed: We concentrated the existing 200 licenses on leaders accountable for strategic outcomes.

2

Create a Champion Network

Workboard Champions and Operational Leads chosen as high performers — not by title. Each supports 3-5 directors under the Executive Leadership Team.

3

Digital Accountability

Make ownership and dependencies explicit. One accountable owner; visible contributors, co-owners, and cross-functional dependencies.

Strategy Realization

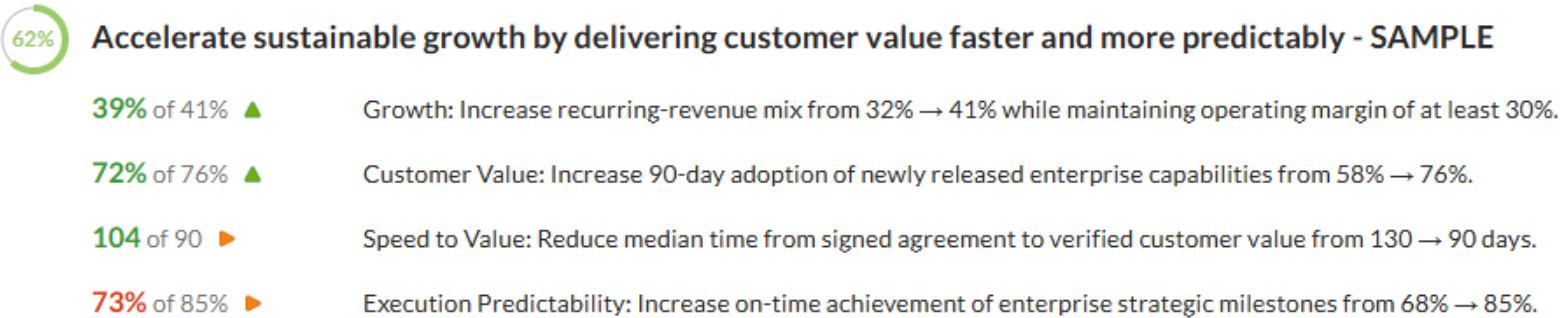
OKR EXAMPLE

Objective: Accelerate sustainable growth by delivering customer value faster and more predictably.

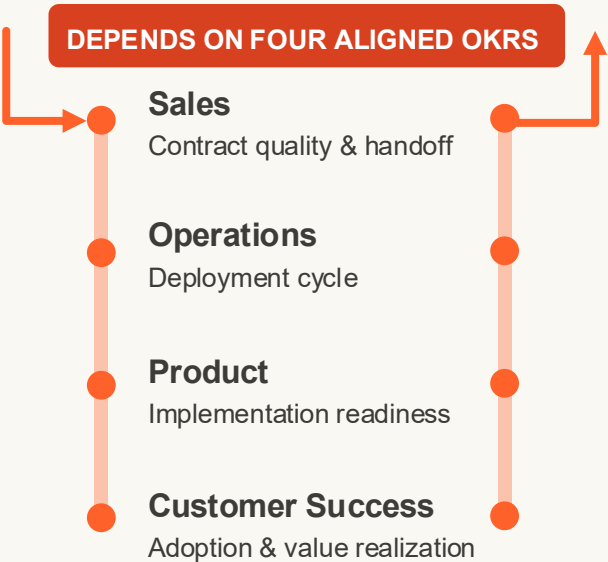
Key Results:

- KR1 — Growth: Increase recurring-revenue mix from 32% → 41% while maintaining operating margin of at least 30%.
- KR2 — Customer Value: Increase 90-day adoption of newly released enterprise capabilities from 58% → 76%.
- KR3 — Speed to Value: Reduce median time from signed agreement to verified customer value from 130 → 90 days.
- KR4 — Execution Predictability: Increase on-time achievement of enterprise strategic milestones from 68% → 85%.

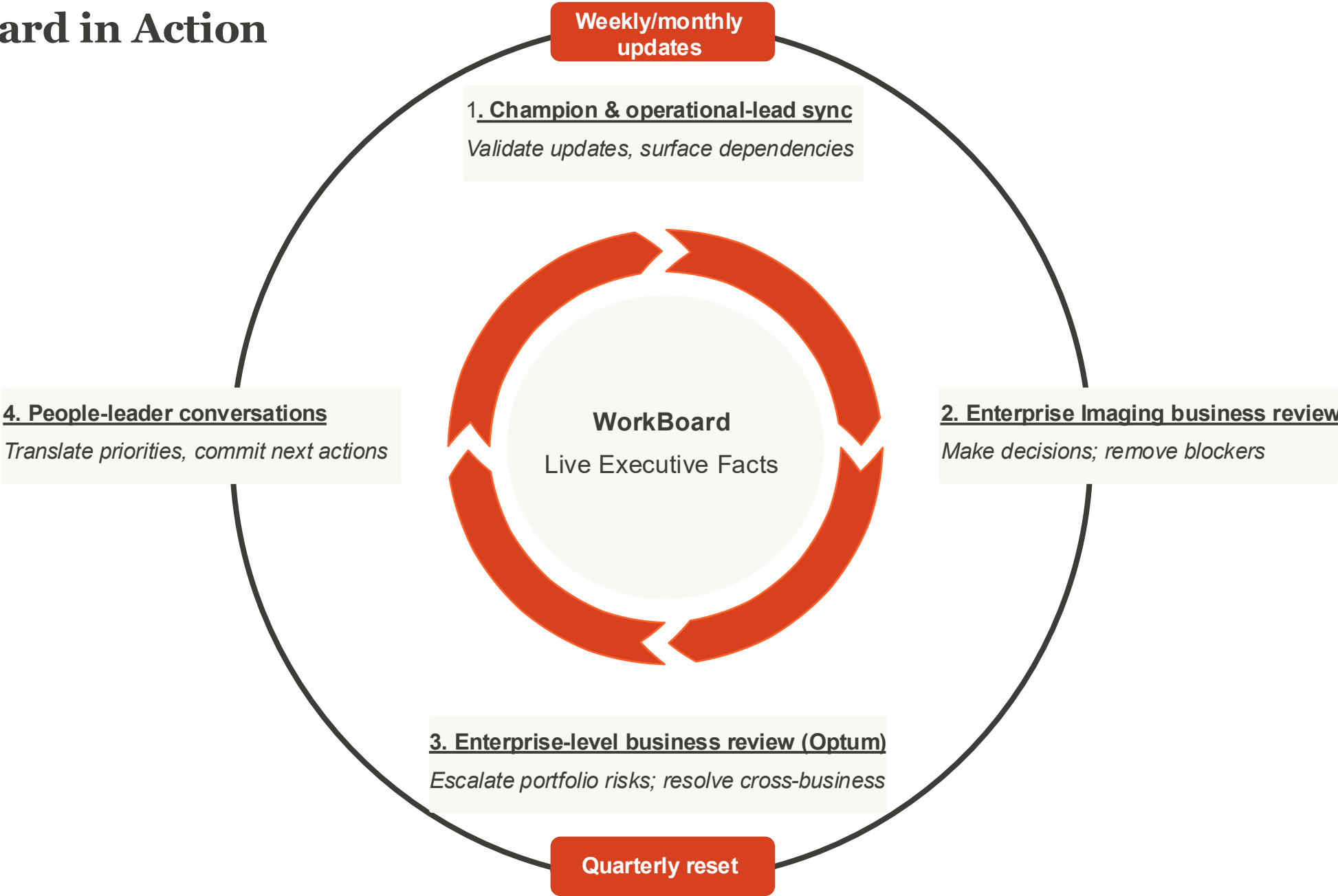
TRACKED LIVE, NOT REPORTED



KR3: Reduce time to customer value
130 → 90 days



WorkBoard in Action



WorkBoard in Action

Weekly/monthly updates

1. Champion & operational-lead sync
Validate updates, surface dependencies

Accelerate sustainable growth by delivering customer value faster and more predictably - SAMPLE

Janine Jackson - CEO : CEO

[Relationship map](#)



Dec 31, 2026
111 days left



Key Results

Relationships

Comments

History

39%
of 41%

Growth: Increase recurring-revenue mix from 32% → 41% while maintaining operating margin of at least 30%.

72%
of 76%

Customer Value: Increase 90-day adoption of newly released enterprise capabilities from 58% → 76%.

104
of 90

Speed to Value: Reduce median time from signed agreement to verified customer value from 130 → 90 days.

73%
of 85%

Execution Predictability: Increase on-time achievement of enterprise strategic milestones from 68% → 85%.

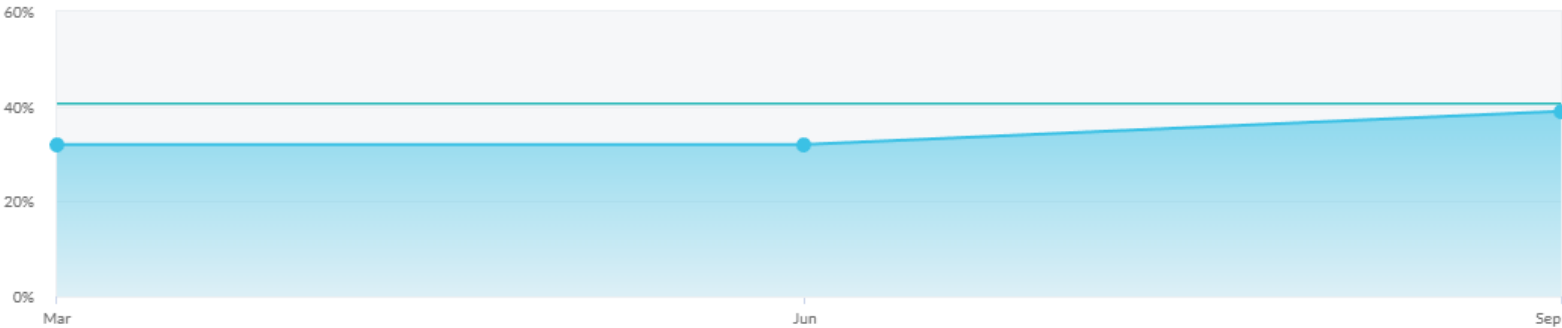
Growth: Increase recurring-revenue mix from 32% → 41% while maintaining operating margin of at least 30%.

As of Sep 11

39% of 41%

Jan 01, 2026 - Dec 31, 2026

Quarterly



[View update history](#)

Owner & Data Provider: Janine Jackson - CEO

[View results details](#)

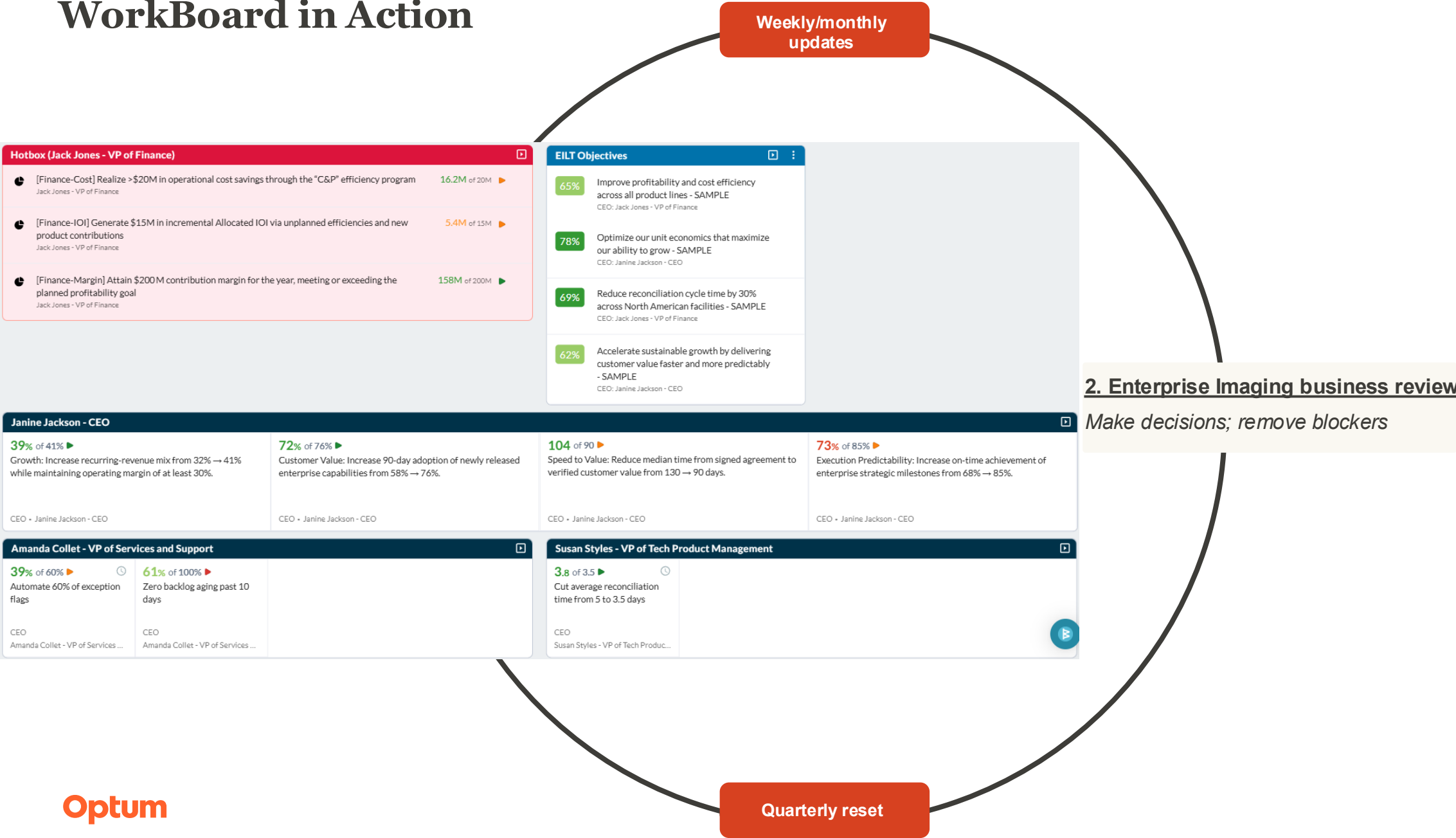
[Update](#)

[Ping](#)



THE MONTHLY OPERATING RHYTHM

WorkBoard in Action



WorkBoard in Action

Weekly/monthly updates

Name	Actual	Target	Trend chart	Comments	Last update date	Owner
Speed to Value: Reduce median time from signed agreement to verified customer value from 130 → 90 days.	104	90		Time to value improved from 130 to 104 days but remains behind the trajectory required to reach the 90-day target. Deployment capacity and handoff variability are the primary constraints.	Sep-14-2026	Janine Jackson - CEO
Customer Value: Increase 90-day adoption of newly released enterprise capabilities from 58% → 76%.	72%	76%		Adoption reached 72%, supported by improved onboarding and targeted customer-success engagement. Current trajectory supports achievement of the 76% target.	Sep-14-2026	Janine Jackson - CEO
Growth: Increase recurring-revenue mix from 32% → 41% while maintaining operating margin of at least 30%.	39%	41%		Recurring-revenue mix increased to 39%, keeping the result on track toward the 41% year-end target. Operating margin remains above the 18% threshold.	Sep-14-2026	Janine Jackson - CEO
Execution Predictability: Increase on-time achievement of enterprise strategic milestones from 68% → 85%.	73%	85%		Strategic milestone performance improved to 73% but remains below the trajectory required to achieve the 85% target. Cross-functional dependencies are creating delays across several priority initiatives.	Sep-14-2026	Janine Jackson - CEO
Grow net new Monthly Recurring Revenue (MRR) from 211.6M to 435.1M	\$386M	\$435.1M		Net-new MRR reached \$386.0M and remains on trajectory. Conversion, adoption, and retention indicators remain supportive.	Sep-14-2026	Janine Jackson - CEO
Zero backlog aging past 10 days	61%	100%		Aged backlog declined from 18 to 7 items but remains above the zero-backlog target. Ownership gaps across facilities require immediate intervention.	Sep-14-2026	Amanda Collet - VP of Services and Support
Automate 60% of exception flags	39%	60%		Exception automation reached 39%. Remaining exceptions require standardized classification and additional engineering rules.	Sep-14-2026	Amanda Collet - VP of Services and Support
Cut average reconciliation time from 5 to 3.5 days	3.8	3.5		Average reconciliation time improved to 3.8 days. Standard work and automated routing remain effective	Sep-14-2026	Susan Styles - VP of Tech Product Management
[Finance-IOI] Generate \$15M in incremental Allocated IOI via unplanned efficiencies and new product contributions	\$5.4M	\$15M		Incremental Allocated IOI reached \$5.4M. Efficiency benefits are materializing, but timing of additional contributions is behind plan	Sep-14-2026	Jack Jones - VP of Finance
[Finance-Cost] Realize >\$20M in operational cost savings through the "C&P" efficiency program	\$16.2M	\$20M		Validated operational savings reached \$16.2M. Automation, vendor optimization, and workflow simplification remain on trajectory.	Sep-14-2026	Jack Jones - VP of Finance

3. Enterprise-level business review (Optum)

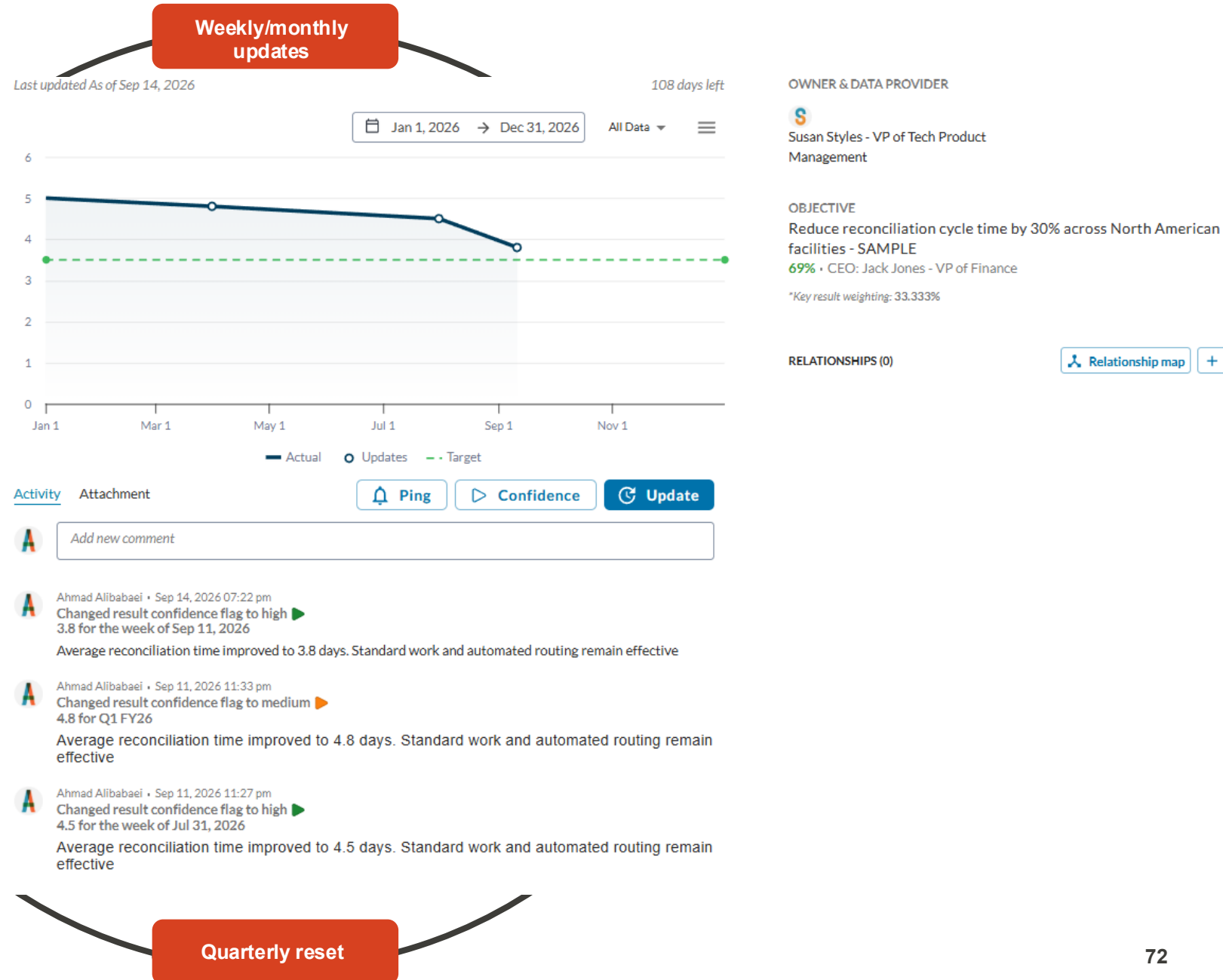
Escalate portfolio risks; resolve cross-business

