WorkBoard AI

Welcome to Accelerate UK 2026!

15 October · London

AGENDA

10:00 – 10:10 **Welcome to Accelerate 2026**

10:10 – 10:50 **WorkBoard: Meeting the future + SPM Demo**

Mike Hipp · Chief Revenue Officer · WorkBoard

10:50 – 11:20 **Integrating OKRs into Agile Ways of Working**

Filipa Gomes · Agile Coach · Vestas

Lisa Saxon · Digital Strategy Consultant, Strategy & Portfolio Management · Vestas

11:20 – 12:00 **AI Powered Strategy Execution**

Stefano Corradino · Head of Group Execution Governance · Gruppo Sella

12:00 – 12:45 **Networking Lunch**

12:45 – 1:20 **The Future of Strategy Execution**

Elie Casamitjana · CEO & Founder · OKR Mentors

1:20 – 1:30 **Strategy Acceleration Awards**

1:30 – 2:05 **WorkBoardAI Agents: State of the Art**

Sameera Moinpour · Global VP, Customer Success & Services · WorkBoard

2:05 – 2:35 **Can Your People Draw the Line? Strategy Visible at Scale**

Brittney Gorham · Chief Business Performance Officer · Optum

2:35 – 2:55 **Break**

2:55 – 3:30 **Strategy Execution at Wallenius Wilhelmsen**

Pete Gornall · VP of Corporate Strategy · Wallenius Wilhelmsen

Jan Ashraf · Strategy Specialist | Corporate Strategy · Wallenius Wilhelmsen

3:30 – 4:00 **Making Strategy Visible**

James Taylor · Senior Director and Chief of Staff · Sony

4:00 – 4:10 **Close**

4:10 – 5:45 **Reception**

Accelerate

AI Strategy Execution Forum 2026



Mike Hipp

Chief Revenue Officer

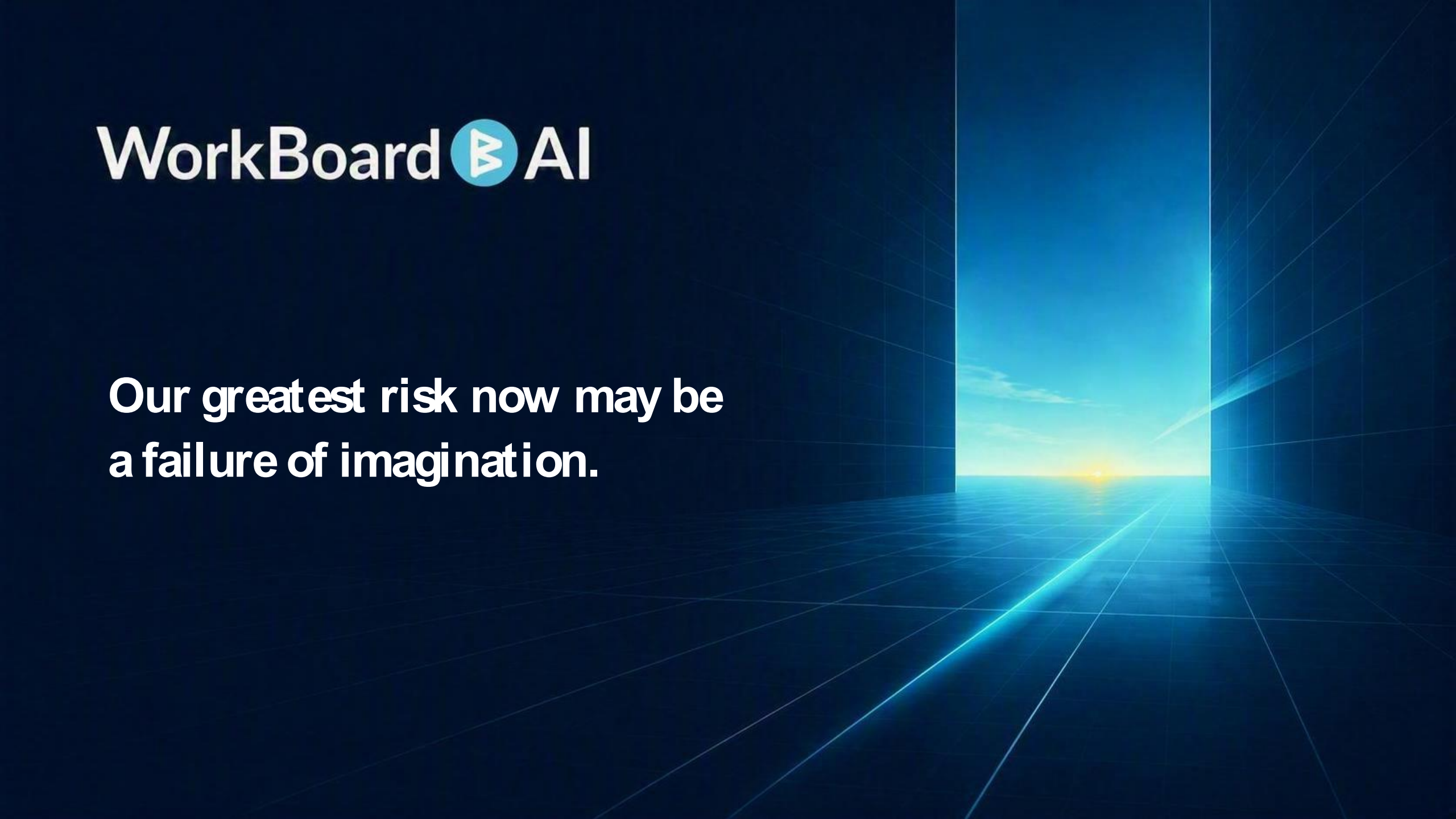
WorkBoard AI

WorkBoard Keynote: Meeting the Future + SPM Demo

Mike leads the WorkBoard revenue organization. He joined WorkBoard in 2018 and has been an integral part of the company's success, including the launch of WorkBoard's European business. Prior to joining WorkBoard, he held sales leadership positions at notable technology companies, including PTC, Medallia, and Aprimo.

WorkBoard AI

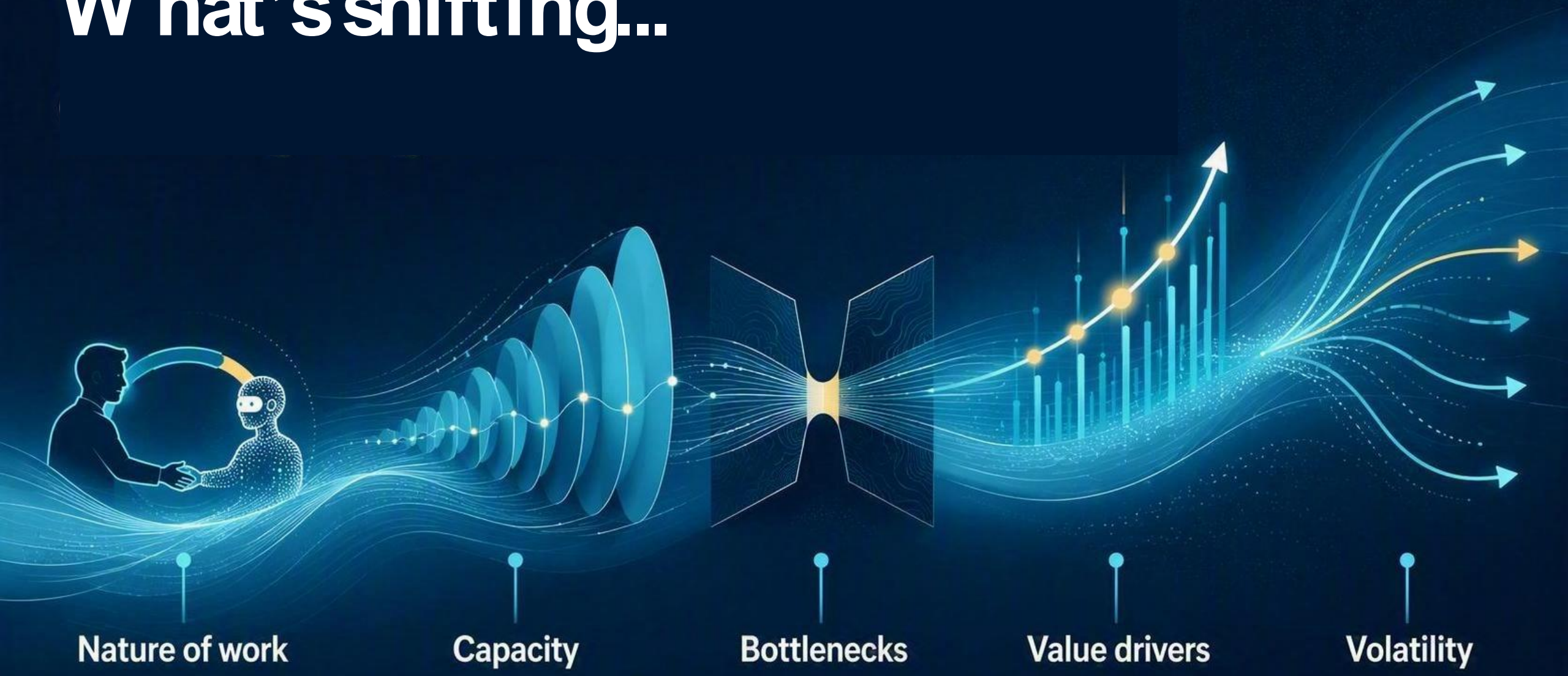
Our greatest risk now may be a failure of imagination.

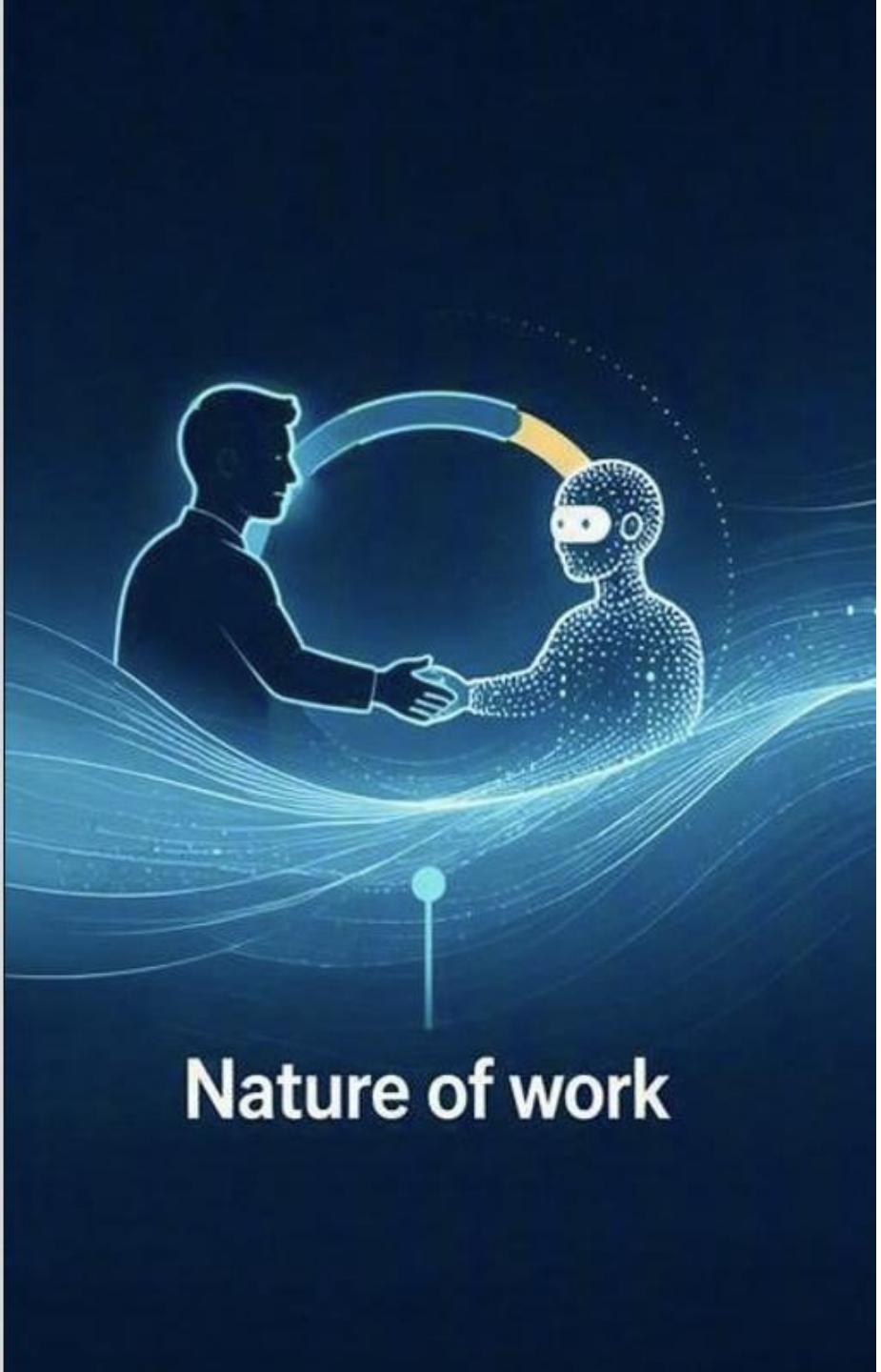


W hat's true now...



W hat’s shift ing...

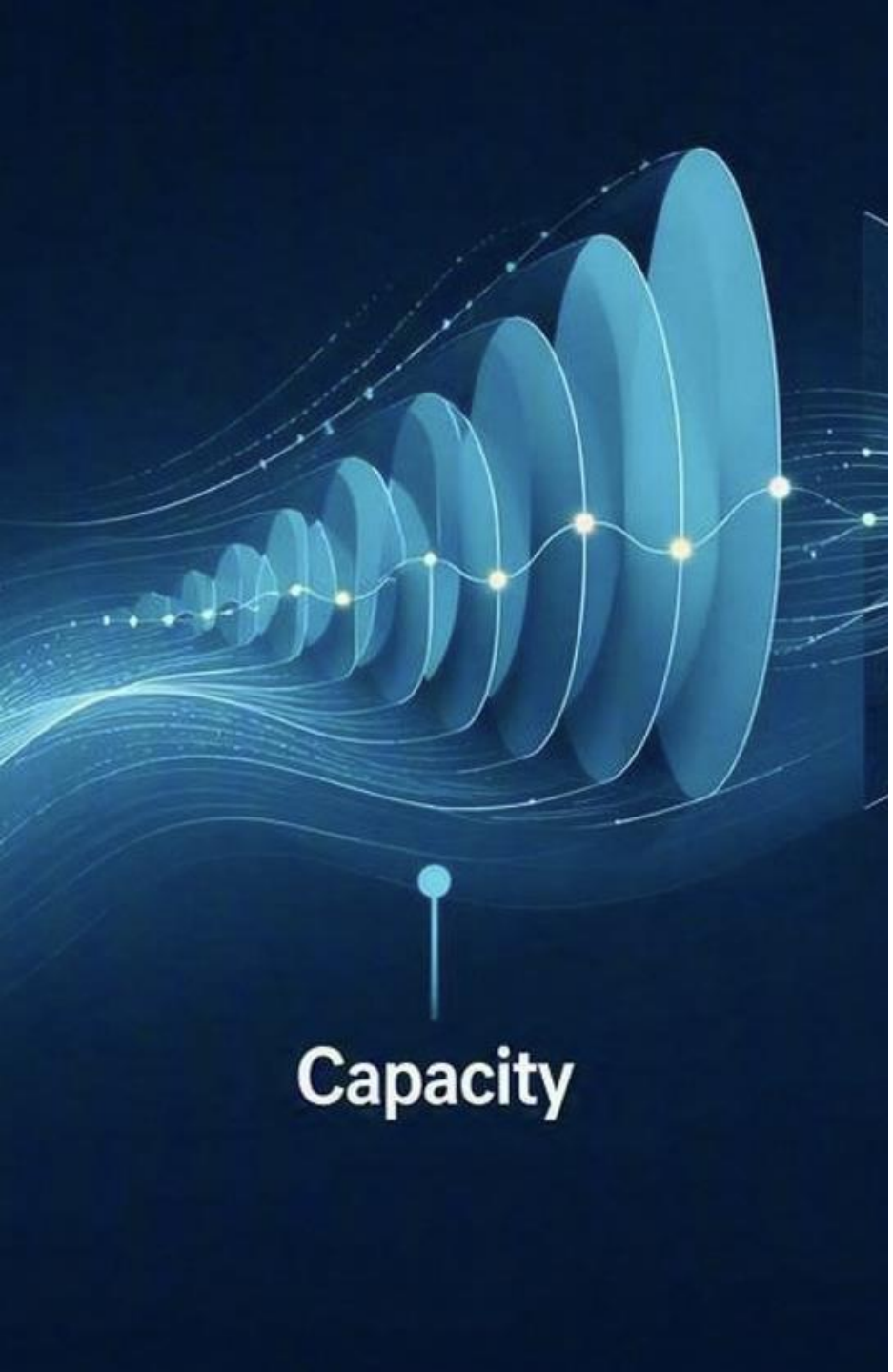




Outcomes and an outcome mindset are essential to unlocking AI benefits

- 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!



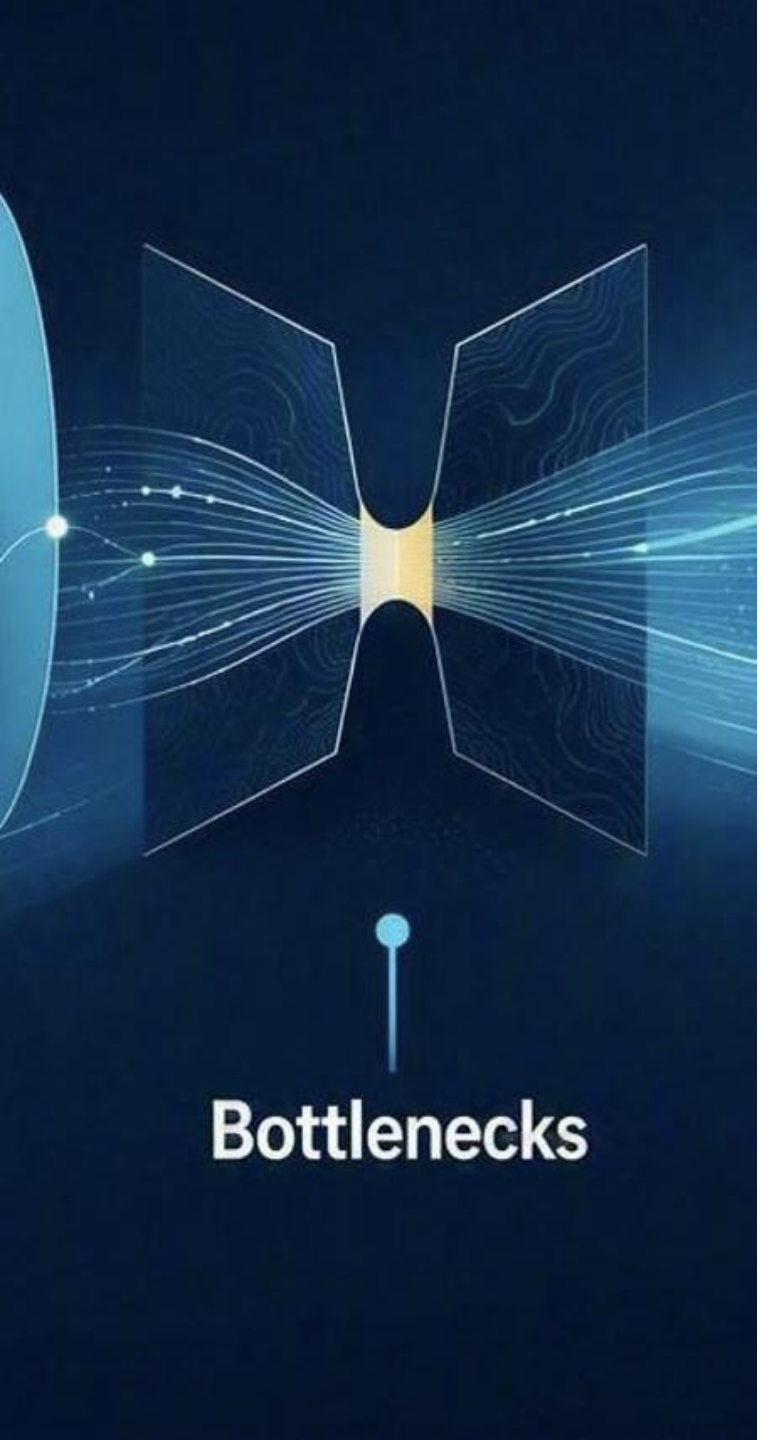
Capacity went from rigid and fixed to expansive and dynamic

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.

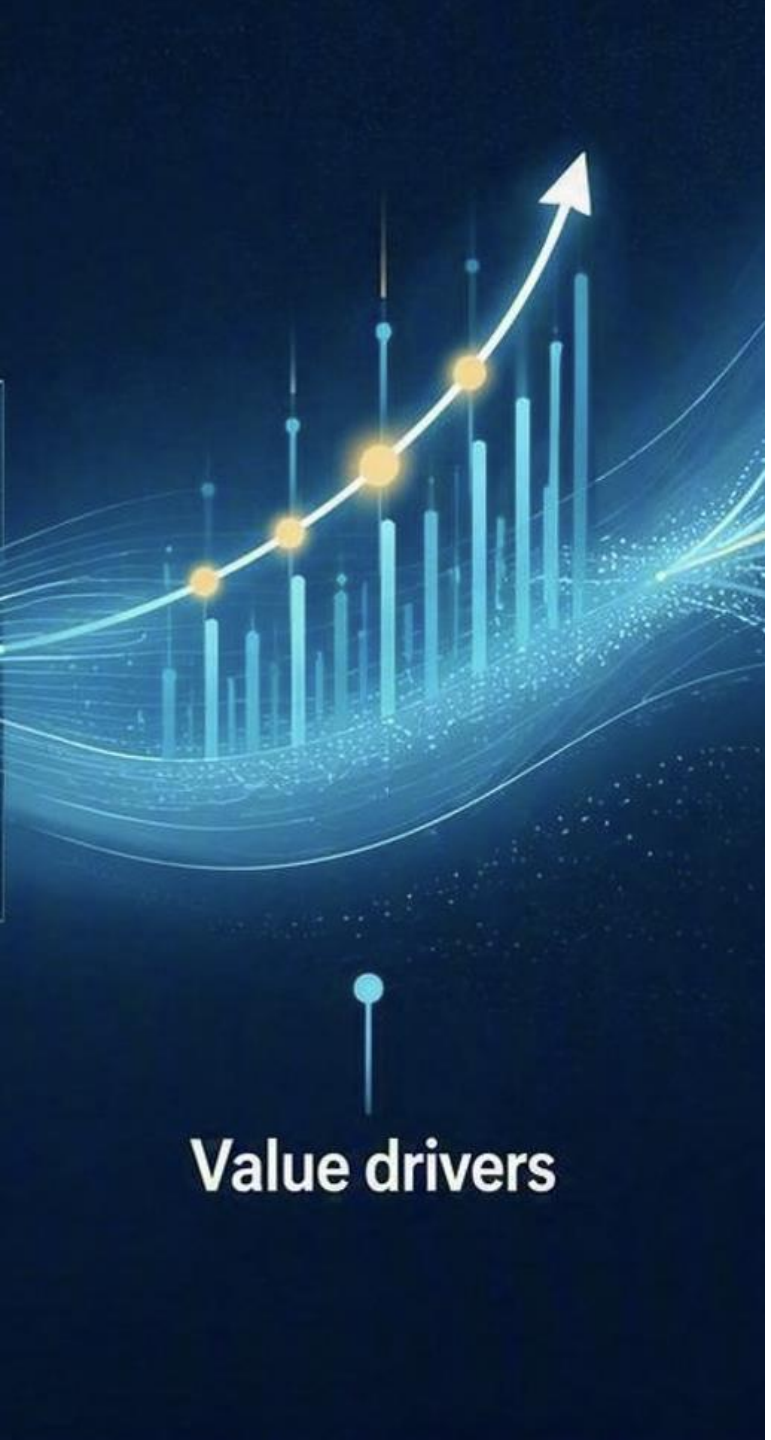
That's 35x or 3500% more capacity!



Bottlenecks 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!



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

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

Chief of Staff Agent

Leadership Coach Agent

MCP

Portfolio Analyst Agent

Strategy Execution & OKRs

- **Strategy, Outcomes, Value & OKRs** Aligned intention and outcomes
- **Operating Cadence & QBRs, MBRs** Decision prep and presentation
- **Performance & Scorecards** Track team and individual outcomes against goals

Strategic Portfolio Management (SPM)

- **Scenario Modeling** Dynamic scenarios and optionality
- **Capacity Planning** Allocate skilled resources effectively
- **Initiatives & Roadmaps** Aggregate objectives, projects, and value

- ✓ Every team is goal-aligned and focused
- ✓ Every person has clarity on priorities and expected outcomes
- ✓ Operating cadence and accountability are efficient and reliable

- ✓ Evaluating scenarios, planning and decisions are fast and iterative
- ✓ Every portfolio, program and product owner owns actual outcomes
- ✓ Zero overhead visibility on value creation and roadmaps

Said another way ...

Strategy Execution & OKRs

OUTCOME ALIGNMENT

Strategic Portfolio Management (SPM)

BUDGETS & RESOURCES

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

©2026 WorkBoard Inc.

Demand always exceeds capital and capacity.

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



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!

Integrating OKRs into Agile Ways of Working



Lisa Saxon

Digital Strategy Consultant, Strategy & Portfolio Management

Lisa is a Digital Strategy Consultant at Vestas, where she drives strategy execution and transformation across the digital organization. Her work focuses on the adoption of Objectives and Key Results (OKRs), Quarterly Business Reviews (QBRs), and performance management practices that improve alignment, prioritization, and accountability at scale. Lisa spearheaded the implementation and adoption of WorkBoard, transforming how leaders and teams align goals, measure progress, and execute strategy across the organization.



Filipa Gomes

Agile Coach

Filipa is an Agile Coach at Vestas, where she partners with product and technology leaders to strengthen the connection between strategy and execution across a global organization. Her work focuses on organizational agility, product operating models, OKRs, and continuous improvement, helping teams align on priorities, improve delivery outcomes, and adapt in complex and rapidly changing environments.

Vestas Wind Systems

Integrating OKRs into Agile Ways of Working



Lisa Saxon & Filipa Gomes
Digital Strategy, Portfolio & Architecture

21 October 2026

The undisputed global leader in wind energy

+39,000

employees

Every day, our employees help create a better world by designing, manufacturing, installing, developing, and servicing wind energy and hybrid projects all over the world

+56,000

turbines under service

Our service technicians keep the world spinning by servicing a global portfolio of + 165 GW - the largest fleet in the world

+207 GW

installed wind turbine capacity

We have installed more wind turbine capacity than any other company in the world, with installations in 88 countries

250m

tonnes CO_2e avoided annually

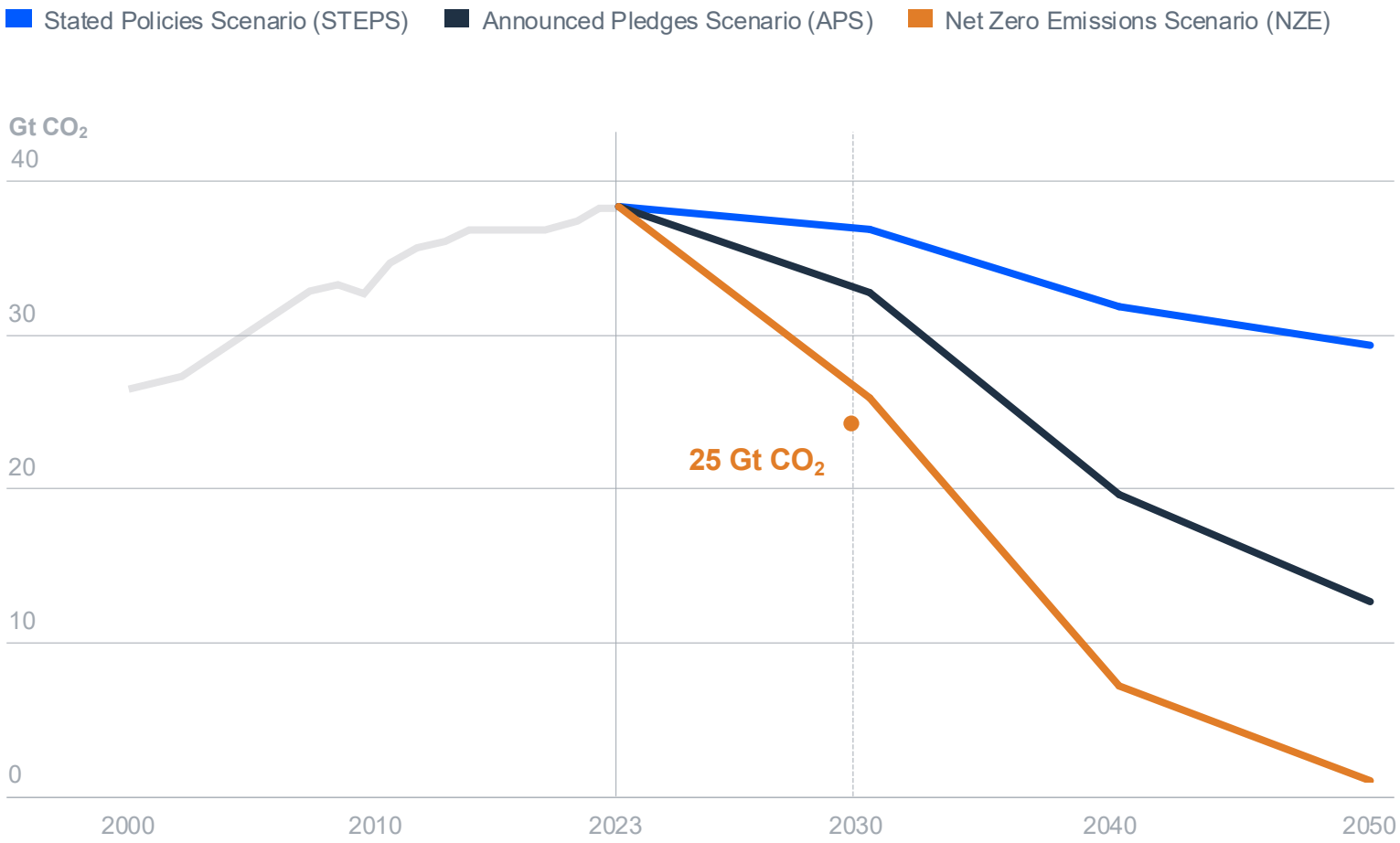
Our total aggregated installed fleet annually help the World avoid emissions of 250 million tonnes CO_2e

Data as of Q2 2026

Classification: Confidential

The World faces an immense challenge to reduce emissions

CO_2 emissions in World Energy Outlook scenarios over time, 2000-2050



Source: International Energy Agency: IEA World Energy Outlook 2024

Temperature rise in 2100, by scenario

Net Zero scenario corresponds to 1.4 degree scenario

+2.4°

+1.7°

+1.4°

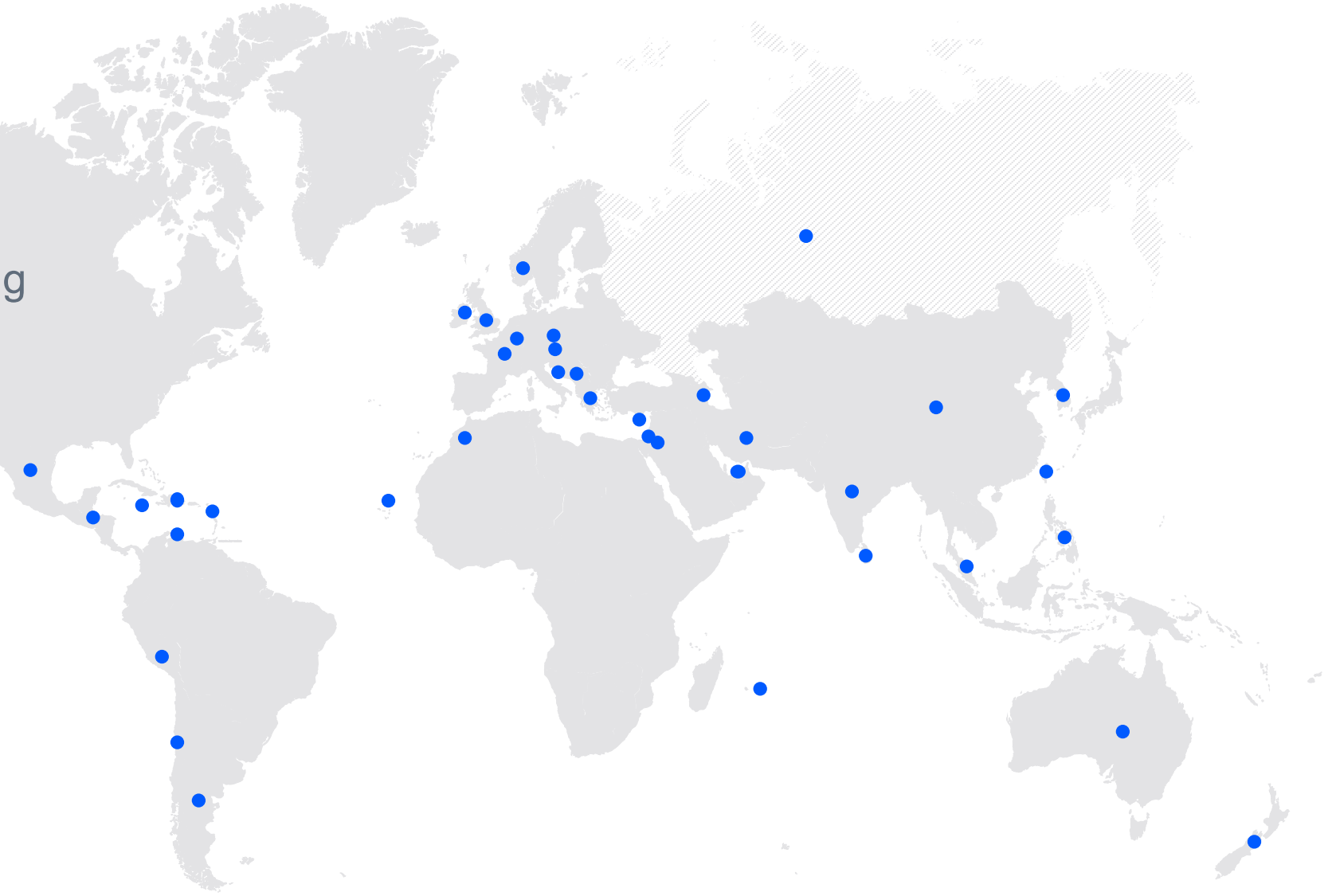
Classification: Confidential

Vestas is the global wind energy pioneer

Vestas has succeeded in bringing renewable energy to 39 markets

Over the past 45 years, Vestas has continuously pioneered new technologies, challenged conventions and developed emerging solutions, thus planting the seeds of the modern wind industry.