Quarterly reset

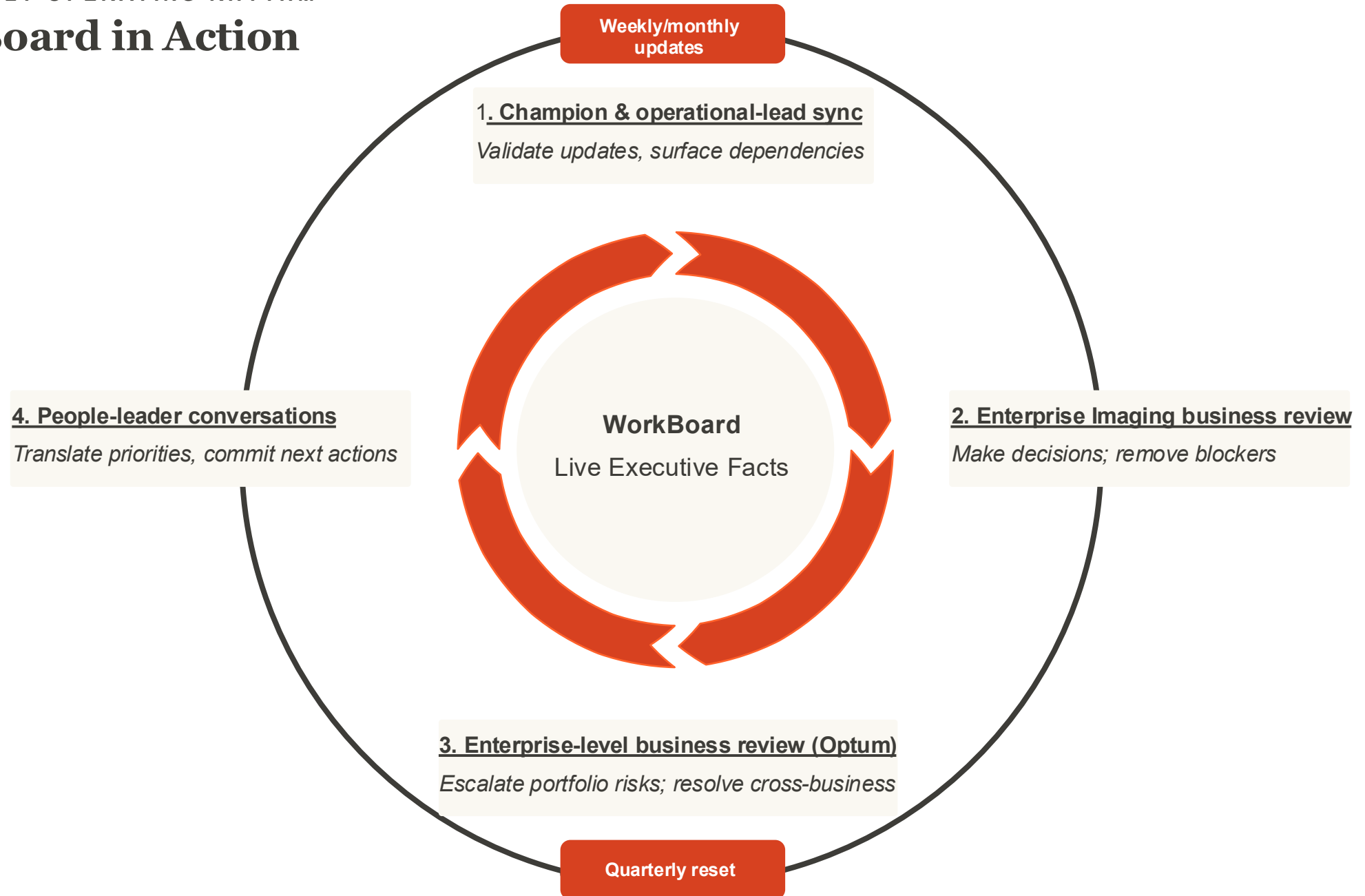
WorkBoard in Action

4. People-leader conversations

Translate priorities, commit next actions



WorkBoard in Action

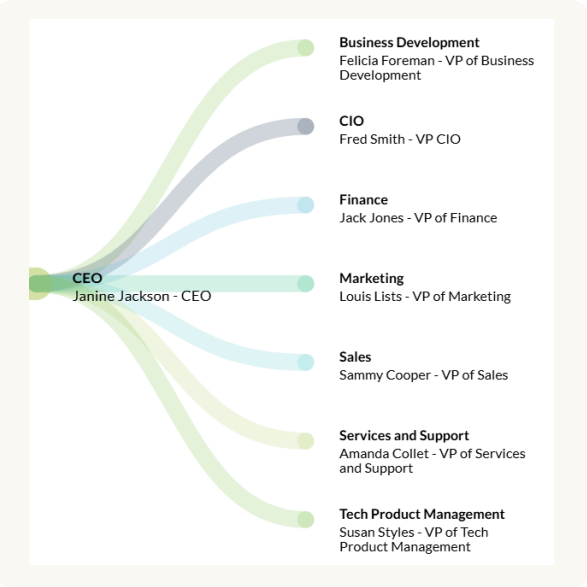


THE MONTHLY OPERATING RHYTHM

WorkBoard in Action

01 DIGITAL ACCOUNTABILITY

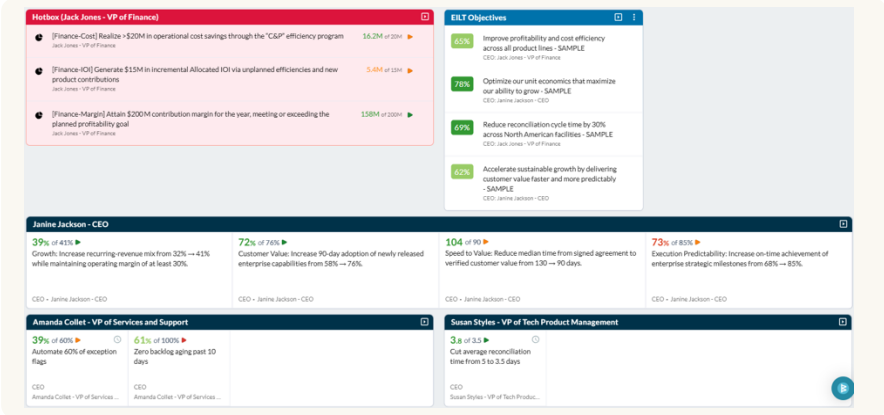
Every objective traces to a named owner; the Strategy is clear from bottoms up and top down.



One system, three views — ownership, status and evidence.

No slides, no spreadsheets.

02 THE LIVE BUSINESS REVIEW



What the room (Executive Leadership Team) looks at

Risks and blockers sit at the top of the page, so the review opens on what needs a decision instead of a status recap.

03 KEY RESULTS, SCORED

Name	Actual	Target	Trend chart	Comments	Last update date	Owner
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Where the candor shows up

Each key result carries a score and a written comment — the reds stay visible, with the plan to recover them.

RESULTS

Results: Sentiment and Business Outcome

SENTIMENT

The Employee Experience Survey Story:

88%

out of 754 responses

say the strategy is clear — up from confusion about our North Star.

BUSINESS OUTCOME

The Booking Story:

61% Growth over LY
(Q1-Q3)

Sentiment tells you people believe it. Business outcome tells you it isn't just belief.

A number here is what turns this from a good story into a board-level case for WorkBoard.

THE TAKEAWAY

Five Things to Take Away

1

Adoption is everything

A tool is only as good as the way it's adopted. Design adoption around accountable roles

2

One accountable owner; visible contributors

Dependencies flows across the org — use the tool to break the silos.

3

Champions don't need titles

Select champions for credibility and execution skill—not hierarchy alone

4

Be candid, not polished

Share the wins and the opportunities — employees live the reality every day.

5

Strategy evolves with execution facts

Data, automation, AI, and connections through Workboard — this is ongoing, not a launch.

Win the adoption, share the ownership, show the facts — that's how strategy sticks in a large organization.

So, back to where we started —

How many of your ten could draw that line?

For us — today it's almost nine out of ten and rising.

Here is the challenge —

What would have to change in your operating rhythm for your results to improve?

Make the strategy visible. Make the ownership explicit. Run the rhythm from the work.

Optum

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Turning Vision Into Action: Advancing Healthcare Strategy Through OKR Transformation



Tyler Barnett

Dir. of Value Improvement Analytics, University Hospitals

Tyler Barnett directs a portfolio of transformative analytics serving a vast variety of quality improvement and population health initiatives with varying degrees of sophistication and knowledge of implementation sciences. He oversees a cross-functional team of data scientists, analysts, actuaries, and data engineers who routinely partner with physician champions and operational leaders to implement novel work streams to improve the value of services University Hospital renders.



Karen Snyder

Principal Project Manager, University Hospitals

Karen Snyder, BSN, RN is a healthcare transformation, quality improvement, and strategy execution leader with more than 30 years of experience advancing clinical quality, patient safety, and organizational excellence across complex health systems. Currently serving as Principal Project Manager for the University Hospitals Veale Healthcare Transformation Institute and Quality Institute, she leads enterprise-wide initiatives that improve patient outcomes and operational effectiveness through the application of performance improvement methodologies, OKRs, and change management.

Turning Vision into Action: Advancing Healthcare Strategy Through OKR Transformation



Karen Snyder, BSN, RN, COKRP
Principle Project Manager
UH Veale Healthcare Transformation Institute
Quality Institute



Tyler Barnett, MHSA
Director, Value Improvement
Analytics

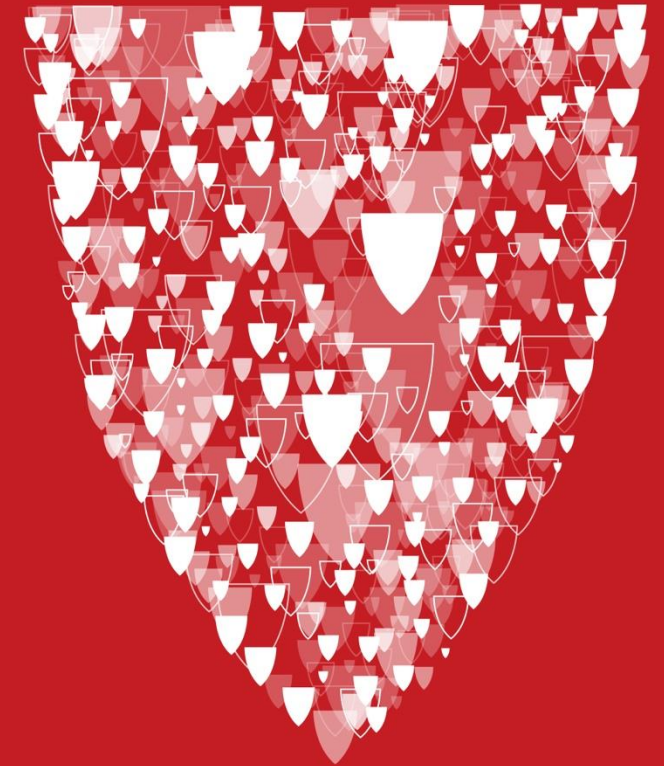


Accelerator Conference September 23, 2026



University Hospitals

Cleveland | Ohio



Mission
To Heal. To Teach. To Discover.



3rd largest healthcare employer in Ohio:
32,000+ employees & ~1,200 residents & fellows



\$7.3 billion 2025 revenues
~1 million unique visits/year



Top-funded research program in the nation:
~3,600 research studies & \$237 million portfolio

**Magnet®
Designation**
5th consecutive time

Academic Medical Center
UH Cleveland Medical Center
#15 in the World
#7 in the U.S.

Brand Finance®

**Forbes
Top 25 Dream
Employer**
2 consecutive
years



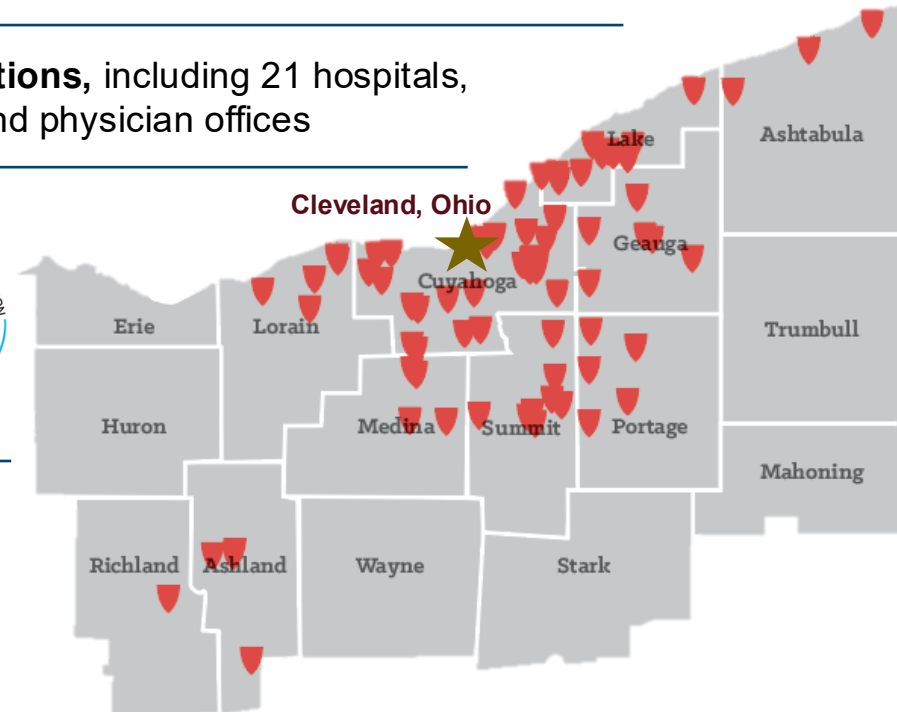
Nearly 300 locations, including 21 hospitals,
health centers and physician offices

ISO 9001 Certified

- 1st in OH - HQ & all hospitals certified
- 1st health system in U.S. - HQ certified



Ethisphere
**One of Worlds Most
Ethical Companies**
12 times



Affiliated with local and international universities:



Proprietary & Confidential

Our North Star



“Healthcare harms too often, costs too much, and learns and improves too slowly.”

— Dr. Peter Pronovost, Chief Transformation and Quality Officer, University Hospitals Health System

UH Strategic Priorities to Drive Value



Create Value through

Customer Experience



Add Value through

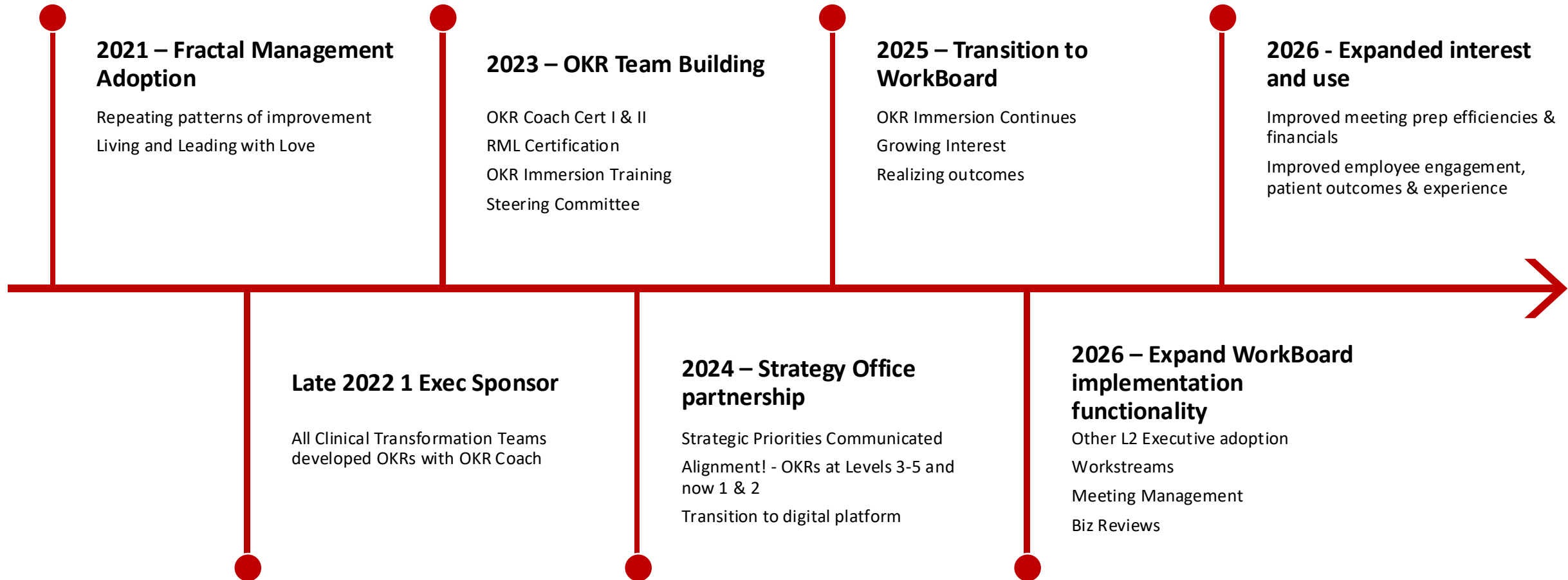
Right-Sized Optimization

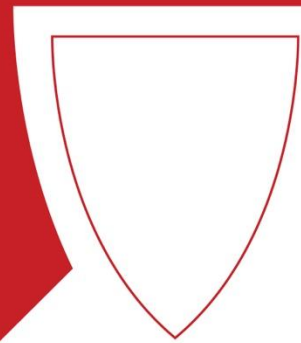


Manage Value through

Risk-Based Strategies

Our OKR Journey: 2021–2026

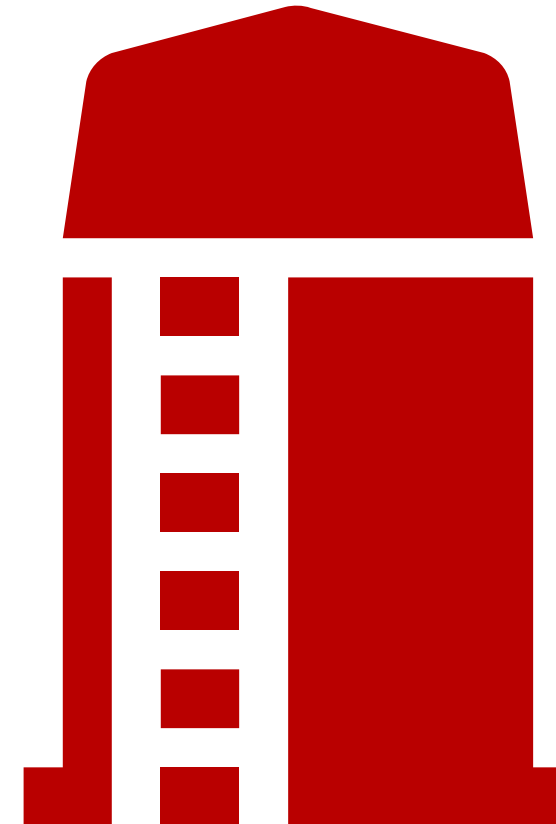




What were we doing before?

The Old Way: Silos and Sporadic Governance

- Sporadic network of committees, governance groups, and ownership verticals. Each operating in relative silos
- A shared accountability matrix mapped how information was intended to flow. Revealing patterns of inefficient communication
- No publicized strategic priorities
- Result: strategy execution that was hard to see, hard to coordinate, and hard to trust



The Old Way: From an Analytics Perspective

A Flood of Similar Asks

Stakeholders across the organization raise slightly different versions of the same request. All of them are unaware of existing resources or strategies already in flight.

Understanding Is the Exception

Thin Data Governance

Outside financial, quality, and safety metrics, UH lacks a defined, system-level shared KPI portfolio.

Our Scope (Value Improvement Analytics Team)

\$100M+

Annual revenue-generating earning potential in risk-based contracts

450+

Assignments Annually

≈20

Masters & PhD-level data professionals

Why OKRs

Written Strategy

Replaces the hallway ask with a documented, measurable plan everyone can see.

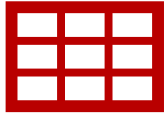
Clear Owners

Every Key Result has a named Directly Responsible Individual.

Accountable Outcomes

Teams are measured on results delivered, not requests fulfilled.

Impetus for Change



Results management with Excel
spreadsheets were not yielding desired
results



Death by powerpoint. Meetings often not
engaging or effective



Results achieved at painfully slow pace



No strategic alignment



No accountability

Align OKRs
vertically &
laterally.



WorkBoard
The Enterprise
Results Platform



marketoonist

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Cultural Transformation – Fractal Management

BELIEVE

What: ensure everyone is treated with respect and is empowered and resourced to do their job with dignity

Why: when employees connect to their purpose, organization performance increases by 40%

BELONG

What: ensure every role and every site of care are involved in a process and have a voice on how to improve it.

Why: Innovation and learning flourish when we create a structure and culture that allows the free flow of ideas and when the culture honors all voices regardless of position.

BUILD

What: A management system that tracks performance, shares transparently, and is centered on shared accountability

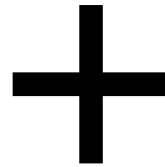
Why: good management and accountability matter and both are largely absent in healthcare today.



The New Way: The Shift to Fractal Management

Fractal Management

Repeating patterns of teams with clear roles, functions, goals, and expectations
Teams closest to the work can move dynamically instead of waiting on rigid hierarchy.



OKRs via Workboard

Workboard digitized our goals into OKRs. Clarifying strategy and making progress ***visible*** and measurable at every level.

A Fractal Management System: Visualized by Workboard

– Alignment view

- ✓ Clear objectives and key results at every level
- ✓ Transparent, shared accountability across teams
- ✓ Regular business reviews that surface progress and risk
- ✓ A common language connecting strategy to daily work
- ✓ Structure that lets teams closest to the work move fast

WorkBoard - How We Rolled It Out

- Middle-out rollout, starting with interested, centralized corporate improvement teams
- Focused first on OKR training and adoption
- Early adopters (Population Health, Quality Institute) made OKRs a common language
- Expanded to IT, PMO, and Operational Effectiveness teams

WorkBoard - Core Features We Leverage



OKRs



Workstreams (select teams)



Business Reviews



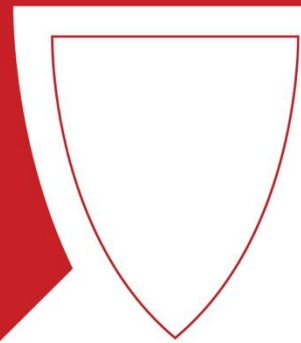
Canvas for working sessions



Meeting agendas integrated into Outlook



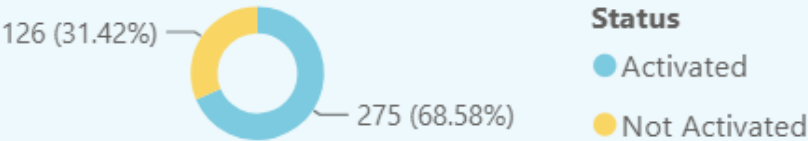
Alignment View and Alignment Analytics



The Workboard Impact

What Workboard Delivered

User Activation Status



93

Total Teams with OKRs

311

Total Objectives

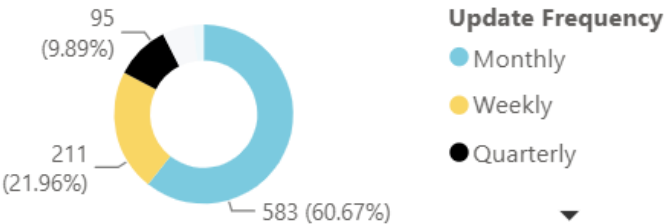
961

Total KRs

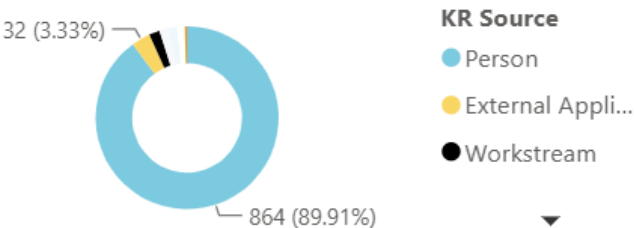
48

Aligned Objectives %

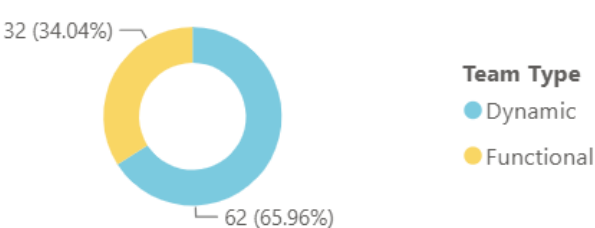
Intended Focus Frequency



KRs by Source



Teams with OKRs



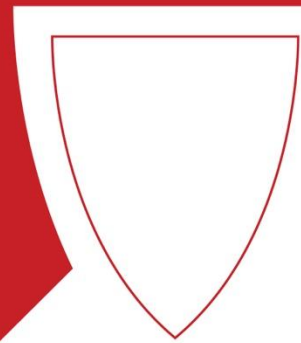
Lessons Learned and The Long Arduous Road Ahead...

Lessons Learned

1. Leaders telling teams “Use OKRs”
2. Thinking with results first is HARD
3. Transparently sharing data invokes fear
4. Change Management - Skepticism, resistance, and haphazard engagement is an expectation
5. Change **with** people takes time and yields far better results than mandated change from above

Future Roadmap

1. Digitize Clinical Transformation Results in Workboard
2. Further Integrate with PowerBi / Excel
3. Amplify positive social reinforcement
4. Ramp up expectations **after** initial engagement
5. Application governance with cross-functional leadership team



Key Accomplishments

Cleveland Medical Center Hospital Operations Committee Monthly Meeting

Why this Matters

- Enable patients to return home safely, where healing, independence, and well-being can continue
- Every team in the hospital contributes the patient journey

What We Needed To Do

- Leader set expectation all teams will write OKRs
- OKR Session with 10 teams
- Run the meeting from WoBo Biz Review

How WoBo Helped

- Created a single, enterprise view of progress; Accelerated decision-making and execution
- Maintained focus on throughput while prioritizing pt safety and pt experience
- Created a sustainable and repeatable framework
- AI-assisted OKR refinement

Achieved DNV (Det Norske Veritas) Healthcare System Accreditation – 1st in the US

Why this Matters

- **Regulatory Compliance:** Satisfies the Medicare Conditions of Participation (CoPs) required to receive federal reimbursement
- **Quality & PI:** ISO 9001 quality management standards; drives continuous safety improvements
- **Risk Reduction:** Mitigates operational, patient, and staff safety risks
- **Collaborative Approach:** Focus on **shared learning, education, and real-time improvements**
- **Aligns with Fractal Management System**

What We Needed To Do

- **Create Accountability:** Say what we do; Do what we say; Prove It; Improve It
- **Create OKRs/KRs** for all DNV corrective actions

How WoBo Helped

- **.Tracked progress** through regular review meetings
- Enabled **real-time accreditation status reporting**
- Provided DNV **with live visibility into action plans and outcomes**

Accreditation OKRs



Sustain and broaden scope of corrective action plans for all DNV-identified nonconformities to proactively address related risks

Feb 01, 2026 - Jul 31, 2026 • 0 days left

86% of 100% ▲	% of identified fire/smoke dampers due for inspection are completed	Kristy Tansey	As of Jun 8, 2026
72% of 90% ►	% of H&P's authored by residents which are co-signed by an attending within 24 hours of availability	Kristy Tansey	As of Aug 9, 2026
88% of 90% ►	% of ventilator settings audited match provider orders	Kristy Tansey	As of Aug 9, 2026
74% of 95% ▼	% of violent restraint episodes have a F2F assessment documented by a provider within one hour	Kristy Tansey	As of Aug 17, 2026
95% of 100% ▲	% of Nutrition Services workers adhere to facial hair covering requirements	Kristy Tansey	As of Aug 9, 2026
100% of 100% ►	% of FM construction, renovation, and repair containments maintaining appropriate air pressure relationships	Kristy Tansey	As of Jun 8, 2026
34% of 100% ►	% of identified repurposed rooms have covers installed to protect medical gas banks	Kristy Tansey	As of Jun 8, 2026
100% of 100% ▲	% of critical spaces identified during survey (n=5) with compliant pressure relationships	Kristy Tansey	As of Jun 8, 2026
100% of 100%	% of suicide risk screening completed by RN	Kristy Tansey	As of Jul 12, 2026
100% of 100%	% patients with positive suicide risk screen who have further suicide assessment (i.e., SAFE-T) completed	Kristy Tansey	As of Aug 9, 2026
100% of 100%	% patients identified as having suicide risk who receive suicide risk resource information on discharge	Kristy Tansey	As of Jul 12, 2026

HARP — Hospital Assault Response Prevention Training

Why this Matters

- There was no unified way to address violent incidents (“code violets”) across the system, leaving caregivers without a consistent path to safety.

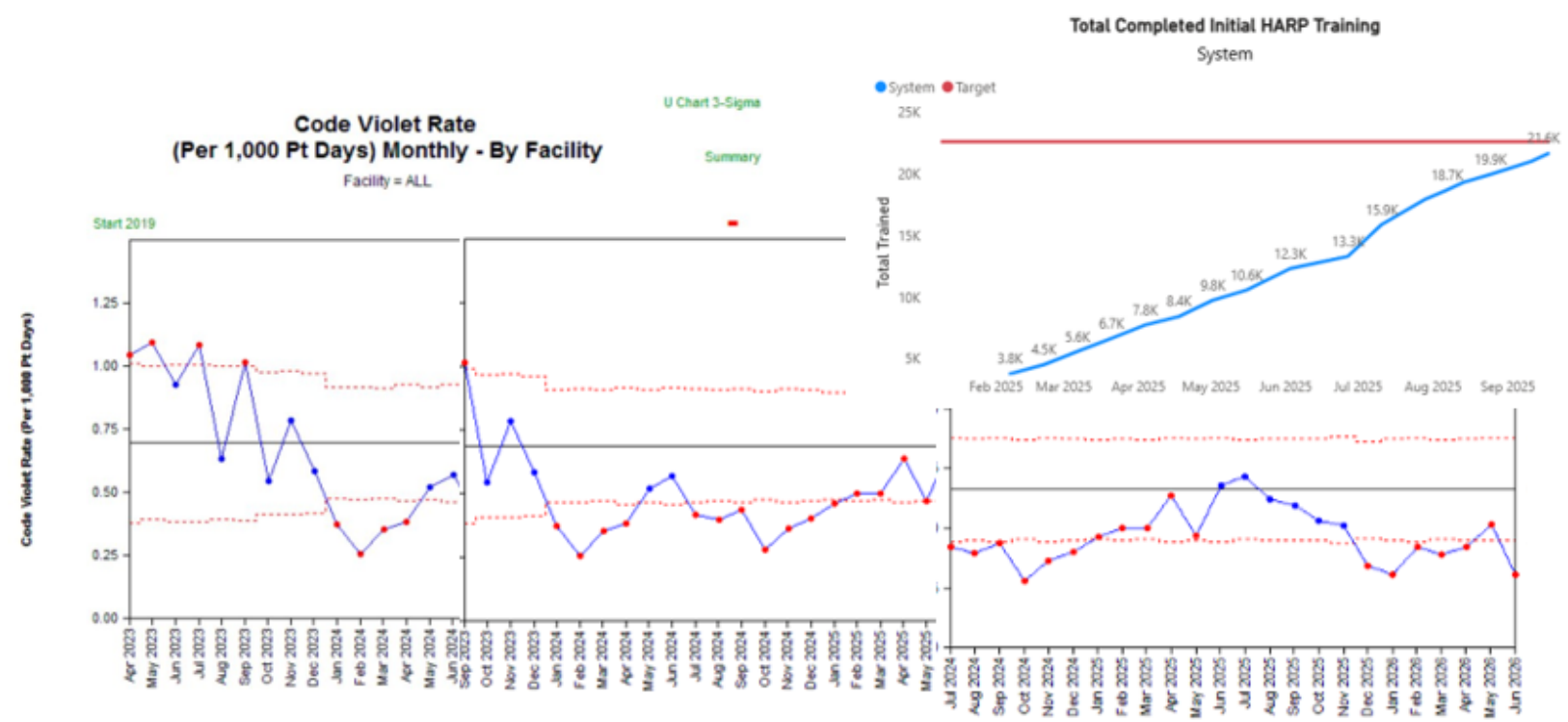
What We Needed To Do

- **Train and advance violence-prevention efforts** system-wide so caregivers could feel safe at work.
- **Obtained Senior Leadership support**
- **Set OKR for Training** (leading), Code Violet Events (lagging)

How WoBo Helped

- **Data integration** for KRs
- **Created Biz Review** to run monthly WPV meeting
- **Workstreams to track actions**

HARP Training and Code Violets



Alignment Is Accelerating

UH Caregiver Engagement Survey • 2023 → 2025

I have a clear understanding of the goals and objectives of the organization

87.9%

▲ +3.1 pts since 2023

84.8% in 2023

I can see a clear link between my work and the organization's objectives

83.7%

▲ +4.2 pts since 2023

79.5% in 2023

More caregivers than ever see the line from their work to our mission.



BREAKOUT 2 • LAB • WADKINS B

Chief of Staff & Leadership Coach Agent Capabilities

Two agents. Four phases. One rhythm you actually keep.

Thursday, Sep 24 • Accelerate 2026

**“Elite leaders don’t have
more hours.”**

They have a different rhythm.

Conversation, not navigation.

Where are you today?

Mark both scales on your card — no wrong answers, this just sets the room.

Luisa

CHIEF OF STAFF

- 1 — Haven't engaged with her
- 2 — A chat or two, a Daily Focus email — not regular
- 3 — Use it occasionally to prep
- 4 — Use it weekly, trust it
- 5 — Changed how I run my rhythm

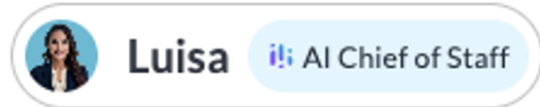
Sofia

LEADERSHIP COACH

- 1 — Haven't engaged with her
- 2 — A chat or two, a Suggested Kudos nudge — not regular
- 3 — Use it occasionally for insight
- 4 — Use it weekly, trust it
- 5 — Changed how I coach my team

Manage results. Manage people.

CHIEF OF STAFF AGENT



Manage results – team operating rhythm

Clarify, adapt, mobilize and execute on strategy faster by driving each team's operating rhythm and effectiveness

- Facilitate alignment and OKR setting
- Accelerate follow through and results
- Automate transparency and reporting
- Strategic thinking partner

Includes data from Jira, Workday, Salesforce and meetings

LEADERSHIP COACH AGENT



Manage people – effective people leader

Navigate people and team challenges that impede performance, build momentum, and have factual performance conversations

- Hard conversation and SBI coaching
- Impact summaries on real work and results
- Team dynamics on real operating patterns
- Thought partner on development

Includes team and personal OKRs, Jira, and meetings

Open the Support Agent. Try this first.

Picking up where Steve Carney left off — this isn't Luisa or Sofia yet. It's WorkBoard's Support Agent, the one that knows the product itself.

“Provide an overview of all agent responsibilities.”

Paste that into WorkBoard's Support Agent right now. See what it says back.

SAME AGENT — ONE MORE BEFORE WE MOVE ON

Try this prompt too.

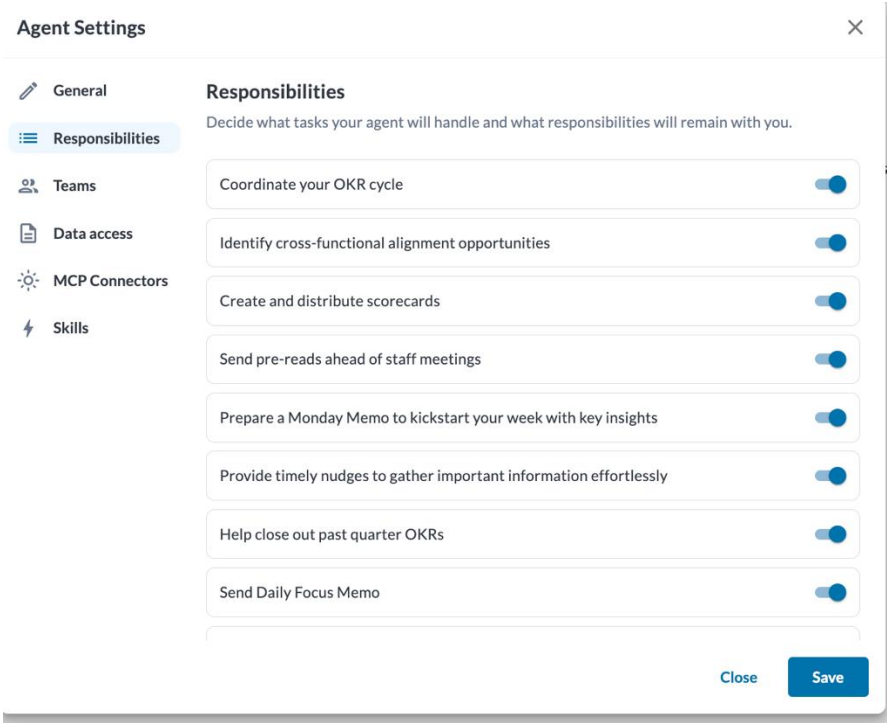
“Which workflow setting creates an OKR canvas prior to the quarter start?”

Still the Support Agent. Ask it, then compare notes with the room — did everyone's agent point to the same setting?

BEFORE WE TURN IT ON

A quick readiness check

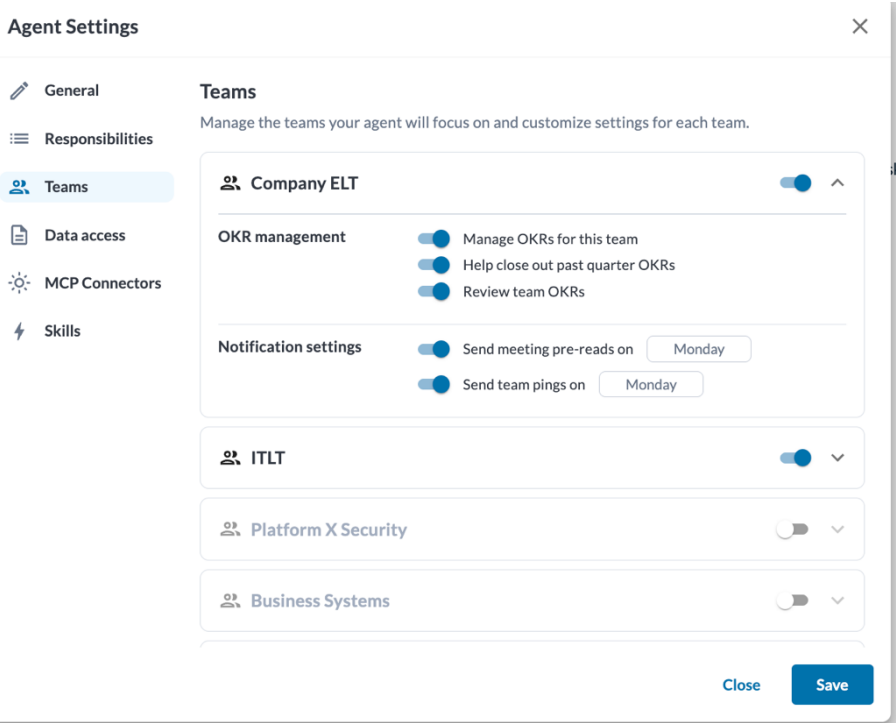
Before we engage either agent live, know your Agent Settings – what's already turned on, and how to turn things on or off.



Responsibilities — what your agent proactively does for you

2 more Responsibilities appear on scroll: meeting summaries/follow-ups, review team OKRs.

“Only teams you manage or co-manage” — set by managers or co-managers. Source: WorkBoard Help Center, “Changing Agent Settings.”



Teams — which teams your Chief of Staff helps you manage

Align → Drive → Automate → Strategize

Align

6%

OF THE EFFICIENCY GAIN

Faster clarity → speed,
ownership, accountability

*Luisa co-drafts OKRs, runs cross-
functional alignment, flags quality
issues*

Drive

60%

OF THE EFFICIENCY GAIN

Resolve roadblocks & people
issues fast → better outcomes

*Luisa keeps the signal current; Sofia
sharpens the people read for 1:1s*

Automate

22%

OF THE EFFICIENCY GAIN

Eliminates plan-vs-actuals
debate — one shared truth

*Luisa builds scorecards, dashboards &
pre-reads live*

Strategize

12%

OF THE EFFICIENCY GAIN

Strategic thinking & coaching for
every manager

*Sofia turns trustworthy signal into
hard-conversation & review prep*

Drive returns 10x the hours Align does — that's where to point your time first.

First we draft. Then we bring in context.

In a few minutes you'll ask Luisa to draft your quarterly OKRs — then push the draft further by feeding her more than just the objective.

STEP 1 — DRAFT

Two ways into next quarter's draft:

OPTION A • IF YOU SET QUARTERLY OKRs

Start from what you already have — the OKRs you set last quarter.

OPTION B • IF YOU HAVE ANNUAL OKRs

Ask Luisa to draft quarterly OKRs off your annual objectives.

EITHER WAY

Select the objectives you want to carry over, add context — your 3-yr Strategy for the Function — and pull in relevant workstreams and other team OKRs.

STEP 2 — ADD CONTEXT

Now make it yours — bring in what only you know:

- This quarter's board or leadership priorities
- Notes from a recent strategy or offsite conversation
- A competitive move or market shift you're reacting to
- Budget, headcount, or timeline constraints
- For each KR: it's an upstream leading indicator — not a quarterly slice of the lagging annual number

More context in, less generic out — that's an outcome-shaped draft instead of an output-shaped one.

A DAY IN THE LIFE

Daily → weekly → monthly → quarterly

Starting point: your OKRs are already loaded – Align is done. That's why Daily + Weekly (Drive, highlighted below) get our time today; Monthly and Quarterly move fast.

WHEN	WHAT HAPPENS	WHO
Daily	Blockers, risks, who needs a nudge — ready before you open your laptop	Luisa
Weekly	Agendas prepped with progress & blockers; status rolls up automatically	Luisa + Sofia
Monthly*	Business-review pre-read ready in advance, built from live data	Luisa
Quarterly	Luisa co-drafts next quarter's goals & gives feedback on first drafts; scorecard created & shared; performance prep grounded in the full quarter	Luisa + Sofia
Anytime	On-call strategic & coaching thought partner for a hard conversation	Sofia

For more on Align — the self-paced LMS courses in your Appendix cover it well.

*Monthly bucket inferred from source material — confirm before this goes live.

LAB BLOCK 1 • 11 MIN

Build it live with Luisa

Align → Drive → Automate — in that order, spending most of our time in Drive.

ALIGN

Draft OKRs.

Have annual key results already? Ask Luisa to draft quarterly ones off your annual objectives.

Everything here is a draft — nothing publishes until you say so.

DRIVE • MOST OF OUR TIME HERE

Draft the agenda for your next 1:1 or team check-in.

Blockers, risks, who needs a nudge — this is where clarity turns into coaching and accountability.

AUTOMATE

Build or refresh a live scorecard / dashboard.

One shared truth — no more plan-vs-actuals debate.

REFLECT — write on your card: “What did she just do that you normally do by hand?”

Turn it on yourself first

Start with you in My Progress — then bring the same lens to your team.

STEP 1 — SELF-ASSESS

Open My Progress in Sofia. Ask for your own read — no KR to pick, just ask.

STEP 2 — NOW YOUR TEAM

“I need guidance to uplevel how I coach my team members.”

“For my direct reports, stratify my approach to coaching each individual based on what you know about them.”

“Looking at my next-level teams, which ones are more output-focused over outcome-focused, and how should I coach them?”

REFLECT (spoken, quick show of hands): “Did seeing your own summary change the question you're about to ask?”

BEFORE YOU GO

One commitment. Seven days.

On your card, name:

- The real meeting on your calendar in the next 7 days
- Which agent you'll bring into it — Luisa or Sofia
- The one specific thing you'll do differently because of it

NOT THIS: “I'll try Luisa.”

THIS: “Before my Monday 1:1 with [name], I'll have Sofia draft the trajectory question on our stalled retention KR — and actually ask it.”

RESOURCES FOR EVERYONE

Build your own competence, then accelerate others — the Agentic LMS content in your Appendix is how you do both.

Leaders go first.

Model it before you mandate it — then bring your team.