From wind energy insight to wind park development, construction and operation, Vestas has the knowledge and capabilities to help any organisation or company successfully invest in wind energy.



● Markets Vestas has pioneered

Classification: Confidential

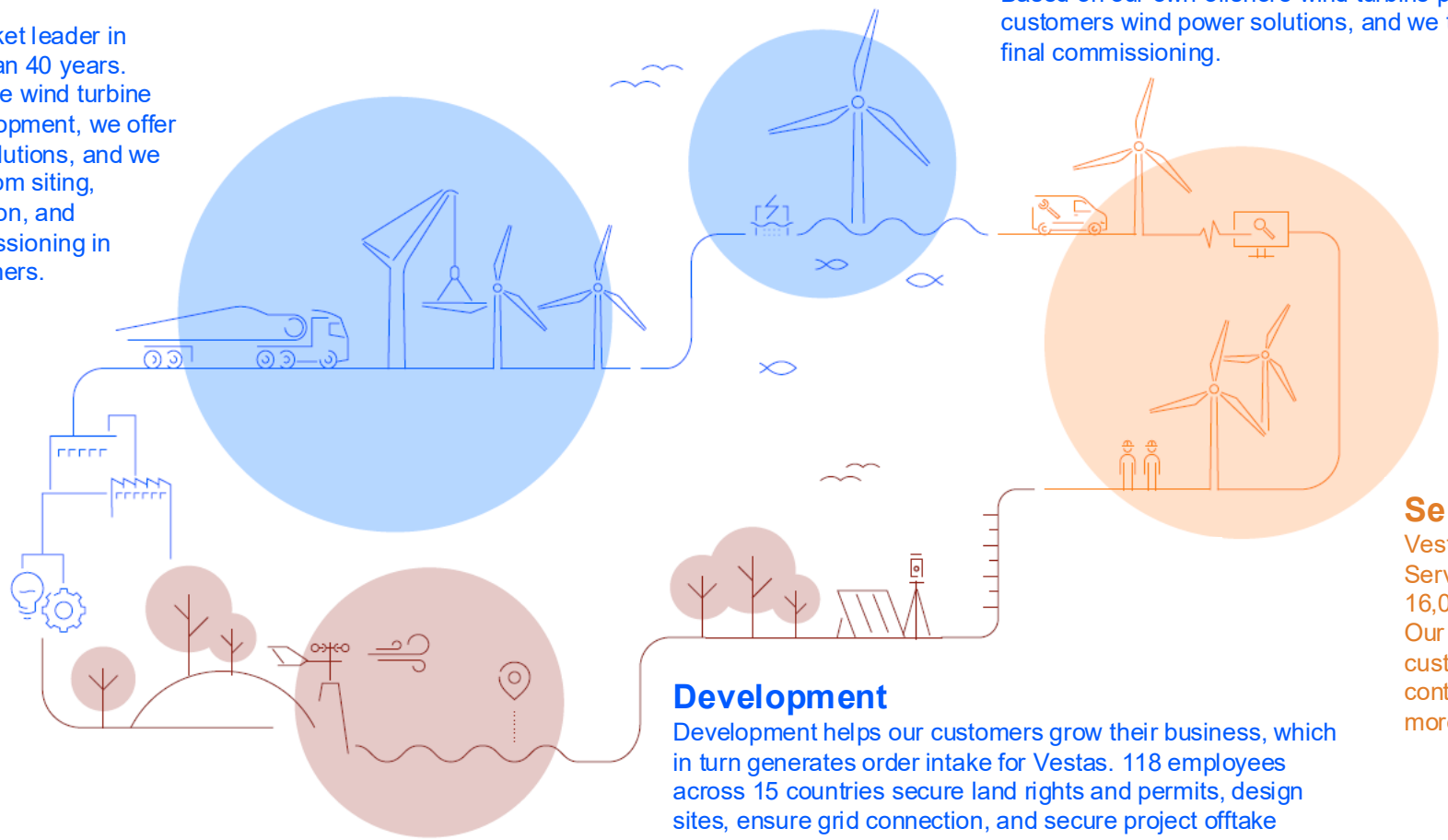
Our core portfolio of sustainable energy solutions

Onshore

Vestas has been the market leader in onshore wind for more than 40 years. Based on our own onshore wind turbine product design and development, we offer customers wind power solutions, and we take care of everything from siting, manufacturing, construction, and installation to final commissioning in cooperation with our partners.

Offshore

Vestas is becoming a leading player in offshore wind with 30 years of experience. Based on our own offshore wind turbine product design and development, we offer customers wind power solutions, and we take care of all stages from siting through final commissioning.



Development

Development helps our customers grow their business, which in turn generates order intake for Vestas. 118 employees across 15 countries secure land rights and permits, design sites, ensure grid connection, and secure project offtake agreements to create quality projects for our partners' investments.

Service

Vestas is the global market leader in Service within wind power with around 16,000 employees across 71 countries. Our people service 165 GW for our customers on long-term subscription-based contracts, making their assets operate more effectively.

Classification: Confidential

V236-15.0 MW

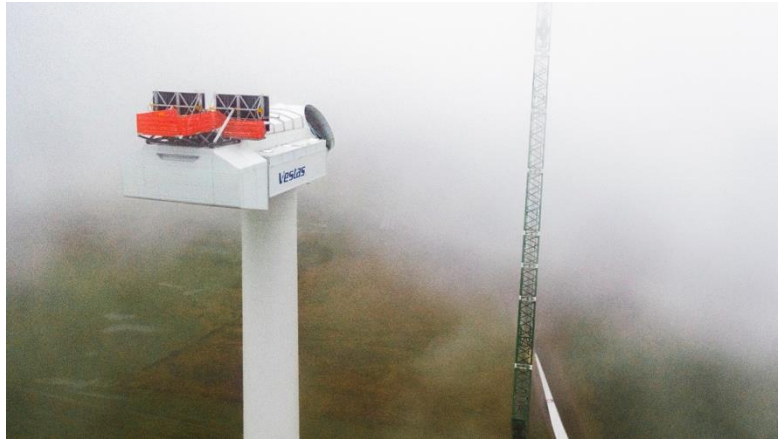
Prototype













Classification: Confidential

Digital Solutions was created in 2023 from the old Global IT structure

		Going from…	… to a target state with
1	**Product-oriented organisation**	Project-based structure	Product-oriented standing teams using agile and DevOps practices
2	**Product based delivery model**	Traditional waterfall IT development in majority of teams with some teams working in target state	Delivery model centred around consumable IT products delivered with high velocity
3	**End-to-end delivery teams**	Many handovers with coordinators and administrators	Teams with end-to-end product responsibility for design, development and operation
4	**Simple requirements capturing process and governance**	Rigid and complex steering mechanisms	Coherent and simple agile friendly budgeting, planning and execution processes

Classification: Confidential

Strategy to Execution in Digital Solutions

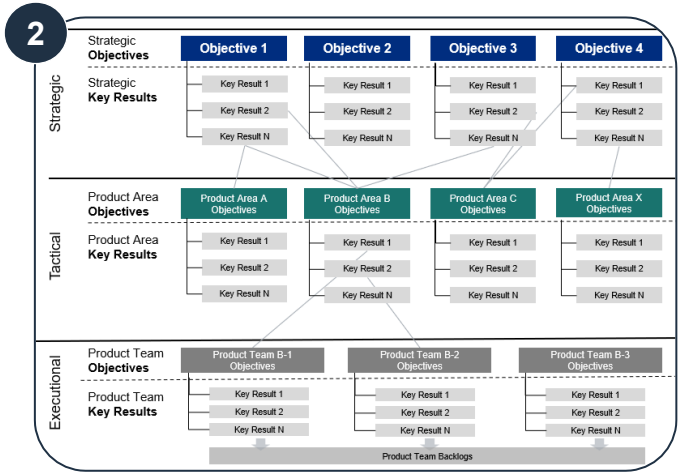
Vestas **Digital Priorities** defines the Strategic OKRs…

1



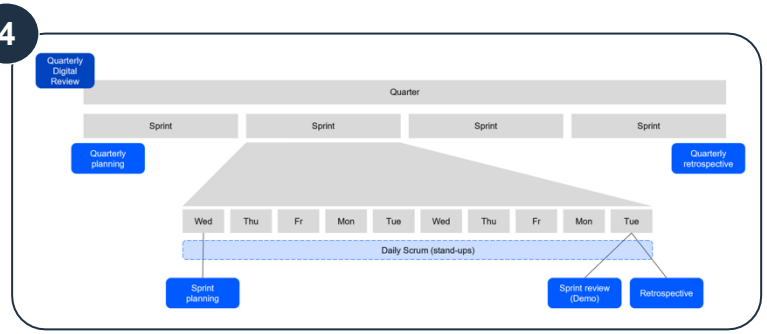
…which are made tangible and measurable through the **OKR Framework**…

2



…driving **strategic impact** and results

4



…and absorbed in **Product Team backlogs** for agile execution…

3

3 QDR cycles/year

Stage	1. QDR kick-off	2. QDR Writing	3. QDR Review	4. Marketplace	5. QDR Closing
Description	• **Revision** of quarterly **performance** • Top-down steer for next quarter's **strategic priorities**	• **Preparation of the QDR memo** by BAL/PAL/TALs and QDR writing group • Internal prioritization	• **QDR memos are shared** • BAL/PAL/TALs read and comment on each others QDR memos	• **BAL/PAL/TALs present their QDR memos** • Potential capacity (re)allocation	• **Follow-up on any open topics from the marketplace** (if necessary) • Sharing of outcomes
Duration	2-4 hours session	~1 week (offline)	~1 week (offline)	Half-day session	~1-3 hours
Participants*	• BAL/PALs • DS Leadership • Business stakeholders**		Relevant sponsors	Relevant sponsors	Relevant sponsors
Output	• Input for QDR memo writing	• Draft of QDR memo	• Horizontal alignment	• Horizontal alignment • Final QDR memos	• Final QDR memos to be shared

…deployed and continuously aligned across Product Areas through the **QDR process**…

Classification: Confidential

How Workboard supports our Strategy Execution

TEAM STRUCTURE

Align teams

Clear view of team structure, ownership, and priorities, enabling transparency, accountability, and alignment across the organisation



OPERATING RHYTHM

Run the rhythm

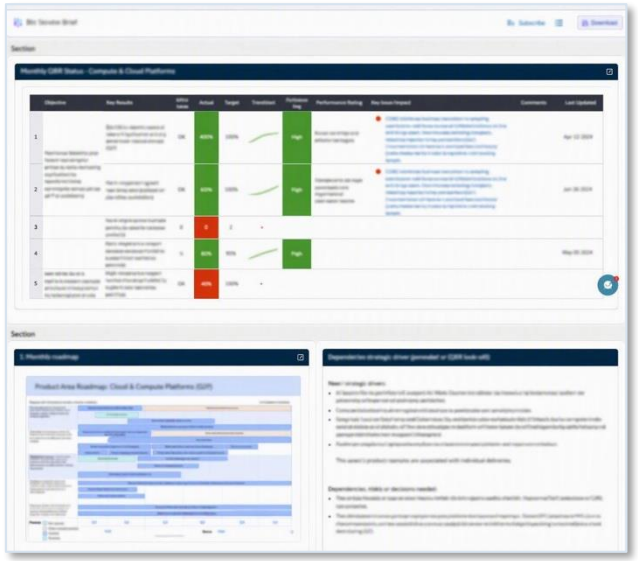
Widespread use of scorecards to support performance reviews, stakeholder engagement, and agile team events



DECISION VISIBILITY

Share outcomes

BizReviews enable real-time visibility of Quarterly Digital Review progress, making it easy to document, present, and share outcomes.



Classification: Confidential

Building maturity in our organization

WE ARE HERE



1 Get Transparency

Get transparency on intended and actual results across the organization. Create a common language for results alignment and give people transparency on what matters most so they can focus.

2 Improve Alignment

Drive wide functional and cross functional alignment on the *primary* drivers of strategy outcomes so the organization actively drives outcomes rather than passively reports them.

3 Raise Velocity

Gain intrinsic agility and speed. Reduce the lag time from risk to resolution to control your outcomes. Respond, learn, and get leverage faster while avoiding x-org collisions.



Jan 2023
Digital transformation initiated

Jun 2023
OKRs introduced
Using Viva Gaols

Dec 2024
Transformation completed

Dec 2025
Transition to Workboard

Dec 2026
Co-owned OKRs Across Vestas?

Classification: Confidential

What Helped Us Successfully Implement and Adopt Workboard

Embedding the mindset

🎯 **OKRs! The Key to Executing Our Digital Strategy** 🚀

Our **Vestas Digital Strategy** sets the direction for where we're headed and why it matters. But how do we turn that ambition into real impact? That's where **Objectives and Key Results (OKRs)** come in!
OKRs are more than just a goal-setting framework - they're the **bridge between strategy and execution**. Here's why they're brilliant:

✅ **Translate St**
OKRs make big-
✅ **Create Alig**
They ensure we
collaboration.
✅ **Drive Focus**
By limiting obje

In the upcoming
making alignme
Teams to set the
to execution

👉 **Dive into th**
across Digital S

📢 **New Article Alert: The Importance of Being Outcome and Data Driven**

In Digital Solutions, we're embracing a mindset shift — from activity to impact, from assumptions to evidence. Our latest article explores how OKRs help us simplify, strengthen, and focus on what truly matters.

🔍 **What you'll find inside:**

- How outcom
- What an "ou
- How data dri
- Why quarter
- How Workbo refinement

💡 Whether you'r
value — this articl
👉 Read the full a

🚀 **Workboard to replace Viva Goals by end of year!** 🎯

After disappointing news from Microsoft last year that Viva Goals would be decommissioned end of 2025, **we're thrilled to announce that we've signed with Workboard** – our new platform for managing strategic goals and OKRs! 🎉

Workboard is designed to help us stay aligned, focused, and move with greater velocity as we work toward our 2026 ambitions. It even comes with built-in AI to make things easier and smarter for everyone 💡✨

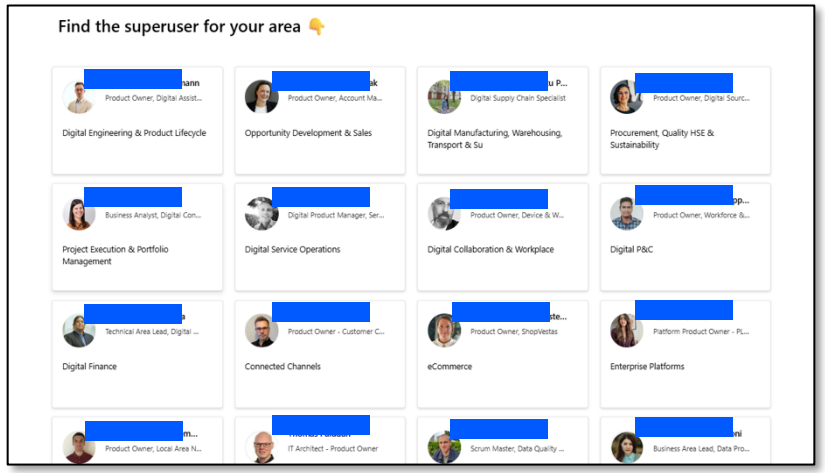
🗓️ We'll kick off with Workboard in the **QDR Q4 cycle**, when we set our 2026 goals. Training and support will be available in November and December, plus on-demand resources to help you get started.

For now, we'll continue using Viva Goals to wrap up our 2025 OKRs.

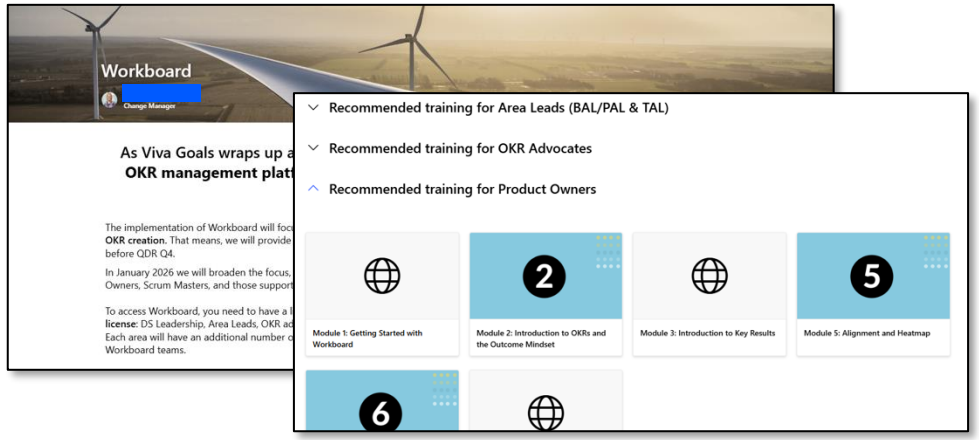
Learn more here WorkboardAI and stay tuned for more information 👀

Let's go! 💪 #StrategyExecution #OKRs #Workboard #ExcitingTimes
see less

Building a superuser community



Information and training available on demand



Classification: Confidential

From strategy to everyday delivery

01 Strategic priorities → 02 OKRs → 03 Team conversations → 04 Backlog decisions → 05 Outcomes

PRINCIPLES



Strategic Alignment

Use OKRs to connect sprint goals and work to business outcomes



Transparency

Make OKRs visible in team events.



Outcome Focus

Shift conversations from “what we delivered” to “what impact we created”



Continuous Inspection & Adaptation

Review OKRs regularly and adjust plans as needed



Embedded in Rhythm

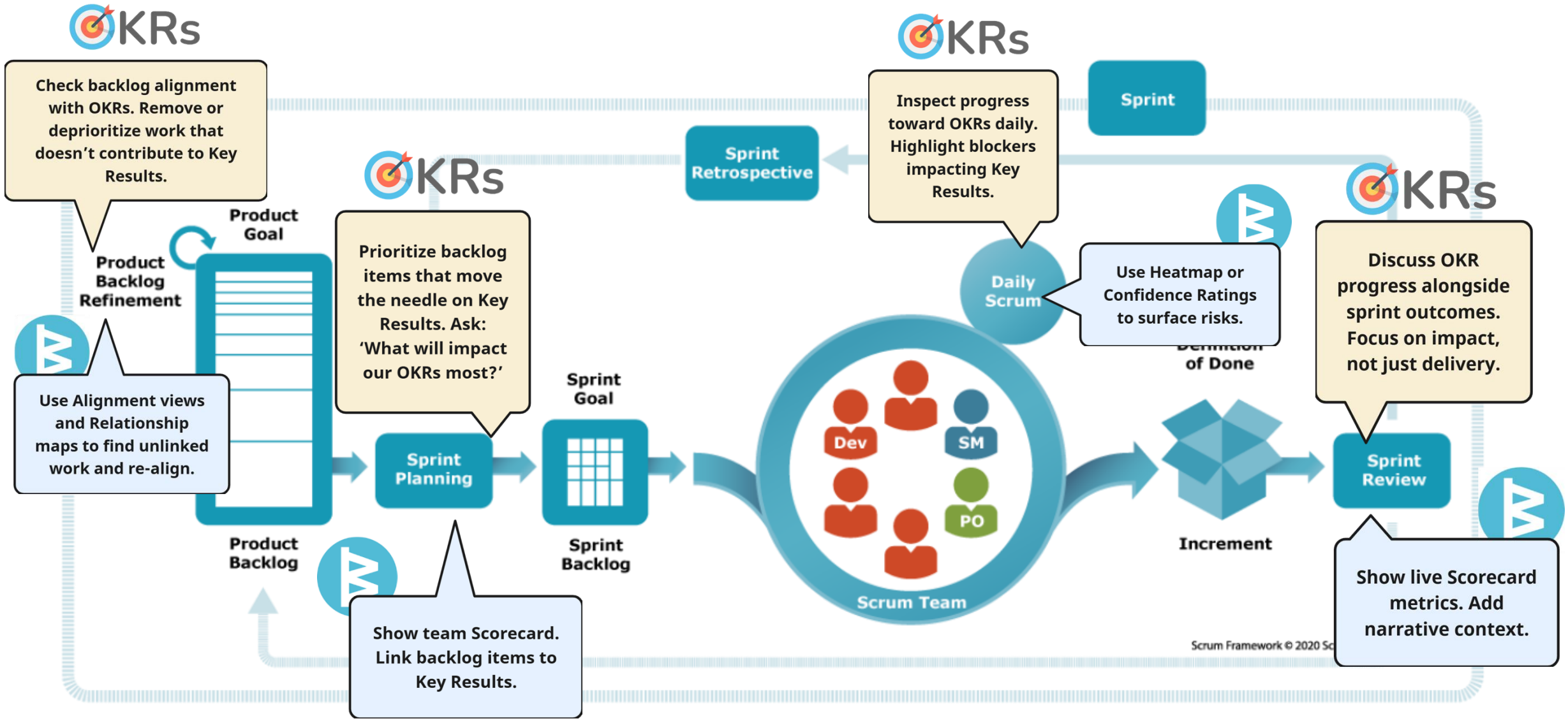
OKRs should be part of team events – not an extra meeting

WorkBoard enables these principles to be applied in everyday team events.

Classification: Confidential

Vestas

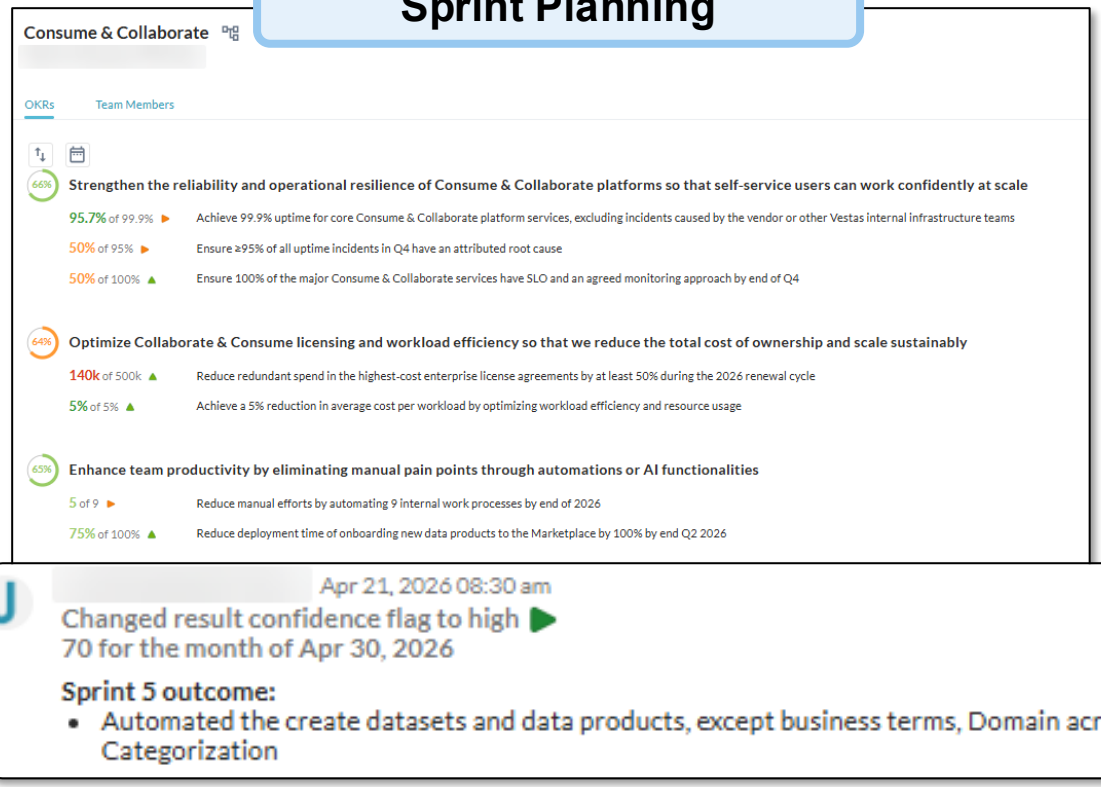
Using Workboard to drive operating rhythms at team level



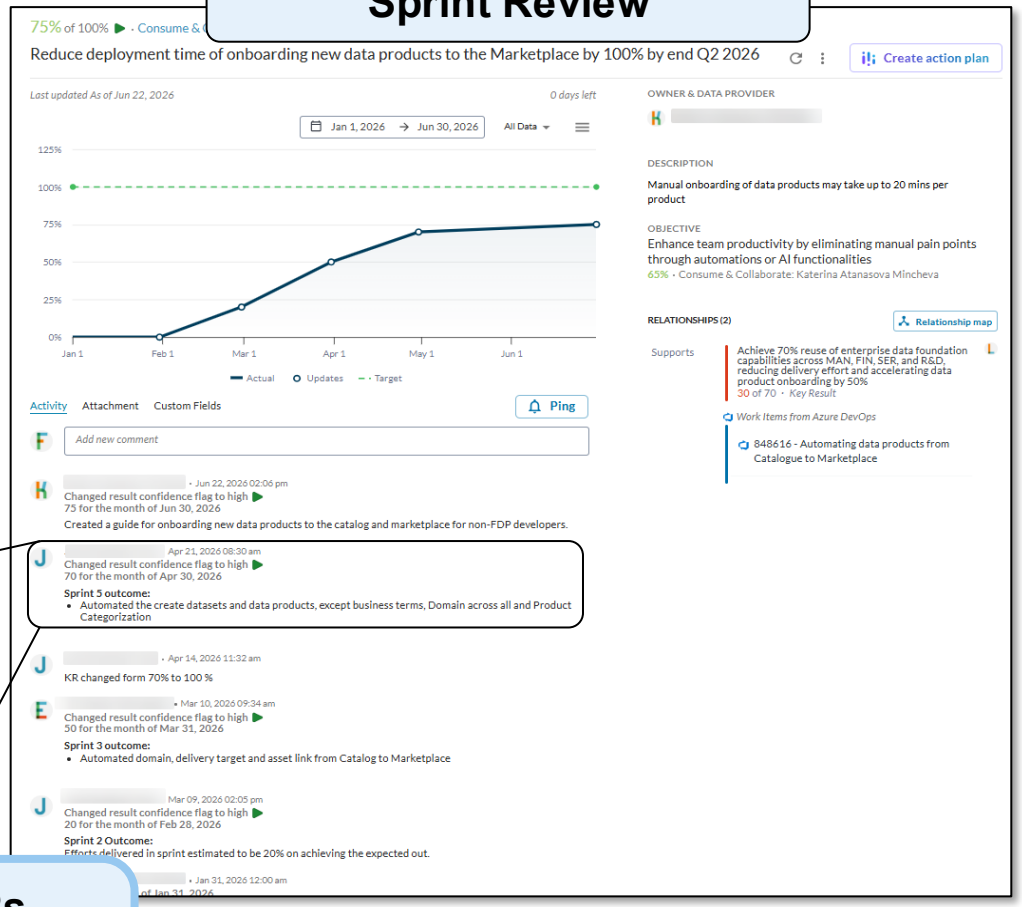
Classification: Confidential

Real-world application: closing the loop every sprint

Sprint Planning



Sprint Review



Plan with the OKRs.
Review the evidence.
Adjust the next priorities.

Classification: Confidential

WorkBoard: from strategy to smarter execution

A strong foundation today. A more intelligent operating model tomorrow.

~100%
product-team adoption

70%
less time on QDR governance

LIVE
dashboards replacing manual updates

BETTER OKRs

Stronger outcome focus and fact-based measures

The shift we have created

1. **Strategy**
   Relevant OKRs visible
2. **Team decisions**
   OKRs inform priorities
3. **Delivery evidence**
   Progress becomes visible
4. **Learning**
   Live data informs reviews

REAL USE CASES

Teams use OKRs to decide what deserves focus next.

WHAT'S NEXT

- **AI agents**
  Turn current data into faster insights and better decisions
- **Strategic Portfolio Management**
  Connect strategy, initiatives, outcomes and value
- **One stronger digital thread**
  Bring strategy and execution even closer together

Make strategy visible, measurable and actionable. Then make it intelligent.

Classification: Confidential



Thank you!



Stefano Corradino

Head of Group Execution Governance

Sella

AI Powered Strategy Execution

Stefano is Head of Execution Governance at Gruppo Sella, where he leads the execution of the Group's strategic plan, working closely with Top Management to translate strategic priorities into measurable business outcomes.

He is also driving the evolution of Gruppo Sella's Execution Governance model, with a strong focus on Artificial Intelligence, data and digital execution platforms, exploring how AI can enhance the way organizations define objectives, manage execution and turn strategy into action.

WorkBoard Accelerate

Sella | WorkBoard



AI-Powered Strategy Execution

From AI-Assisted Execution to an AI-Augmented Execution Model

Stefano Corradino
Head of Group Execution Governance

Gruppo Sella | London – October 15 2026


Let’s start with
some numbers...
≈40
STRATEGIC PROGRAMS
>500
PROJECTS
1,000
KR PER QUARTER
2,500
COLLEAGUES INVOLVED
Sella


How can we turn
strategic complexity
into effective execution?
Sella

Five Challenges Shaping the Future of Strategy Execution



Strategy to Execution & Value Gap

- Connecting strategic ambitions to measurable execution outcomes and benefits across **projects and OKRs.**
- Strengthen governance processes, including strategic portfolio management, **OKR frameworks** and value-based prioritization.



Initiative Complexity & Dynamic Prioritization

- Continuously prioritizing investments, **projects, OKRs,** capacity and resources according to strategic value.
- A more structured portfolio management approach through rigorous prioritization processes and periodic portfolio reviews.



Critical Skills, Capacity & Resource Allocation

- Building future-ready execution capabilities and dynamically allocating critical skills across **projects and OKRs.**
- Introduce enterprise capacity planning, strategic skills and greater flexibility in resource allocation.



Delivery Predictability & Benefit Realization

- Moving from retrospective monitoring to early-warning, predictive and adaptive management for **projects and OKRs.**
- Introduce portfolio health monitoring, early warning risk indicators and new analytics models to improve delivery predictability.



Data-Driven and AI-Enabled Execution

- Embedding **trusted data** and AI into execution processes to improve decisions, productivity and outcomes across **projects and OKRs.**
- Execution functions are evolving toward execution intelligence models, with AI applied to project and portfolio management.