Penny Beich

Senior Director,
Strategy Execution



AI Won't Save Your Strategy: Making Strategy Visible Before AI Accelerates It

Penny Beich, CCXP, CTFL, and most recently Workboard Results Management Leader Certified is the Senior Director of Strategy Execution at Navitus, where she helps connect enterprise strategy to the outcomes, capabilities, initiatives, and operating rhythms that drive measurable value. With more than 21 years at Navitus, she has built and led teams across operations, process improvement & innovation, enterprise project management, software development, and customer and digital experience. Her niche has been identifying the teams the company needs next, then defining their purpose, direction, structure, and staffing to create durable value. Her career has centered on creating clarity, alignment, and momentum through complex organizational change.

AI Won't Save Your Strategy

Making strategy aligned and visible before AI accelerates it

Penny Beich, RME, CCXP, CTFL
Sr. Director, Strategy Execution



Mission-Driven from the beginning

Founded in 2003 and owned by SSM Health and Costco, we are the nation's **first and longest-standing** pass-through PBM.



25M

Lives Covered Nationwide

8.4%

Book of Business Trend vs. 10.6% Industry

30%

PBM Member Growth Since 2023

99%

Client Satisfaction¹

+81

Lumicera World Class NPS

¹ Source: Navitus' 2025 Customer Satisfaction (CSAT) Survey

Enabling better health.
Making medication
more affordable.

It's what we do.

Clarity

Beyond transparency, the first and only open book PBM.

Trend Over Time

Promote better health while managing spend over years.

Aligned By Design

A partnership approach, backed by decades of experience.

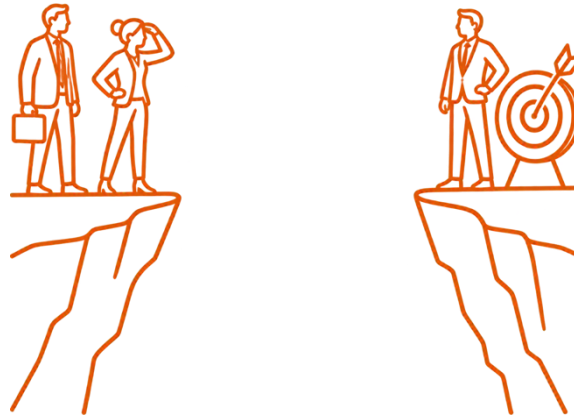
Where this story starts

It began as an alignment problem — not a technology problem



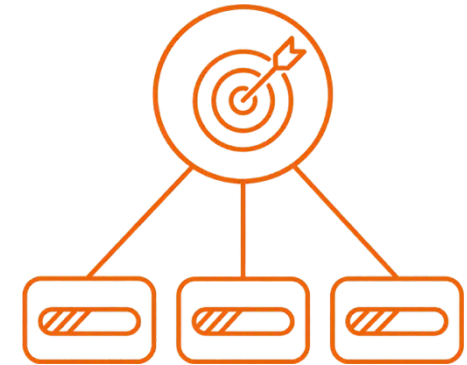
A plan built for projects

BHAG, LTARs, STARS, strategic pillars, strategic pillar categories, etc. — but the work was framed as projects.



An alignment gap

IT drove the goals and the reporting. Business owners were semi-involved, and work didn't tie to outcomes.



Starting with OKRs

We bought Quantive to install OKRs — making priorities visible and shifting divisions from activity to outcomes.

Why project-led strategy execution feels aligned but often isn't

Every signal of alignment — without the alignment.

Why it feels aligned

Everything has a strategic label. BHAGs, LTARs, STARs, pillars — when any project can be justified, the labels stop discriminating.

Activity looks like progress. Charters, milestones, dashboards — busy reads as healthy.

The governance is real. Rigorous machinery — aimed at the wrong unit of measure.

Projects are concrete. Owners, dates, scope, budgets — gives a sense of control.

Why it's a trap

Measures delivery, not value. You can finish 100% of the portfolio and move zero outcomes.

The unit is temporary. Projects end; capabilities persist.

Alignment is asserted, not traced. A pillar tag is not a capability link.

It hides gaps for capabilities you need to bring to market. The portfolio view can't show you what isn't there or isn't funded.

Ownership shifts to the wrong area. IT drove goals and reporting; growth and retention owners were not heard and not involved.

AI accelerates the illusion. Faster, prettier dashboards focused on work and never tied to outcomes.

Project-led strategy execution tells you the work got done. It can't tell you whether the strategy got delivered.

The Project-Led Trap

Green projects do not guarantee strategic success.

FROM · The questions we ask

What projects should we complete?

How much will it cost to implement?

What is the status?

When does it close?

Who owns it?

Apply AI here → faster reporting

Auto status rollups, drafted updates, slip and burn alerts. We answer the same questions, just sooner.



TO · The questions strategy NEEDS

What capability are we building?

What outcome does it enable?

Where are the gaps to that outcome?

By when must the value land?

Which decisions must leaders make?

Apply AI here → better choices

Capability gap analysis, value laddering at intake, trade-off simulation. We change which work we fund.

How does any of this support my hypothesis that AI won't save your strategy?

The AI Execution Paradox

Speed is only an asset when the direction is already right.

If AI made your current execution model move faster, would that be a good thing?

What AI does well

- Summarize and analyze at speed
- Draft, detect patterns, spot signals
- Accelerate reporting and roll-ups
- Reduce friction in repeatable work

What AI will not do

- Create alignment where there is none
- Decide what matters most
- Clarify ownership
- Replace accountability

Unclear priorities x AI = faster confusion

The Capability-Led Shift

Stop pretending project management is the same as strategy execution. Projects end. Capabilities compound.



Outcomes — defined up front, measured at every stage, proven at the end

Every capability has a measure. Every dollar has a destination.

We can see what each investment strengthens, which initiatives carry more than one capability, and where a capability we depend on is running on empty — so AI accelerates the right things, not just more things.

Multiple buckets of work, one capability

Different intake, different funding, different cadence — all laddering to the same capability.

L1 CAPABILITY: Experience chassis that drives engagement.
MARKET(S): Health Plan / Employer

Capital Projects

DEFINITION – Technology Capital Projects managed from Transformation Office funding

L2 CAPABILITY: Member engagement platform that enables self-service, drives member action and delivers a connected experience across all products, programs and point solutions.

MARKET(S): Health Plan / Employer

L2 CAPABILITY: Standardized, portable data supports seamless integration and data quality across platforms.

MARKET(S): Health Plan

Business Initiatives

DEFINITION – Cross-functional business projects that do not require technology

L2 CAPABILITY: Stand up a dedicated MX team that owns the member journey end-to-end and experience design across all products.

MARKET(S): Health Plan / Employer

Divisional OKRs

DEFINITION – Divisional activity to contribute to the outcomes of the capability

OBJECTIVE: Make the member portal the members' first choice for managing their pharmacy benefits.

KEY RESULTS: Increase Health Plan member adoption of the portal from 5% to 10% by 12.31.2026. Increase Employer member adoption of the portal from 20% to 27% by 12.31.2026.

MARKET(S): Health Plan / Employer

Manage them differently. Evaluate them the same way – one capability, clear outcomes, aligned scoreboards.

Aligned outcomes

One shared library of outcomes and value measures, ladderred to enterprise goals.

Leadership Outcomes Menu			
Parent Category	Sub-category	Example Metrics	Typical STAR / EBITDA Link
Financial Performance	Revenue and Income	Revenue, pre-tax income, pay-for-performance, or other approved financial results	Direct to EBITDA; direct to STAR financial/revenue measures where approved
Financial Performance	Margin and EBITDA	EBITDA contribution, operating margin, unit margin	Direct to EBITDA
Financial Performance	Cost Reduction	Sustained reduction in operating expense or cost-to-serve, reduction in labor, consulting costs	Direct or contributory to EBITDA
Growth and Market	Member and Client Growth	Member lives, new clients, client expansion	Direct to STAR growth/revenue; contributory to EBITDA
Growth and Market	Product and Channel Adoption	Product adoption, digital channel use, cross-sell	Contributory to STAR growth/revenue and EBITDA
Growth and Market	Retention and Expansion	Client retention, renewal, expansion	Contributory to STAR growth/revenue and EBITDA
Customer and Member	Client Experience	Client satisfaction, effort, responsiveness, trust	Direct to STAR customer/member satisfaction
Customer and Member	Member Experience	Member satisfaction, NPS, ease, access	Direct to STAR customer/member satisfaction
Customer and Member	Service and Access	First-contact resolution, access, timeliness, consistency	Contributory to STAR satisfaction; enabling EBITDA
Operational Excellence	Productivity and Automation	Automation, effort reduction, capacity, throughput per FTE	Direct or contributory to EBITDA cost efficiency
Operational Excellence	Quality and Accuracy	First-pass quality, defects, rework, accuracy, performance guarantees	Contributory to STAR satisfaction and EBITDA
Operational Excellence	Scalability and Cost-to-Serve	Unit cost, service cost	Direct or contributory to EBITDA cost efficiency
Workforce Effectiveness	Engagement	Associate engagement and experience	Direct to STAR engagement/turnover where approved
Workforce Effectiveness	Retention and Capacity	Voluntary turnover, vacancy, capacity stability	Direct to STAR turnover where approved; enabling EBITDA
Strategic Resilience	Risk and Compliance	Risk exposure, controls, audit, regulatory readiness, fines	Enabling STAR and EBITDA; may protect value
Strategic Resilience	Technology and Data Health	Reliability, data quality, reuse, technical debt	Enabling STAR and EBITDA

We need strategy-related data AND project data

Two inputs, one decision-ready view.

Integrated from source systems · facts we never re-type

Project & portfolio data — plans, milestones, risks

Financials — spend, budget vs. actual

Operational metrics — claims, service, clinical KPIs

Client & experience data — book of business, survey feedback

Human resources data — headcount, skills, capacity

Entered by our teams · the judgment we own

Objectives & key results — target, baseline, outcome moved

Capability tag — which capability it strengthens

Owner and sponsor — who decides, not just reports

Value milestones — benefit, by when, confidence

WHERE LEADERSHIP DECISIONS ARE MADE:

Where we invest

Capabilities supported

Outcomes it moves

Where the gaps are

Where sequencing risk sits

Less admiring status. More deciding what to do next.

Where AI Actually Creates Value

AI is only as good as what sits underneath it: give it one model linking strategy, capability, investment and outcome, and it finally has something real to reason on.



Run scenarios faster

Test options in minutes, not planning cycles.



Understand tradeoffs

See what gives when priorities move.



Generate roadmaps

Sequence work from capability gaps.



Automate reporting

Dashboards and decks built from live data.



Surface risks earlier

Dependency impacts spotted before it's too late.



Leader-ready views

Many views all aligned to one source of truth.

AI does not replace strategic thinking. It removes friction from strategic execution.

What WorkBoard Strategic Portfolio Management (SPM) actually gives us

A decision hub – not another reporting layer.

Connect

Priorities, capabilities, initiatives and spend in one view.

Analyze

Scenarios and tradeoffs, not just status.

Publish

Executive roadmaps and portfolio views.

Fund & Staff

Money and people against the plan.

FROM REPORTING TO DECIDING

Executives — Decide against strategy, not just review status.

Business owners — Priorities show up where money and sequencing are decided.

EPMO & PMO — One roadmap, no monthly reconciliations; re-run scenarios in minutes.

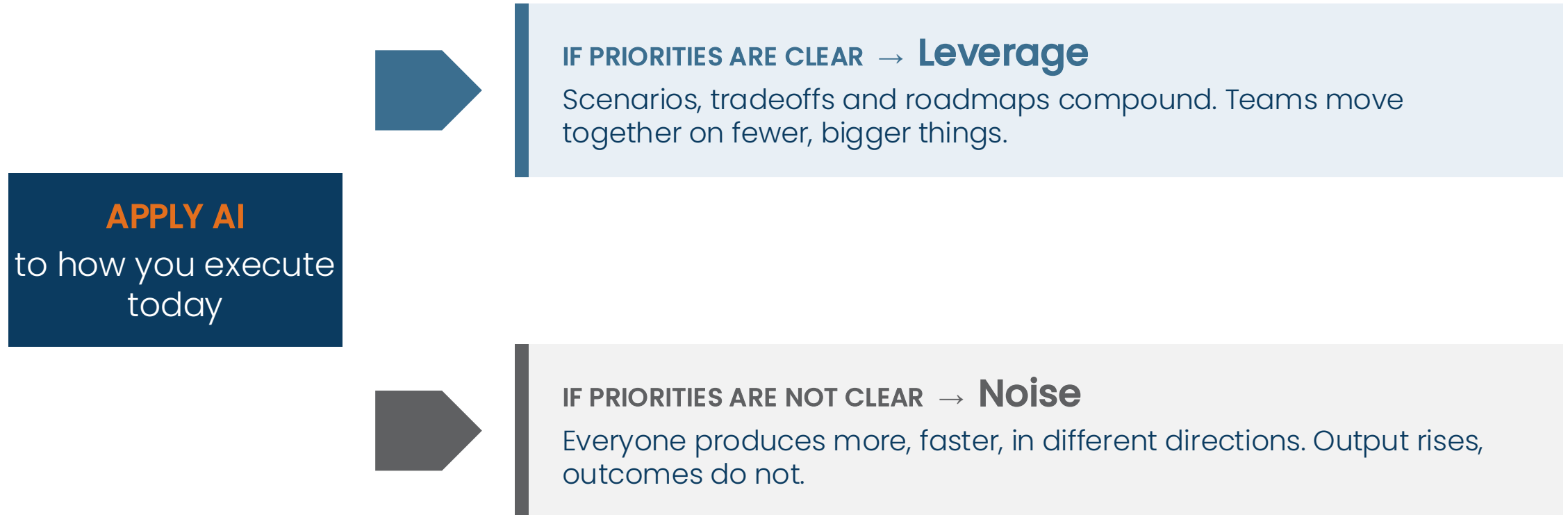
Teams — Line of sight from work to outcome, less status reporting.

Resource owners — See demand on your teams before it lands.

SPM makes strategy the unit of management – money, people and work all answer to the outcome.

So how do you know you are ready for AI?

Same technology, two very different destinations.



The tool is the same. The destination is not.

The gaps the project-led view hid

Outcome dates ran years past their planning horizons — invisible until we understood the outcomes, connections and dependencies.

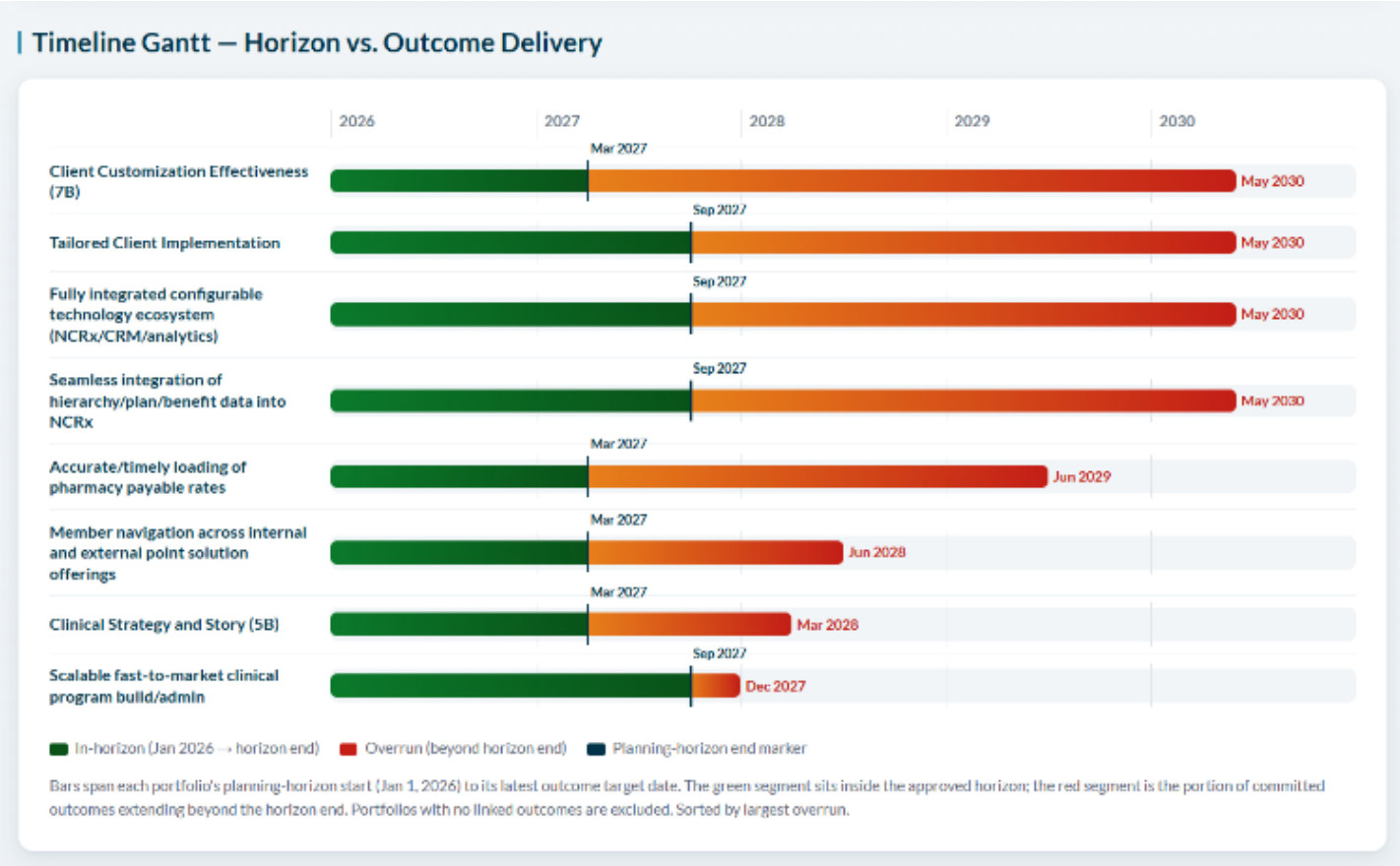
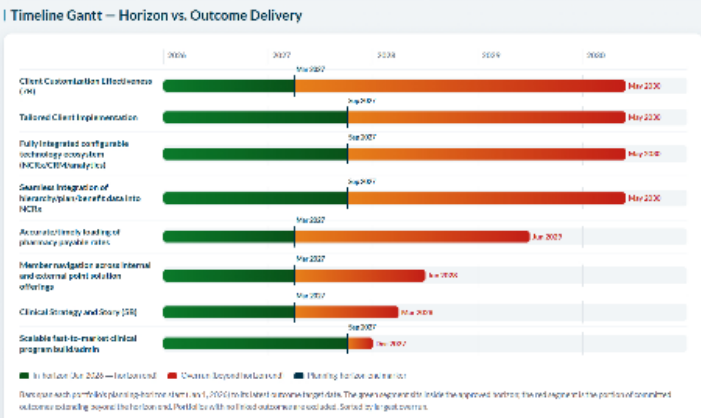
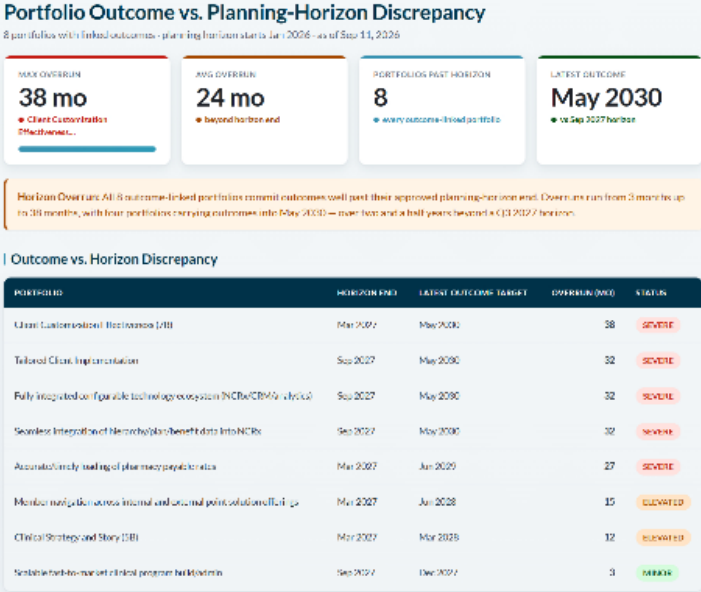
BEFORE

Portfolio Order	Published Dashboard Link	Overall Health	Project Status	Current Target Close
22	Access Guidance Services: Member Communication Enhancements	●	Active - Planning	
19	Beacon Completion	●	Active - Development / Implementation	08/27/27
10	CAO Formulary Integration for Adjudicator	●	Active - Development / Implementation	07/30/27
14	CARS 2.0	●	Active - Development / Implementation	04/30/27
18	Claimwise Migration	●	Active - Development / Implementation	08/31/26
24	Contact Center Member Experience	●	Active - Planning	02/23/28
02	Enterprise Document Management System	●	Active - Planning	01/15/27
25	FFS Drug Rebate Solution	●	Active - Development / Implementation	10/30/26
17	GEMS 2.0	●	Active - Development / Implementation	12/31/26
07	Gen 1 to Gen 3 Microservices	●	Active - Development / Implementation	03/14/28
11	Hierarchy, Plan & Benefit Integration for Adjudicator	●	Active - Development / Implementation	04/30/27
08	Member Portal App Modernization	●	Active - Planning	06/30/28
20	Member Preference Management	●	Active - Planning	12/31/27
04	Navitus Data Lake Implementation	●	Active - Development / Implementation	12/31/27
01	NCPDP F6 Program	●	Active - Development / Implementation	09/30/28
05	NCPDP Standard eHealth Products (ePrescribing, ePA)		Active - Development / Implementation	03/01/28
23	NCRxNEXT Enhancements	●	Active - Development / Implementation	04/13/29
13	Pharmacy Experience Phase II	●	Active - Development / Implementation	09/30/27
12	Pharmacy Network Integration	●	Active - Development / Implementation	10/29/27
15	Pricing Ecosystem	●	Active - Development / Implementation	09/30/26
21	RISE Expansion	●	Active - Development / Implementation	12/31/27

The gaps the project-led view hid

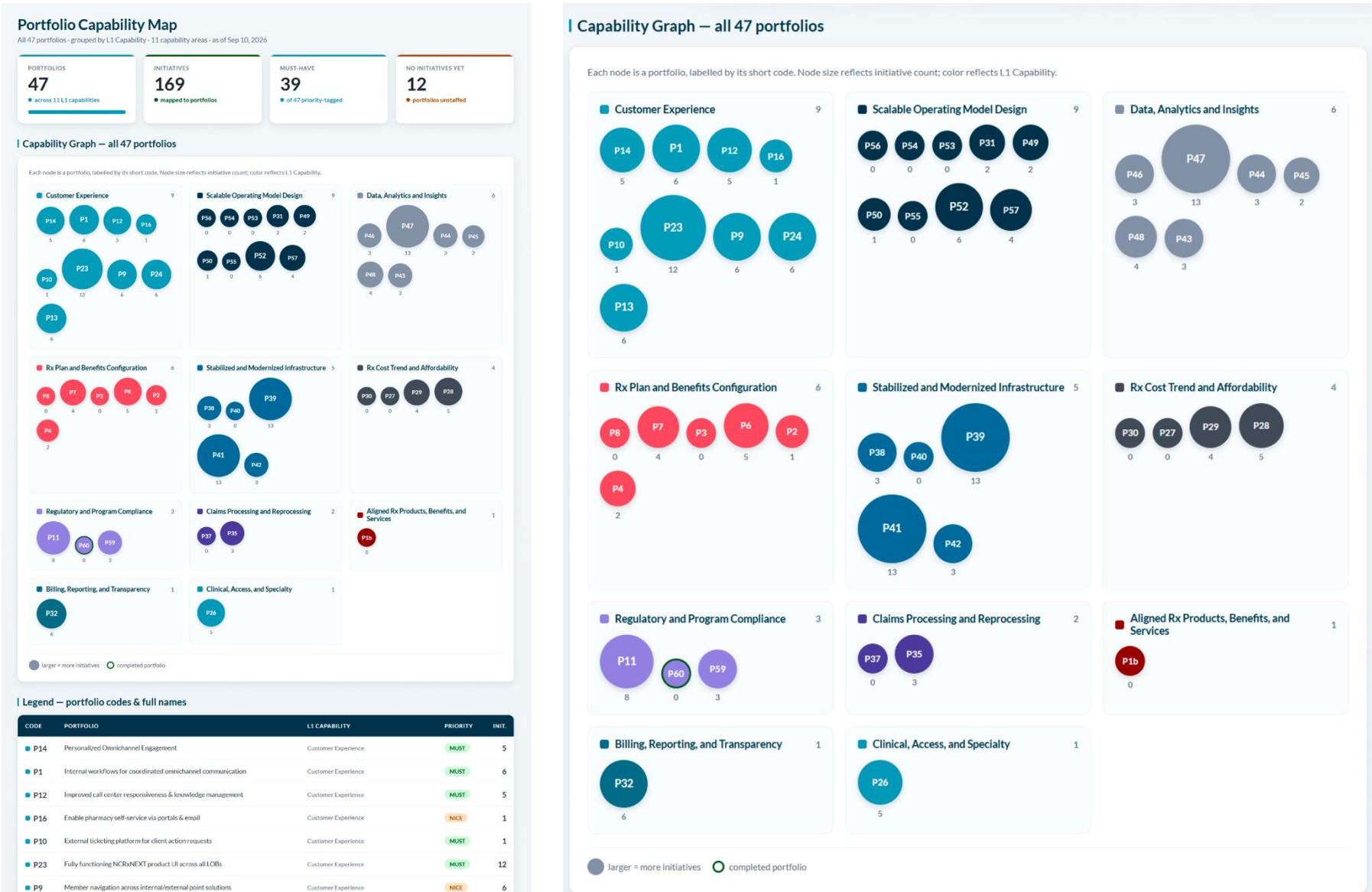
Outcome dates ran years past their planning horizons — invisible until we understood the outcomes, connections and dependencies.

AFTER

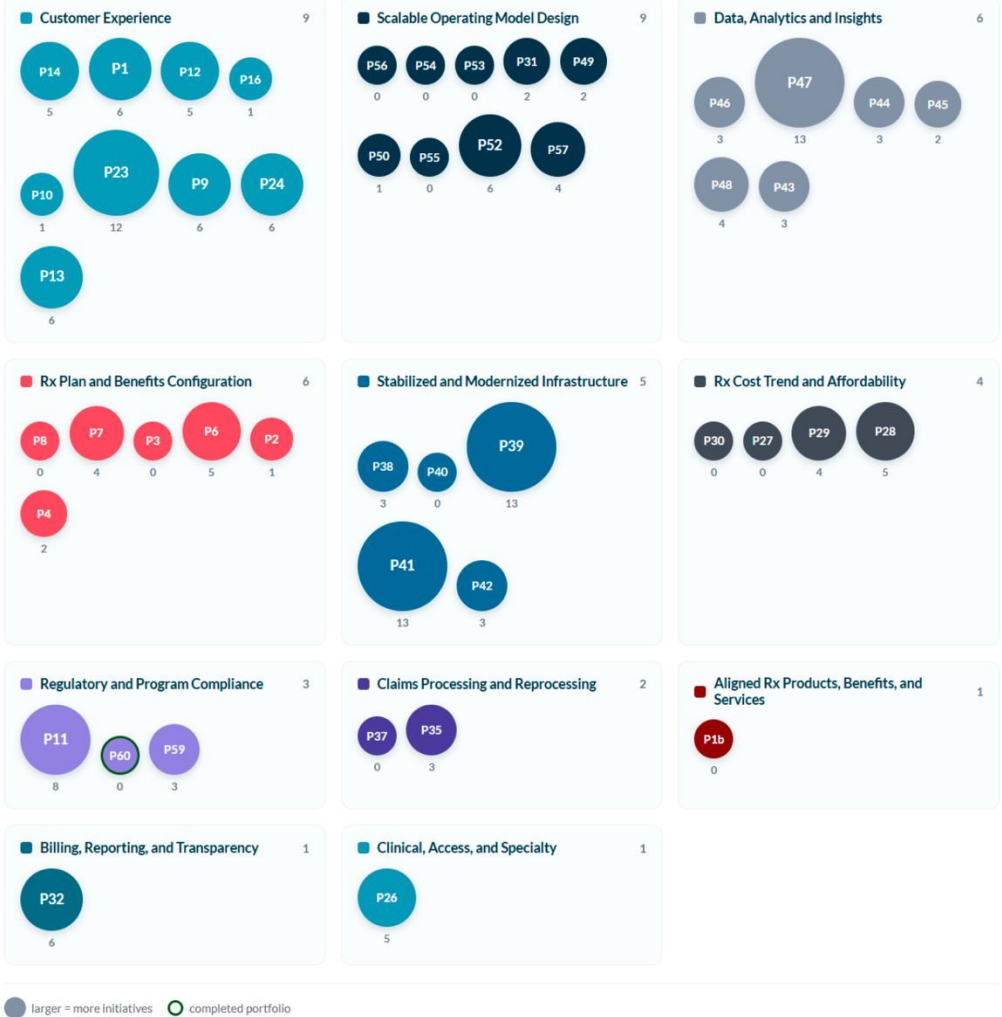


From a list of projects to a map of capabilities

Mapping portfolios to capabilities lets us compare value to market, not line items.



Each node is a portfolio, labelled by its short code. Node size reflects initiative count; color reflects L1 Capability.



larger = more initiatives

completed portfolio

What our own journey already proved

What we expected — and what actually changed.

What we expected to gain

- Organizational alignment
- Transparency of the work
- Get more done
- A better reporting tool

What the real value turned out to be

- Get more of the right things done
- Conversations shifted to capabilities — and the outcomes that prove them
- Prompted a re-evaluation of our strategic plan
- Leaders started “embracing the red”
- Less OKR training needed; AI agents eased the drafting

“The real value was not the software; it was the behavior it encouraged.”
– Darryl Munden, SVP & COO at Navitus

Take a moment

Three questions to think about & take back to your leadership team.

01

Are we focused on projects or the capabilities required to deliver strategy?

02

Can we trace investments to the outcomes leaders actually care about?

03

If AI accelerated our current operating model, would that be a good thing?

Question three is the critical question. It tells you whether you have built an execution system worth accelerating and insights worth trusting.

AI won't save your strategy. It will accelerate it.

Is what you have worth accelerating?



Driving Strategic Growth: How eCapital Used WorkBoard to Turn Enterprise Priorities Into Measurable Results



Melissa Forman-Barenblit

President of Transportation Group, eCapital

A transformative leader in freight finance, Melissa Forman-Barenblit brings more than 25 years of experience spanning transportation technology, logistics, and commercial finance. She is known for modernizing systems, improving service delivery, and creating new pathways for capital to move efficiently through the freight economy. Her leadership style emphasizes team development, cross-functional execution, and long-term value creation.



Nate Gilmore

SVP and Head of Partner & Integration Strategy

Nate Gilmore is SVP and Head of Partner & Integration Strategy for eCapital's Transportation Group, where he leads the company's partnership ecosystem, integration strategy, and commercial enablement initiatives. In this role, he is responsible for expanding strategic alliances, driving technology integrations, and creating new growth opportunities across the transportation finance and logistics ecosystem. With more than 25 years of experience spanning transportation, logistics, fintech, SaaS, and enterprise technology, Nate has held leadership positions with eCapital, TriumphPay, The Refinery, Transflo, and Xerox Business Services. Throughout his career, he has focused on building high-performing teams, creating scalable partner programs, and aligning strategy with measurable business outcomes.



Driving strategic growth

How eCapital used WorkBoard to turn
enterprise priorities into measurable results

September 2026



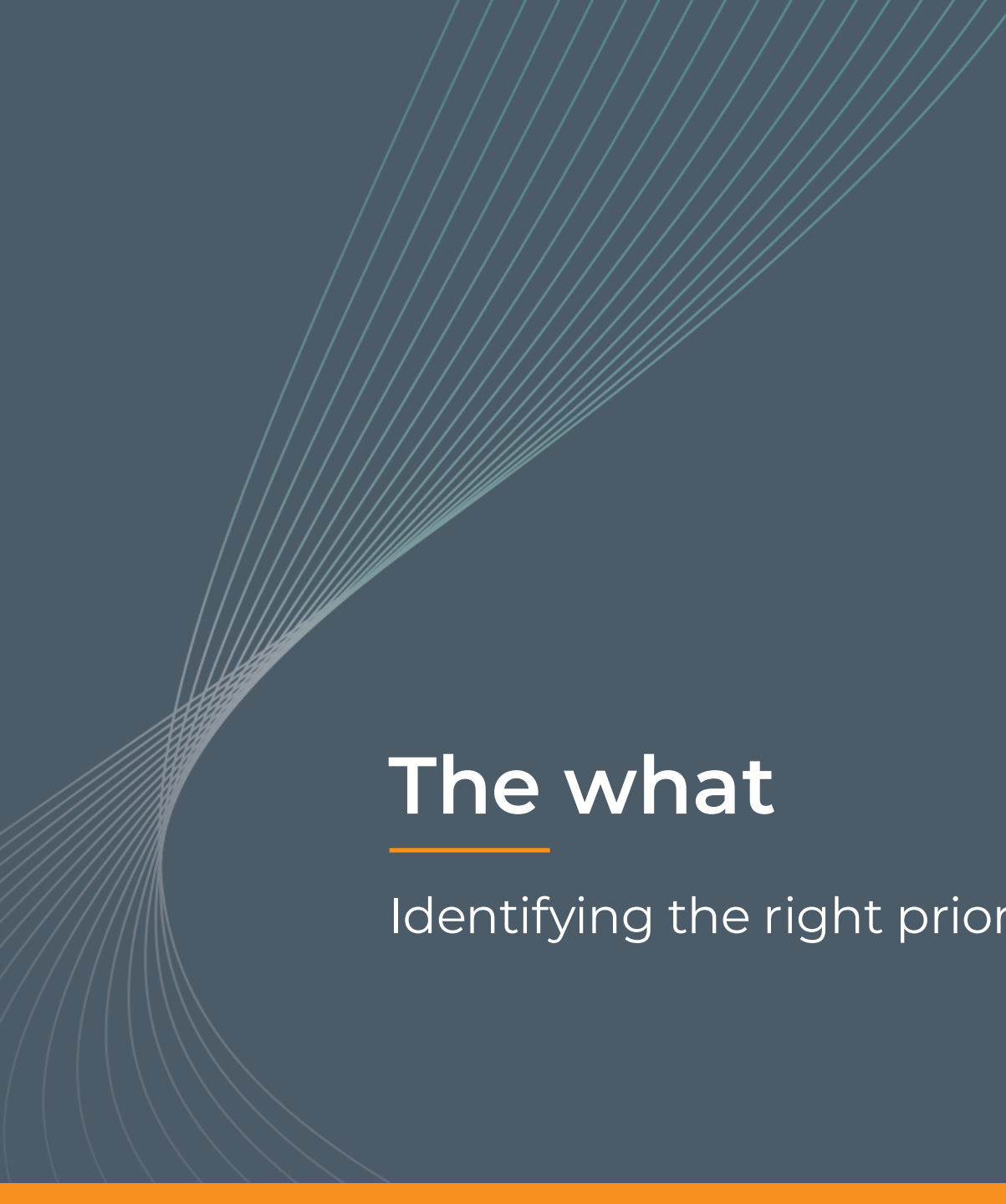
The why

Creating order from a complex and
fragmented project landscape

103

Projects and
priorities at varying
stages





The what

Identifying the right priorities and defining success

The process



Corporate Priorities for 2026

Growth. Scale. Efficiency. Risk Management. Client Experience. Culture.



Set Division Financial Objectives

Grow the business. Monetize and keep the portfolio safe. Improve operational efficiency.



Engage Leadership

What are some realistic results we could set out to achieve?



Roll Out to Functional Teams & Individuals

What will it take to achieve our targets?

Financial Objectives

GROW THE BUSINESS



Increase net funds employed by year-end

GROW THE BUSINESS



Increase annual purchases

MONETIZE THE PORTFOLIO



Create additional value-added revenue

KEEP THE PORTFOLIO SAFE



Keep bad debt write offs below 0.75% of portfolio

IMPROVE OPERATIONAL EFFICIENCY



Keep cost of operations below 14%

Financial Objectives : OKR Alignment

GROW THE BUSINESS



Increase net funds employed by year-end

25%

OKRs MAPPED

GROW THE BUSINESS



Increase annual purchases

25%

OKRs MAPPED

MONETIZE THE PORTFOLIO



Create additional value-added revenue

25%

OKRs MAPPED

KEEP THE PORTFOLIO SAFE



Keep bad debt write offs below 0.75% of portfolio

10%

OKRs MAPPED

IMPROVE OPERATIONAL EFFICIENCY



Keep cost of operations below 14%

15%

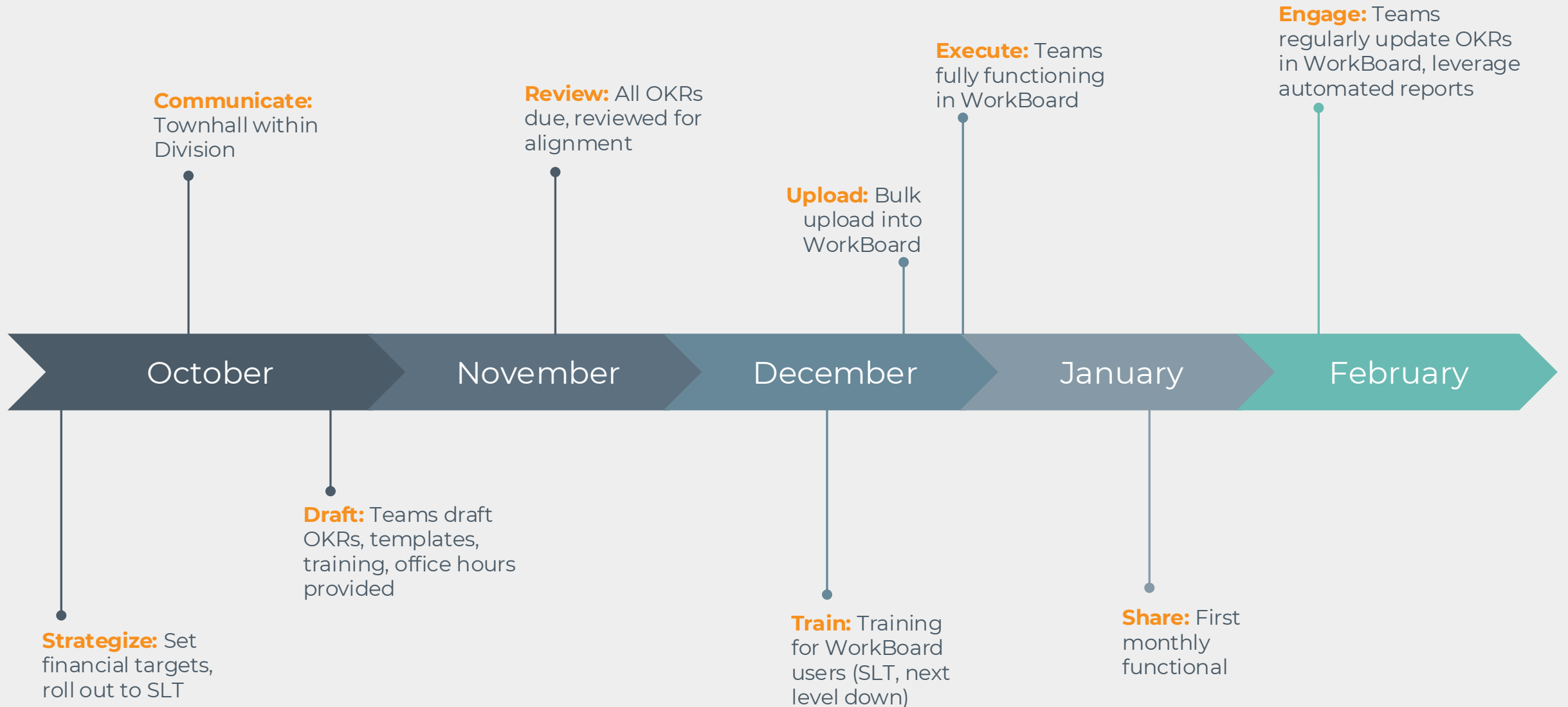
OKRs MAPPED



The how

Building alignment through planning,
coaching, and accountability

Roadmap to OKR Results



Implementation **key takeaways**

1

Change Management |

Provide ample opportunities for the team to learn, engage, and grow

2

Executive Leadership Engagement |

If leadership isn't invested, your team will pick up their attitude and quickly follow suit.

3

Wave Nine Account Executive |

They've been around the block multiple times, leverage their experience to see results faster



The results

So, how'd it work out?

Financial Objectives: Results

GROW THE BUSINESS



Increase net funds employed by year-end

36%

GROWTH TARGET OVER 2025

GROW THE BUSINESS



Increase annual purchases

24%

GROWTH TARGET OVER 2025

MONETIZE THE PORTFOLIO



Create additional value-added revenue

7%

GROWTH TARGET OVER 2025

KEEP THE PORTFOLIO SAFE



Keep bad debt write offs below 0.75% of portfolio

0.75%

KEPT TARGET FROM 2025

IMPROVE OPERATIONAL EFFICIENCY



Keep cost of operations below 14%

17%

DECREASE FROM TARGET OVER 2025

The results

	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	Dec-26	Growth Since Budgeted Dec 2025
Grow the Portfolio Increase Net Funds Employed by year-end YTD Progress: 120%	Actual 107%	Actual 102%	Actual 101%	Actual 105%	Actual 120%	Actual 123%	Actual 120%	FORECAST 142%	Actual 136%
Grow the Portfolio Increase Annual Purchases YTD Progress: 117%	Actual 105%	Actual 105%	Actual 105%	Actual 107%	Actual 110%	Actual 115%	Actual 117%	FORECAST 126%	Actual 124%
Monetize the Portfolio Create additional value-added revenue YTD Progress: 108%	Actual 100%	Actual 100%	Actual 103%	Actual 105%	Actual 104%	Actual 108%	Actual 108%	FORECAST 108%	Actual 107%
Keep the Portfolio Safe Keep Bad Debt Write Offs below 0.75% of portfolio YTD Progress 100%	Actual 100%	Actual 100%	Actual 100%	Actual 100%	Actual 100%	Actual 100%	Actual 100%	FORECAST 100%	Actual 100%
Improve Operational Efficiency Keep cost of operations below 14% YTD Progress 104%	Actual 99%	Actual 102%	Actual 102%	Actual 102%	Actual 101%	Actual 104%	Actual 104%	FORECAST 111%	Actual 117%



Where are we now?

Building momentum with champions, automation,
and broader adoption

Where are we and what is up ahead?