Sella

Execution Governance Evolution (2026–2030)



The role of execution governance is evolving from monitoring to strategic orchestration of transformation.

From Project Monitoring to Strategic Portfolio Management

The Execution team becomes a partner of top management in managing strategy execution.

From Reporting to Execution Intelligence

Less reporting, more analytics and decision support.

From Governance to Transformation Governance

A Transformation Governance Office with responsibilities for coordinating strategic programs, managing dependencies and orchestrating cross-functional initiatives.

Focus on Value Realization & Outcome

Linking projects and OKRs to strategic outcomes, benefits tracking and accountability for results.

Introducing AI into Execution

The Execution will increasingly evolve into an AI-enabled execution function (e.g. delay prediction, risk identification, resource allocation, automated report generation).

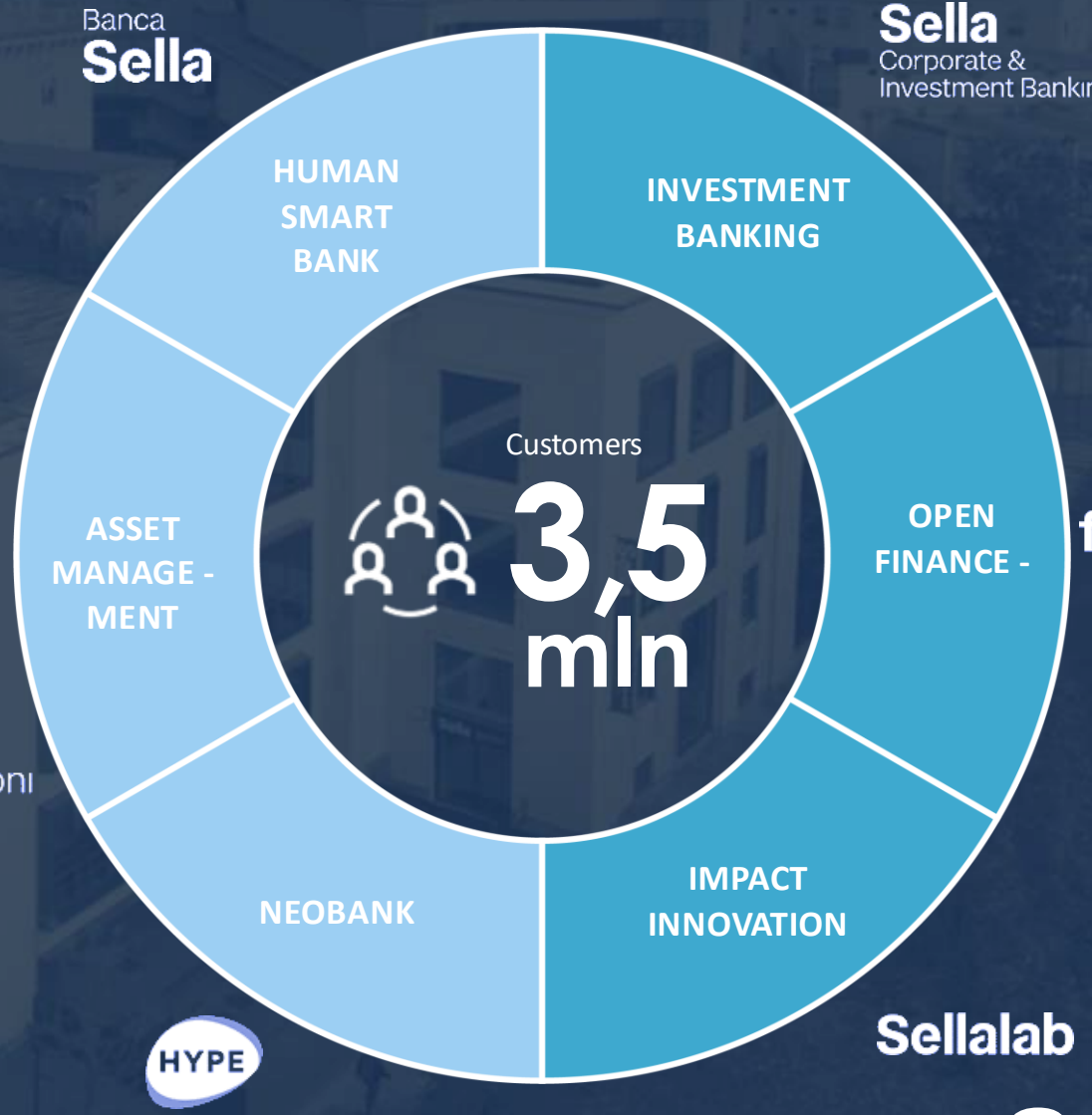
Sella


Sella Group
Sella

Our Purpose

450 YEARS OF INNOVATION BY TRADITION

Fulfill people's aspirations, building the sustainable financial ecosystem of the future



About the Group

Our History

1570

The Sella family's entrepreneurial roots date to the mid-16th century, with Bartolomeo and his son Comino as wool producers and financiers in Biella.

1671

The Sella family also become agricultural entrepreneurs through vine cultivation,. which still characterise the Sella Estates today.

1817

Pietro Sella brought textile machinery from England, starting the industrialization in Biella.

1886

Banca Gaudenzio Sella & Co., founded by Gaudenzio Sella inspired by Quintino Sella, marks the origin of today's Banca Sella.

The 1970s

Banca Sella introduces Italy's first Chubb machine—the precursor of modern ATMs—and starts offering treasury bills (BOTs) in branches.

1950-1970

The bank becomes a joint-stock company and introduces early IT, evolving its mechanographic center into an electronic data center.

1980s

Autostrade chooses Banca Sella to test Viacard. The bank is also among the first to have an asset management company and offer investment funds.

1995

Banca Sella is among the first in Italy to create and put online a website.

1997

Banca Sella joins the first European e-commerce programme with Microsoft and Yahoo.

Sella

About the Group

Our History

2008

Banca Sella develops its first banking app for iPhone and also enters the social media world.

2013

The Sellalab innovation platform is born in the historic Lanificio Maurizio Sella premises, where Hype will be established two years later.

2017

SellaLab fosters the establishment of the Fintech District in Milan. The first Italian API-enabled open banking platform is born.

2018

Fabrick is launched as an open finance ecosystem, and Axerve is established as a hub for international payments.

2019

Centrico is established as an IT offering open to third parties, alongside Sella Venture Partners for venture capital investments.

2020

Hype drives Italy's first open banking consolidation via the Sella–illimity joint venture.

2021

Sella Group leads Italian banking in cutting and offsetting CO_2 emissions through long-term mitigation and certified carbon credits.

2022-2023

Sella Group expands in Open Finance, with Centrico partnering with SeSa Group and Fabrick securing deals with Mastercard and Reale Group.

2024

Open Innovation Centers expand with a new Turin hub, enhancing the Group's specialized consulting offering.

2025

Sella Group expands through the acquisitions of Banca Galileo and FinApi, strengthening asset management and open banking capabilities
Banca Sella co-founds the European consortium Qvalis developing a euro stablecoin
Fabrick became one of the Digital Euro suppliers.

2026

Sella Group strengthens its digital banking and innovation by acquiring Hype, set to become a new Group brand.
Banca Sella was the first Italian bank authorized to operate in crypto-activity.

Sella

How are we organized

Commercial Bank

- Banca Sella
- Sella Leasing
- Sella Personal Credit
- Nephis
- Sella Broker
- HYPE

Wealth & Asset Management

- Banca Patrimoni Sella & C.
- Sella Fiduciaria
- Sella SGR
- Sella Negoziazione
- Sella Banca Corrispondente

Open Finance

- fabrick
- fabrick Solutions Spain
- dpixel
- judo

Treasury & Financial Markets

- Sella Financial Markets
- Sella CB

Corporate & Investment Banking

- Sella Corporate & Investment Banking
- Sella Venture Partners

Corporate Center

- centrico
- centrico Selir
- centrico India
- Sellalab
- Immobiliare Lanificio Maurizio Sella
- Consorzio di Vigilanza Sella

Sella

Our Values



PEOPLE



ETHICS



TRUST

Core Values



INNOVATION



ENTREPRENEURSHIP



OPENNESS

Sella

Our Numbers

6815

Team Sella at the end of 2025

+227

Compared to 2024

35,6 Years

Average age of new employees

46%

Female employees

51

Countries of origin

Sella in Italy

333

Branches

45

Group company headquarters, financial advisor offices and Sellalab

Sella in the world

Italy

India

Romania

Spain

United Kingdom

Germany

Sella



Sella

The **Planning** and **Execution** model in our Group

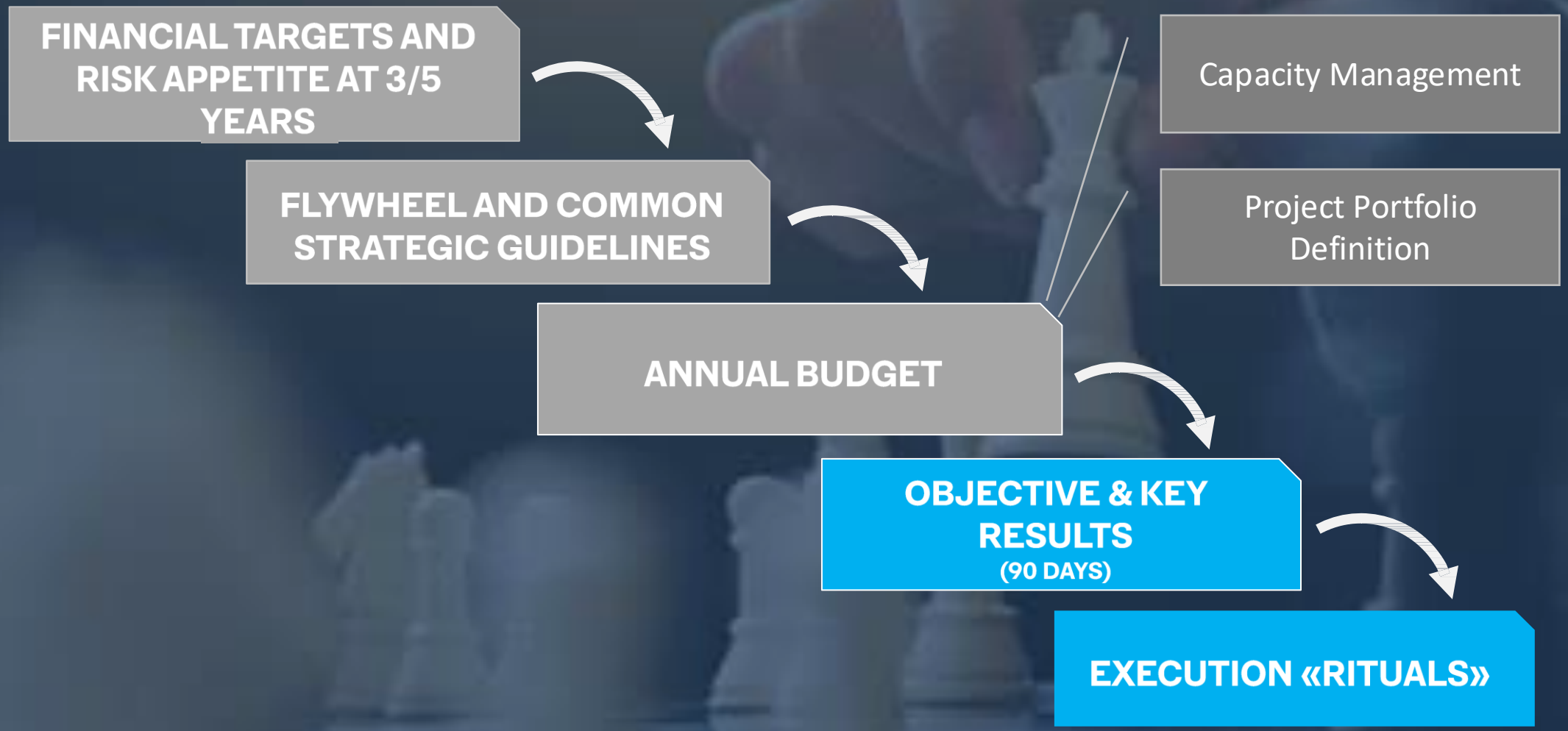
Since 2018, Gruppo Sella has been evolving its strategic planning model through the adoption of an Agile Planning methodology, built around five closely interconnected pillars and centered on customer needs, with the aim of driving greater alignment, focus, speed, and agility in strategy execution.



Our model for the Execution of the Strategic Plan

PLANNING

EXECUTION

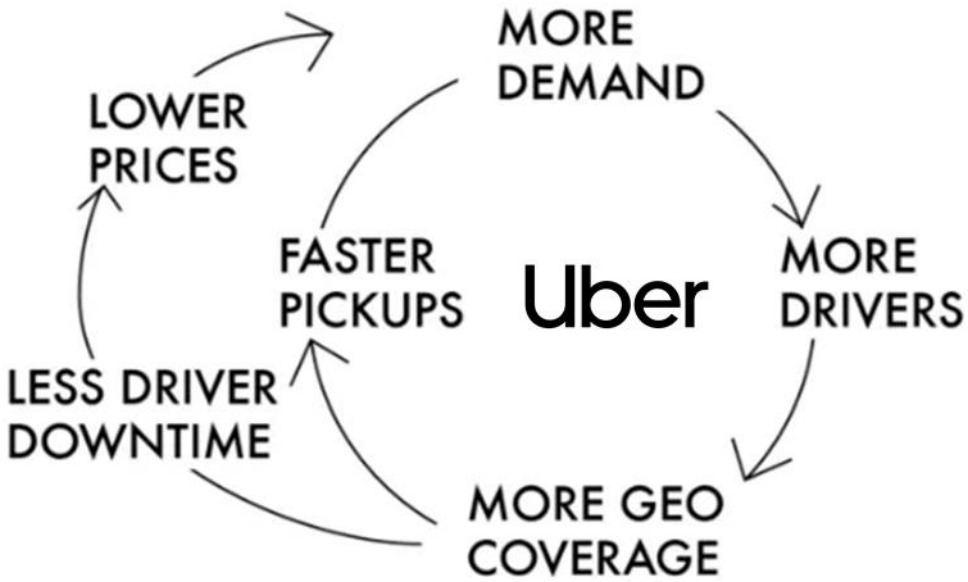


Sella

The Flywheel

FLYWHEEL AND COMMON STRATEGIC GUIDELINES





The Evolution of Our Strategic Flywheel

From 2018 to today… to 2030

2018 – 2020



Open to Grow

2021 – 2023



OneSella
Stronger Together

2024 – 2026



Make an **Impact**

2027 – 2030

One **Sella** 2030

Vision

To be the reference point for strategic execution, enabling a model in which prioritization, decision-making speed, impact measurability, delivery culture and value creation are fully integrated into the Group's operating model.

STRATEGIC EXECUTION GOVERNANCE

Mission

Support the implementation of the strategy, ensuring alignment with the objectives set over time by the Group Strategic Plan.

Sella

Execution 2027–2030 - Flywheel



Sella

OKR

Sella

OBJECTIVE & KEY RESULTS
(90 DAYS)



OKR

Manifesto Gruppo Sella

Sella

Cosa sono gli OKR?

Gli OKR (Objectives & Key Results) sono uno strumento per scegliere gli obiettivi di breve periodo e misurarne il raggiungimento, in coerenza con gli obiettivi strategici di medio/lungo periodo a livello aziendale con lo scopo di guidare l'execution.

OBIETTIVO ---------- KEY RESULT

- Un Obiettivo **motiva ad ispira il team** che lavora al suo raggiungimento: è **descritto in modo qualitativo.**
- Ha un **orizzonte temporale di breve periodo** (3 mesi) e può essere riconfermato nel trimestre successivo
- Un Key Result è **misurabile e descritto in modo quantitativo**: rappresenta ciò che deve essere fatto per raggiungere l'obiettivo. Conseguentemente, sono associati 2/3 Key Results per Obiettivo.
- Ha un **orizzonte temporale di breve periodo** (3 mesi)
- E' **espresso sia in termini di attività con scadenza che di metriche associate** (n°, %, €)

Quando un Key Result è efficace?

Un Key Result è scritto in maniera efficace se:

- **È sfidante pur essendo realistico**: ponendo il focus solo su ciò che è realmente importante, la metodologia ci aiuta a raggiungere obiettivi esponenziali.
- **Favorisce la collaborazione across tra le diverse funzioni organizzative**: nel raggiungimento di un Key Result, è comune avere delle interdipendenze con altri team.
- **Ha un responsabile.**
- **È quantificabile**, e consente quindi un monitoraggio continuo sull'andamento dell'attività sottostante da parte di chi sta lavorando al raggiungimento del Key Result.
- È scritto in maniera chiara, semplice, comprensibile a tutti gli stakeholder: **è autoesplicativo.**
- **È visibile a tutti i livelli dell'organizzazione.**
- **Viene utilizzato all'interno del processo decisionale** e durante i rituali che il team ha scelto di adottare.

Strumenti

Per mantenere l'adeguata focalizzazione e promuovere la responsabilizzazione di ciascuno dei componenti del team di riferimento, gli OKR hanno bisogno di **strumenti**, luoghi fisici e virtuali. Gli strumenti messi a disposizione sono:

- **Software di gestione collaborativa degli OKR**: il Gruppo utilizza Workboard come tool per facilitare la condivisione e l'allineamento all'interno dello stesso team e tra team diversi
- **Dashboard**: per monitorare costantemente l'andamento delle metriche sottese ai KR
- **«OKR room»s**: tipicamente, luogo virtuale/fisico dove gli OKR sono riportati per consultazione da parte di tutta l'organizzazione, scritti di muro o su lavagne virtuali (es. Miro).

Rituali

Per sfruttarne bene, il metodo OKR necessita di due momenti chiave:

- La **Quarterly Business Review**: all'inizio del trimestre, ci si riunisce con il team di riferimento con l'obiettivo di co-creare gli OKR del trimestre
- Il **Weekly Meeting**: una volta a settimana, il team si riunisce per allinearsi sull'andamento dei Key Results decisi insieme. Viene commentato con un indicatore R/A/G (Red/Amber/Green) l'andamento della settimana appena trascorsa per ciascun KR.

OUTPUT -> OUTCOME



Sella

Sella

Setting the Quarter

Weeks −1 / 0	Weeks 1 / 2	Week 2	Week 3
01	02	03	04
Retrospective	**Group QBR**	**Forward Looking**	**Sharing**
WHAT Review economic and transformative performance across programmes, projects, priorities, KPIs and OKRs.	**WHAT** Share and review **financial results** and **transformative progress** across programmes, projects, KPI priorities and OKRs.	**WHAT** Company-level follow-up QBRs to define **quarterly OKRs.**	**WHAT** Present OKRs, including projects linked to **common priorities** and **programmes.**
OUTPUT Performance review.	**OUTPUT** Common priorities and cross-functional OKRs.	**OUTPUT** Companies' OKRs, including shared priorities.	**OUTPUT** Shared **OKRs** and related projects/ programmes.

Our first steps with AI in Execution

Workboard Co-Author beta program, July 2023

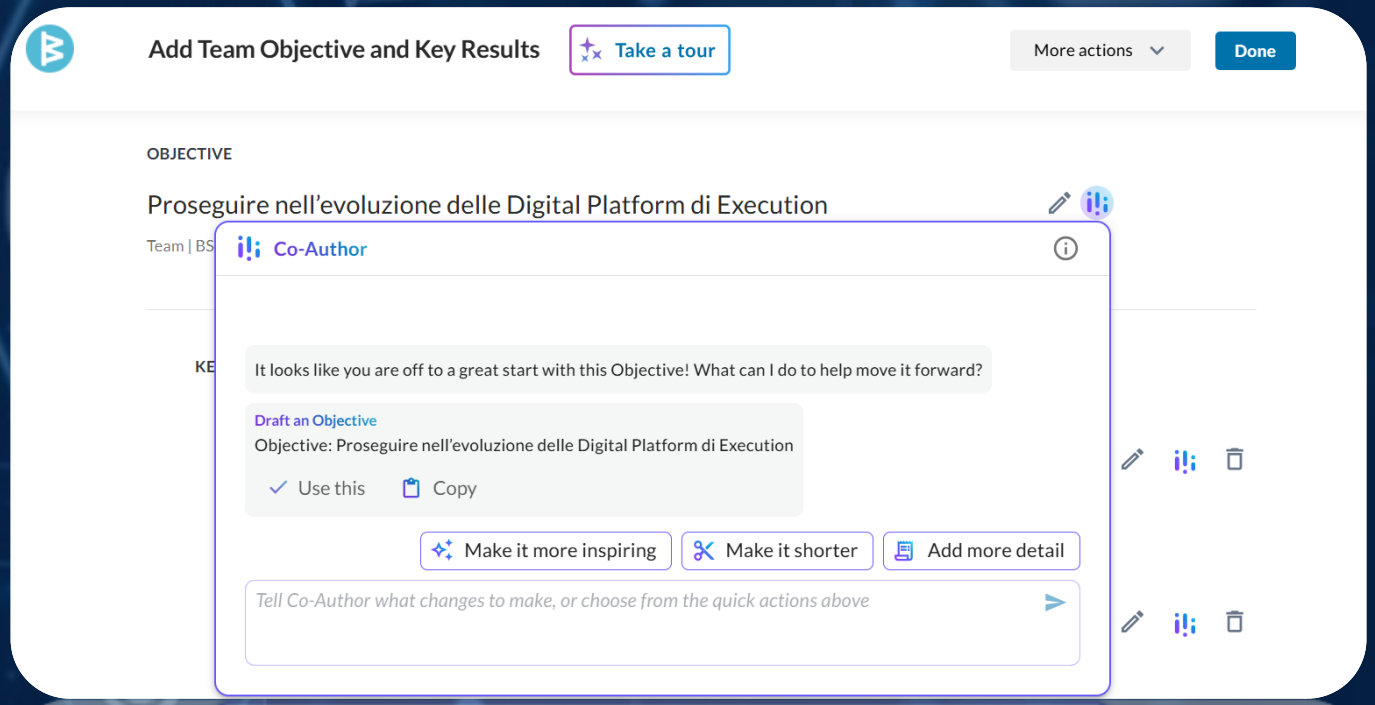
Initial focus: AI assistance within an existing Execution activity.

ENTRY INTO THE BETA PROGRAM

We joined the Workboard Co-Author beta program to explore AI support for OKR definition

PILOT AND FIRST STEPS

We started by using Co-Author to draft and refine OKRs, exploring how AI could help teams articulate their objectives more clearly and define more meaningful, outcome-driven Key Results.



Sella

From task-level AI to an integrated, strategy-driven Execution cycle

We started by exploring how AI could support individual tasks. We then realized that its greater potential lies in connecting the entire Execution cycle, starting from shared strategic priorities and measurable outcomes

AI SUPPORT



SHARED STRATEGIC CONTEXT



EXECUTION CYCLE WITH AI



01 Initial hypothesis

- AI assistance for individual tasks
- Focus on productivity and effort reduction

02 Canvas and Co-Author

- Canvas: define shared strategic priorities
- Co-Author: translate priorities into measurable OKRs

03 One connected process

- AI supports the entire Execution lifecycle
- A connected flow from strategy to execution and review

WorkBoard AI across our execution cycle

Sella

Where AI augments the flow from strategy to action



01 DEFINE
Clear, measurable outcomes
- OKR definition with Co-Author
- OKR Quality Check
- Better, outcome-driven OKRs

02 CONNECT
What is related?
- Suggestions and recommendations
- Relationships map
- Cross-initiative alignment

03 ALIGN
Contribution to strategy?
- Strategic alignment insights
- Impact analysis
- Prioritization support

04 PLAN
How will we deliver?
- AI action plans
- Scenario analysis
- Resource and dependency insights

05 EXECUTE
Consistent progress updates
- Execution updates from WorkBoard data
- Progress summaries
- Early signals and alerts

06 UNDERSTAND
What needs attention?
- AI insights and summaries
- Risk and issue detection
- Team and program summaries

07 REVIEW
What should we learn?
- AI-powered business reviews
- Insights and key takeaways
- Recommendations for next quarter

08 ACT
What action comes next?
- Instant dashboards
- AI agents and Copilot
- Suggested next actions

DEFINE: From Strategic Priorities to Measurable Outcomes

Sella

DEFINE | CONNECT | ALIGN | PLAN | EXECUTE | UNDERSTAND | REVIEW | ACT

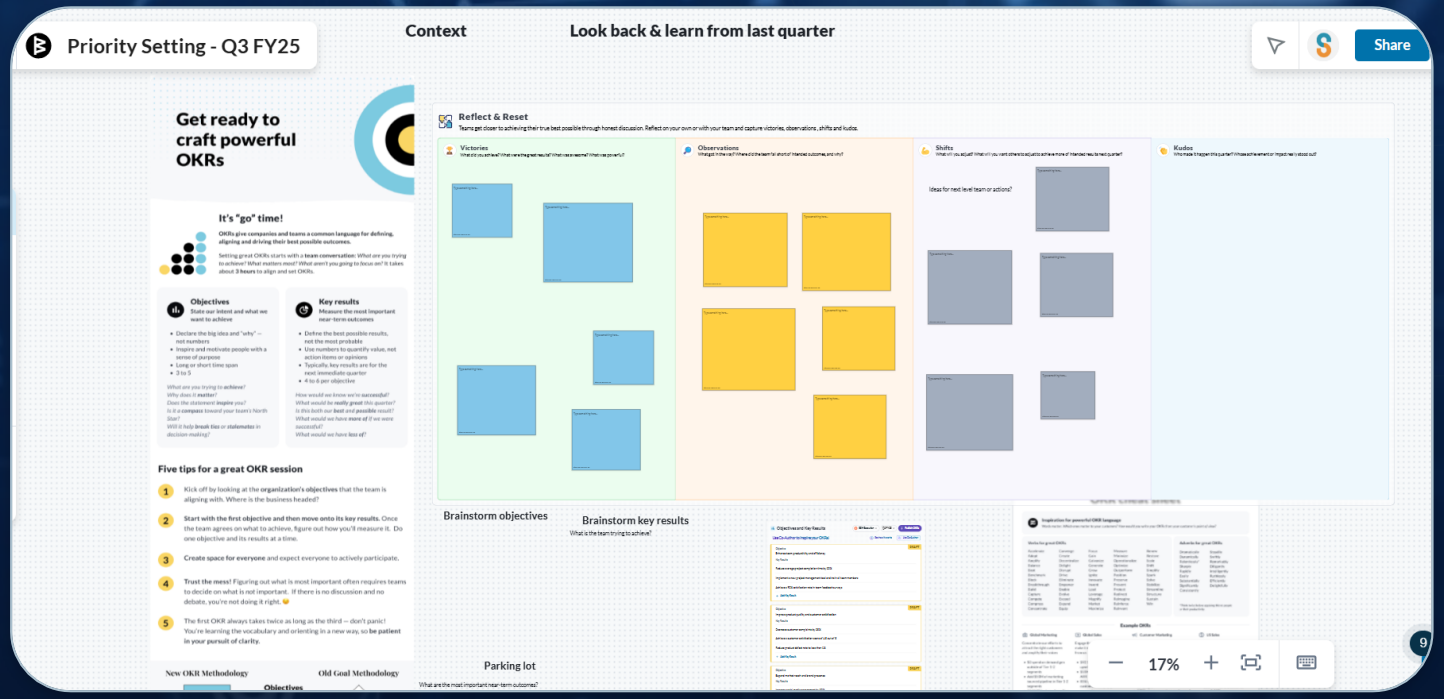
Canvas supports our execution cycle by bringing Flywheel, Bold Steps and quarterly priorities into one shared workspace. It gives teams a common strategic starting point before they draft OKRs with Co-Author.

CANVAS: SHARED PRIORITIES

01 STRATEGIC CONTEXT:
Flywheel and Bold Steps

02 TEAM DISCUSSION:
Share and prioritise contributions

03 QUARTERLY PRIORITIES;
Starting point for OKR drafting



> *Canvas makes priorities explicit. Co-Author helps teams turn them into measurable outcomes.*

DEFINE: From Strategic Priorities to Measurable Outcomes

Sella

DEFINE | CONNECT | ALIGN | PLAN | EXECUTE | UNDERSTAND | REVIEW | ACT

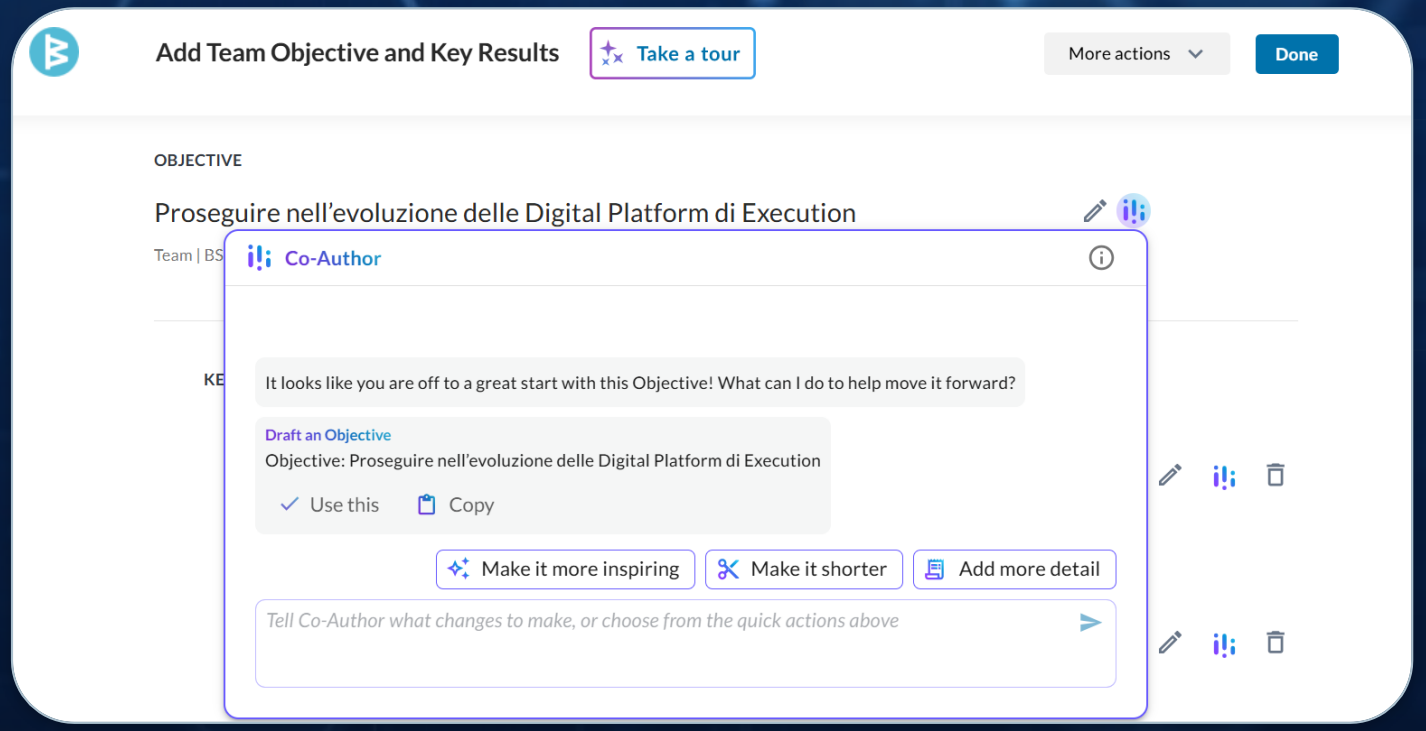
OKR Co-Author helps by turning strategic priorities into draft Objectives and measurable Key Results. enables us to focus on outcomes rather than activities, giving teams clearer goals for alignment, action planning and quarterly reviews.

CO-AUTHOR: MEASURABLE OKRs

01 STRATEGIC CONTEXT:
Start with agreed priorities

02 AI DRAFT AND REFINE:
Challenge activities, quantify KRs

03 TEAM VALIDATION:
Agree goals and measures



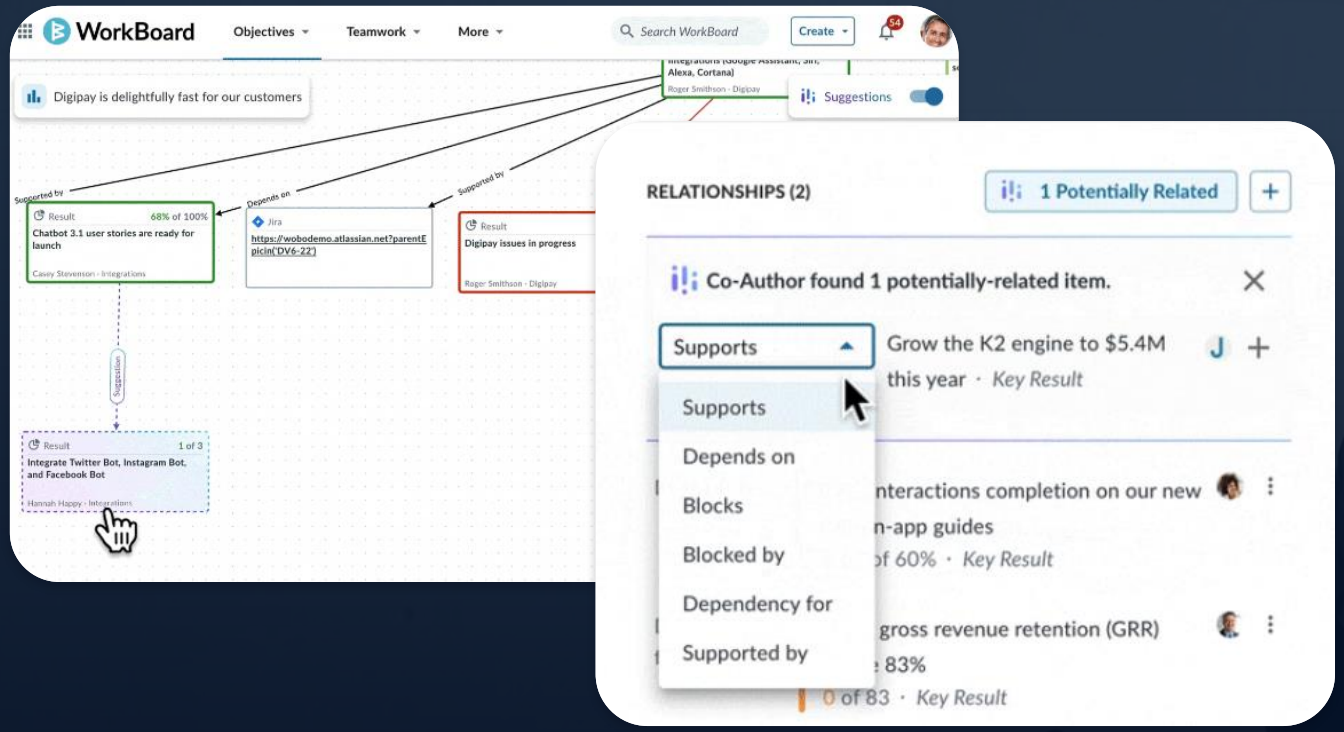
> *AI supports OKR quality. Teams validate the goals and remain accountable for results.*

CONNECT: Making Dependencies Visible

Sella

DEFINE | **CONNECT** | ALIGN | PLAN | EXECUTE | UNDERSTAND | REVIEW | ACT

We needed a shared view of how teams contribute to common goals and rely on each other's work. **WorkBoard's AI Suggestions and Relationship Maps** helped us reveal these connections, coordinate earlier and reduce the risk of teams working in isolation.



Use AI suggestions to identify potential relationships between Objectives, Key Results and Action Items.

Use AI-powered recommendations to identify potential blockers.

Gain a complete view of dependencies and relationships through the Relationship Map.

> **Use the Relationship Map to view all relationships and dependencies involved in achieving an objective.**

ALIGN: Understanding Contribution to Strategy

DEFINE | CONNECT | **ALIGN** | PLAN | EXECUTE | UNDERSTAND | REVIEW | ACT

We needed to understand how each team's OKRs contributed to strategic priorities, beyond simply identifying a connection. WorkBoard's AI Alignment Cycle helped us assess that contribution and identify where alignment needed clarification or strengthening.

FLYWHEEL & STRATEGIC PRIORITIES

BOLD STEPS & PORTFOLIO

TEAM OUTCOMES & KEY RESULTS



Clearer contribution of team OKRs to strategic priorities

Earlier identification of gaps in strategic alignment

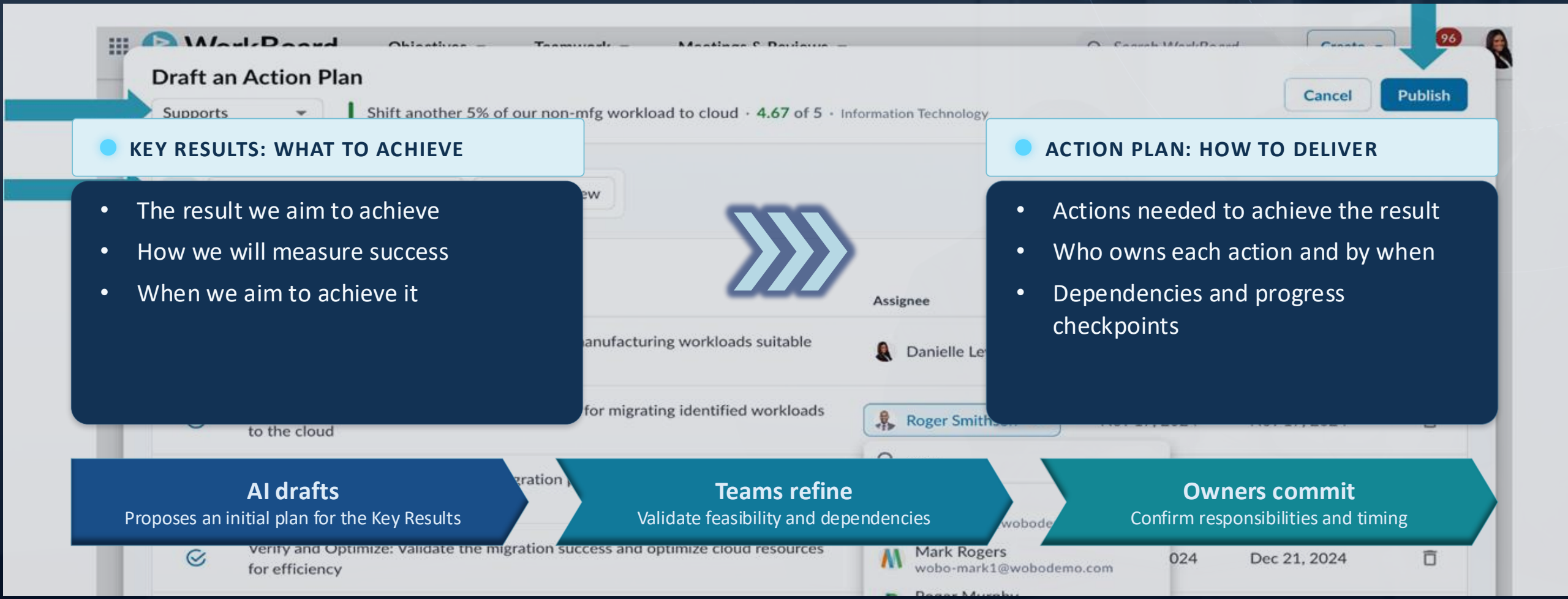
Sella

PLAN: Turning Outcomes into Coordinated Action

Sella

DEFINE | CONNECT | ALIGN | **PLAN** | **EXECUTE** | UNDERSTAND | REVIEW | ACT

We needed to translate Key Results into practical action plans, making it clear what to do and where to start. WorkBoard's AI Action Plans helped us develop an initial plan that teams could refine and validate before committing to execution.



KEY RESULTS: WHAT TO ACHIEVE

- The result we aim to achieve
- How we will measure success
- When we aim to achieve it

ACTION PLAN: HOW TO DELIVER

- Actions needed to achieve the result
- Who owns each action and by when
- Dependencies and progress checkpoints

AI drafts
Proposes an initial plan for the Key Results

Teams refine
Validate feasibility and dependencies

Owners commit
Confirm responsibilities and timing

AI Team Brief: Preparation for Management Reviews

Sella

DEFINE | CONNECT | ALIGN | PLAN | EXECUTE | **UNDERSTAND** | REVIEW | ACT

AI Team Brief automatically summarizes progress across OKRs, results and workstreams. In our execution workflow, it supports preparation for reviews so teams can arrive aligned instead of searching for updates.

PROGRESS SUMMARY

Bring execution updates into one concise briefing.

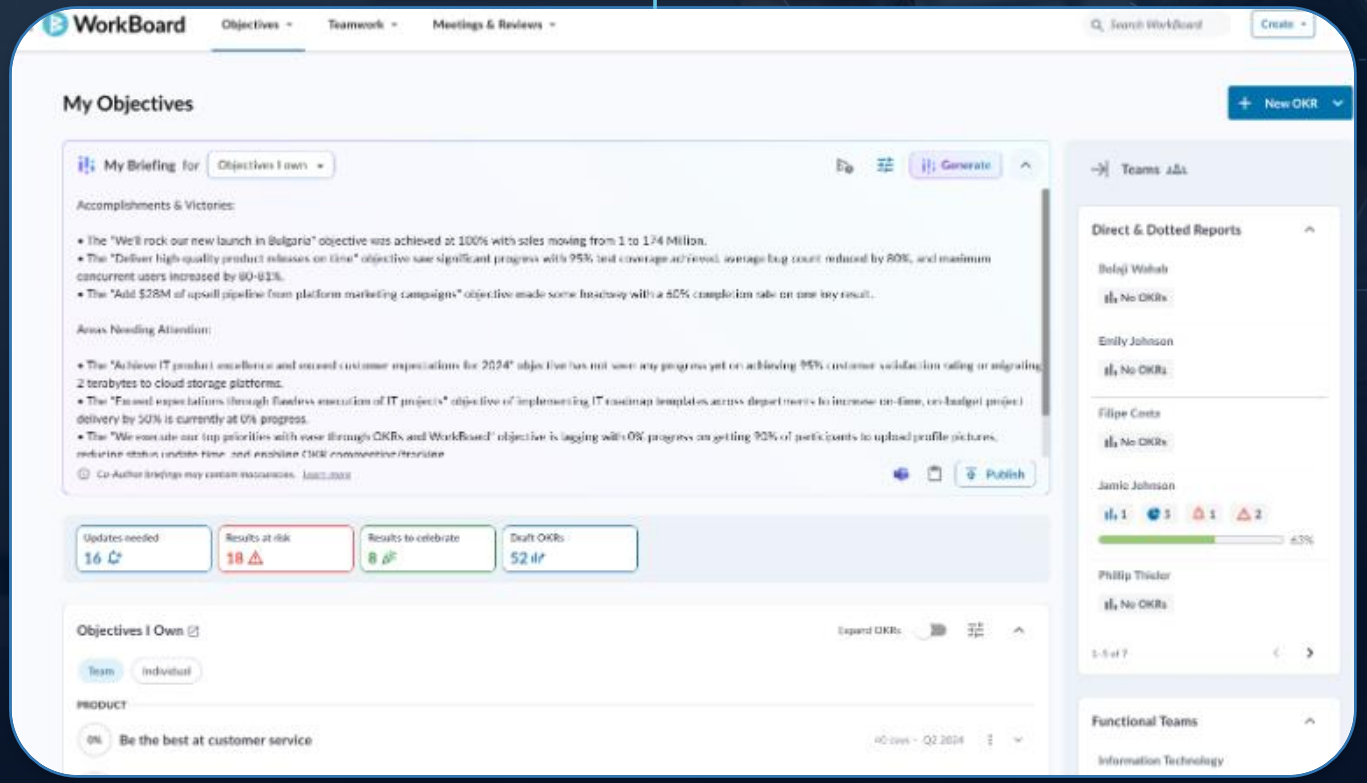
SCHEDULED DELIVERY

Receive customized briefs by email or directly on MS Teams

MEETING PREPARATION

Start with a shared view of progress and key issues.

AI BRIEF



Scorecards & AI Insights in Our Management Rituals

Sella

DEFINE | CONNECT | ALIGN | PLAN | EXECUTE | UNDERSTAND | **REVIEW** | **ACT**

Scorecards bring up-to-date OKRs, KPIs, charts and comments into one place. AI Insights interprets what changed and what needs attention, helping prepare briefs for Scorecards and Biz Reviews.

AI CONTRIBUTION

Scorecards refresh data automatically. AI summarises risks and variances on request.

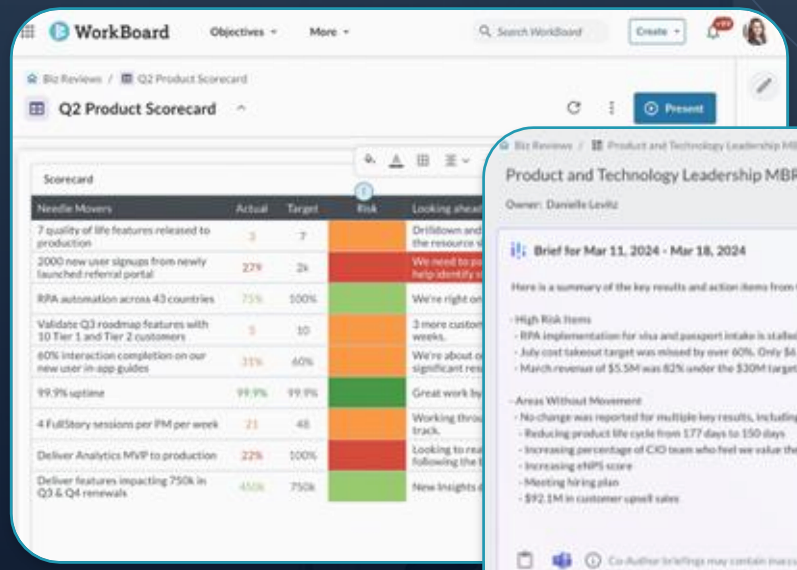
GOVERNANCE VALUE

Reviews can focus on exceptions and where corrective action may be needed.

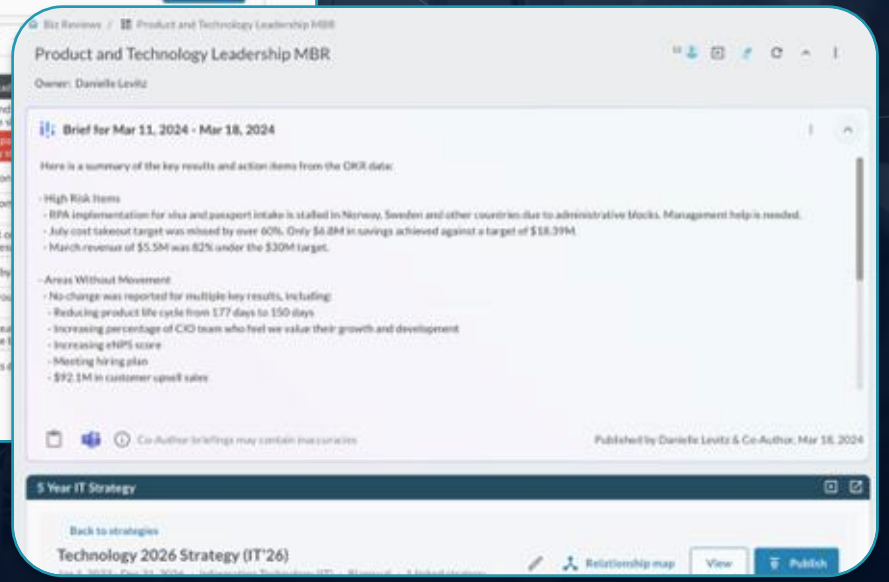
QBR,MBR & WEEKLY

Compare progress with plan and identify gaps or dependencies.

SCORECARD



Get to smart decisions faster with automated briefs.



Scorecards provide operational data. AI Insights turns that data into points for discussion.

Biz Reviews: Decision and Action

DEFINE — CONNECT — ALIGN — PLAN — EXECUTE — UNDERSTAND — **REVIEW** — **ACT**

Governance needs to convert review findings into aligned decisions and clear ownership. AI can draft summaries from OKR, workstream and KPI data in Biz Reviews, giving management a shared basis for deciding what to change. People validate the evidence, make decisions and assign actions.

AI CONTRIBUTION

AI drafts review materials from live data, creating a common basis for decisions.

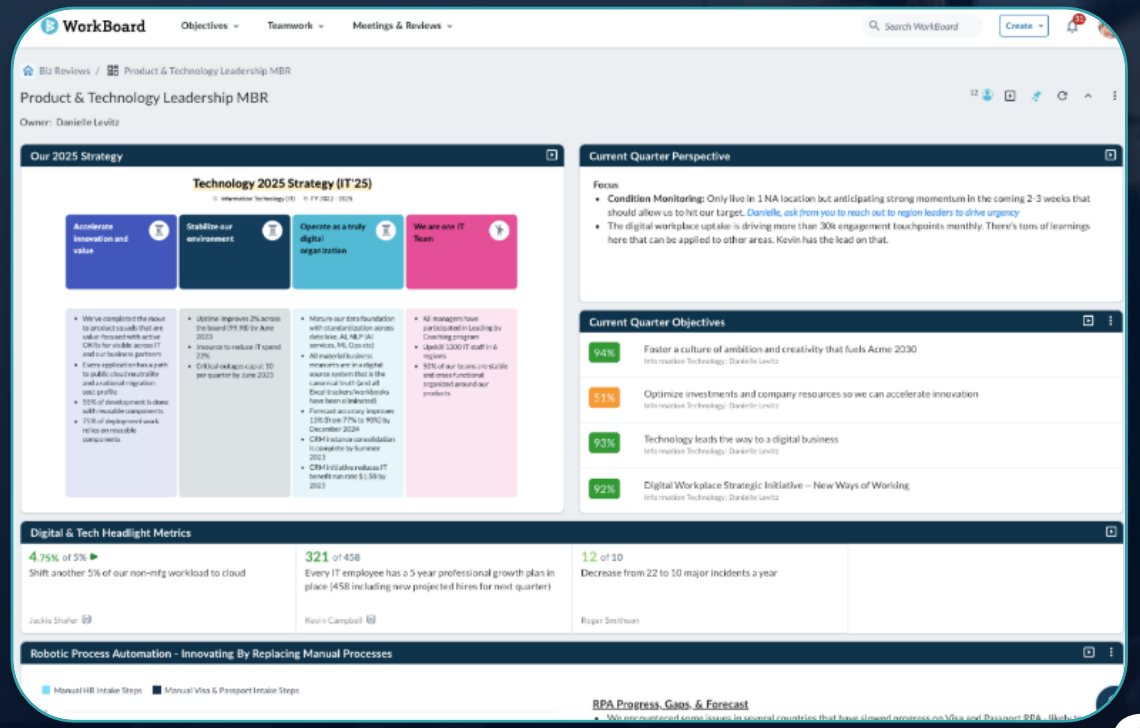
GOVERNANCE VALUE

More time for decisions and coordinated action across teams.

AI-ENABLED MODEL

Connected evidence supports reprioritization, coordination and intervention.

BIZ REVIEW



Sella

Sella

Agents 3.0: An additional intelligence layer for Strategy Execution

Alongside the AI capabilities embedded in each workflow, Agents 3.0 provide a **conversational intelligence layer** to access **execution insights, generate outputs** and **take action** across the execution lifecycle.

40+ Agent Skills

Help teams improve OKRs with AI capabilities.

Manage work and track progress.

Prepare Business Reviews.

Gain insights and recommend next actions.

Instant Dashboards

Generate interactive dashboards on demand using WorkBoard and connected data.

MCP Integration

Connect agents to external tools and data sources, enabling access to WorkBoard capabilities from enterprise AI assistants.

From asking questions to generating **insights** and **taking action**.

Instant Dashboards: Decision support in our Execution model

Instant Dashboards bring WorkBoard and connected data into focused views. In our Execution model, they can help management assess progress against strategic priorities and decide where to intervene.

01 IN MBRs AND QBRs

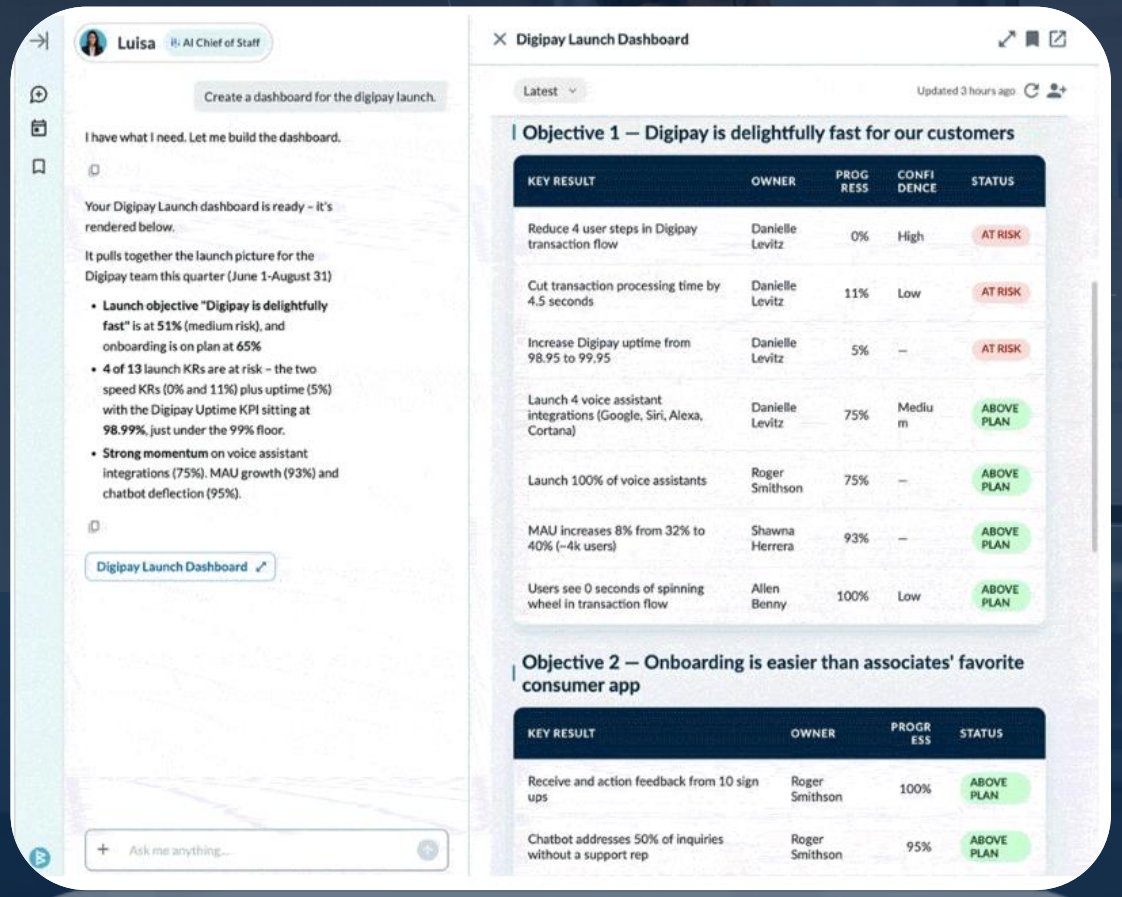
Prepare focused views of priority OKRs for reviews and investigations between meetings.

02 FOR STRATEGIC DECISIONS

Highlight gaps against strategic outcomes to discuss trade-offs and reprioritization.

03 UNDERSTAND, REVIEW, ACT

Examine evidence, challenge it in reviews and agree actions with clear owners.



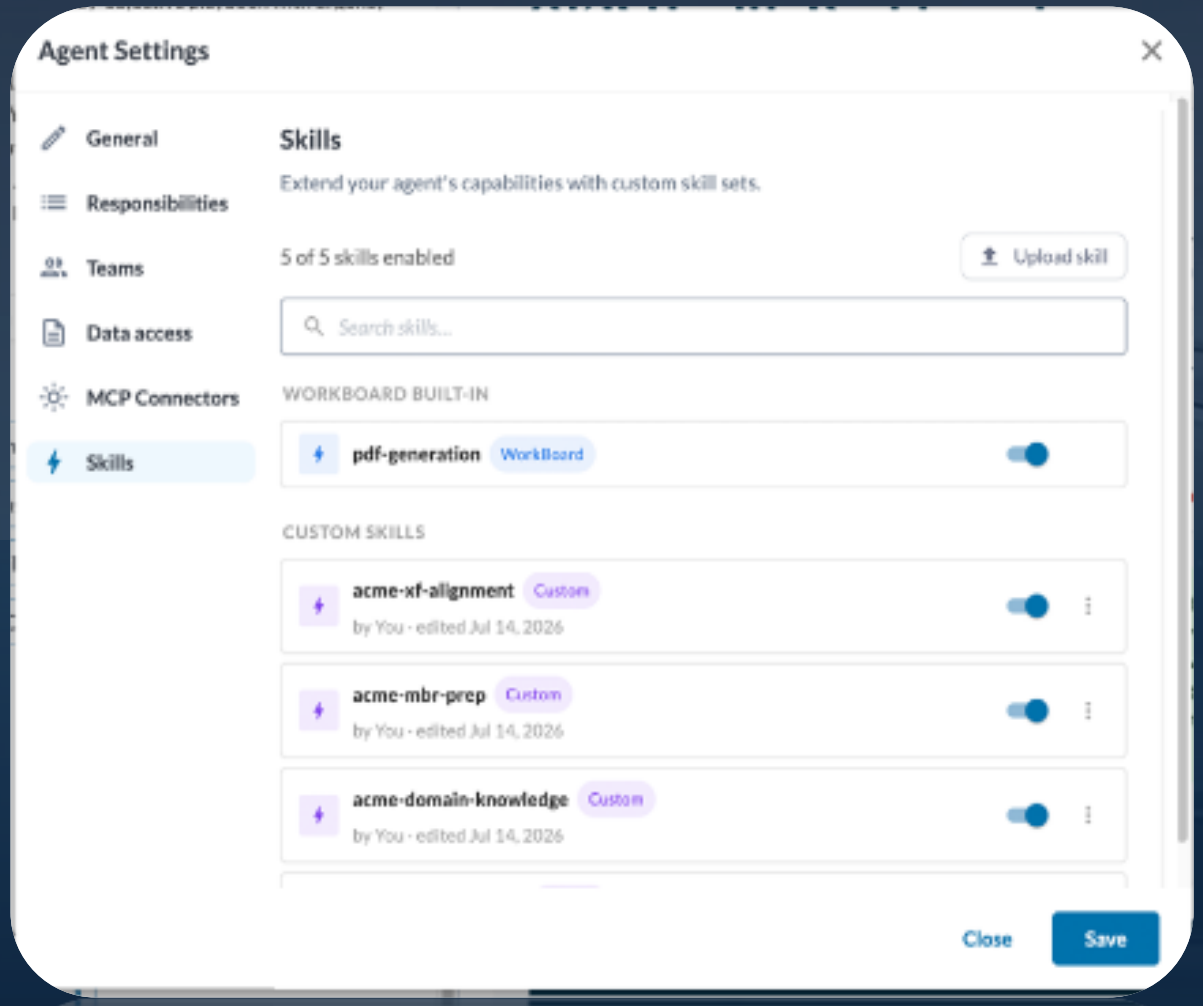
AI structures the evidence. Management retains judgment, ownership and accountability.

Sella

Agent Skills: Applications across our Execution model

Sella

Agents 3.0 bring conversational AI across the Execution cycle, helping teams explore data, generate insights and take action—from goal setting to business reviews and daily execution—while keeping people accountable for decisions.



WHAT AGENT SKILLS CAN DO FOR US:

EXPLORE YOUR DATA

Turn a management question into an interactive view.

PREPARE USABLE MATERIALS

Draft PPT, PDF, Word or Excel files from live data, ready to verify.

ACT ON WORK ITEMS

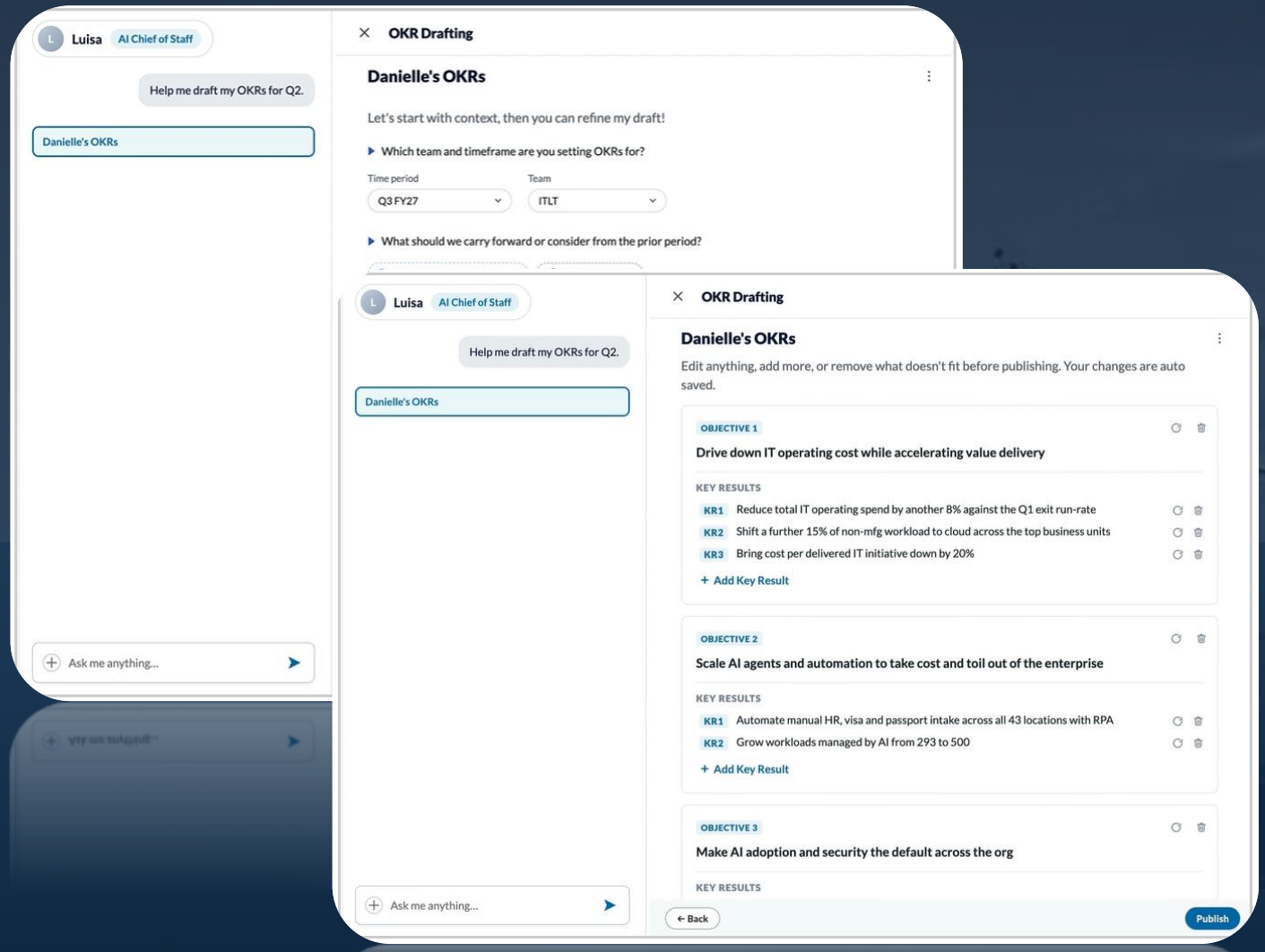
Create and update actions, Key Results and KPIs in conversation.

STAY ALIGNED EVERY DAY

Receive proactive briefings with priorities and reminders.

Agents 3.0: Better OKRs with AI

During quarterly planning, AI helps teams translate strategic priorities and previous OKRs into draft Objectives and measurable Key Results. Teams refine the proposal to reflect their context.



DEFINE & ALIGN: QUARTERLY GOALS

01 WHERE WE USE IT

Quarterly planning and goal setting

02 HOW AI HELPS

Draft from priorities and past OKRs

03 TEAM JUDGMENT

Confirm targets and ownership

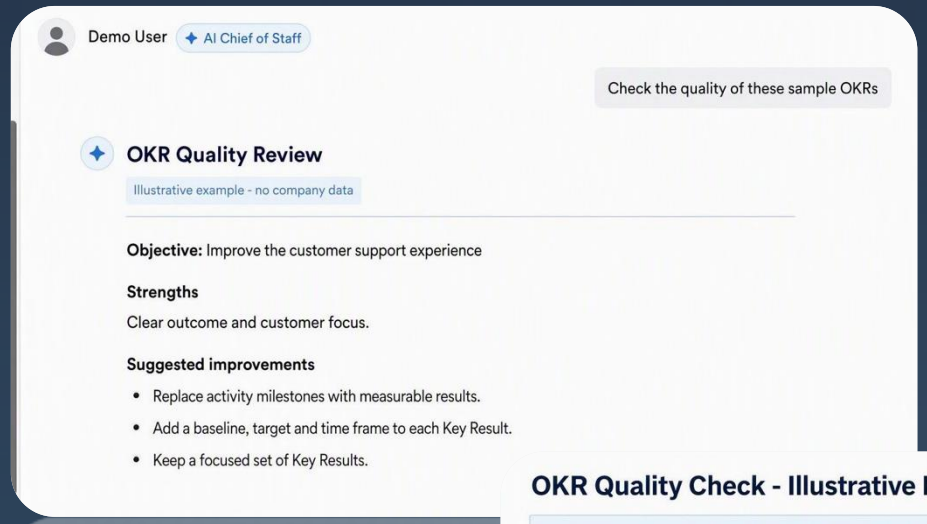
04 EXECUTION VALUE

Less effort to define clear goals

Sella

Agents 3.0: OKR Quality AI Check

Before publishing, teams use the OKR Quality AI Check to assess clarity and measurability. They evaluate the feedback and strengthen the draft before committing to the goals.