CALIBRATE MONDAYS



Teams start their week by aligning on what needs to get accomplished to keep OKRs on track

CELEBRATE FRIDAYS



Teams end their weeks by celebrating victories, big and small

OKR CHAMPION PROGRAM



Internal team of next level down leaders, meeting monthly to discuss progress, challenges, and opportunities for continued growth

ADDITIONAL WORKBOARD USERS

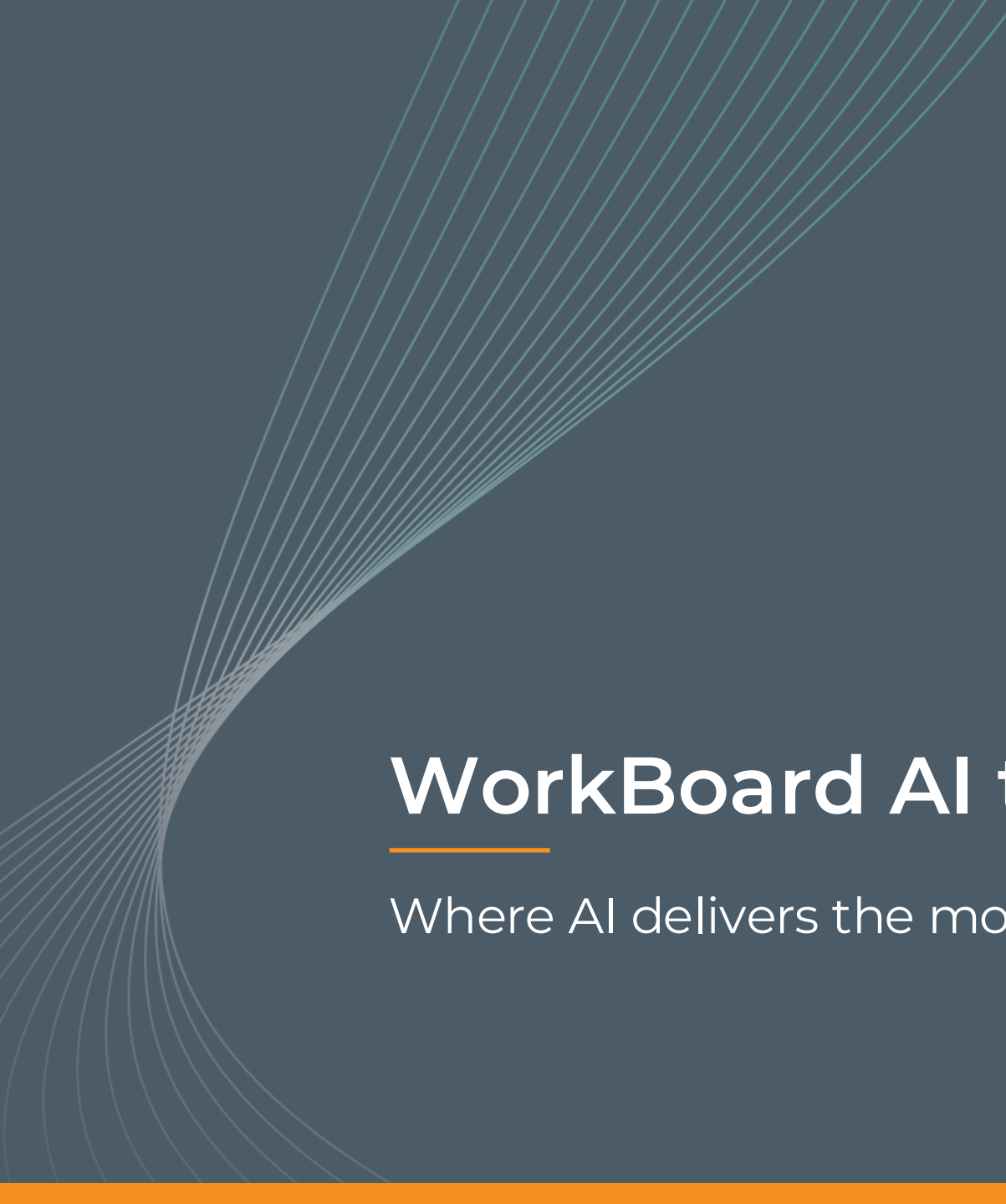


Coming Q4 we will be adding in another layer of team members

DATA AUTOMATION



2027 target to focus on increased data automation for consistent, real-time results

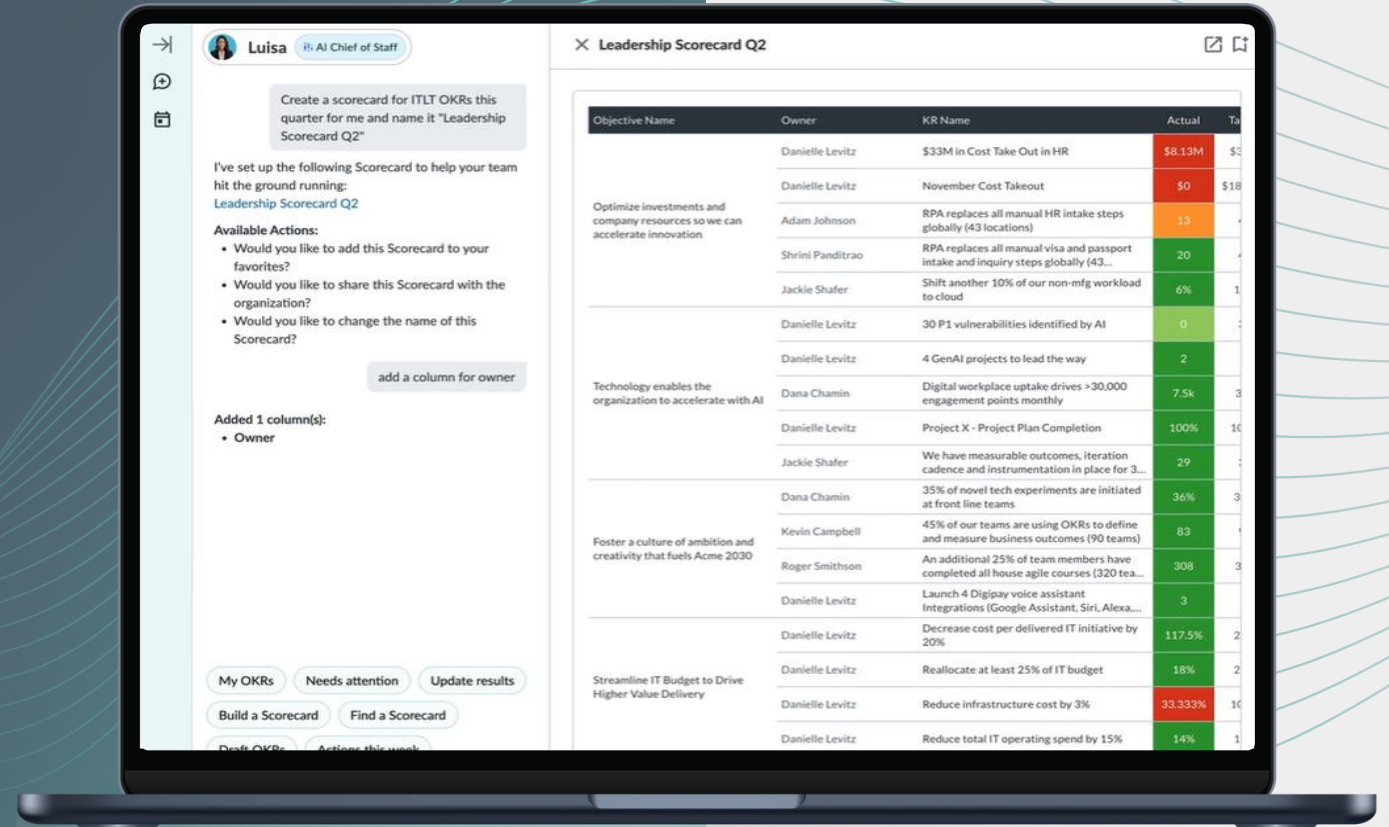


WorkBoard AI top recommendations

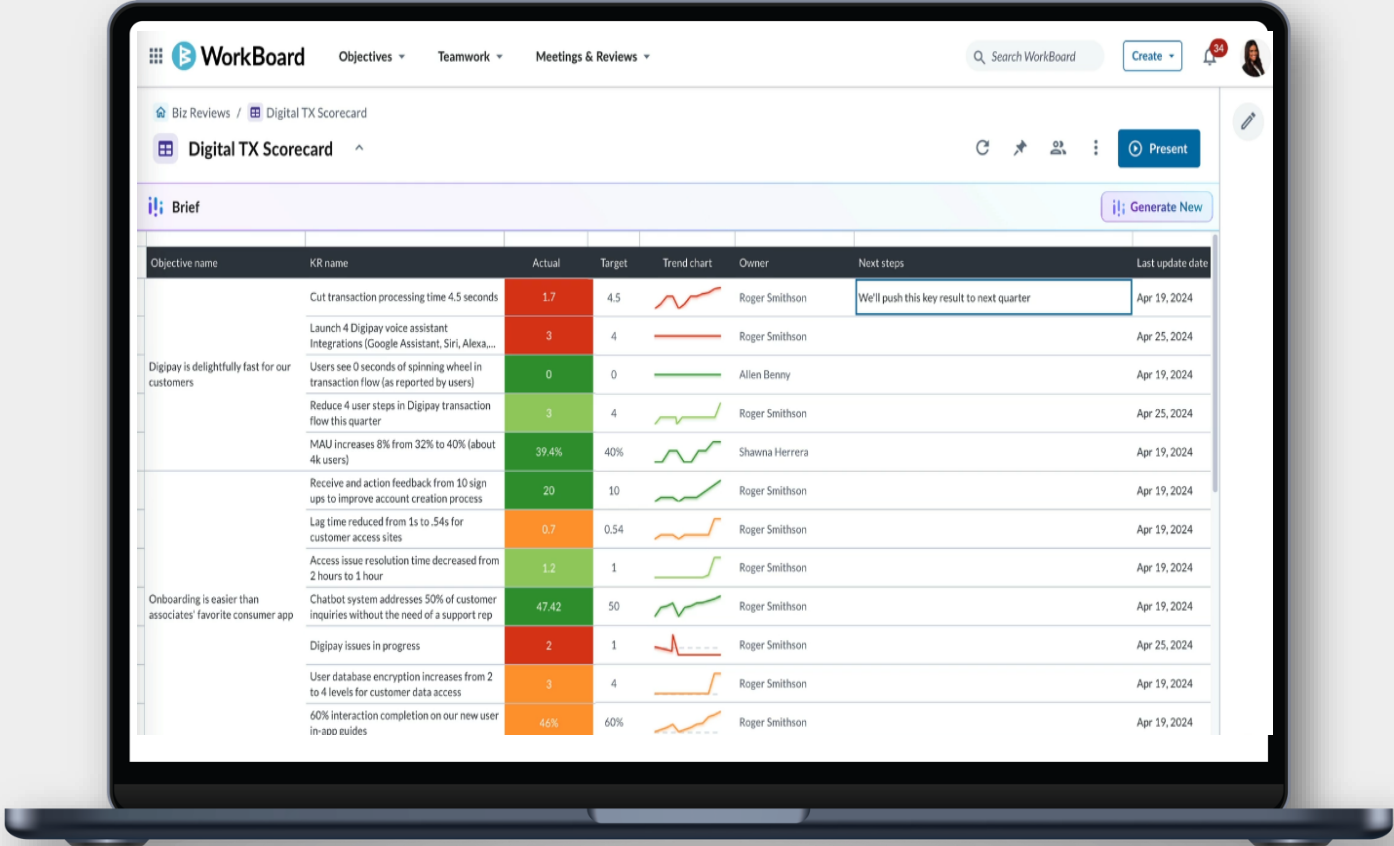
Where AI delivers the most meaningful results

Top tools and analytics to drive results

- Automated reporting: scorecards, business reviews
 - Sent to leadership weekly
 - Maintain transparency and drive accountability
- Trend charts for KRs
- Team heatmap
- RME analytics



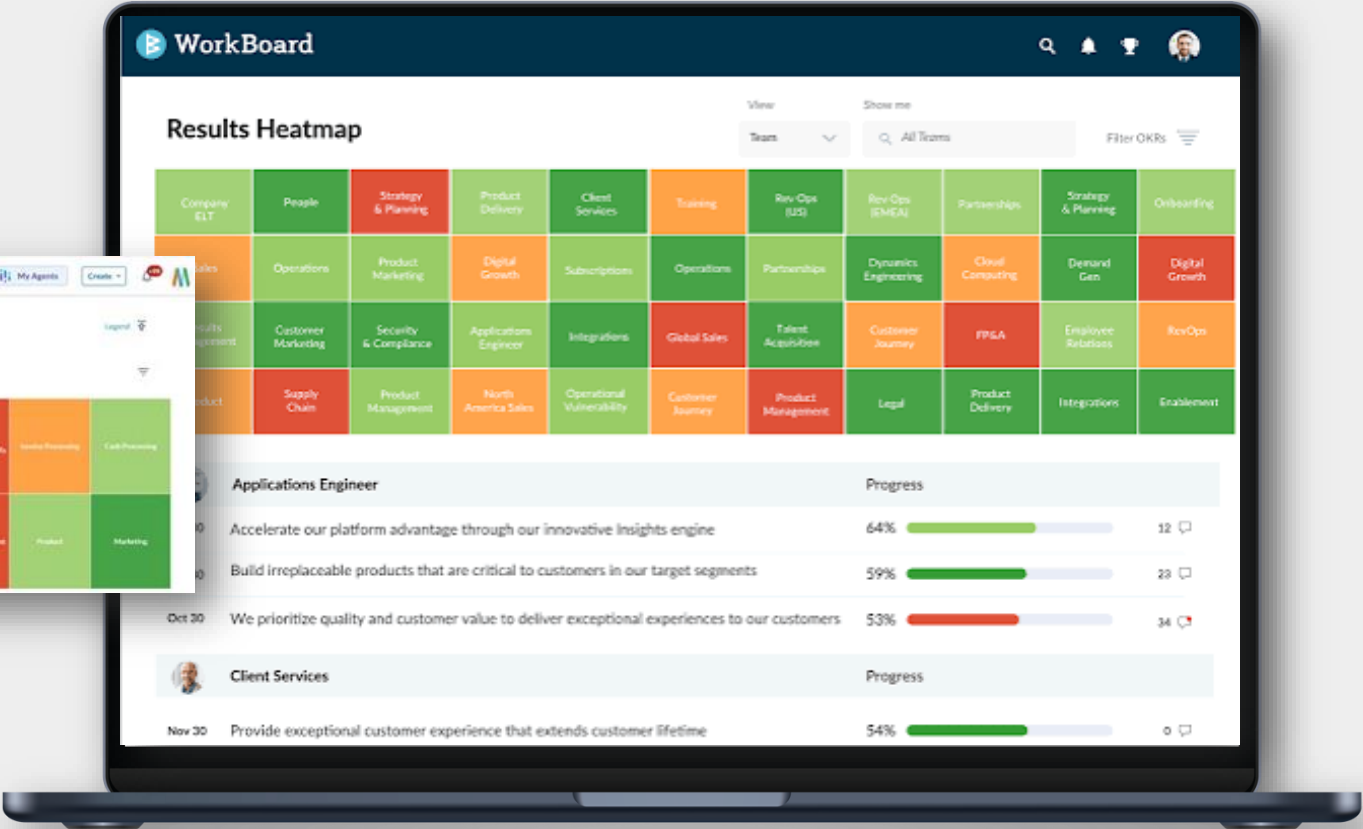
Scorecard & Trend Chart



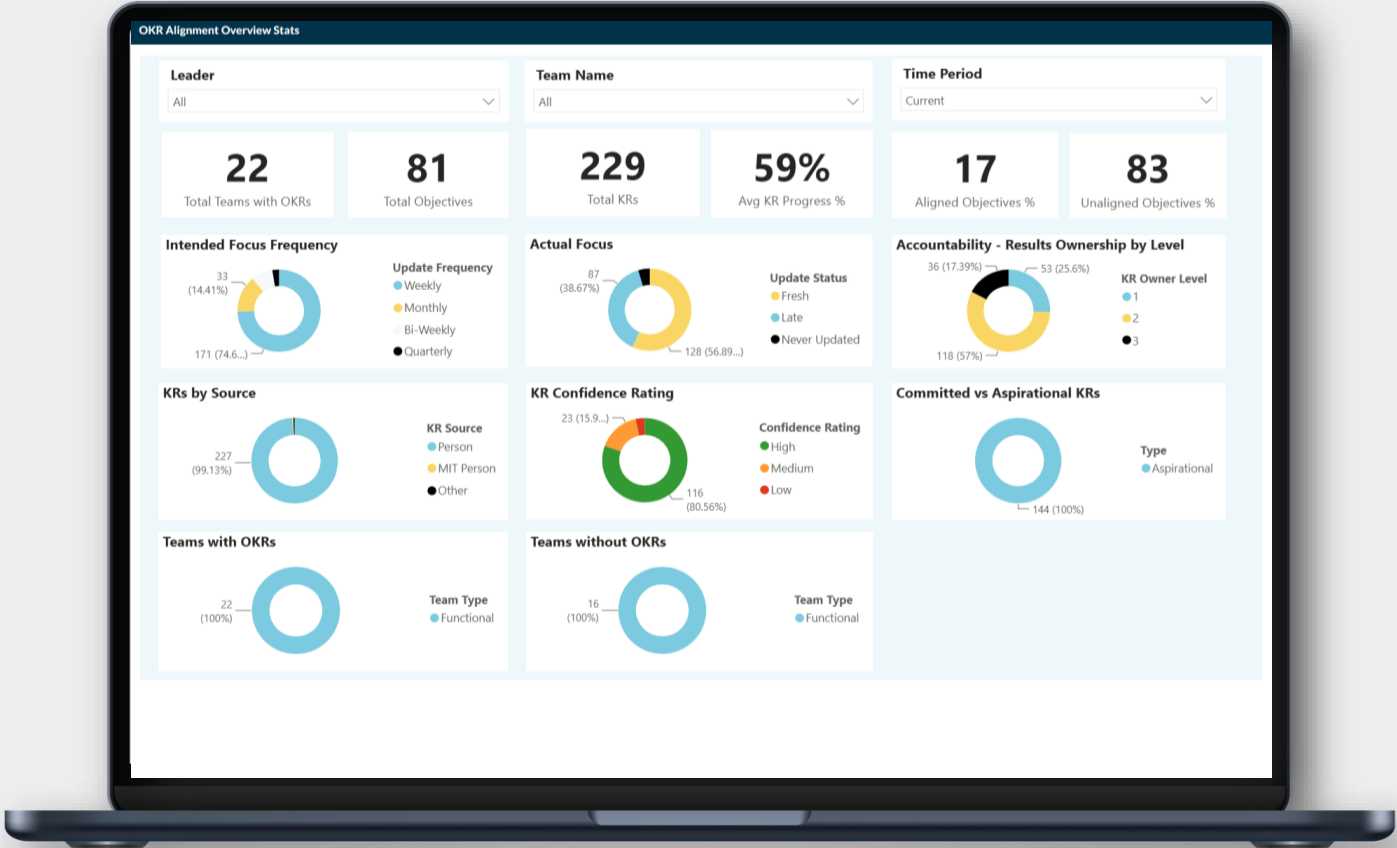
The heatmap



2026 TRANSPORTATION GROUP



RME Analytics



2026 TRANSPORTATION GROUP



Insights

Be ambitious, realistic, celebrate, and embrace change

Implementation **key takeaways**

**Manage
ambitions.**

01

**Navigate
roadblocks.**

02

**Remember to
celebrate!**

03

**Change is
inevitable.**

04



Questions?



Mallika San Agustin

Manager, Talent & Performance



Driven by Recognition: Gamifying Adoption & Turning OKRs into an Everyday Habit

Mallika San Agustin is a Manager, Talent & Performance at Metropolis, where she leads the company's OKR program and performance management strategies. She specializes in building the systems and enablement behind effective goal-setting from platform rollout and manager training to redesigning calibration processes that keep performance reviews consistent and fair. Before Metropolis, she honed this expertise at Public Consulting Group, and USC. Mallika holds a Master of Public Administration from USC's Sol Price School of Public Policy, and her work centers on turning performance frameworks into practical tools that help people and organizations grow together.

Driven by Recognition:

Gamifying adoption & turning
OKRs into an everyday habit



Driven by Recognition:

Gamifying adoption & turning
OKRs into an everyday habit



Just drive in.

Thanks for parking at
Harvey St. Lot
Ended Jan 21 at 4:34 pm

6h 28 min Elapsed time | \$12.99 Total

View receipt

Done

We're creating the
Intelligence Layer that
makes real-world
experiences everywhere
frictionless, personal and
magical.

From vehicle to identity recognition, that's who we are.
Our growth strengthens the value our Members get, and it starts with parking.





Enjoy your order!
You're 47 points away from a reward.





Parking reservation confirmed
Long term lot • Starts 11/6/25 at 5:00PM





Welcome back to the Ace Lounge
You are now checked in.





PARKING



AVIATION



CHARGING



FUTURE
MOBILITY



WASHING



FUELING AND
CONVENIENCE



QUICK SERVE
RESTAURANTS



HOSPITALITY



SECURITY



LIVE
ENTERTAINMENT

CORE CHALLENGES

Before WorkBoard: what we were solving for

Missed or misaligned goals across teams

Leadership investment gap in day-to-day execution

Siloed or spotty data, no shared source of truth

Diligence and rigor that didn't scale past a certain size



Owner mentality means every individual plays a direct role in achieving our strategy. Success isn't just a top-down mandate — it's shared accountability, active contribution and absolute alignment.

WE ARE OWNERS

Progress is not inevitable; it must be forged by vision, determination and a bias for action.

WE ARE LEADERS

We are a product-led technology company — leading while others follow. We challenge out of principle, welcome different perspectives, and rally for progress.

WE ARE INNOVATORS

Revolutionizing physical infrastructure takes boldness. We move fast, challenge the status quo, and realize excellence through rapid iteration.

LAUNCH WINS

- **96%** of Total Employee OKR Creation
- **100%** of Provisioned Users accessed WorkBoard
- **100%** of Executive Leaders created Company and Department OKRs within WorkBoard

OPPORTUNITIES

- **Moving from Launch to Habit:** Keeping momentum high after the initial setup high.
- **Active Communication:** Getting teams to proactively log wins, track progress, and update metrics in the tool.
- **The Friction Barrier:** Avoiding the trap of static, monthly HR nag emails.