OKR Quality Check - Illustrative Example

Criterion	What the AI checks
Strategic objectives	Clarity and intended impact
Outcome-focused KRs	Results rather than activities
Measurability	Baseline, target and time frame
Focus	A concise set of Key Results
Ambition	Meaningful but realistic improvement
Strategic alignment	Contribution to the stated objective

DEFINE: OKR QUALITY

01 WHERE WE USE IT

Before teams publish or refresh OKRs

02 HOW AI HELPS

Check clarity and measurability

03 TEAM JUDGMENT

Assess feedback and refine measures

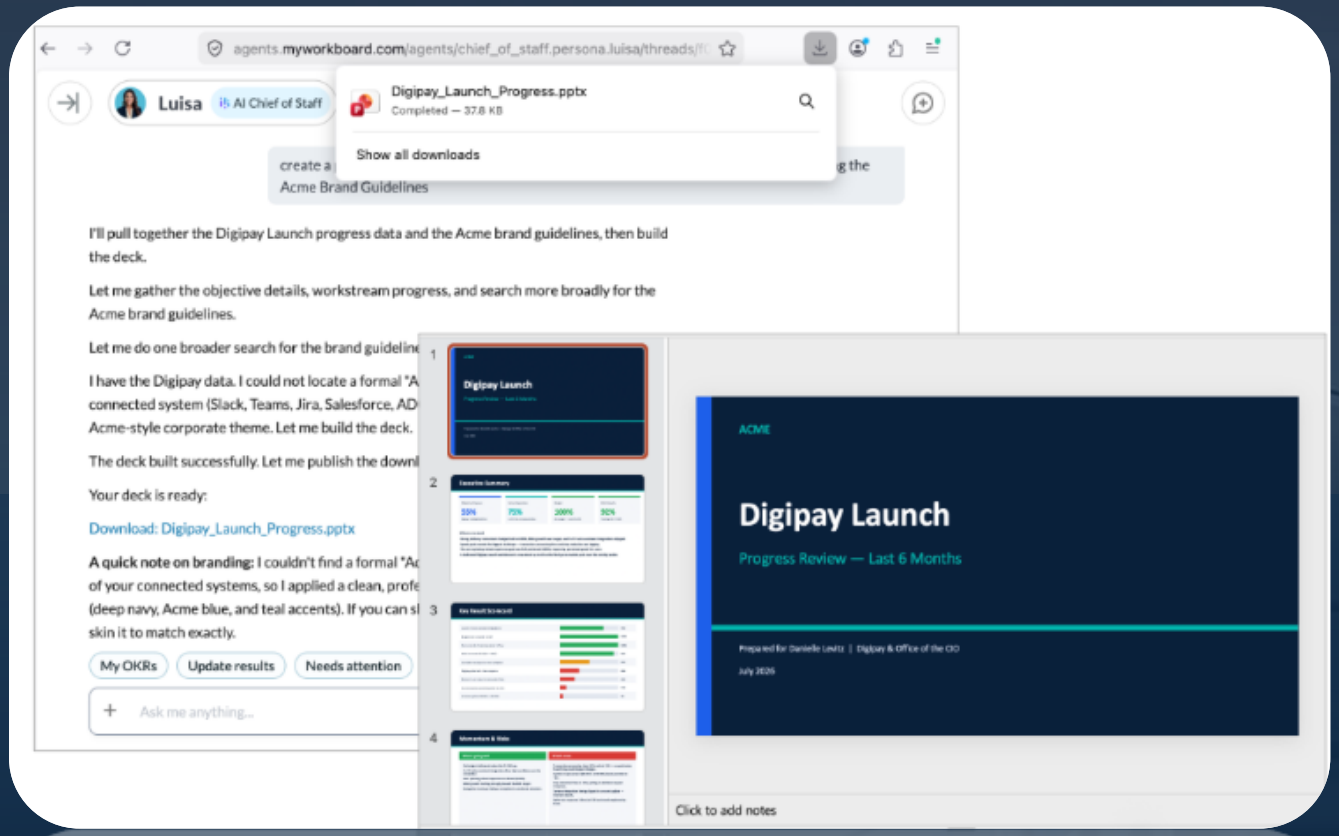
04 EXECUTION VALUE

Clearer outcomes to track and review

Sella

Agents 3.0: Documents for Business Reviews

Once goals are set and progress data is available, the focus shifts to management reviews. Alongside Instant Dashboards, AI-generated documents help teams prepare evidence for MBR and QBR decisions.



UNDERSTAND & REVIEW: EVIDENCE

01 WHERE WE USE IT

Preparation for MBRs and QBRs

02 HOW AI HELPS

Draft documents from OKR and KPI data

03 TEAM JUDGMENT

Verify evidence and decide where to act

04 EXECUTION VALUE

Less preparation, more time for decisions

Sella

Agents 3.0: Daily Focus for Team Alignment

After review decisions, execution continues in daily work. Monday Memos and daily briefings keep priorities and follow-up visible, helping teams maintain focus between management reviews.

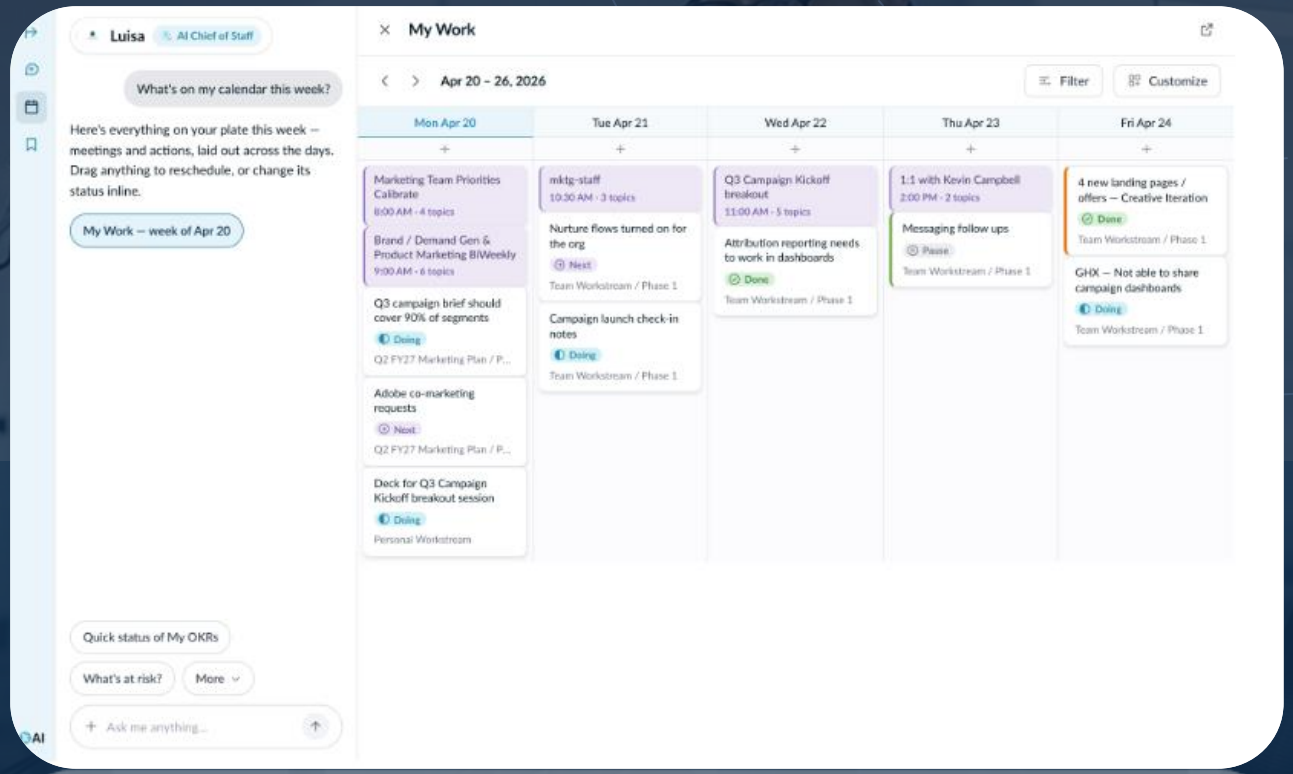
EXECUTE & ACT: DAILY FOLLOW-UP

01 WHERE WE USE IT
Daily execution between reviews

02 HOW AI HELPS
Surface priorities and reminders

03 TEAM JUDGMENT
Choose actions and follow through

04 EXECUTION VALUE
Continuity between reviews and daily work



Sella

Selly and WorkBoard: A proposed MCP integration

A simple connection between our **company AI assistant** and **WorkBoard**, enabling secure and real-time access to execution data and actions.



Selly

Gruppo Sella AI Assistant

- Ask questions
- Get insights
- Take actions

User requests and questions

Data, insights and suggested actions

MCP

WorkBoard Model Context Protocol

Secure and standardized interface to connect AI agents with WorkBoard

WorkBoard data and capabilities

Context, actions and responses

WorkBoard

Execution Platform

- OKRs & Alignment
- Programs & Projects
- Insights & Analytics



Natural interaction
Ask Selly in natural language

Real-time access
to WorkBoard data and context

Actionable outputs
Insights, recommendations and direct actions

Secure and governed
integration via MCP

How AI Strengthens Our Execution Model

Sella

Our model already connects strategy, portfolios and OKRs. AI strengthens how we use it to decide and act.

EXECUTION CHALLENGE	HOW AI SUPPORTS US	WHAT CHANGES IN OUR MODEL
STRATEGIC ALIGNMENT	Helps draft measurable OKRs and assess their contribution to strategic priorities.	**Clearer outcomes linked to strategy** Teams refine goals and clarify how they contribute.
CROSS-TEAM DEPENDENCIES	Suggests objective links and highlights potential dependencies and blockers.	**Coordination through visible dependencies** Teams use shared connections to align plans.
PRIORITIES INTO ACTION	Supports action planning, with briefings and reminders between review meetings.	**Continuity between decisions and daily work** Teams keep agreed actions and priorities in focus.
DATA INTO DECISIONS	Summarises progress and surfaces changes and issues for management discussion.	**Reviews focused on judgment and decisions** Management challenges evidence and agrees action.

AI makes connected execution information more useful for decisions and follow-through.

Teams and management retain ownership, judgment and accountability.

What We Have Learned So Far

Our experience with AI in Execution

~1,000

Active users

~1,000

KRs per quarter

3,000+

AI interactions per quarter

~–40%

OKR definition time

Less effort in definition

75%

OKR quality

Clearer outcomes to pursue

+10–15%

execution velocity

Faster progress in execution

Sella

The Future: AI-Augmented Strategy Execution

Towards a connected, continuous and intelligent Execution system

Four shifts shaping the next evolution of Strategy Execution

01 CONTINUOUS INTELLIGENCE

From periodic reviews
to continuous intelligence

Insights throughout execution, beyond QBRs, MBRs and periodic reporting.

02 CONNECTED EXECUTION

From fragmented activities
to connected execution

Strategy, OKRs, projects, investments, resources and benefits in one model.

03 PREDICTIVE EXECUTION

From reactive monitoring
to predictive execution

Anticipate risks, misalignment and opportunities before they emerge.

04 AGENTIC SUPPORT

From AI assistance
to AI agents

Agents generate insights, recommend actions and follow through. People retain accountability.

AI helps us anticipate challenges, accelerate action and turn strategic ambition into measurable outcomes.

Sella

The Future:
One Connected Execution System

From AI assistance to a connected operating model — with people at the centre

01
AI-Assisted Execution

02
AI-Embedded Execution

03
AI-Augmented Execution Governance

04
One Connected Execution System

HUMAN LEADERSHIP
Vision, direction and decisions

EXECUTION GOVERNANCE
Strategy, alignment, outcomes and accountability

ARTIFICIAL INTELLIGENCE
Context, insights, predictions and action support

The future is not AI executing strategy.
It is people leading, with AI making execution smarter, faster and more effective.

THANK YOU



Stefano Corradino
stefano.corradino@sella.it
+393471720901



Elie Casamitjana

CEO & Founder

OKR mentors

The Future of Strategy Execution

Elie is a global voice in strategy execution and organizational transformation. As Founder and CEO of OKR Mentors, he has helped over 600 organizations across 30+ countries turn ambition into measurable impact, training 7,000 leaders and certifying 50,000+ practitioners worldwide.

Host of the OKR Forum International and the OKRx Summit, Elie advances strategy execution as a shared language that connects purpose, performance, and progress. Co-author of “La Méthode OKR, le guide pratique” and “The Global State of Strategy Execution”, he blends strategic rigor with human insight to help organizations build living systems of alignment and learning.

OKR mentors

The Future of Strategy Execution

Why AI investments fail to transform execution — and what strategy execution leaders do differently.

Live - 15 October 2026 - London · Elie Casamitjana , CEO OKR Mentors

OKR mentors

Building the **global infrastructure** for strategy execution excellence

600
organizations supported

70k
professionals trained

150
strategy execution experts

30
countries

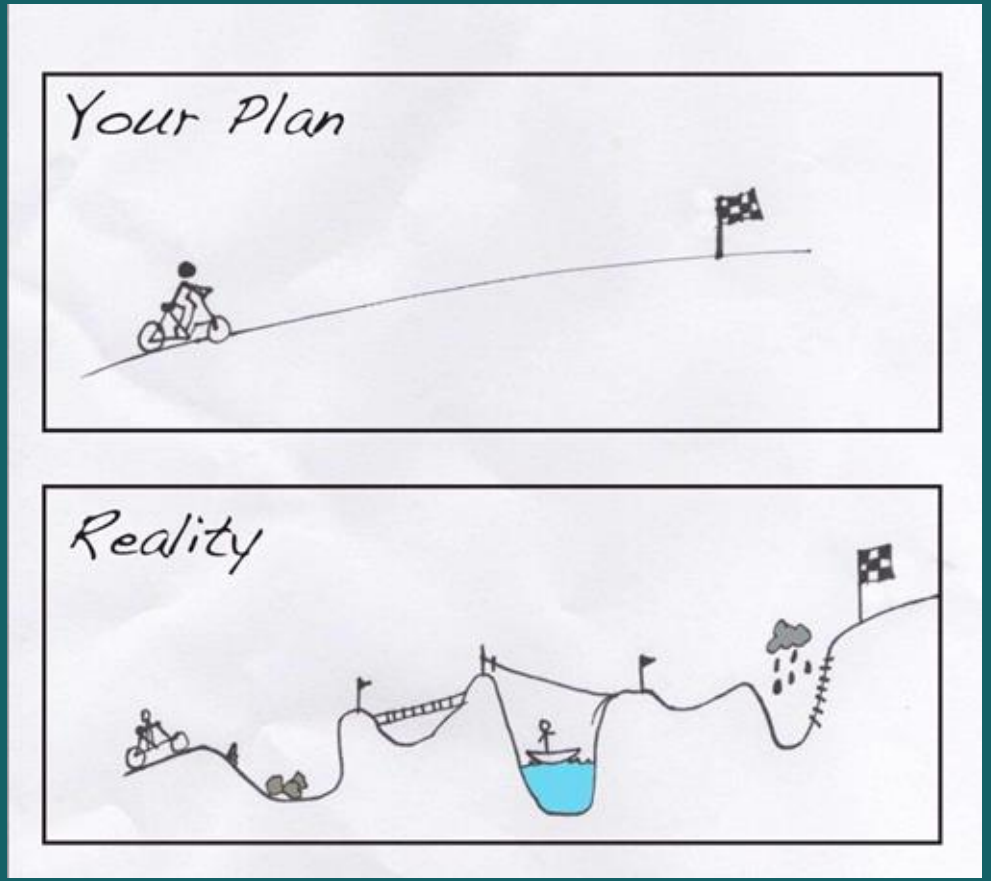


The world is changing faster and faster. Strategic cycles are compressing.

Organizations must adapt and transform faster, better, and continuously.

Strategy execution is no longer a nice-to-have. It's a survival skill.

The future of strategy execution belongs to those who close the loop fastest.



OKR mentors

THE MULTI-LAYER GAME

As orchestrator, you're holding more coordination than any one person can hold

STRATEGY EXECUTION ORCHESTRATOR

"I'm accountable to close the gaps I can see but I don't always control the actions to fix them."

"I'm accountable for execution, but most of the decisions sit elsewhere."

— Chief of Staff, Enterprise SaaS

Senior Leadership

Why isn't it going faster? Are teams on the right topics?

Middle Management

Priorities keep shifting, and my teams are buried in firefighting.

Individual Contributors

What's the point of my work, and what does success even mean?

Meet Isabelle Rossi

Director of Strategy & Operations



"I'm building the roads that strategy travels on. I connect the dots that nobody else sees."

What keeps her up at night

- Too many priorities, too little control
- Gaps stay invisible until they're crises
- Leaders sponsor in words, not behavior

What success looks like

- Executives champion it publicly
- Outcomes traceable to the system
- Teams treat strategy as their work

What drains her

- Frameworks that change nothing
- Alignment theater: no decisions
- Same problems every cycle

OKR mentors

QUICK POLL — PICK THE ONE THAT'S MOST YOU

Which drain is loudest right now?

1. Too many priorities — no authority to enforce them
2. Alignment theater: meetings that decide nothing
3. Same problems every cycle, because nothing sticks
4. I'm told to “use AI” without being shown where

OKR mentors



egy Execution
Challenges

01 *“There is so much noise and fragmentation between 10,000 feet and the ground floor. Teams can't make the translation.”*

The Translation Gap: From Boardroom Intent to Frontline Action

02 *"We are asking two things of people. Work the way you have always worked, but also change for the future."*

Organizations Try to Run and Transform With the Same People, Structures, and Tools

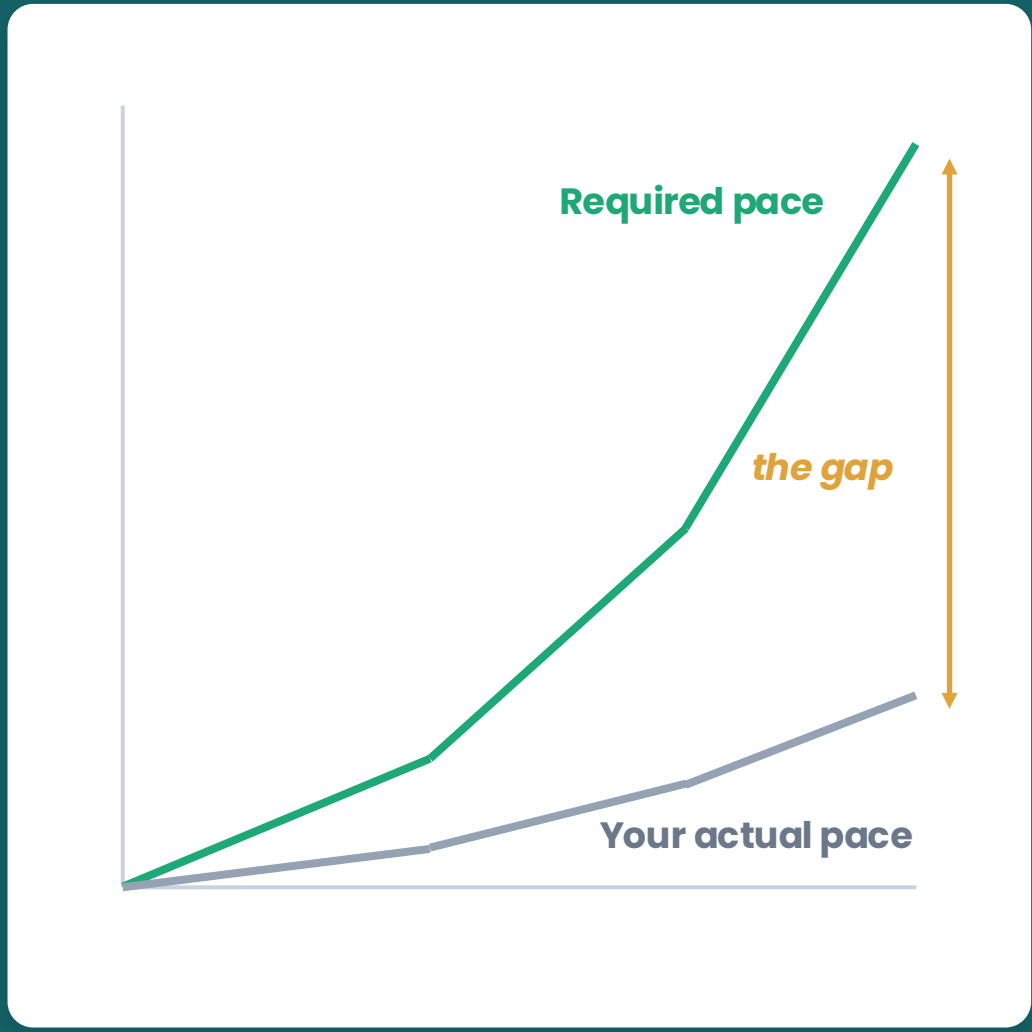
03 *"Some professionals enjoy staying in the ambiguity because they don't have to prove their value."*

Cultural Resistance and the Fear of Transparency

The Strategic Velocity Gap

The widening distance between the velocity your strategy now requires and the velocity your execution actually delivers.

Cycles are compressing for everyone that raises the velocity strategy requires. AI raised what's possible; your execution didn't move with it.



OKR mentors

WHY NOW · WHAT CHANGED

In 18 months, AI crossed three lines

Answering → acting	Agents plan, use your tools, and finish multi-step work.	agents · tool use · MCP
A prompt → your whole portfolio	Long context holds 1,500 metrics across 10 tools; memory carries it across cycles.	long context · memory
One model → a team of agents	Specialized agents — research, analyze, draft, review — run by an orchestrator.	orchestration · A2A

What's next: from on-demand to always-on — agents that watch, warn, and act within your guardrails.

WHY NOW

The market is building your job into its systems

- **The winning AI architecture has a name for the human role: the orchestrator.**

  A network of specialized agents needs someone to coordinate them toward the goal. That's literally your function, now mirrored in the technology.

- **AI needs exactly what you already hold.**

  The cross-functional context, the system, the data. You're not a consumer of AI tools. you're positioned to architect the AI-augmented execution system.

The work going agent-first is your coordination load.
What's left is judgment: the scarce thing.

OKR mentors



"The first wave of AI focused on individual productivity. The coming wave will need to transform collective work.

Everyone is talking about AI replacing work, but it is in fact really about rethinking the human value-add inside."

Vinciane Beauchene
Managing Director & Partner, BCG

Three beliefs that separate the pioneers from everyone else

01 The game is velocity	As strategic cycles compress, outcomes are won on speed of intent-to-result.
02 Your edge is judgment	Your value is no longer circulating information — it's influencing the decisions that count.
03 Redesign first, then add AI	AI multiplies the quality of execution you already have. Bad execution amplifies too.

THE COMMON BELIEF

“My job is to get the strategy executed.”



THE REFRAME

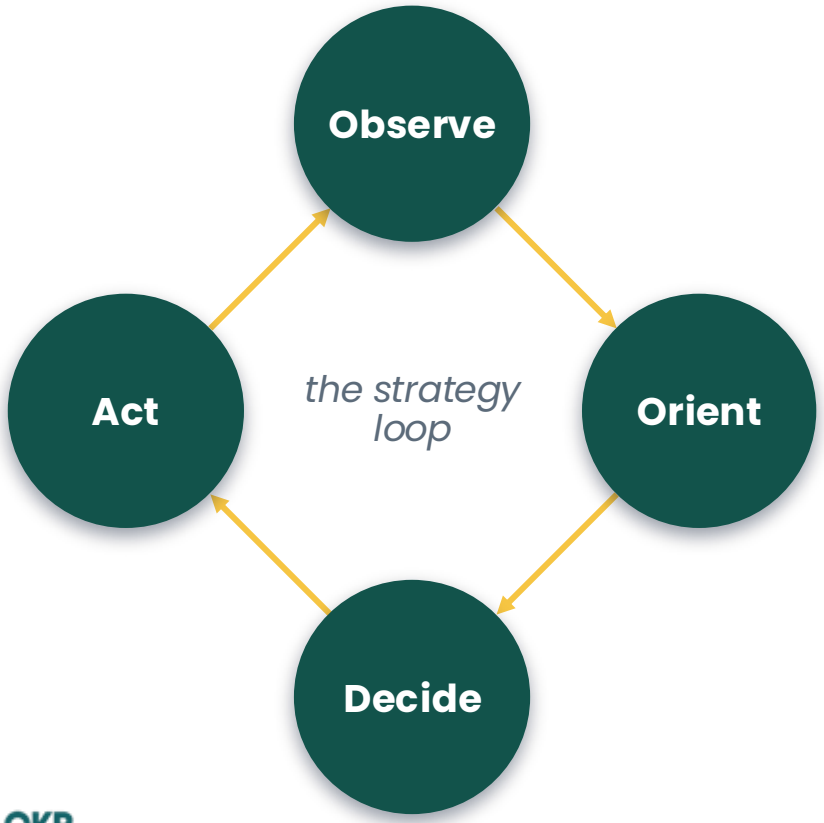
My job is how fast strategic intent turns into result.

The cycle that used to turn once a year now turns in a quarter. Whoever closes the loop fastest compounds advantage — everyone else executes last year's strategy, perfectly on time.

BELIEF 01 — THE PROOF

Whoever closes the loop fastest wins

Boyd's law, applied to strategy: the faster cycle beats the better plan.



3.5× more likely to review progress weekly. the single biggest differentiator in our research.

Only 27% of organizations review weekly at all.

WHY FREQUENCY COMPOUNDS

Annual cycle

Quarterly cycle

Four turns vs one, and each turn compounds on the last.

Velocity isn't talent. It's loop frequency
...and frequency is learnable.

OKR mentors

THE COMMON BELIEF

"I need to master the AI tools to stay relevant."



THE REFRAME

My edge is judgment...and AI makes it scarcer, which means more valuable.

As AI absorbs coordination, synthesis, and reporting, the bottleneck moves to prioritization, arbitration, and the calls only you can make. Scarce things appreciate.

"AI can pull the sword. It can't decide which battle is worth fighting."

THE COMMON BELIEF

“Add AI on top of what we do, and we'll go faster.”



THE REFRAME

AI multiplies the execution you already have.

Bolt AI onto a broken workflow and it runs the same frictions, silos, and hand-offs, just faster. On a mature process AI compounds. On a broken one it amplifies the noise.

Paving the cowpath: a faster route along a road that was never straight.

The move was never more AI.
It's redesigning the work so the decisions that matter - and their impact - compound.

OKR mentors

Strategic outcomes are produced, not wished for...

If velocity is the game, what produces it? Not effort. A system.

STRATEGIC OUTCOMES

Strategic Velocity ✖ **Strategic Predictability**

produced by ↓ three drivers

Strategic Alignment | **Execution Discipline** | **Learning & Adaptation**

The guardrail: velocity without predictability is just fast chaos. The three drivers produce both and AI done well lifts both.

OKR mentors

WHERE AI COMES IN

AI can accelerate all three drivers but not uniformly, and not safely everywhere.

Strategic Alignment

Translate intent across layers without losing the “why.” Catch conflicts before they're committed.

Execution Discipline

Surface risk and blockers continuously, between reviews, not just at them.

Learning & Adaptation

Synthesize what worked across teams and cycles. Spot what to retire and where to double down.

THE FRAMEWORK · LENS 1 OF 2

The AI Leverage Map — Modes

Sort the work: what AI does and where judgment stays mine.

AUTOMATE

Full AI leverage

- Information gathering
- Synthesis & reporting
- Data consolidation

AUGMENT

Shared — AI + you

- Analyses & recommendations
- Preparing arbitrations
- Generating options

KEEP HUMAN

Judgment protected

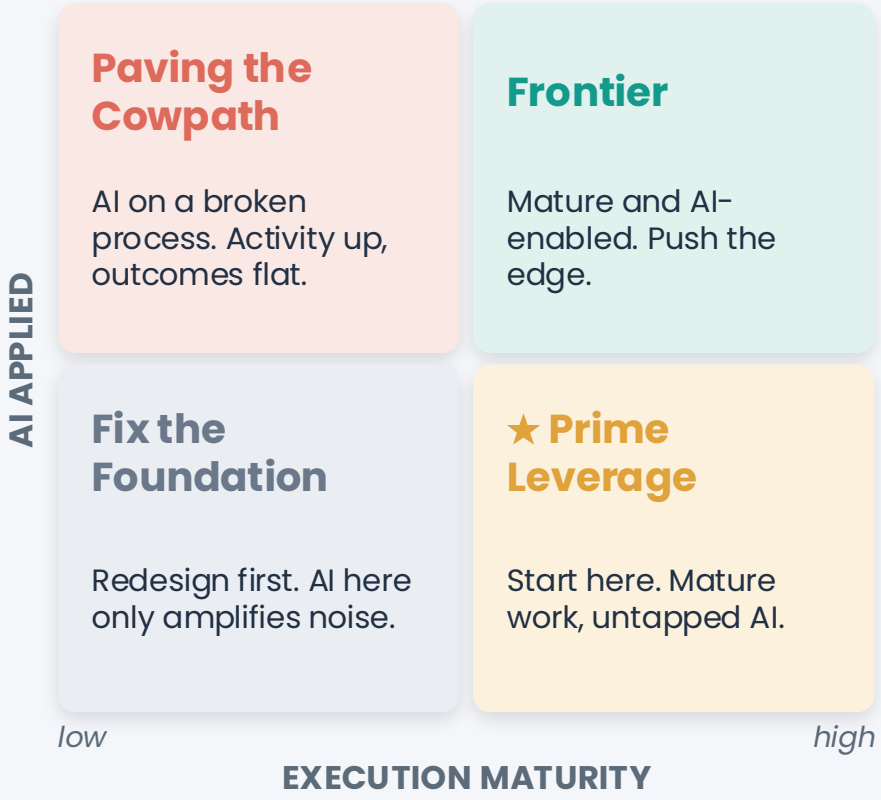
- Prioritization & strategic decisions
- Managing trade-offs
- Leadership in uncertainty

OKR mentors

THE FRAMEWORK · LENS 2 OF 2

The AI Leverage Map — Position

Modes tell you what AI does. Position tells you where to start.



THE PRINCIPLE

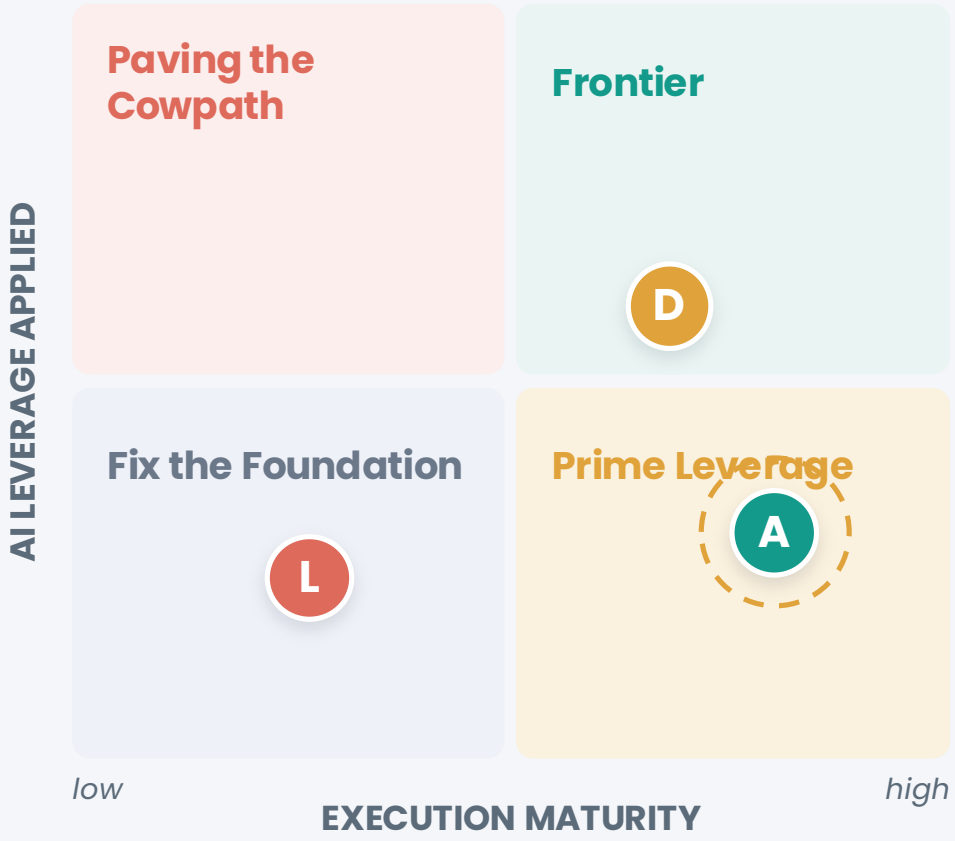
Move right before you move up. AI multiplies the maturity you already have — it can't manufacture it.

YOUR PERSONALIZED MAP

We **plot** your three drivers on this grid in the Mapping Session — and the one place to start becomes obvious.

OKR mentors

One organization, three drivers, one starting move

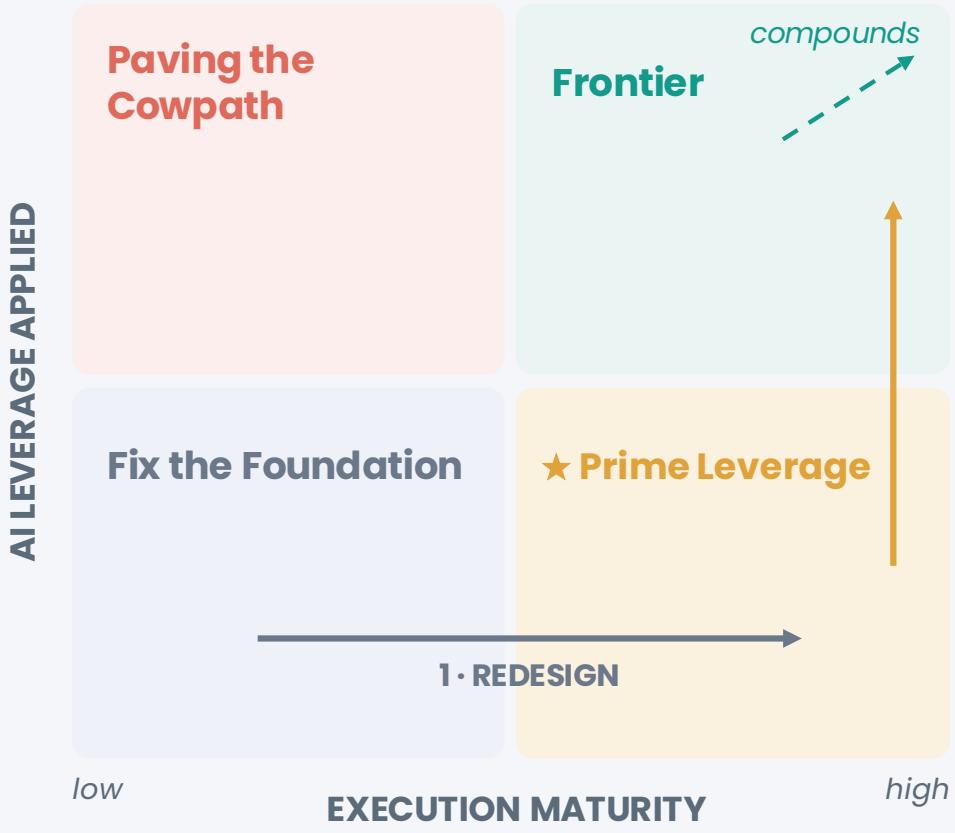


THE READ

- **A** **Alignment —** Prime Leverage — mature, little AI. Start here.
- **D** **Discipline —** Entering the Frontier — keep pushing.
- **L** **Learning —** Fix the Foundation — build the muscle first.

Sequenced move: AI on Alignment now. Mature Learning before touching it.

Two currencies: redesign moves you right, AI moves you up



AI INVESTMENT PRIORITY

1. **Prime Leverage —** Apply AI now — fastest, safest return.
2. **Cowpath —** Remediate — redesign under the AI you deployed.
3. **Frontier —** Extend — find the next workflow.
4. **Fix the Foundation —** Redesign first — a maturity project.

The rule: spend redesign to go right, AI to go up. The map tell you which.

THIS ISN'T THEORETICAL — HERE'S WHERE THE GAP LIVES

The drivers, by the numbers

ALIGNMENT

only

41%

align objectives across departments.

Leaders: 2.34× more likely.

DISCIPLINE

only

27%

review progress weekly. 21% clear blockers fast.

Leaders: 3.5× / 3.52×.

LEARNING

only

22%

retire outdated strategies.

Leaders: 3.55× — the largest relative gap.

Source: Global State of Strategy Execution 2025, Insights from 201 leaders, OKR Mentors

OKR mentors

LIVE · 01

Reporting synthesis

10 reports & sources → A 1-page exec brief. In 90 seconds.

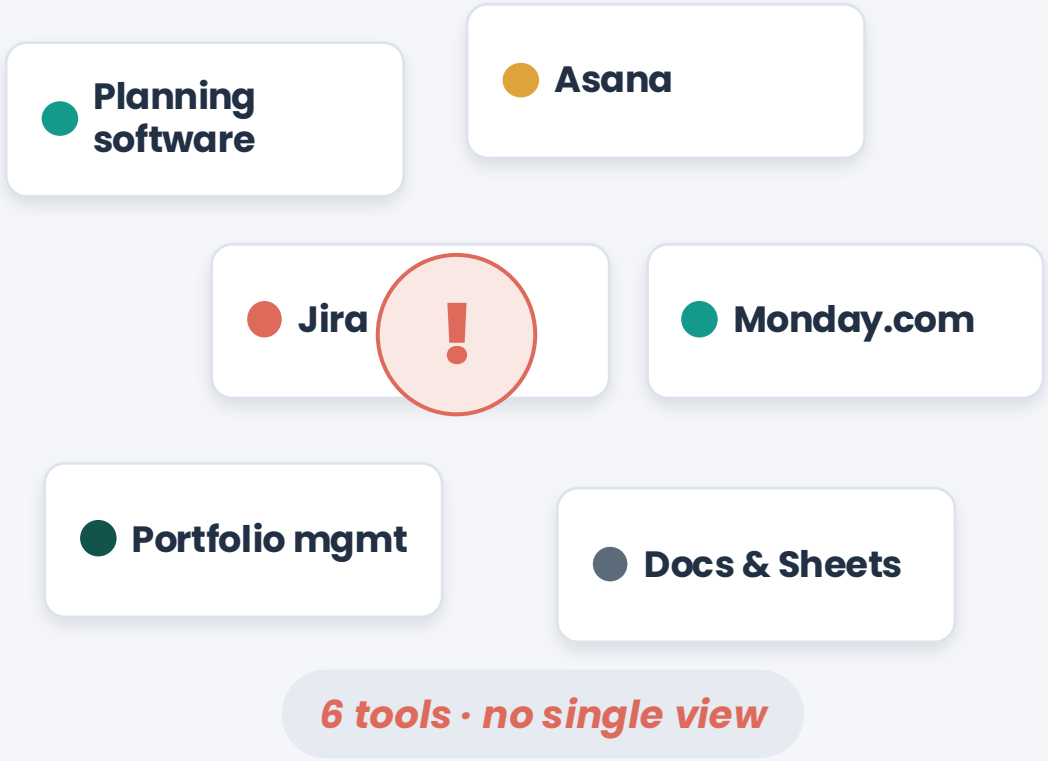
Watch what gets cleared, and what's left for leadership to decide.

OKR mentors

USE CASE 01 · EXECUTION DISCIPLINE

You can't steer what you can't see

Progress, blockers and risk live in a dozen tools that don't talk to each other.



WHY IT MATTERS

- Blockers surface as crises, not signals.
- Leadership attention lands where it's loudest — not where it matters.
- Between reviews, you're flying blind.

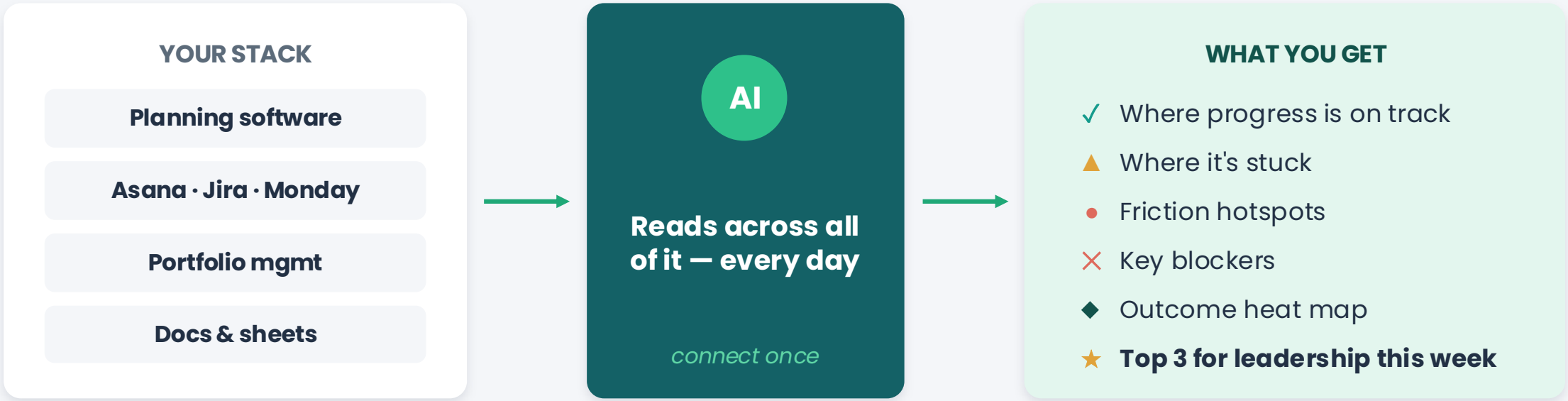
Only 27% review weekly. The rest find out at quarter-end.

OKR mentors

USE CASE 01 · THE SOLUTION

Always-on strategy awareness

AI reads across your whole stack and tells you — continuously — exactly where to look.



USE CASE 01 · WHAT IT LOOKS LIKE

Your Monday-morning strategy briefing

OUTCOME HEAT MAP

Ship Platform v2	On track	↑
Margin program	On track	↑
Win EMEA mid-market	Slipping	→
Onboarding revamp	Slipping	↓
Reduce churn < 5%	Blocked	↓

5 strategic outcomes · updated daily, automatically

THIS WEEK

✓ **On track**
4 outcomes

▲ **Slipping**
EMEA pipeline · onboarding scope

✕ **Blocked**
Churn — data integration stalled 3 wks

★ LEADERSHIP FOCUS THIS WEEK

1) Unblock churn data dependency 2) Reinforce EMEA pipeline 3) Decide onboarding scope cut

OKR mentors

DEMO 01 — BEFORE & AFTER

Same information. A fraction of the cost.

BEFORE

- Hours stitching status across ten tools
- One version of truth, manually reconciled
- Decisions wait for the deck to be built
- Meetings spent catching up, not deciding

AFTER

- 1-page brief in 90 seconds
- Hours recovered, every cycle
- Decisions accelerated — the read is ready
- Meetings spent on the call, not the catch-up

Time recovered · decisions accelerated · meetings cut

OKR mentors

AI didn't replace the work that matters. It cleared the work that was burying it.

That's AUTOMATE. The synthesis is the machine's. The call about what matters is still yours.

OKR mentors

LIVE · 02

Strategy Validation & Sensing at Scale

Building the learning loops integrated into the way to design and execute strategy

OKR mentors

USE CASE 02 · LEARNING & ADAPTATION

Learning gets trapped at the bottom

Teams learn every week. Strategy hears about it once a quarter — if at all.

STRATEGY · LEADERSHIP

Direction and assumptions set the cycle — then rarely revisited



learnings don't travel up

TEAMS · THE FIELD

Execution, check-ins, retros — insights surface every cycle

WHY IT MATTERS

- Stale assumptions keep driving decisions long after they've broken.
- The same problems resurface every cycle — nothing feeds back.
- Retros become a ritual, not a rudder.

Only 22% retire outdated strategies — the biggest leader gap.

OKR mentors

USE CASE 02 · THE SOLUTION

Close the learning loop

Turn every check-in and retro into a test of the assumptions your strategy is built on.

INPUTS

- **Check-ins**
- **Retrospectives**
- **External signals**
- **Your stated assumptions**

→

AI

Tests reality against your assumptions

each cycle

→

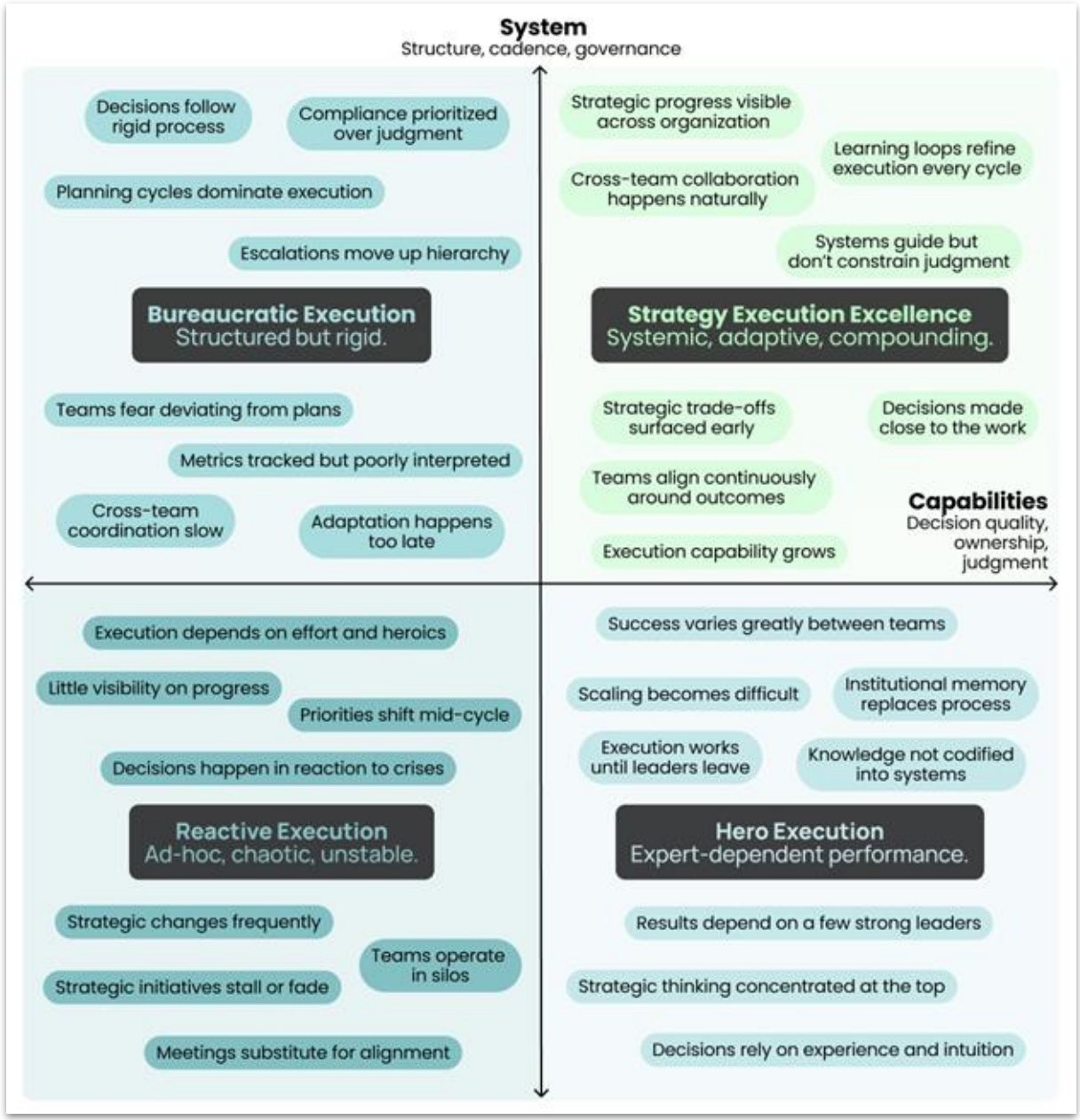
WHAT YOU GET

- ✓ Assumptions validated
- ✗ …and invalidated
- ? What needs more evidence
- ◆ Key cross-team learnings
- → **Stop · double-down · pivot**

How: state your strategic assumptions up front → point AI at your check-in + retro corpus each cycle.
AI proposes the arbitration with evidence; leadership decides.

OKR mentors

Mind your dual-engine by building both your **System** and your **Capabilities**.



OKR mentors

THE COMMON BELIEF

"Once the tools are in place, execution will follow."

→

THE REFRAME

Technology × capability is what makes a pioneer.

The platforms multiply the execution system you bring to them. Combine both and you set the standard for everyone else.

The technology

AI inside your stack, available today

The system

Work redesigned so AI compounds

The judgment

The human decision point, marked

WHAT WE DID ABOUT IT

We designed a dedicated program to empower the next generation of leaders in strategy execution

Four years codifying strategy execution with 600+ organizations. One year testing where AI belongs inside it.

Certified Strategy Operations Leader (CSOL©)

+ AI for Strategy Execution track (CSOL-AI©)
8 weeks · ~5 hrs/week · 6 live sessions + 2 AI labs + 2×1:1 · tool-agnostic

In partnership with Workboard

WHAT YOU BUILD

Your StratOps Blueprint: the three drivers as one operating model, sized to the maturity you actually have.

WHAT YOU EARN

Earned on evidence, not attendance. Six deliverables for your own organization are the exam.

WHO YOU JOIN

12 curated peers in your role, and an executive network that keeps meeting after the cohort.

OKR mentors

WHAT YOU BUILD, WEEK BY WEEK

Everything you saw today, built for your organization

01

Strategy Execution Diagnostic

WHERE IT LEAKS

02

Strategic Alignment Architecture

ALIGNMENT

03

Operating & Learning Rhythm Design

DISCIPLINE

04

AI Leverage Map

CSOL-AI TRACK

05

Capability Development Plan

LEARNING

06

StratOps Blueprint

THE BIG PICTURE

Check the full Certified Strategy Operations Leaders CSOL© program

OKR mentors

AI brings capacity your organization never had. Strategy Execution Capability tells it where to go

Start with where you stand.

The Strategy Execution Quick Check

Questions? Let's take them now.

600
organizations supported

70k
professionals trained

150
strategy execution experts

30
countries

OKR mentors

STRATEGY ACCELERATION AWARD

STRATEGY ACCELERATION AWARD

Award Categories

- AI Accelerated Execution
- Golden Thread: Performance Coherence
- Operating Model & Execution Excellence

2026 US Winners

axos®

AI-Accelerated Execution

pax8

Golden Thread: Performance Coherence

CROWDSTRIKE

Operating Model & Execution Excellence

STRATEGY ACCELERATION AWARD

2026 UK Winner

AI Accelerated Execution

STRATEGY ACCELERATION AWARD

AI-Accelerated Execution



awarded to

Sella

Stefano Corradino

Head of Group Execution Governance



Sameera Moinpour

Global VP, Customer Success & Services

WorkBoard AI

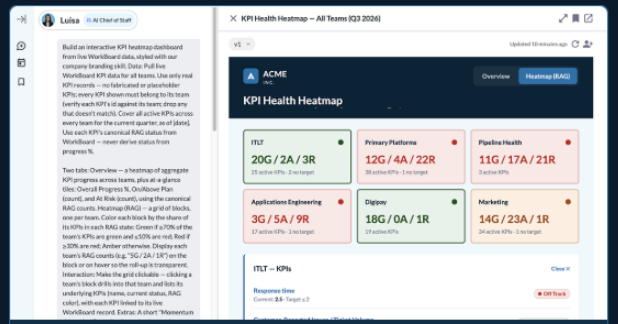
WorkBoardAI Agents: State of the Art

Sameera leads the customer success, strategic services, and solutions teams at WorkBoard. She has helped hundreds of organizations tailor strategy execution and OKR practices to their culture and align on outcomes. Sameera has personally coached over 1,000 teams to set and align OKRs, and is one of the most experienced OKR coaches in the world. She is a member of the Results Foundry faculty and works directly with senior leaders across Ford, Workday, Juniper, AstraZeneca, and other large enterprises. Sameera has a Bachelor's degree from the University of California, Santa Cruz and has lived and worked in Spain and the UK.

Agent Gallery

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

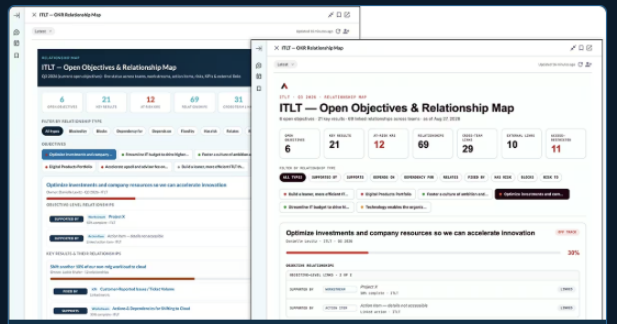
All | Dashboards | Decks | Utilities | Workflows



KPI Heatmap Dashboard

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

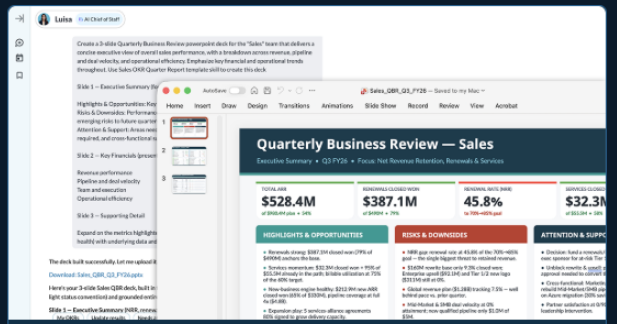
CHIEF OF STAFF | DASHBOARD



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.

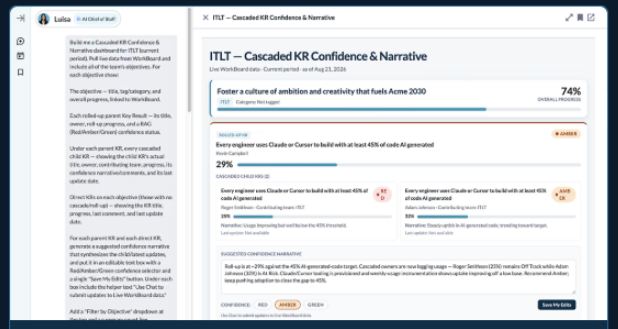
CHIEF OF STAFF | LEADERSHIP COACH | PORTFOLIO ANALYST | UTILITY

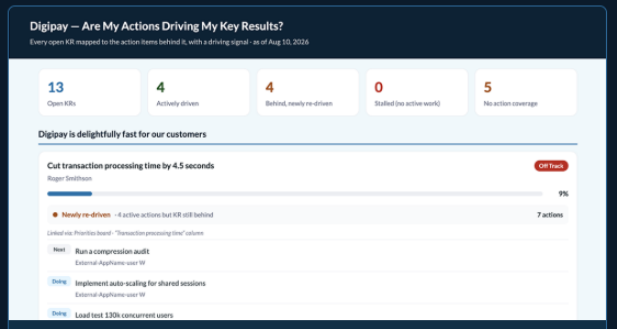


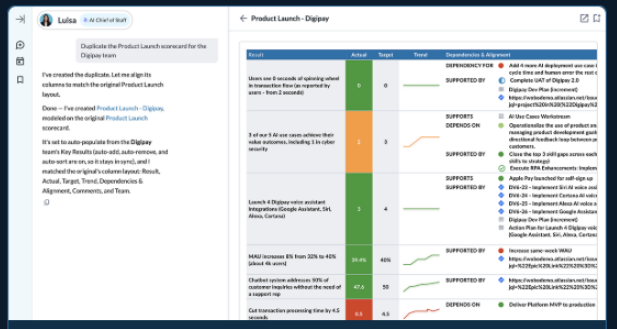
Build a Sales Overview Deck

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

CHIEF OF STAFF | DECK



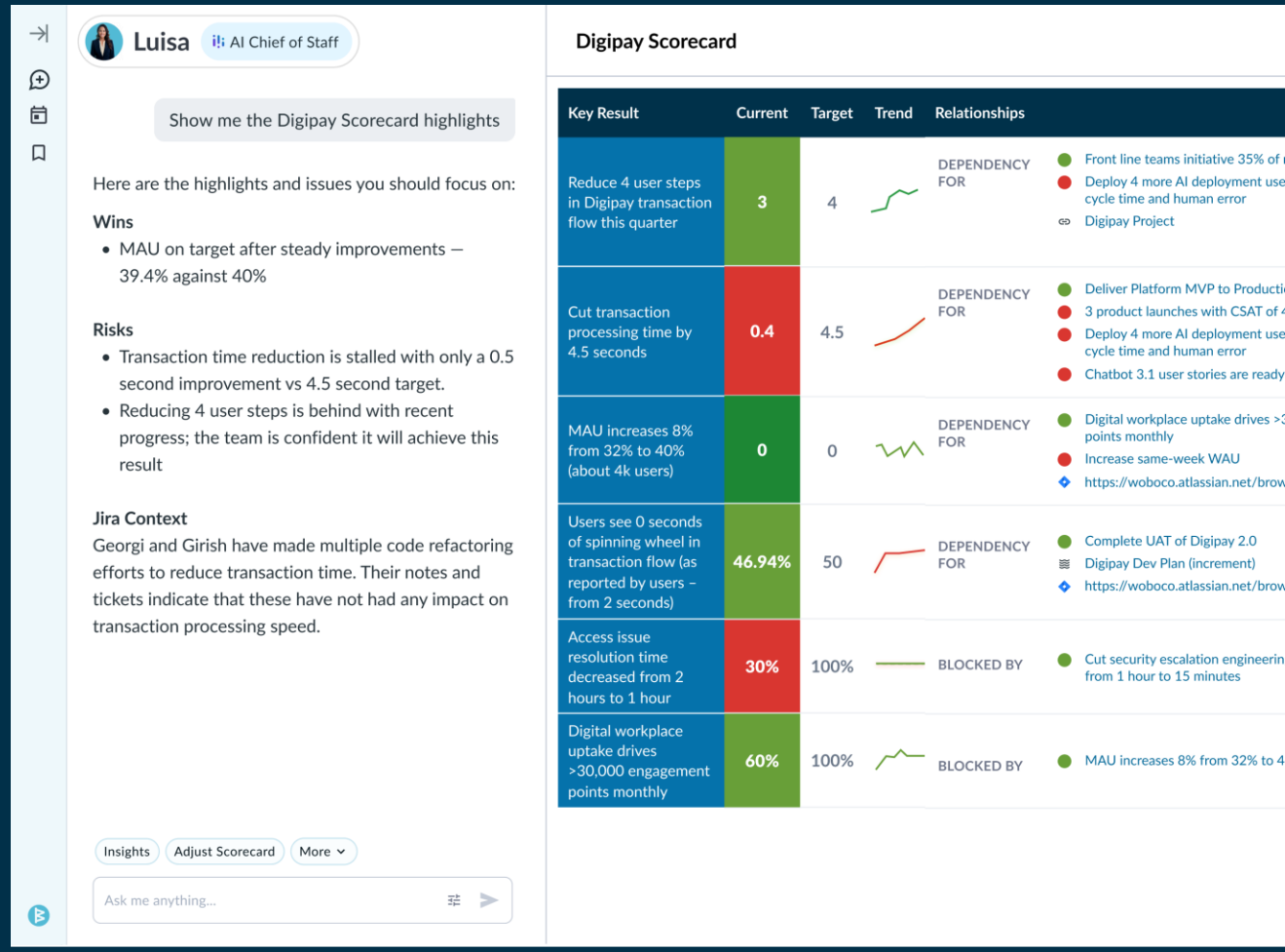




Strategy execution and OKRs now completely agentic and chat-driven.

+

New Agentic Foundation gives agents the capability of Claude.



©2026 WorkBoard Inc.



Can Your People Draw the Line? Strategy Visible at Scale

Brittney Gorham

Chief Business Performance Officer

Optum

Brittney 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.

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

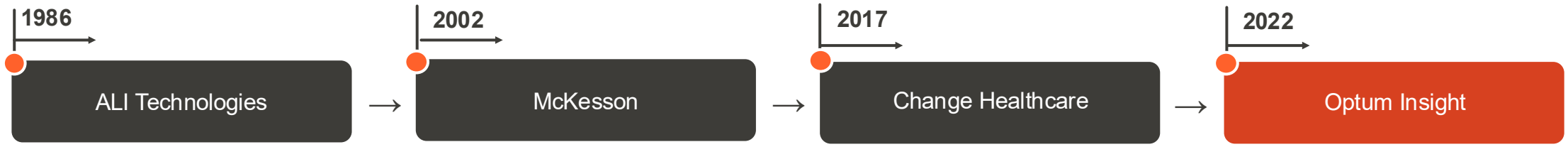
Brittney Gorham | Chief Business Performance Officer, Optum Enterprise Imaging

Optum

THE SETUP

Why This Was Hard

A MARKET THAT HAS CONSOLIDATED OVERTIME



$350M

Medical Imaging Business

1,200

Employees

7

Countries

3

Solution Domains (Radiology, Cardiology, Cloud EI Platform)

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

© 2026 Optum, Inc. All rights reserved.

THE EXECUTION TRAP

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.

Optum

© 2026 Optum, Inc. All rights reserved.

“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.

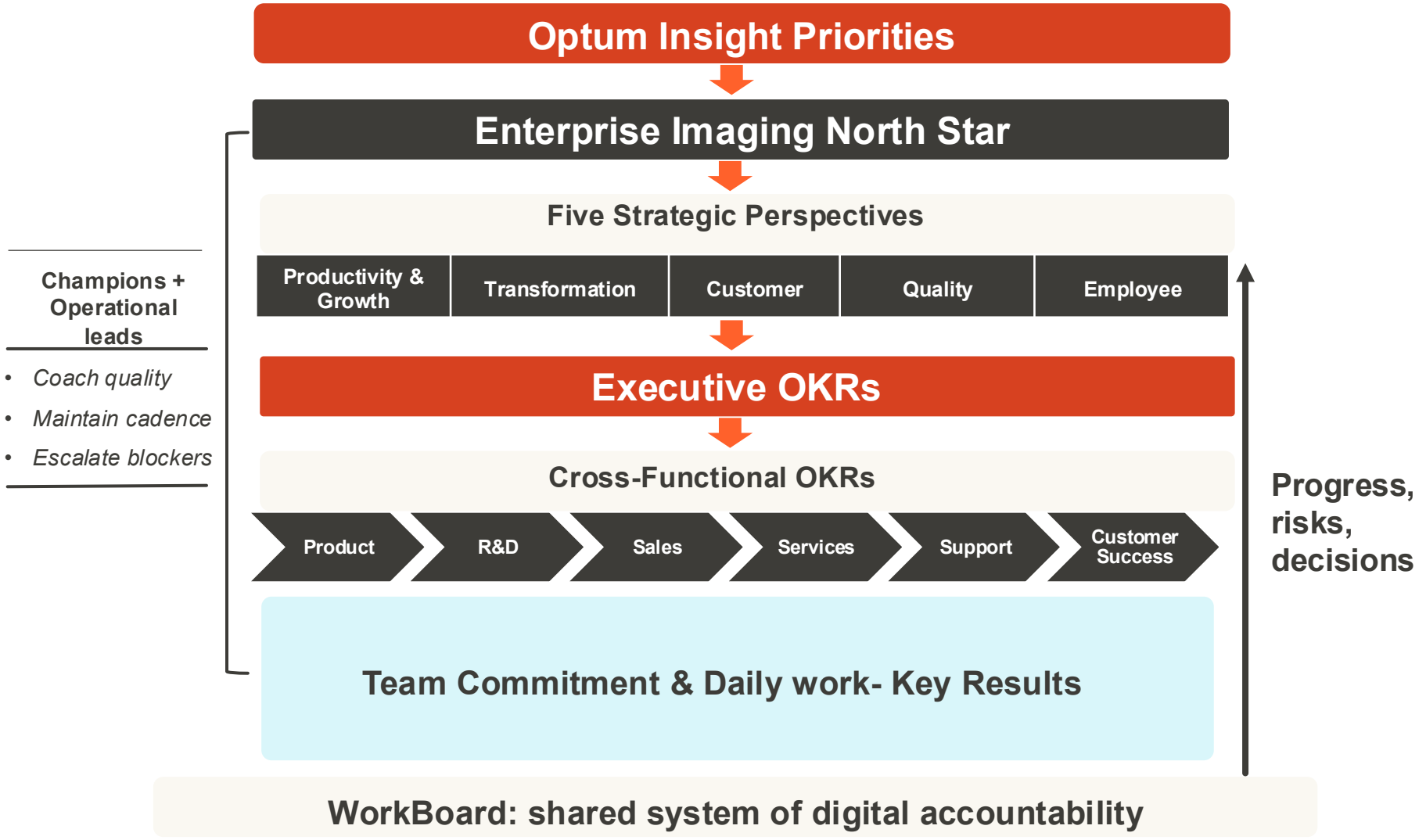
Optum

© 2026 Optum, Inc. All rights reserved.