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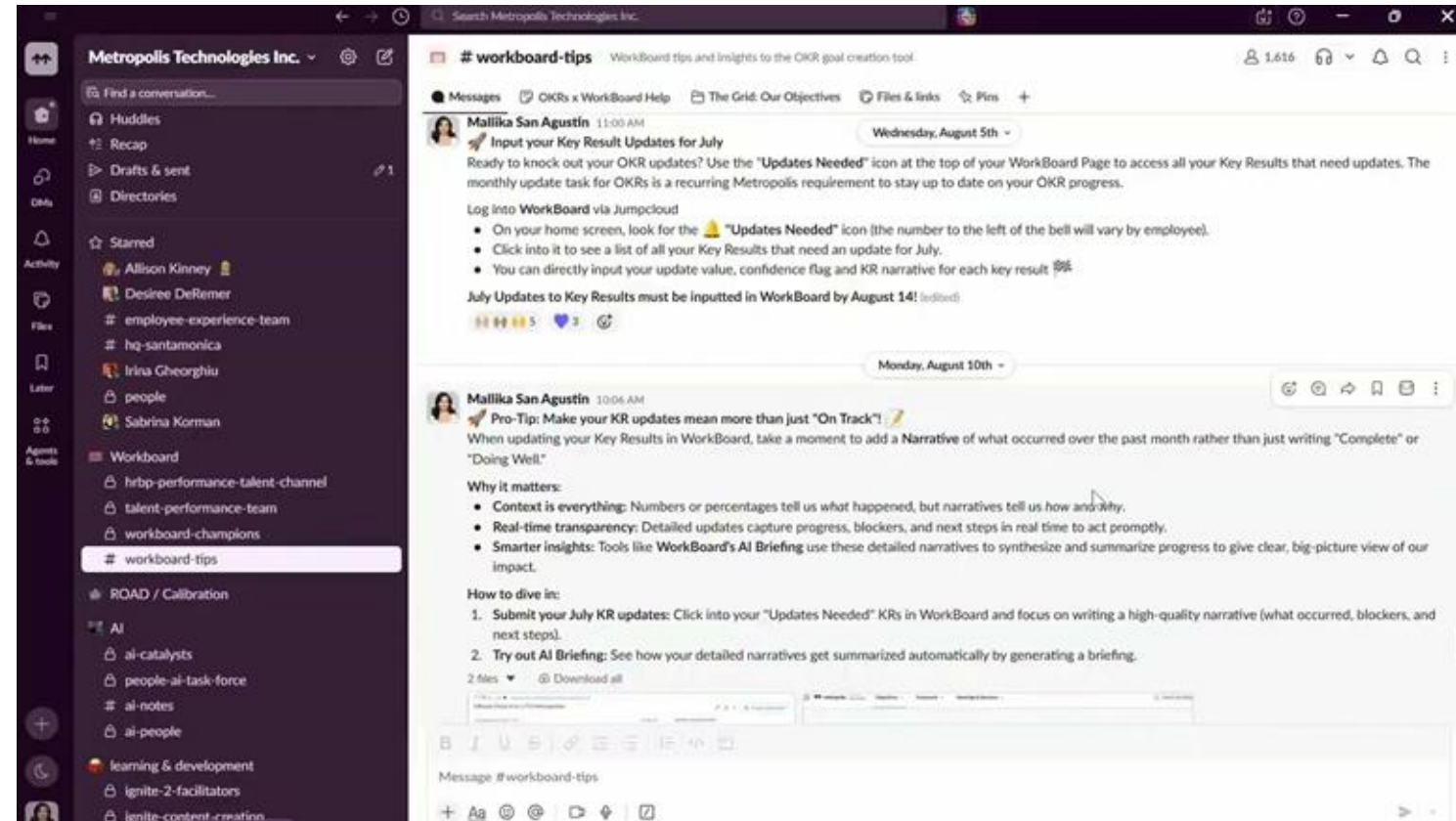
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COMMUNICATION STRATEGY

Meeting people where they work

- **Weekly AI prompts:** Practical tips for Sofia & Luisa agents.
- **Micro-demos:** 1-minute video walkthroughs of key actions.
- **High visibility:** Easy peer tagging, real-time Q+A and unblocking.



GAMIFICATION

The WorkBoard World Cup

Ahead of our 2H drafting sprint, we launched a 5-day companywide challenge week to transform tool usage into an inter-office competition.

The execution:

Daily challenges, live-streamed in at every office — bringing the digital experience to the living in-person culture.



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An Agent-first workforce culture

- By framing AI agents (Luisa + Sofia) as personal coaches, employees began viewing WorkBoard not as an HR directive, but as a productivity tool that manages their daily focus and workload.
- We back this with real incentives: a spot bonus for employees who build and share AI workflows tied to company OKRs, and a portion of bonus outcomes connected to OKR attainment overall.
- Employees now proactively approach the People team asking: "Can we integrate our internal AI Agents into WorkBoard or create a custom team for our engineering workflow?"—paving the way for our 2027 strategy.

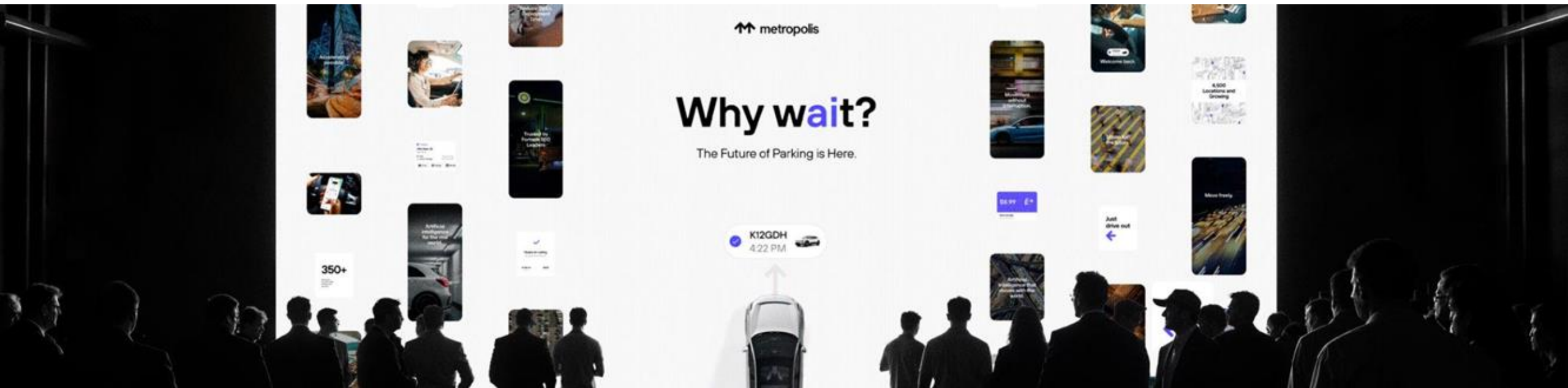
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NEXT FRONTIER

Where we plan to grow

- Objective-writing: still taking an above KR and making it the Objective, instead of writing one that motivates
- KR-writing: still output-focused ("launch three campaigns") vs. outcome-focused ("grow qualified pipeline")
- **2027 focus:** strengthening OKR fundamentals alongside AI and gamification layers



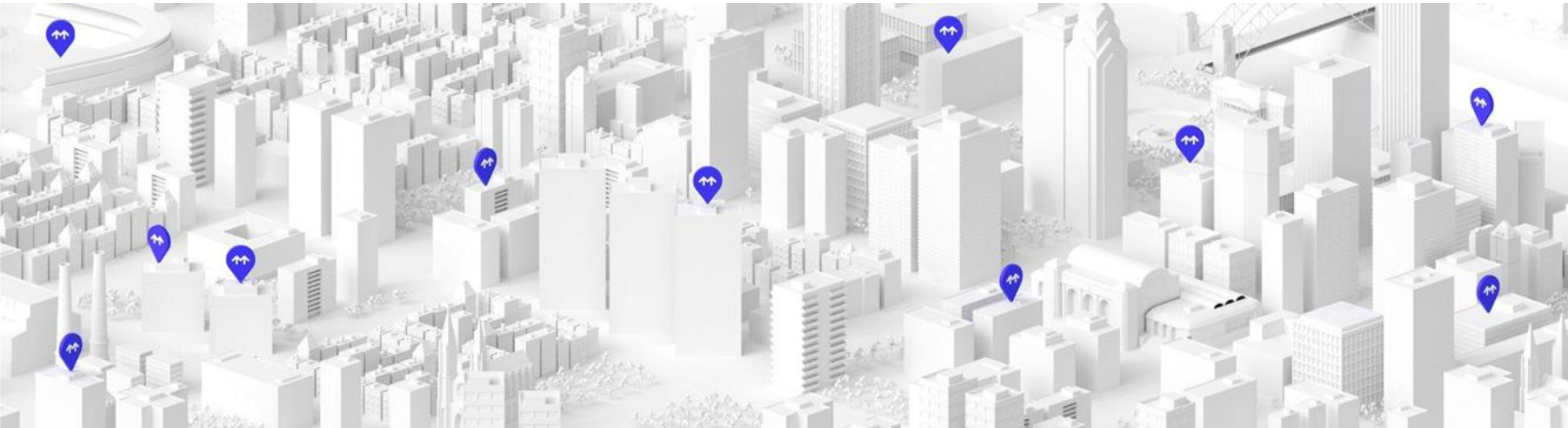
TAKEAWAYS

The HR playbook

-  **People Partnership** Partner with People Teams for change management, employee design, and cultural push.
-  **Gamified Campaigns** Swap compliance emails for high-energy campaigns like the "World Cup" challenge.
-  **Native Workflow** Embed tracking directly into Slack and Google Calendar to minimize context switching.
-  **AI Assistance** Position AI agents and briefings as time-savers that eliminate administrative checkboxes.
-  **Multi-Level Alignment** Combine bonus ties with bottom-up peer engagement and friendly competition.

We're just getting started.

"Act as a culture consultant for the [Insert Industry] industry with a [Insert culture tone, e.g., fast-paced, analytical] vibe, and give me 3 innovative, fun ways to gamify AI agent adoption and energize our OKR culture."



Thank you



Day 3 Presenttions





Matt Turek
Strategy Execution Lead



Accelerating Adoption: High-Impact Actions from Dominion Energy's OKR Journey

Matthew Turek is the Strategy Execution Lead at Dominion Energy, where he spearheaded the shift to outcome thinking, and now helps turn strategic priorities into actionable outcomes by helping leaders align their strategic vision with actionable outcomes. Known for his ability to rally others to action without formal authority, Matthew excels at bringing together diverse stakeholders, building consensus, and moving initiatives forward.

His approach combines empathy with direct engagement, creating trusted partnerships that foster collaboration and accountability.

Accelerating Adoption

High – Impact Actions from Dominion Energy's OKR Journey

Matthew Turek, Strategy Execution Lead

[Presentation Date]

About Me

- Matthew Turek, Strategy Execution Lead for Dominion's IT Organization
- 15yrs in I.T., 14yrs at Dominion Energy
- Fun Facts
 - Visited 37 lighthouses
 - Sing in a choir
- Favorite Hobby: Cars



Who We Are

- **Dominion Energy** provides regulated electricity service to 3.6 million homes and businesses in Virginia, North Carolina, and South Carolina; as well as regulated natural gas service to 500,000 customers in South Carolina
- We provide electricity to several major military facilities, including the Pentagon
- Our generating fleet includes traditional stations, renewables and Nuclear Power



Why Did We Adopt WorkBoard?

- Our IT organization is transitioning to an outcome focus as part of a broader transformation
 - Historically we have been an output = success organization.
- Consultants flagged WorkBoard as a key accelerator for the shift
- Our CIO set the course and asked me to execute
 - Most of our leaders were not asking for WorkBoard
- Our *project* team formed in Q2 2025

WorkBoard  AI

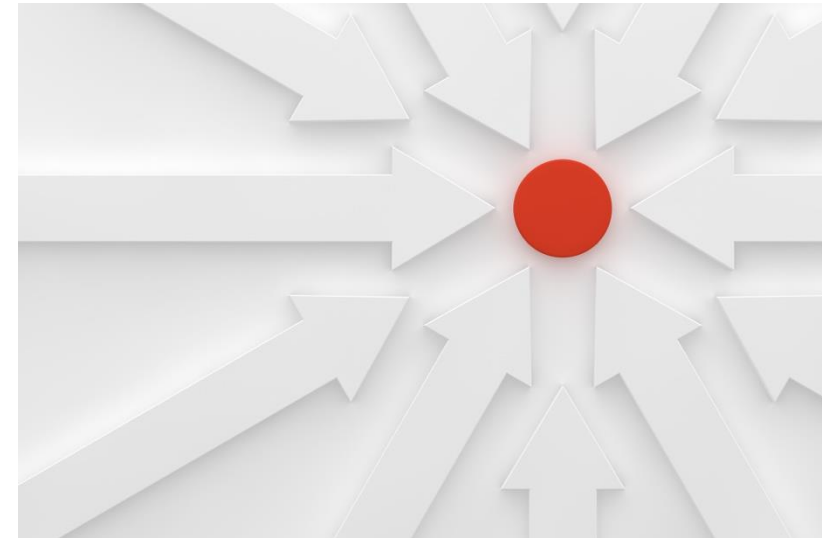
Mid-Launch, Our Leaders Asked Us to Stop



- Mid-launch our Leaders asked us to pause our plans
- Leaders did not understand the reason for WorkBoard or OKRs
 - The value statement, how it fit into our landscape, and how it fit into our transformation were all unclear.
- Leaders did not understand OKRs or the new processes
 - OKRs were drafted in isolation. Teams did not understand intent, or where responsibility landed.
- Leadership was not engaged beyond the directive from above

We Paused Instead of Pushing

- We took time to reflect and reset rather than pushing a process that wasn't working
- We started a regular feedback loop with leaders to understand concerns and ensure our changes move us in the right direction
- We attended Accelerate to learn from others in similar situations



What We Heard From Our Leaders



- **Our messaging fell flat**
 - Talking about alignment did not resonate with leaders – it didn't convey a value add
 - Lack of clear delineation caused confusion about where WorkBoard ended and performance and project management began
- **Our Training schedule did not allow time to practice what was learned**
 - Most leaders could not recall training content when drafting started
- **Competing Priorities win without visible Executive Sponsorship.**

What We Learned at Accelerate

- Success requires change management, not just a tool rollout
- Improvement is iterative, progress over perfection
- Training and messaging customized for your organization is far more effective
- Ask questions, listen, and share your story



We Rebuilt The Message And The Training



- We slowed down - we focused on meeting leader's needs rather than expansion
- We updated our messaging to resonate with DE culture
 - Focusing on Outcomes instead of alignment – Did the work accomplish anything
- We created custom training that focused on Dominion examples and solving real problems
 - These allowed folks to connect the process to real tangible things
- We continued feedback loops
 - Periodic check ins let us know our approach was working, and kept leaders engaged
- We dedicated resources to the effort (me)

Drafting Received Proper Focus

- OKR drafting became a focused and collaborative exercise
 - All team members had to be present
 - Start with an hour of dedicated time
- All OKR drafting was facilitated
 - I attended sessions to guide leaders through the process.
 - My presence allowed leaders to focus on the discussion instead of the tool
 - I could provide immediate feedback and ask questions to guide towards higher quality OKRs
- Our Senior Leaders began using AI briefs to drive leadership meetings



Behaviors Changed

- Our leaders use their OKRs
 - Intent, responsibility and value are all understood
- OKRs are more outcome-focused
- Skills are reinforced through training and facilitation
 - Teams are starting to self correct when drafting OKRs
- Leaders are more proactive about OKR updates ahead of Executive status meetings
- We stopped getting questions about the value of WorkBoard and OKRs or where they fit in the organization



Adoption Improved

- Our report card: From 'F' to 'C' on OKR quality
- OKRs have become a Key talking point in CIO meetings
- 90% of our L2 leaders have adopted AI briefs
- Teams have begun self correcting during drafting - "I know we need to do this, but what is the outcome?"
- More than 50% of leaders feel that the value provided by OKRs outweighs the effort required to draft them



What Comes Next?

- Expand to new businesses units
- IT sets the example for strategy execution at Dominion
- Establish repeatable self sustaining behavior
 - Standards
 - Deep training resources
 - Robust Champion support
- Shrinking drafting times
 - Using pre-scheduled meetings to normalize a tighter timeframe
 - Leaders pre – drafting Objectives focuses team discussions



How YOU Can Accelerate Adoption



- Plan to Pause, reflect, and reset
 - Act on this, use what you learn
- Create a strong, regular feedback loop
- Build for your organization – training, narratives, examples, they should resonate with your people.
- Leverage visible executive support
- Promote collaborative drafting – gently support the leaders as they learn
- Focus on consistent usage – this reinforces skills and starts to demonstrate value
 - Progress matters more than perfection
- Make it easy

Testimonials

- “I have had access to OKRs for a few months, and I was not clear before yesterday’s presentation about how this works. Thank you!”
- “The guided sessions were extremely helpful.”
- “Love the fact that you shared your specific and personal examples and made this pretty complex topic so easy to understand and follow.”
- An early win is simply the collaboration needed to create the first set of OKRs. It was a good exercise in revealing how much look-ahead planning is needed to be more successful.
- OKRs really do help keep the focus on the things that are important, so the "noise" of day-to-day activity doesn't keep us constantly pulled off course.

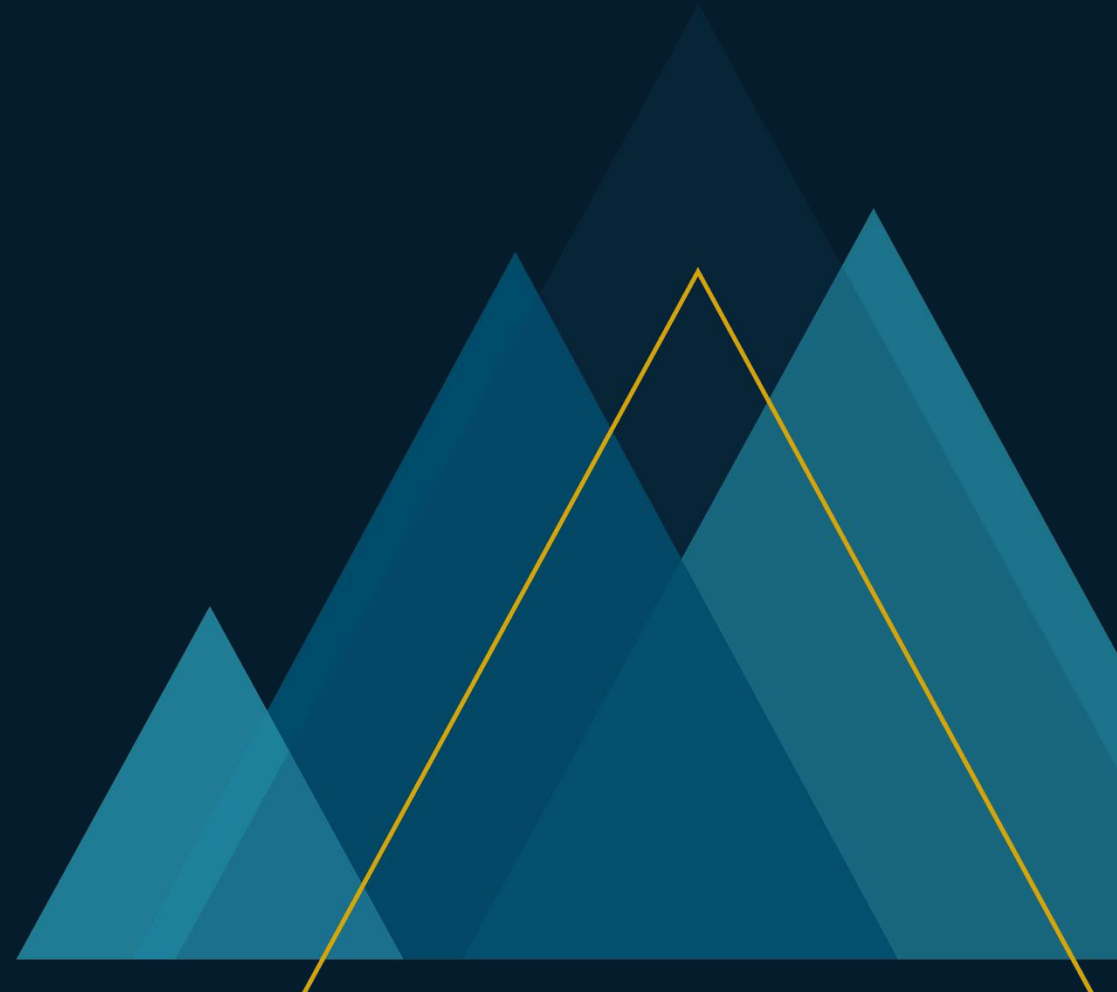


Questions?

Find me and have a conversation!

Operating Cadence and Rhythm Best Practices

Your best managers are already doing this!



LEADERSHIP BIO

Megan Rene

Customer Success & Services Leadership Team, WorkBoardAI

Megan has been part of the foundational team that built WorkBoardAI's Customer Success and Services organization from the ground up since joining the company in 2018. She also leads the execution of WorkBoardAI's Channel Strategy. As a lecturer and faculty member of WorkBoardAI's Results Foundry, she has coached and facilitated hundreds of executive workshops, helping enterprise leadership teams align on measurable strategic priorities.

Before WorkBoardAI, Megan held go-to-market roles at Medallia, Lanetix, and Esri, and led product and strategy teams at Oracle and Target. She began her career at Booz Allen Hamilton, supporting a State Department program focused on counter-terrorism efforts in the Middle East before and after 9/11.



Every employee wants to be aligned with the company strategy

They have told you this!



Leading indicators are how managers keep their teams on track and the way leaders mitigate risk fast!



Transparency to these indicators, creates confidence every employee is calibrating on work that actually drives the strategy



The timing is right now!

Strategic Portfolio Management

Deep Dive

BO Bo AI SE Analyst

Web search

Run both scenarios, based on the value created from the objectives connected. And run the sensitivity analysis and make a recommendation on which scenario to execute against.