THE CONNECTION

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.



© 2026 Optum, Inc. All rights reserved.

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.

Optum

© 2026 Optum, Inc. All rights reserved.

PROOF

Strategy Realization

OKR EXAMPLE

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

Key Results:

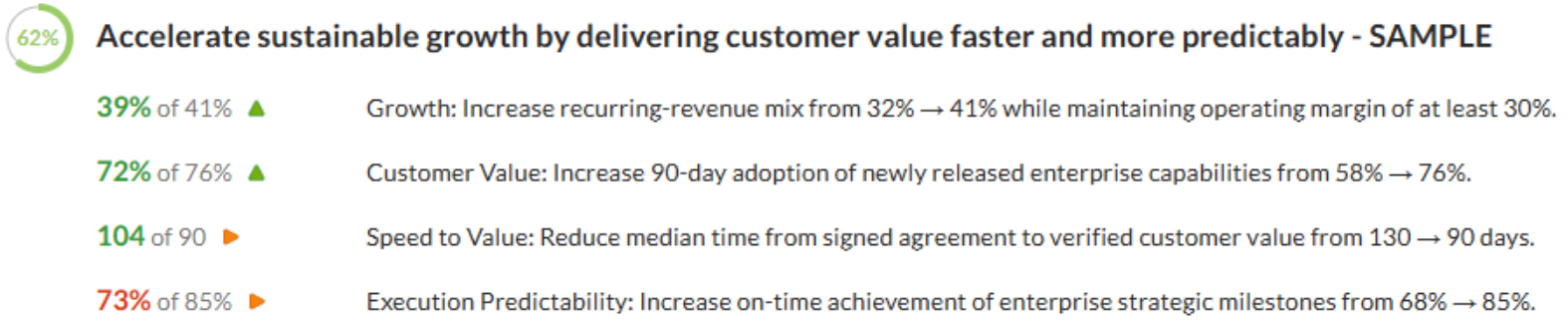
KR1 — Growth: Increase recurring-revenue mix from 32% → 41% while maintaining operating margin of at least 30%.

KR2 — Customer Value: Increase 90-day adoption of newly released enterprise capabilities from 58% → 76%.

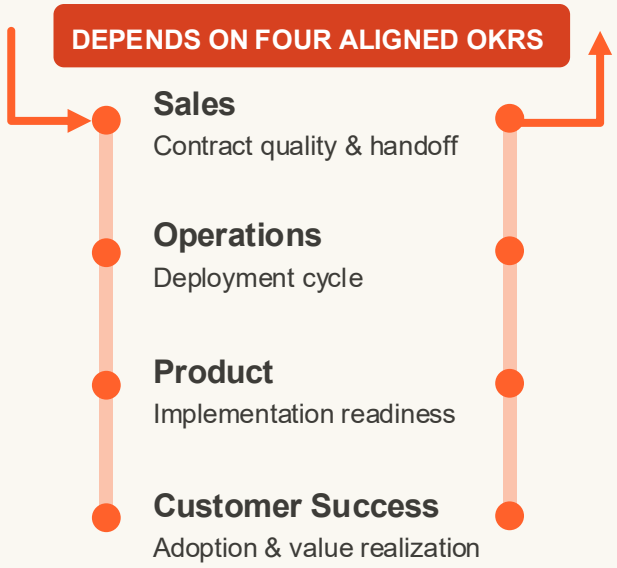
KR3 — Speed to Value: Reduce median time from signed agreement to verified customer value from 130 → 90 days.

KR4 — Execution Predictability: Increase on-time achievement of enterprise strategic milestones from 68% → 85%.

TRACKED LIVE, NOT REPORTED



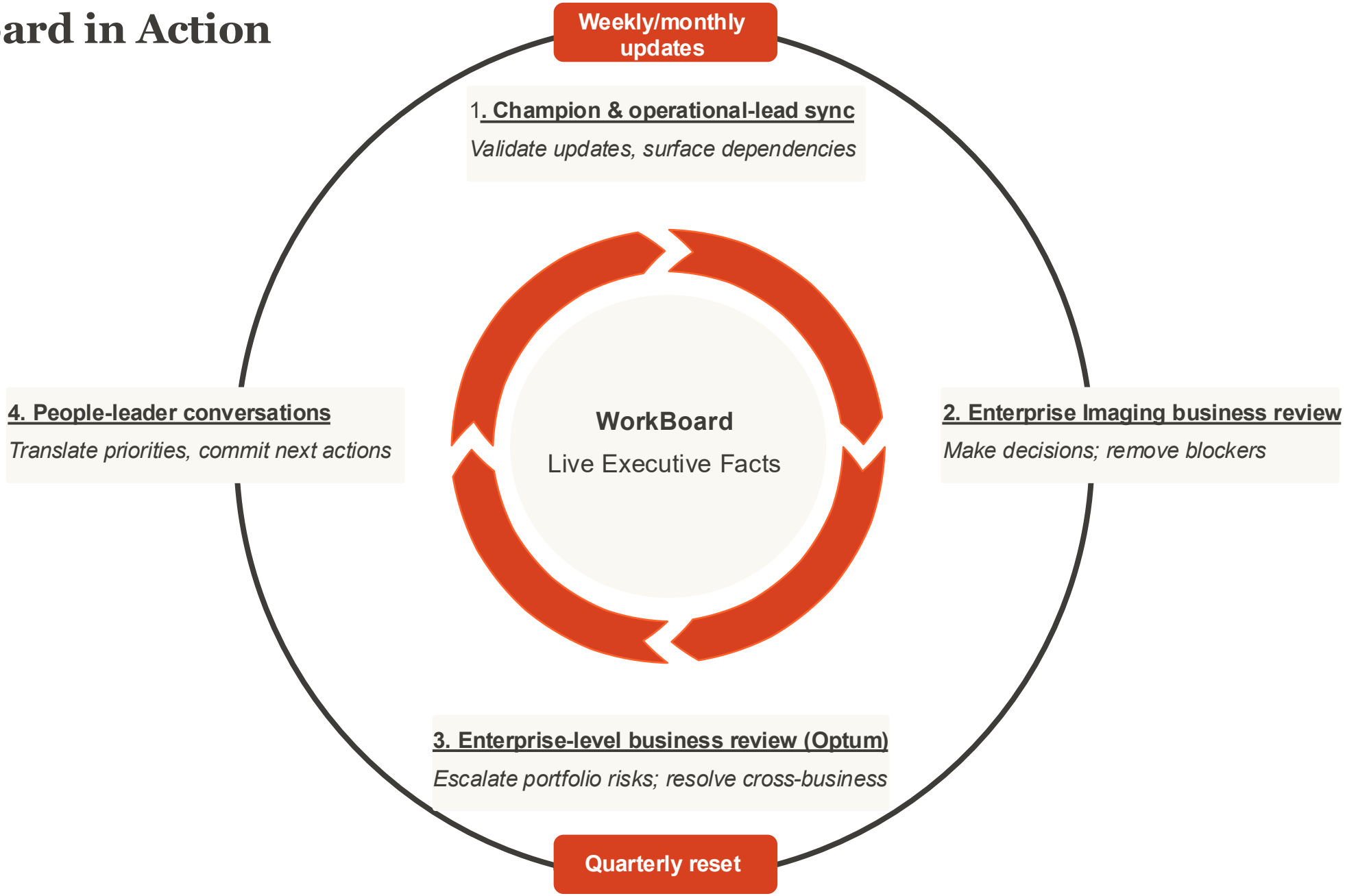
KR3: Reduce time to customer value 130 → 90 days



© 2026 Optum, Inc. All rights reserved.

THE MONTHLY OPERATING RHYTHM

WorkBoard in Action

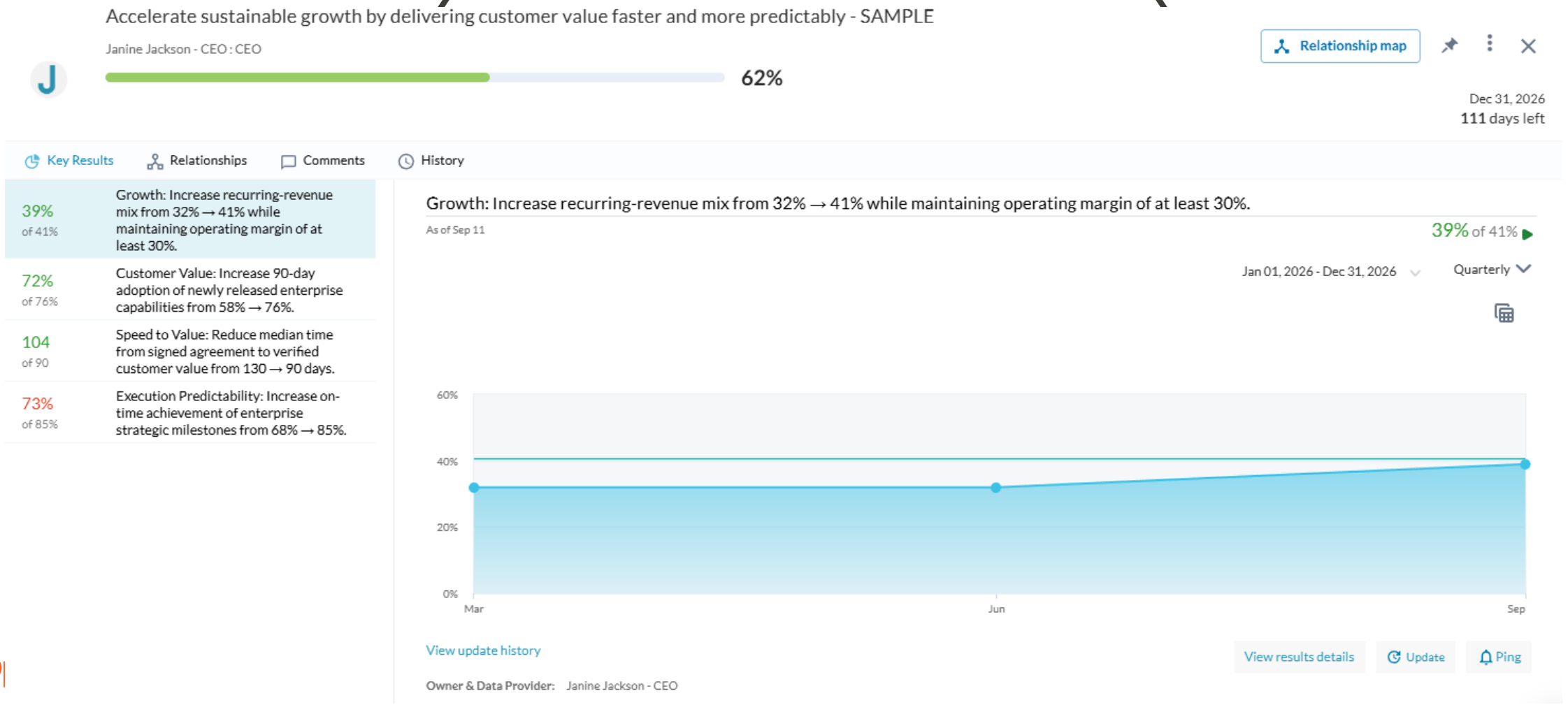


WorkBoard in Action

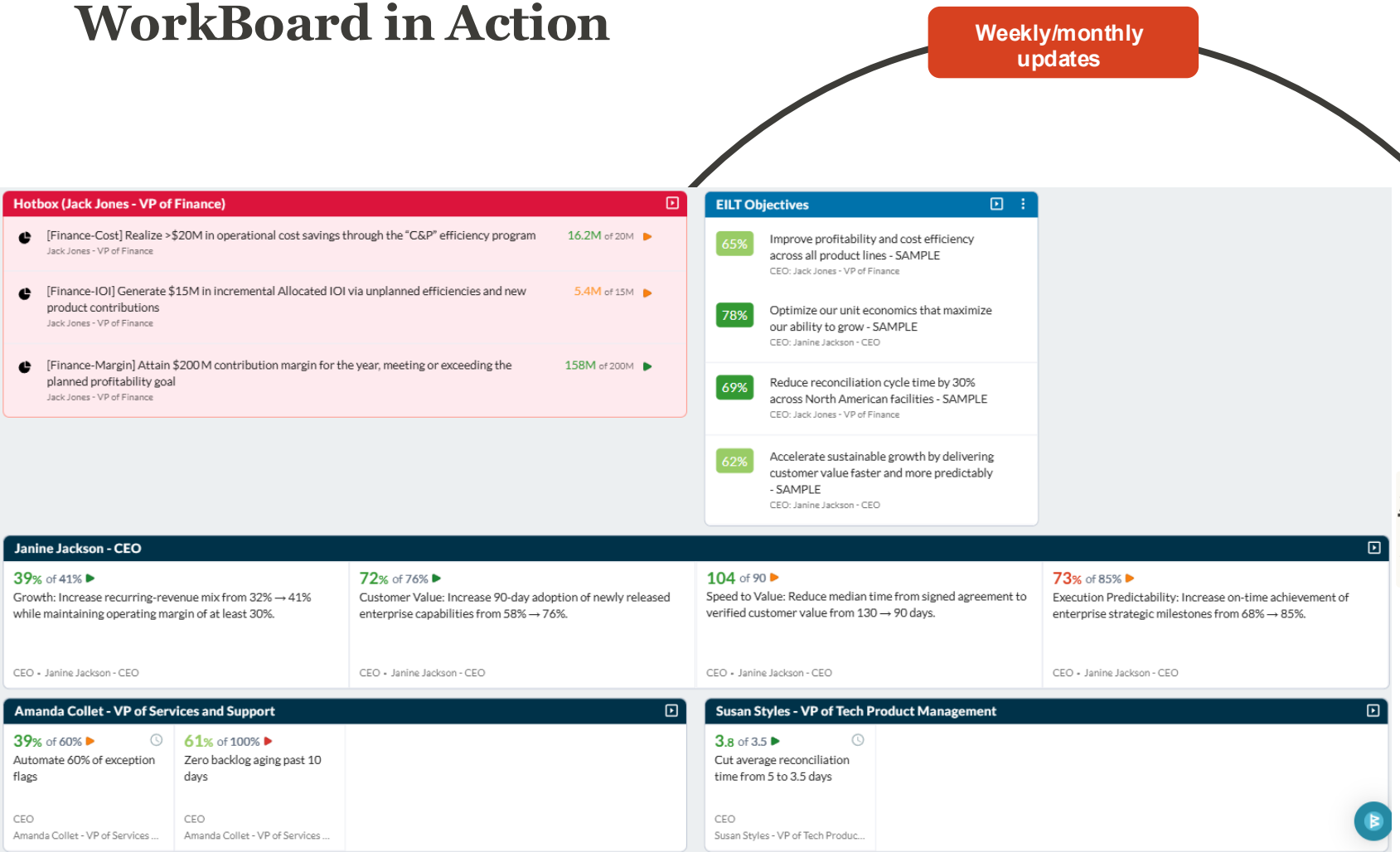
Weekly/monthly updates

1. Champion & operational-lead sync

Validate updates, surface dependencies



WorkBoard in Action



2. Enterprise Imaging business review

Make decisions; remove blockers

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

Weekly/monthly updates

Last updated As of Sep 14, 2026 — *108 days left*

Jan 1, 2026 → Dec 31, 2026 | All Data



Activity | Attachment

Ping | Confidence | Update

Add new comment

Ahmad Alibabaei • Sep 14, 2026 07:22 pm
Changed result confidence flag to high
3.8 for the week of Sep 11, 2026
Average reconciliation time improved to 3.8 days. Standard work and automated routing remain effective

Ahmad Alibabaei • Sep 11, 2026 11:33 pm
Changed result confidence flag to medium
4.8 for Q1 FY26
Average reconciliation time improved to 4.8 days. Standard work and automated routing remain effective

Ahmad Alibabaei • Sep 11, 2026 11:27 pm
Changed result confidence flag to high
4.5 for the week of Jul 31, 2026
Average reconciliation time improved to 4.5 days. Standard work and automated routing remain effective

Quarterly reset

4. People-leader conversations

Translate priorities, commit next actions

OWNER & DATA PROVIDER

Susan Styles - VP of Tech Product Management

OBJECTIVE

Reduce reconciliation cycle time by 30% across North American facilities - SAMPLE

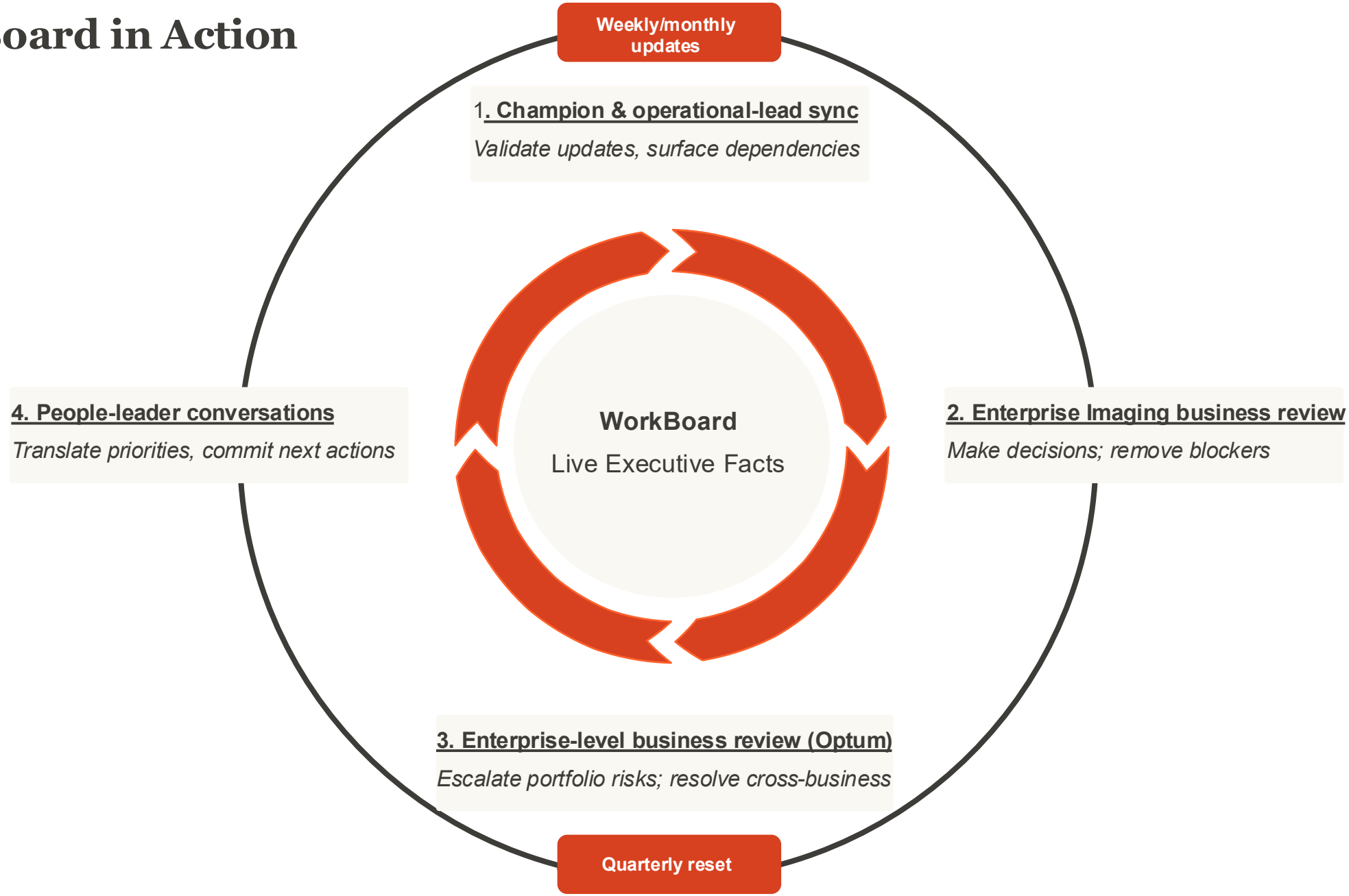
69% • CEO: Jack Jones - VP of Finance

**Key result weighting:* 33.333%

RELATIONSHIPS (0) — Relationship map | +

THE MONTHLY OPERATING RHYTHM

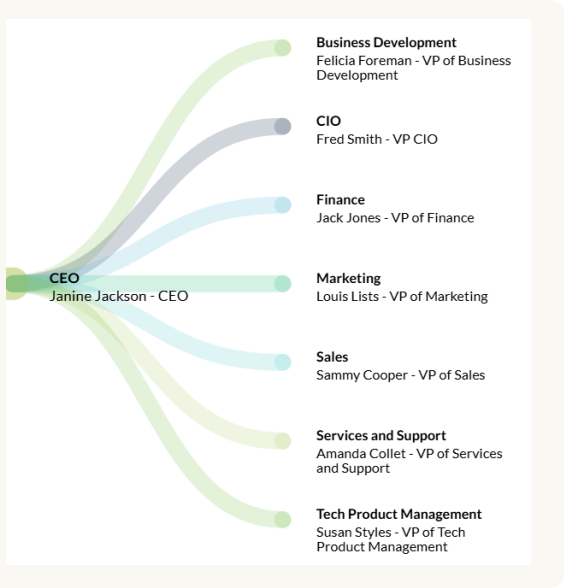
WorkBoard in Action



WorkBoard in Action

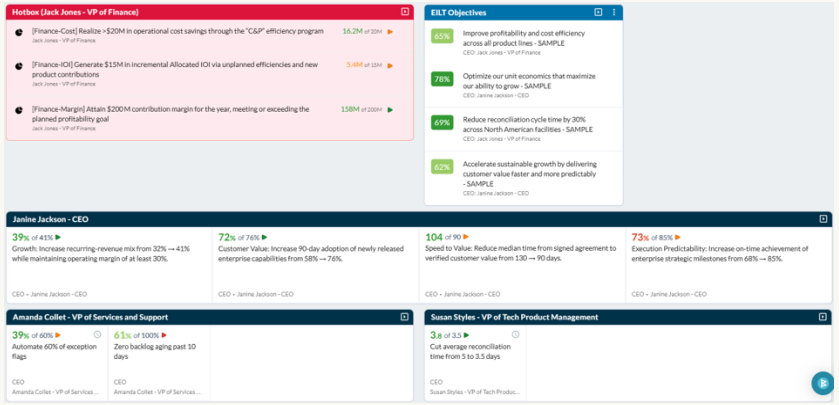
01 DIGITAL ACCOUNTABILITY

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



03 KEY RESULTS, SCORED



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

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.

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.

Optum

© 2026 Optum, Inc. All rights reserved.

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.

Optum

© 2026 Optum, Inc. All rights reserved.

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.

Optum

© 2026 Optum, Inc. All rights reserved.

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.

© 2026 Optum, Inc. All rights reserved.



Optum is a registered trademark of Optum, Inc. in the U.S. and other jurisdictions. All other brand or product names are the property of their respective owners. Because we are continuously improving our products and services, Optum reserves the right to change specifications without prior notice. Optum is an equal opportunity employer.

© 2026 Optum, Inc. All rights reserved.



Strategy Execution at Wallenius Wilhelmsen

Pete Gornall

Vice President, Corporate Strategy & M&A

Wallenius Wilhelmsen

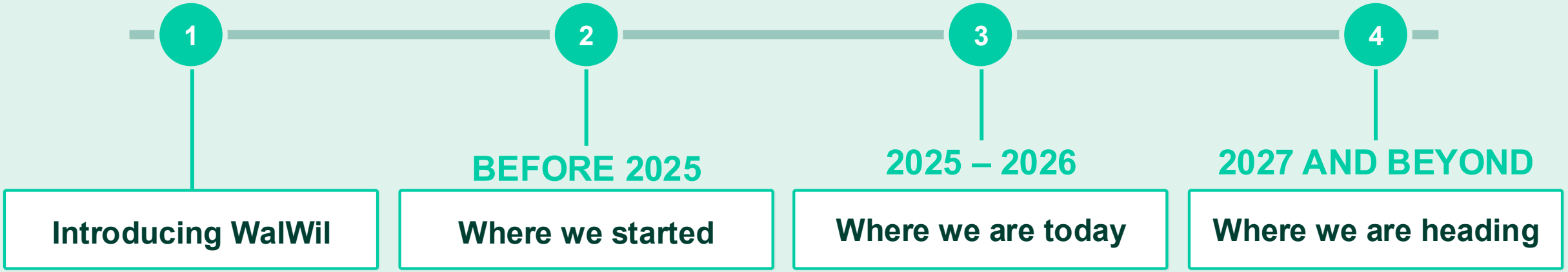
Pete is Vice President of Corporate Strategy at Wallenius Wilhelmsen, where he is responsible for corporate strategy, strategy execution, mergers and acquisitions, and strategic initiatives across the global business. Prior to joining Wallenius Wilhelmsen, he spent eight years with McKinsey & Company advising transportation, logistics, and infrastructure clients on growth, transformation, and M&A. Pete began his career as an officer in the British Army and is a graduate of the University of Oxford.

Strategy Execution at Wallenius Wilhelmsen

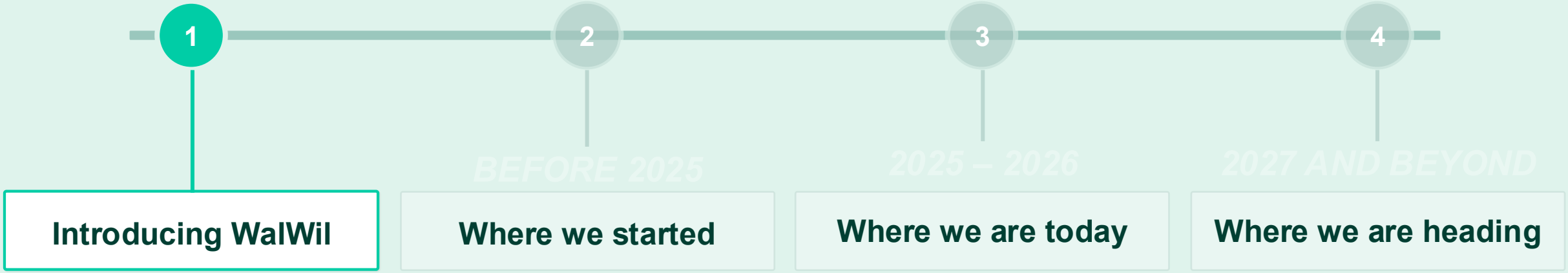
WorkBoard Accelerate 2026

October, 2026

Our plan today



Our plan today | Introducing WalWil



Leading the way to connected, sustainable supply chains



Total Revenue 2025

5.2 USD billion

EBITDA 2025

1.8 USD billion

OSE Ticker

WAWI

Key Segments

Shipping | Logistics | Government

Our three key segments

Shipping



4.0 USD billion in revenues

1.6 USD billion of adj. EBITDA

Market leader with unrivaled high & heavy and breakbulk capabilities

Logistics



1.1 USD billion in revenues

133 USD million of adj. EBITDA

Customers' **preferred partner** for logistics, processing and terminal services

Government



411 USD million in revenues

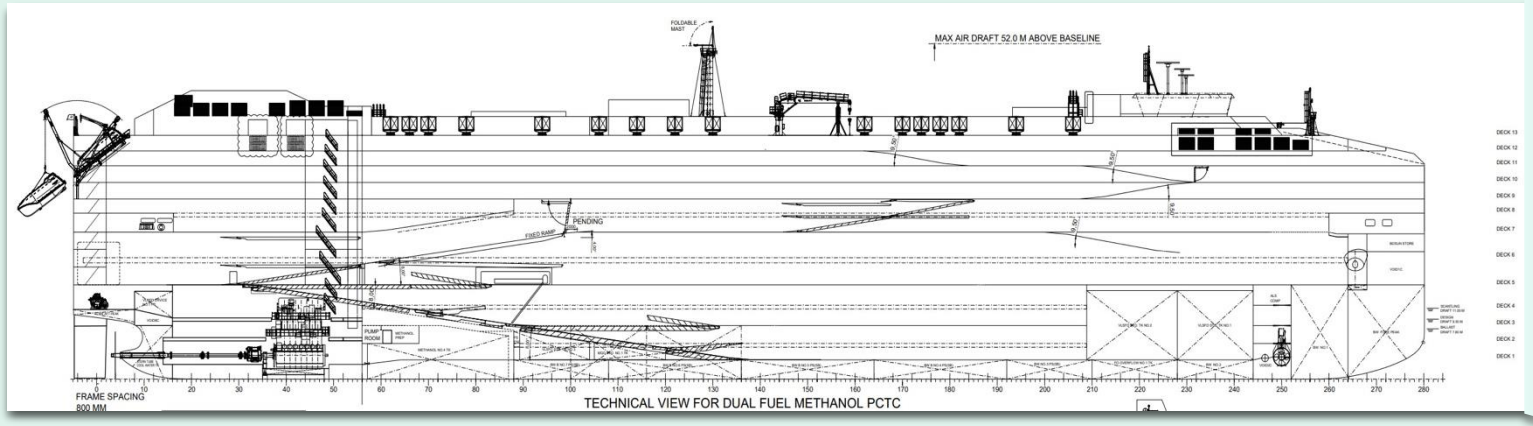
153 USD million of adj. EBITDA

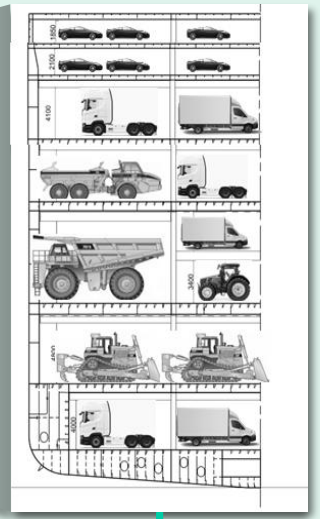
Dedicated ocean transport and logistics services for the U.S. government

All figures are from 2025. Read more in our annual report*

Pure Car and Truck Carriers (PCTCs) are purpose-built for global vehicle and equipment logistics

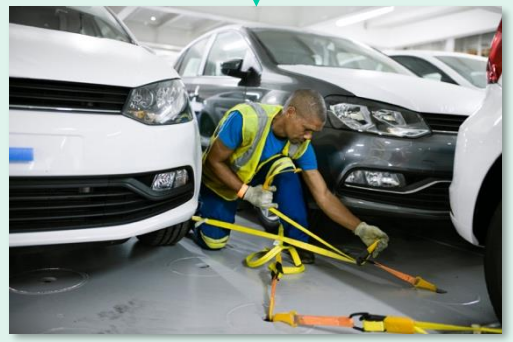
A PCTC is a large multi-storey floating car park with ramps



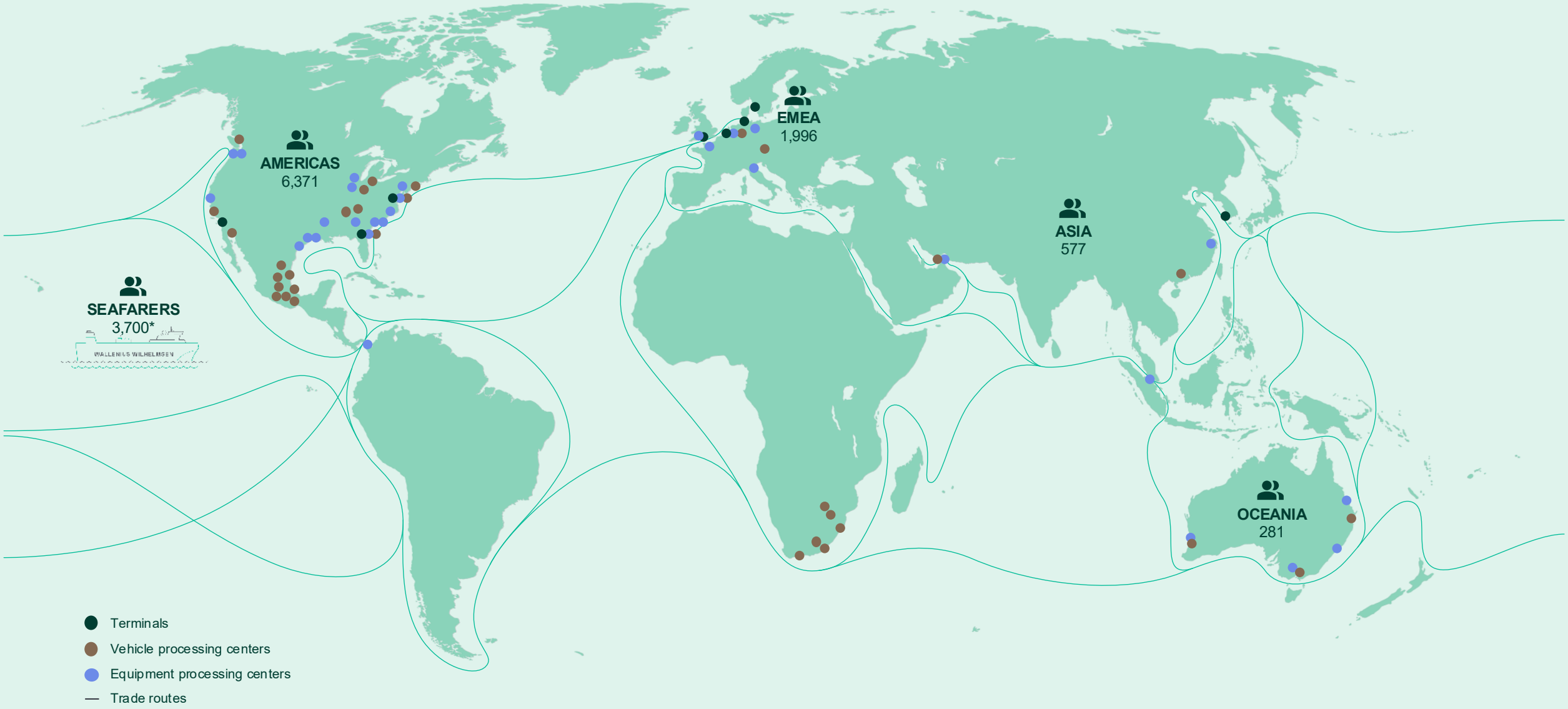






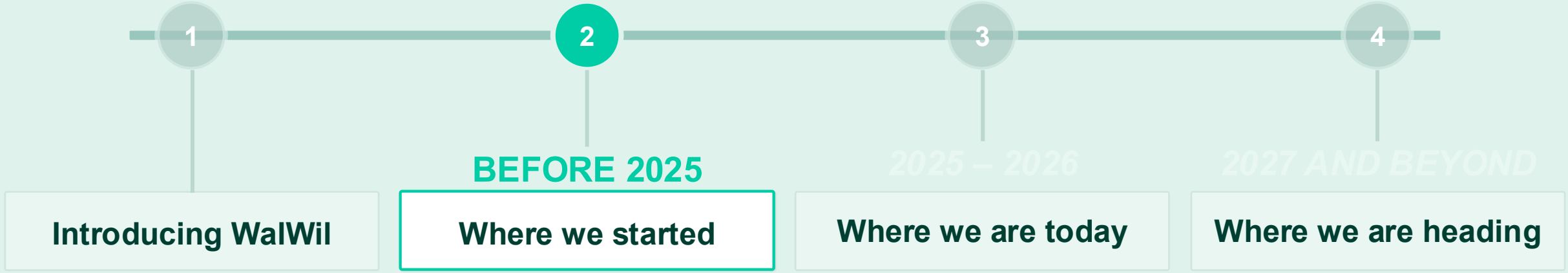


An unrivaled global network and footprint



Seafarers - Figure is for the total crewing pool for our fleet / Worker figures include both employees and contingent workers*
All people statistics exported April 10 2025

Our plan today | Where we started



Our 2027 strategy

We had a clear strategy…

Mission

We lead the way to connected, sustainable supply chains

Goals

- Be our customers' first choice in core businesses
- Demonstrate the value of integrated solutions
- Make net-zero available and affordable
- Create value for customers, employees, shareholders and partners

Values

We Care — We Challenge — We Commit

Enablers

- Safe, secure and compliant
- Customer-centric
- Digital-first
- Cost- and energy efficiency
- One band of rockstars

…but we had no strategy execution engine



No single set of enterprise priorities



No enterprise-wide definition of success

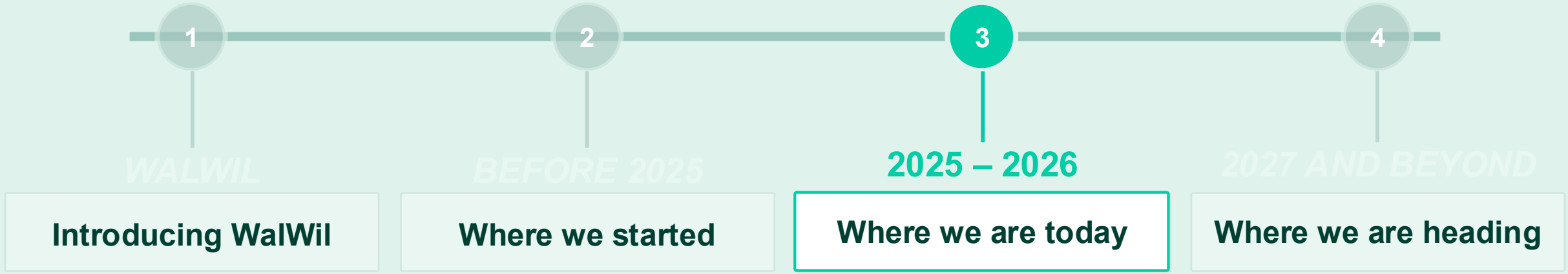


No common tool for strategy execution



No execution rhythm

Our plan today | Where we are today



First, we established a single set of enterprise priorities linked to our strategy

Our 2027 Strategy

Our 2027 strategy

We are connecting the dots

Mission

We lead the way to connected, sustainable supply chains

Goals

- Be our customers' first choice in core businesses
- Demonstrate the value of integrated solutions
- Make net-zero available and affordable
- Create value for customers, employees, shareholders and partners

Values

We Care — We Challenge — We Commit

Enablers

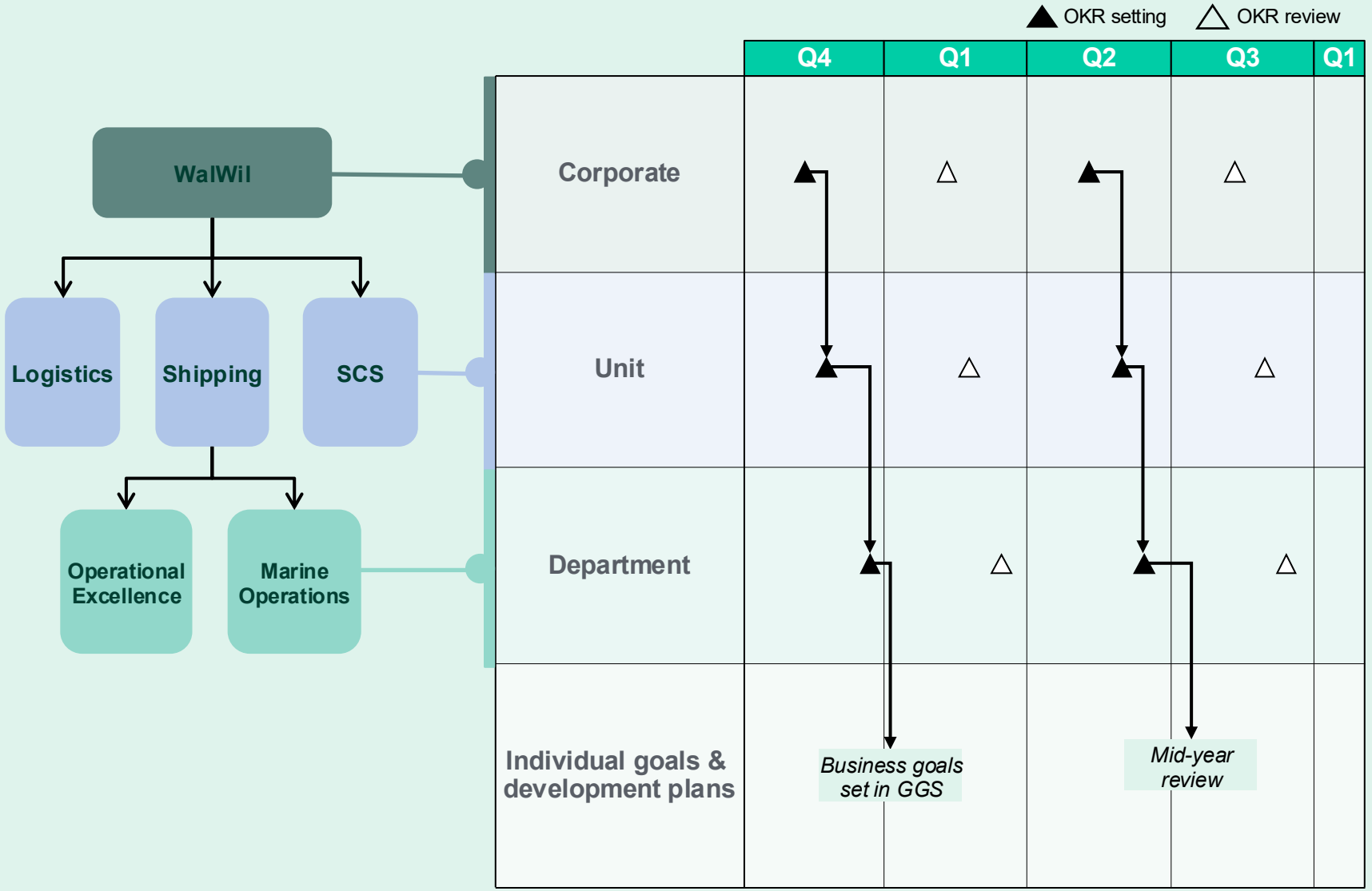
- Safe, secure and compliant
- Customer-centric
- Digital-first
- Cost- and energy efficiency
- One band of rockstars

WalWil 2027: 21 strategic initiatives

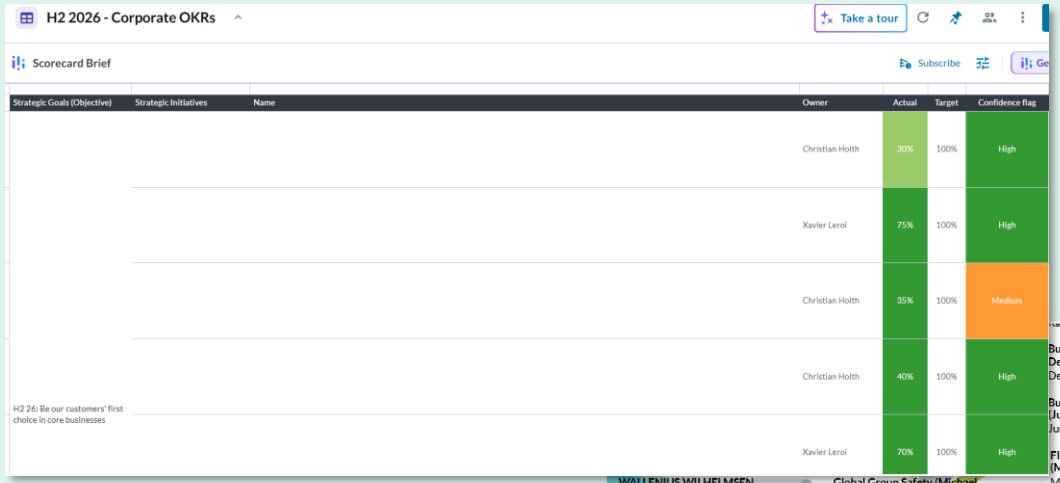
WalWil 27 | A program of 21 initiatives within nine priorities to implement our 2027 strategy

Be our customers' first choice in core businesses	Demonstrate the value of Integrated solutions	Make net-zero available and affordable	Create value for Customers, Shareholders, Employees, and Partners
Strengthen & Grow our Businesses	Integrate Internally	Deliver on 2040 Net-Zero Trajectory	Empower employees
Increase our Competitiveness	Pilot Integrated Solutions		Deepen Customer Positions and Relations
			Return Attractive Value to Shareholders
			Secure Critical Strategic Partners

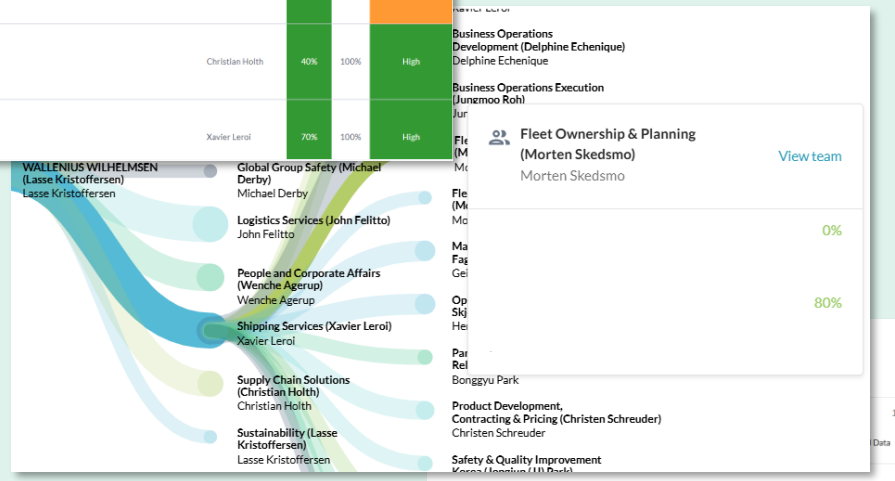
Second, we set an enterprise-wide definition of success by setting or reviewing OKRs every quarter



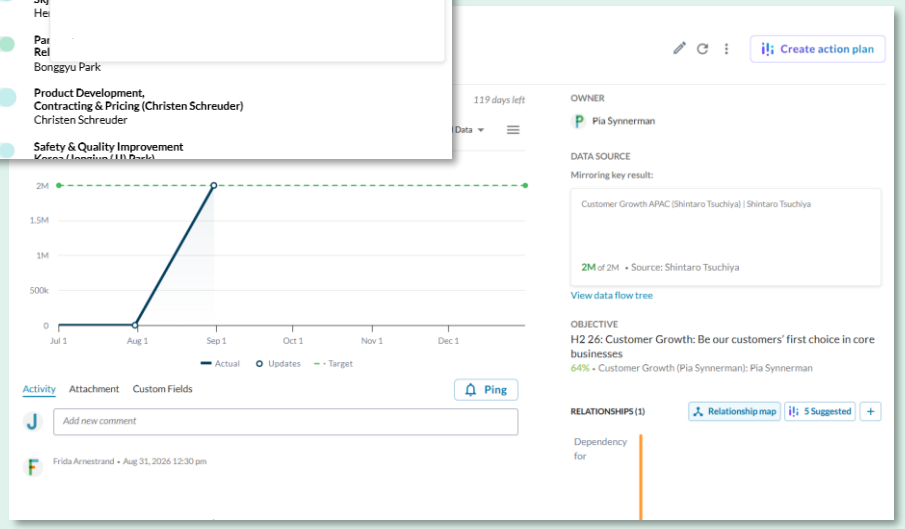
Third, we implemented WorkBoard to drive transparency, enable alignment and support execution across WalWil



Drive transparency

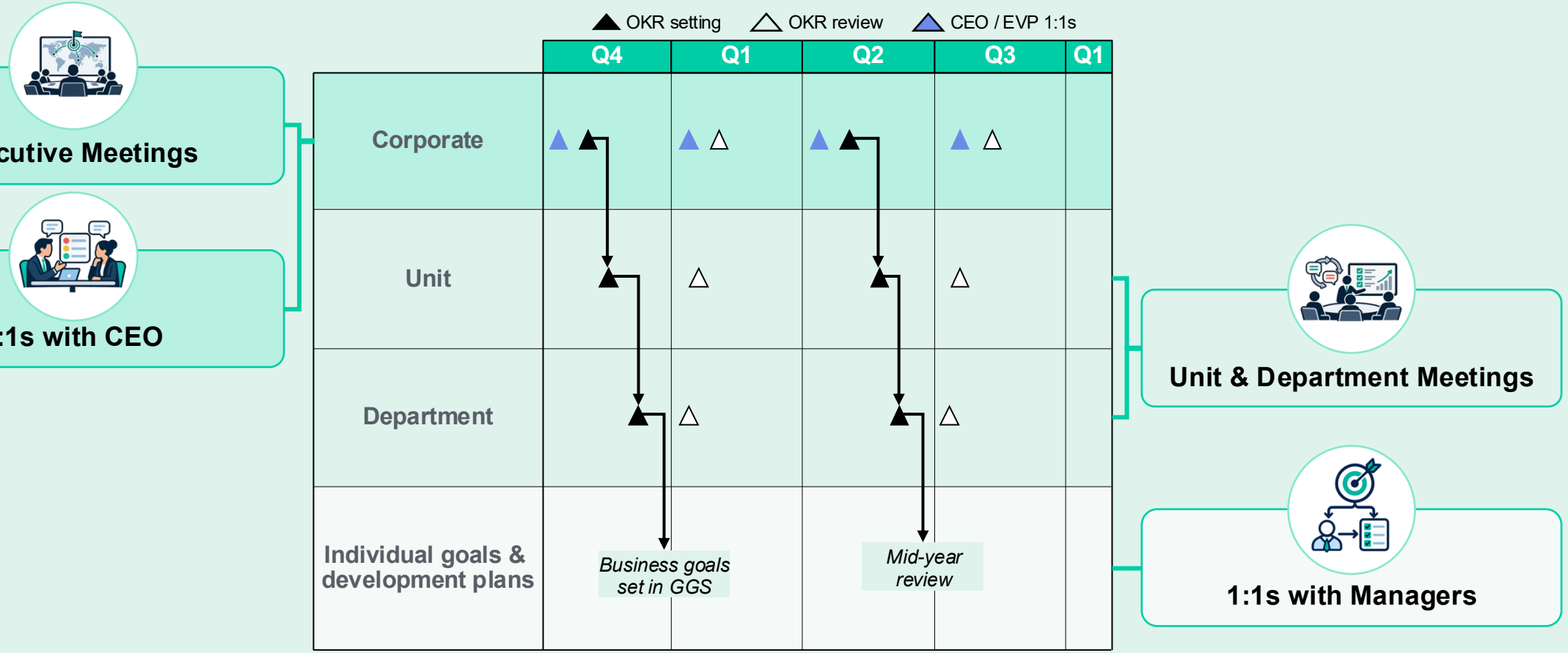


Enable alignment

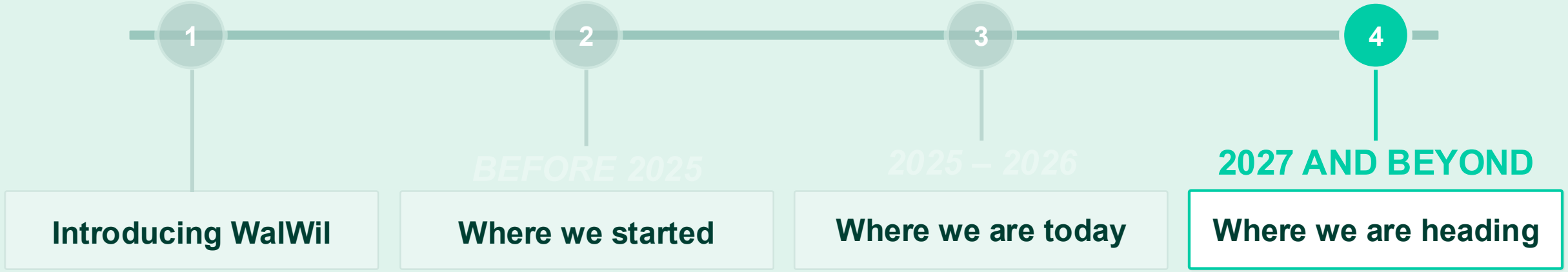


Support execution

Finally, we embedded strategy execution into the company's operating rhythm



Our plan today | Where we are heading



Where we are heading...



Cascade further into the organisation



Get full value from AI



Learn from you today

In summary: What made our approach work?

Four factors got us to this point…



CEO and executive team sponsorship



One strategy, one programme, one operating rhythm



Train-the-trainer approach

WorkBoard

Technology enabled scale and transparency



Making Strategy Visible

James Taylor

Senior Director and Chief of Staff

SONY

James is Chief of Staff to the Head of CISD and Senior Director for Strategy at Sony. He joined Sony in 2019 after a decade working in intelligence and risk, where his first role was with Sony Pictures as an Information Security Manager, supporting security across 45 companies in 23 countries and spanning both corporate environments and film and television production.

SONY

Making Strategy Visible

How CISD is building a more visible, outcome-focused operating model



James Taylor, Senior Director of Strategy and Chief of Staff, Sony Corporate Information Security Division (CISD)

CONTEXT

Who Are We?



Sony

A global business with diverse markets, operating companies, environments, risks, and priorities

CISD

Provides shared information security direction, capabilities, and coordination

CISD teams

Execute specialized work across cyber defense, risk, security partnerships, governance, and operational enablement

The Operating Challenge:

Maintain a shared strategic direction across a complex, global execution environment.

© 2026 Sony. All rights reserved.

CONTEXT

Strategy at CISD: The Challenge

01

Success centered on completion of efforts

02

There was no clear alignment between the work and a division wide strategy

03

The intention behind the strategy wasn’t clear across the division

© 2026 Sony. All rights reserved.

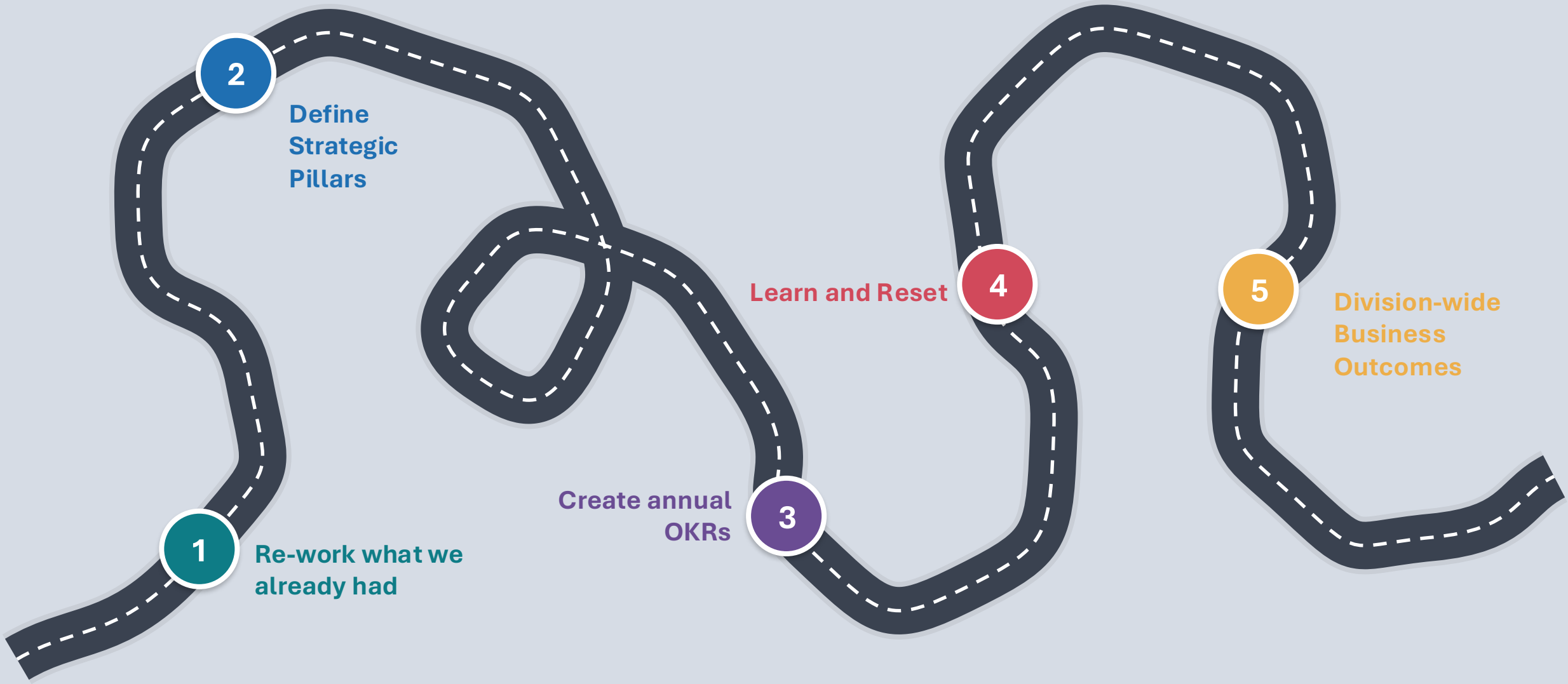
THE FRAMEWORK

What We Wanted From OKRs and WorkBoard



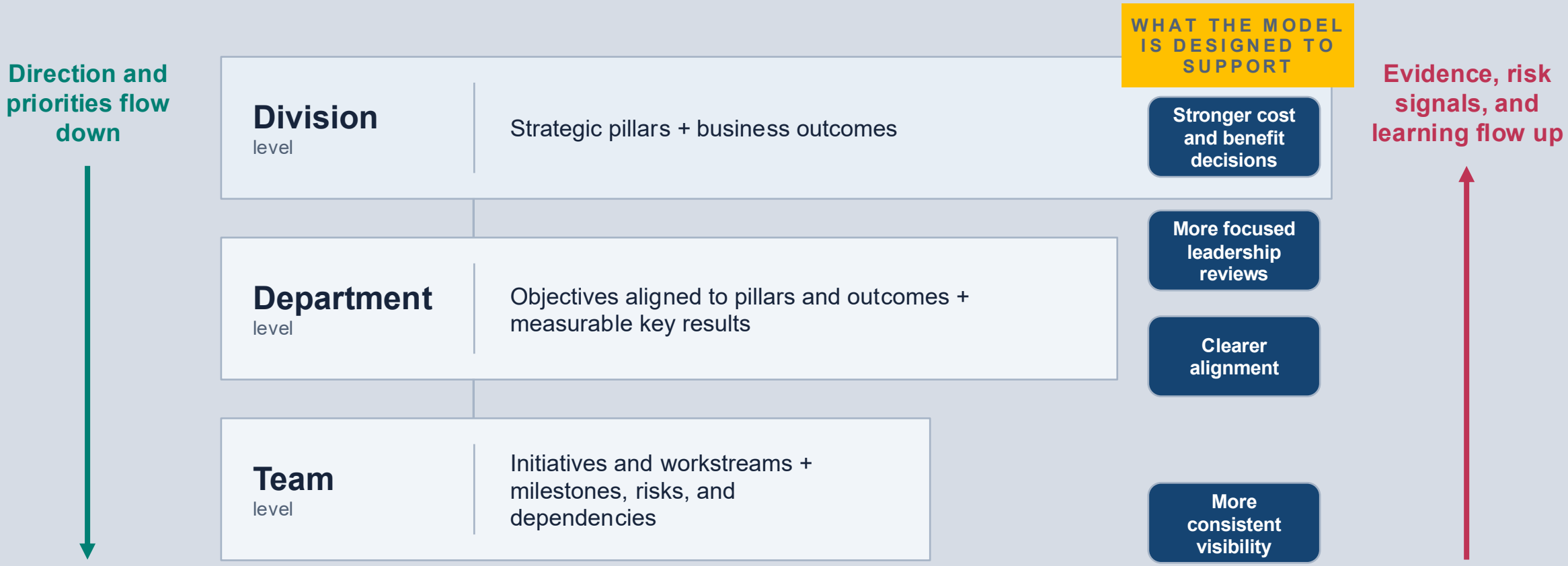
© 2026 Sony. All rights reserved.

Strategy at CISD: Our Evolution



© 2026 Sony. All rights reserved.

One Strategy, Translated Through Every Level of Execution



WorkBoard provides the shared environment where these levels can be viewed together.

© 2026 Sony. All rights reserved.

Ways We've Embedded Workboard Into the Operating Rhythm



01 Utilising AI summaries for department updates to the head of the division

02 Created AI skills for custom dashboards to share with teams

03 Established a quarterly check-in across the divisions leadership

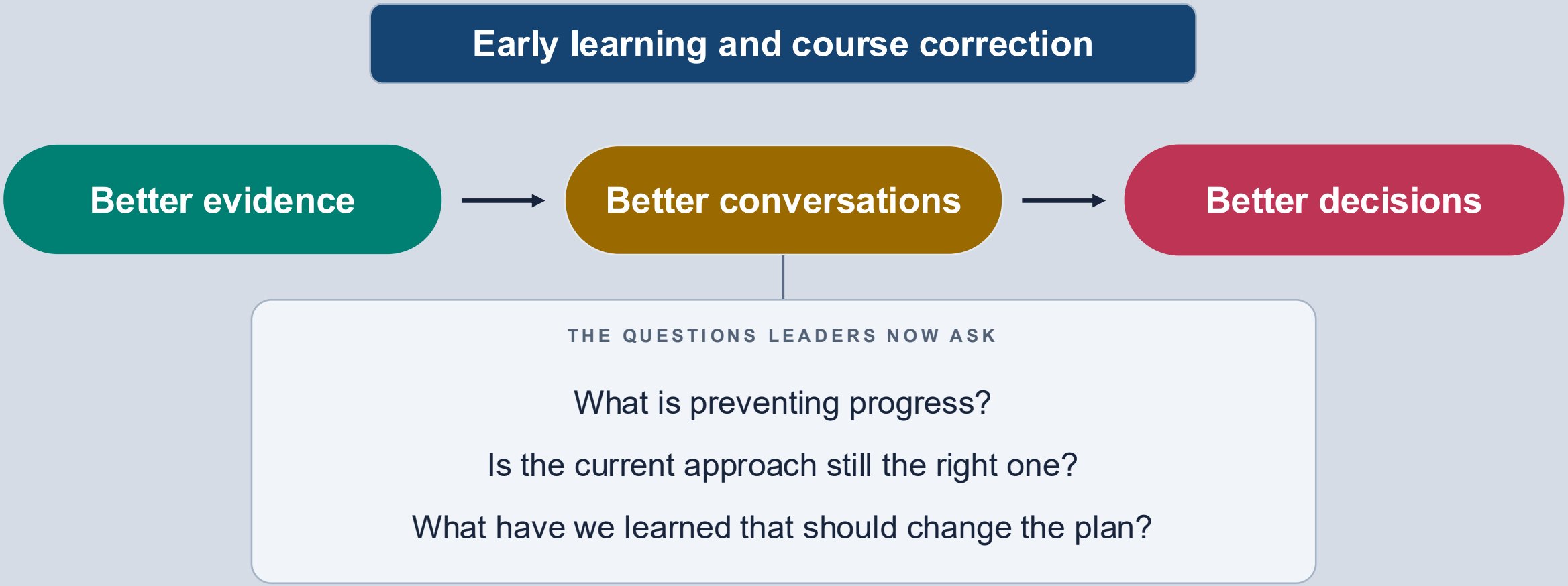
04 Created KPIs that measure general performance and help drive results

05 Utilise daily focus to help keep on top of what matters

06 Utilise the AI feature for meetings through Outlook

© 2026 Sony. All rights reserved.

Better Evidence Enables Better Conversations and Decisions



© 2026 Sony. All rights reserved.

LESSONS SO FAR

What We Have Learned About Making the Model Work

Establish clarity and commitment from the top

Clear divisional priorities, visible leadership commitment, and consistent leadership behavior are imperative.

Stronger key results take time and practice

Teams need coaching and regular review to move from tracking activities and deliverables to measuring outcomes. This shift takes time and repetition.

Increase stakeholder engagement

So far, we've focused adoption on a select group of stakeholders. To create a lasting shift in how we think and work, we need to expand adoption.

A strong foundation — and still learning, maturing, and improving.

© 2026 Sony. All rights reserved.

SONY

Thank You

Questions & discussion

James Taylor
james.taylor@sony.com

Accelerate

AI Strategy Execution Forum 2026

Thank you!