Results are written back to both scenarios. Here's the dashboard and recommendation:

Scenario Analysis & Recommendation — Enterprise Automation & AI

Scenario Plan — Enterprise Automation & AI Transformation

Monte Carlo · 10,000 trials · value anchored on 7 linked KRs (Obj 568006 + 567532) · run 2026-06-22

RECOMMENDATION

Execute Scenario 2: Budget Cut –35% (Defer + Descope)

Counter-intuitively, the deeper cut produces **higher expected NPV (\$27.6M vs \$25.7M)** AND **lower volatility (\$7.8M σ vs \$9.3M σ)**. Risk-adjusted score: 3.53 vs 2.75. The reason: deferring Agentic Workload Mgmt (\$7.3M at only 50% confidence) removes the portfolio's single biggest unrewarded bet. Pro-rata cutting is mathematically dominated.

RECOMMENDED SPEND

\$20.4M

vs \$31.3M baseline · saves \$11.0M

EXPECTED 3YR NPV

\$27.6M

P10 \$17.1M / P90 \$37.4M

ROI MULTIPLE

2.35×

value-realized ÷ spend

P(NPV>0)

100%

all 10k trials profitable

Side-by-Side

Per-Initiative Value

Sensitivity (Tornado)

Why S2 Wins

S1 · Budget Cut –10% (Pro-Rata)

Spread the 10% cut evenly. No initiative descope.

Spend

\$28.21M

NPV P10

\$13.20M

Std dev (σ)

\$9.28M

NPV mean

\$25.68M

NPV P90

\$37.70M

ROI

1.04×

S2 · Budget Cut –35% (Defer + Descope)

Defer Agentic, protect AP+IDP, descope yellows to MVP.

RECOMMENDED

Spend

\$20.37M

NPV P10

\$17.10M

Std dev (σ)

\$7.82M

NPV mean

\$27.58M

NPV P90

\$37.40M

ROI

2.35×

+ Ask about your portfolios or initiatives...

©2026 WorkBoard Inc.

One solution to align capital and capacity to strategy and measure, manage and drive optimal strategic outcomes



WHY WE INVESTED

Planning, adapting, and decisions must be faster to seize the opportunities ahead – you can’t operate at future speed on slides or a system from the past.

PAIN POINT TODAY	WHAT PEOPLE WANT INSTEAD
Spending the budget isn’t success, outcomes are	<i>Strategy and outcomes anchor scenarios, plans, and roadmaps</i>
Steep learning curve for legacy systems	<i>Self-explanatory, conversational – live in a week, productive in 10 minutes</i>
Status updates and roadmaps are labor intensive	<i>Status from real signals, dashboards in seconds, and roadmaps in real time</i>
Slow, rigid scenario planning = slow optimization	<i>Dynamic and iterative in conversation; compare ten alternatives in seconds</i>
No lift from AI – it’s missing or limited	<i>Native AI agents that act, simulate, monitor, and escalate. A platform that evolves faster.</i>

Drive your best outcomes



Use WorkBoardAI for ...

- ✓ Align on strategy and OKRs
- ✓ Scenarios and prioritization
- ✓ Value management
- ✓ IT financial performance
- ✓ Operating cadence and reporting
- ✓ Plan validation and communication
- ✓ Publish roadmaps and reporting
- ✓ Resource management
- ✓ Project and workstream management



Manage all the value delivery elements

Strategy – Pillars, outcomes, risks

OKRs and outcomes – Align portfolio, initiatives and projects to strategy

Portfolios – For example, Data & AI and Revenue Optimization

> **Initiatives** – For example, Threat Detection, ERP Transformation

> **Projects** – For example, 3rd-Party AI Assessment, ERP Data Lake

Funding – For example, \$3B distributed across 6 portfolios and 38 initiatives

Scenarios – Comparison of options with analysis and recommendations

Plans and roadmaps – Path of record and history of decisions

Resources – Employees, contractors, AI, cloud, physical resources



Source data easily with MCP and connectors

- Intake and portfolios from docs, slides, legacy systems, or people
- Value and outcomes from OKRs
- Budgets and actuals from Excel
- Projects and work items from WorkBoard, Jira, or ADO via MCP
- Resources from WorkBoard, Workday, Jira, or Excel

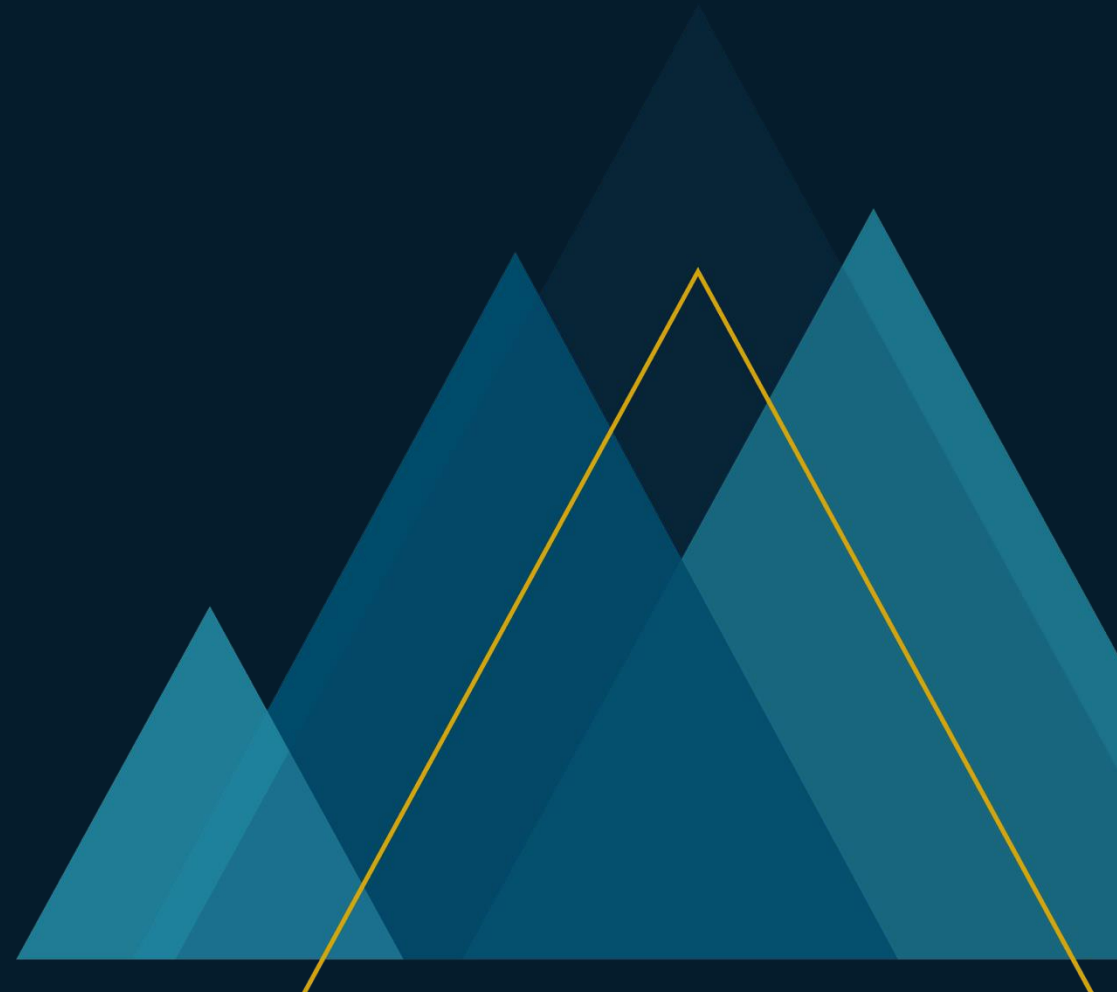


BREAKOUT 4 LAB · WADKINS B

Influencing Your Leadership's Operating Rhythm

You Are the Catalyst.

Tiffany Maurycy · Friday, September 25, 2026 · 10:40–11:50am



Stand Up. Meet Someone New.

Before we get too comfortable — influence starts with gathering other people's ideas. You're about to do exactly that.

A fast-forward exchange, adapted from Marshall Goldsmith's FeedForward technique.

1

Find Someone You Don't Know

Stand up. Find a new face in the room — not your seat neighbor.

2

Ask Your Question

Share a real strategy-execution question — what you're stuck on, or trying to get better at. Yours to pick.

3

Get Two Ideas. Just Say Thank You.

They offer one or two forward-looking suggestions. No debate — take it in, say thank you.

4

Switch, Then Find Someone New

Return the favor, then rotate. Three rounds, two minutes each.

New people. Real input. No debate. Carry it into what's next.

In a fast-changing world with a lot at stake, stellar strategy execution is a real **competitive and financial advantage**

This isn't about the methodology. This isn't about the tool. It's about achieving results faster — it's a commitment to a new way of working.



Everyone knows where the company and their teams are going



Everyone knows how far we've come, the distance to target, and what's in the way



No one spends time compiling and packaging “truth” for others



Everyone uses the same language and data for execution decision making



Everyone has more predictability and control over their team's results

Make Your Strategic Focus the First Topic

Front and center, first on the agenda — not because it's a methodology. Because it's the priority.

1

Front and Center

Send the pre-read the day before, so people walk in prepared — leveraging scorecards, business reviews, or dashboards, whichever WorkBoard view fits.

2

First on the Agenda

Not a report-out — a focus on the critical risks, the actions already underway to get back on track, and aligning on next steps.

3

The Focus Is the Point. OKRs Are How You Express It.

Your OKRs aren't the destination — they're the instrument. The strategy is the golden thread running through them. The rest of this session is the how — the collaboration and commitments your team makes to drive results faster.

What Does Influence Actually Mean?

WORKING DEFINITION

Influence is what changes even when you don't own the room — because of what you bring to it.

What would you add, challenge, or say differently? Let's hear it from the room.

Can You Point To It?

Can you point to something — in your operating rhythm, or your leader's — that's different today, because of you?

Not because you did the work. Because the room changed — and it changed faster than it used to.

Start thinking about your answer — you'll share it with the person on your right in just a few minutes.

BEFORE WE GO FURTHER

Where's Your Leverage?

PAIR UP

Turn to the person on your right — they're your partner for the rest of the session.

Everyone in this room can move a rhythm they don't fully own. Which one is yours?

IF YOU LEAD A TEAM

Your Lever Is Direct

Model it. Run the rhythm yourself — visibly — and your team follows what you show them, not what you tell them.

e.g. Team meetings and 1:1s carry the same thread every time — progress on results, status of actions — because you act on your own Daily Focus reminders first, not a goal you set once and moved on from.

IF YOU LEAD STRATEGY EXECUTION

Your Lever Is the Pattern

You don't own one team's rhythm — you see all of them. Use that to make the ask sharper than any one person could.

e.g. Six of your eight VPs are missing the same leading indicator — no single VP would catch that pattern. You can, and you turn it into one ask that fixes it for all eight, not just one.

TURN & TALK

Introduce yourselves — which one are you, and what's your rhythm?

OPEN YOUR NOTEBOOK

Every move from here works for both — the tactic just looks different depending on which one is yours.

Where Has Your Influence Shown Up?

With your partner, ask these questions in order and capture their answers in their notebook as they respond — then switch.

01

IMPACT SO FAR

Where has your influence already shown up — landed, or still in flight?

Name it: a change that's already happened, or something already moving because of you.

02

WHERE YOU'D FOCUS

If it hasn't yet — or you want more — where's the next opportunity to up-level the rhythm?

Name it: the specific 1:1 or team meeting — that's the choice you'd make.

03

YOUR NEXT ACTION

What are you committing to doing differently — and why?

Starting next week — not just a resolve.

BEFORE WE LOG IT

Share Your Commitment

A few volunteers — where it's already shown up, then what you're committing to next. Out loud, in your own words.

What are you committing to — and why?

MAKE IT REAL

Log It However Works for You

Log the commitment you just made with your partner — in WorkBoard, so your Daily Focus reminds you of it Monday morning.

Turn back to that same partner. Say the commitment out loud — and why it matters, why you're starting there — before you log it.

1

In the App or Browser

Right now, at your seat — create the action before you move on.

2

On Your Phone

Log in through the browser. Same action, same place, from anywhere.

3

By Email

Forward or send it straight into WorkBoard. No app required — quick one-time setup at right.

Whatever you create becomes your Daily Focus — Monday morning.

SET UP EMAIL-TO-ACTION, ONCE

You can turn an email into a WorkBoard action by forwarding it to your WorkBoard email address.

Steps:

- Click your **Profile Photo**
- Go to **My Settings** → **Profile Settings**
- Copy your **WorkBoard Email Address**
- Add it to your email contacts
- Forward any email you want to that address

What happens next:

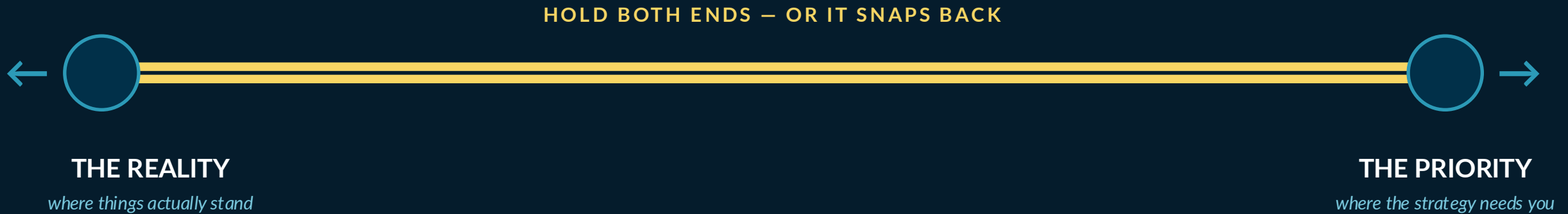
- The **email subject** becomes the **action name**
- The **email body and attachments** go into the **action notes**
- The action is created in your **Personal Stream** by default ¹

Tip: you can edit the subject line before forwarding to include things like the owner, workstream, or due date (for example: @John #Marketing# !5/15).

THE DISCIPLINE BEHIND IT

Structured Tension Never Resolves

People love homeostasis. Left alone, a team settles back to equilibrium — structured tension is what keeps pulling it forward.



Hold the reality in one hand, the priority in the other. Let go of either, and it doesn't stay in place — it snaps back to homeostasis, every time.

Keep beating the drum. That's the job now.

BEFORE YOU GO

AI Is Moving Fast. So Are You.

You've got the tools. You've got the community. Now it's in your hands.

1

Speed

AI has already changed how fast an idea becomes an action, and how fast a team aligns around one. That pace isn't slowing down.

2

Tools

WorkBoard's agents — Chief of Staff, Leadership Coach — are built to help you keep that pace, not just report on it.

3

Community

You're not doing this alone. This room is working the same problem — keep the conversation going after today.

Now it's in your hands.

You Are the Catalyst.

*Every great organization has people
who bring the strategy to life.
You are that person.*

Beyond today's lab — reinforce it in WorkBoard Learn

26 self-serve courses across WorkBoard Learn's Getting Started and Building on Foundations tiers, organized the way we think about execution — pick up right where today's lab left off.

ALIGN	DRIVE	AUTOMATE	STRATEGIZE
• <u>Setting OKRs: Get better aligned, faster</u> • <u>OKR Reflect & Reset: Improve every quarter, purposefully</u> • <u>OKR Quality Review: Catch OKR integrity issues early in the quarter</u> • <u>Cross-Functional Alignment: Know where your team fits</u>	• <u>Daily Focus: Start every day anchored on what matters</u> • <u>Key Results: Updating data to unblock decisions</u> • <u>Action items: tracking execution progress, discussions, and ownership</u> • <u>1on1s: faster prep, sharper conversations, real follow-through</u> • <u>Impact Summaries: Understand every direct's story before your 1on1</u> • <u>Giving Kudos: Recognition that actually means something</u> • <u>Meetings: Less prep time, nothing forgotten</u>	• <u>Briefs and Summaries: Stop reporting, start leading.</u> • <u>Scorecards: Your Command View of Results Progress</u> • <u>Biz Reviews: Your live dashboard for every review conversation</u> • <u>MCP and Integrations: your strategy execution data, wherever you need it</u>	• <u>My Progress: Your own on-demand check-in</u> • <u>Navigate Hard Conversations Using SBI</u> • <u>Assessing Performance: Walk into every review already prepared</u> • <u>Check-ins: impactful coaching conversations, grounded in real performance</u>

LAYER 1 — FOUNDATIONAL [Introduction to OKRs and the Outcome Mindset](#) · [Launch Your Digital Operating Rhythm in WorkBoard](#) · [Getting Started with WorkBoard](#) · [Using OKRs to Drive an Outcome Mindset](#)

ALIGN — course detail

Every ALIGN course in the LMS.

Setting OKRs: Get better aligned, faster

Ask the AI Chief of Staff to brainstorm and co-draft OKRs with coaching; use Co-Author in Canvas to draft, refine, and publish objectives and key results — from a team brainstorm or an uploaded strategy document, solo or with the team.

OKR Reflect & Reset: Improve every quarter, purposefully

Delegate session scheduling to the AI Chief of Staff; use the Canvas retro template (Celebrate, Observations, Shifts, Kudos) and Co-Author to turn team input into next-quarter OKRs — so reflection actually changes what happens next.

OKR Quality Review: Catch OKR integrity issues early in the quarter

Activate the "Review team OKRs" responsibility for the AI Chief of Staff; interpret its prioritized, reasoned feedback on recently published OKRs; use those reviews as a coaching tool to improve direct reports' OKR-writing.

Cross-Functional Alignment: Know where your team fits

Deploy the Chief of Staff Agent and the AI Alignment Cycle to see how your team connects to company priorities; use the Relationship Map to catch at-risk dependencies — including leading and lagging indicators — beyond your direct line of sight.

WHY THIS MATTERS FOR A LEADER SPECIFICALLY

Get this step wrong and everything downstream inherits it — vague OKRs make every check-in, review, and coaching conversation harder. Coaches can pressure-test a Leader's first draft before it's published.

DRIVE — course detail

Every DRIVE course in the LMS.

Gray italic = existing platform basics. **Navy = agentic.**

My Objectives

Read the My Objectives landing page fluently — the home screen every WorkBoard user lands on — to see what's on track and where to act next.

Introduction to Key Results

Learn the mechanics of a key result itself — momentum at a glance, clear ownership — the setup before layering the AI Chief of Staff on top.

The Heatmap: see risk before it reaches you

Scan color-coded grid and leaderboard views to catch at-risk OKRs before they become a missed commitment — adjust scope and drill into full reports.

Daily Focus: Start every day anchored on what matters

A personalized daily briefing from the AI Chief of Staff — priorities, overdue follow-ups, and 1:1 agendas — so you walk in ready to coach, not catch up.

Key Results: Updating data to unblock decisions

Refresh a key result through dialogue with the AI Chief of Staff — confidence and trajectory so readers understand momentum, not just status.

Action items: tracking execution progress, discussions, and ownership

Create, assign, and date action items by talking with the AI Chief of Staff; co-draft recovery plans and convert them into owned, tracked work.

1on1s: faster prep, sharper conversations, real follow-through

Build a smart agenda from OKRs and action items already in progress; capture takeaways live and use the PACE Meter to surface perception gaps early.

Impact Summaries: Understand every direct's story before your 1on1 *Leader-specific*

The AI Leadership Coach pulls a direct report's strengths, risks, and stalled items before every 1-on-1 — prep time goes to coaching, not status-hunting.

Giving Kudos: Recognition that actually means something

The AI Leadership Coach surfaces a direct report's specific, data-grounded contribution each week and drafts the recognition for you — specific beats generic.

WHY THIS MATTERS FOR A LEADER SPECIFICALLY

This is where a Leader gets proactive — showing up to every 1-on-1 prepared, asking the probing questions, offering real support, and following up on commitments. That's what actually drives results.

AUTOMATE — course detail

Every AUTOMATE course in the LMS.

Briefs and Summaries: Stop reporting, start leading.

Generate an on-demand brief for any objective in under 60 seconds instead of building a deck by hand; schedule recurring briefs for scorecards or business reviews, then review and contextualize before sharing with stakeholders.

Scorecards: Your Command View of Results Progress

Use the AI Chief of Staff to build, find, and share a live, always-current Scorecard by chat — built once, never rebuilt; add or remove key-result columns conversationally; embed and present for MBRs and QBRs.

Biz Reviews: Your live dashboard for every review conversation

Share real-time OKRs, workstreams, and scorecards without building a deck; use Present mode to run a live MBR or QBR — drilling into key results, assigning follow-ups, and logging decisions in the room.

MCP and Integrations: your strategy execution data, wherever you need it

Give the agent access to external business data for richer context; understand how WorkBoard's MCP server lets you query WorkBoard data from Claude, ChatGPT, or Copilot; enable built-in calendar and chat integrations.

WHY THIS MATTERS FOR A LEADER SPECIFICALLY

This is where reporting and prep get automated — freeing up time to execute, not report. Coaches help decide which of these to automate first.

STRATEGIZE — course detail

Every STRATEGIZE course in the LMS.

My Progress: Your own on-demand check-in

Request a progress check-in from the AI Leadership Coach for any timeframe, and apply the same rigor to your own update that you'd apply to a direct report's — catching stalled initiatives before anyone else does.

Navigate Hard Conversations Using SBI

Bring a messy, emotional situation to the AI Leadership Coach and leave with a structured Situation-Behavior-Impact framing — built for recurring patterns across meetings, not just one incident, with a full strategy before you walk in.

Assessing Performance: Walk into every review already prepared

Generate an AI-built, evidence-based performance summary so you walk into every review or calibration conversation already prepared.

WHY THIS MATTERS FOR A LEADER SPECIFICALLY

This is where the data becomes a conversation — performance, hard feedback, self-reflection. Coaches can help a Leader use these tools to coach, not just report on people.

WorkBoard  AI

Thank you for
attending!