

A FOUR-PART SERIES

THE ULTIMATE STEP-BY-STEP GUIDE TO LAUNCHING AN OKR PROGRAM

PHASE 2: LAUNCH



HEY, YOU MADE IT TO PHASE 2!



This is part two of four of our “Ultimate Step-By-Step Guide to Launching an OKR Program.” If you haven’t read the first part yet, you can find links to all four phases below.

Let’s recap what you should already have from the first phase.

At this point, you should have:

- A strong OKR process established and documented for quick reference.
- A dedicated program team that’s ready to own the program.
- A steering committee ready to steer the program in the right direction.
- A list of champions to get certified to support teams in the new process.
- An executive leadership team that is fully onboard and committed to the program’s success.
- A plan for change that will not only inform, but excite!

Phase 2 will focus on launching and announcing the program to everyone involved, OKR training, champion certification and prepping for the executive OKR workshop. Ready? Let’s launch your OKR program!



Download all four step-by-step guides here:



Phase 1: **Setup**



Phase 2: **Launch**



Phase 3: **OKR Cycle**



Phase 4: **Mature & Scale**

OVERVIEW

Announce the Program to Everyone in Scope	04
Provide Basic OKR Training	06
Get Champions Certified	07
Leadership Alignment Survey	08
Conclusion of Phase 2	10
Phase 2 Checklist	11



STEP 1

ANNOUNCE THE PROGRAM TO EVERYONE IN SCOPE

In phase 1, we discussed how you should set a date and send out an invite for the **All-Hands Kickoff**. This All-Hands Kickoff will provide an overview of the OKR program, timeline, and next steps as well as any relevant information about the scope of the teams that will be participating in the program. Our kickoffs usually follow this agenda:

1. Welcome and Introduction

This is pretty standard. We don't think we need to explain this section.

2. What's Changing & Why?

Explain what the OKR program actually entails and the “why” behind the rollout. How is this new OKR program going to affect various departments/teams? Bring up what the goals are for the OKR program (the OKRs for OKRs that you already prepared in phase 1). In addition to stating how the company will benefit from the OKR program as a whole, go into detail about how OKRs will benefit how teams work together and individual performance. You want to get people engaged and excited about the new framework. The last thing you want is for people to just think of this as any other initiative. You'll need to sell the transformative qualities of the OKR rollout and explain in detail how the new OKR process will help and empower everyone individually to achieve more.



3. What are OKRs?

It's best to give a brief summary of what OKRs are. There's no need to turn this into a full fledged OKR course, but you should still provide everyone with some basic information. Not everyone will be 100% familiar with the methodology and some might have no idea what you're talking about. Let everyone know that they will receive more training at a later date, to alleviate their worries. More so, you will likely have a few voices in the room talking about their prior OKR experience and that they don't need yet another introduction. Feel free to remind everyone that there is no global standard of OKRs and every OKR process is different - custom fit to the culture and processes of each organization. Hence, it's critical that everyone engages with the new OKR training to ensure everyone has the same understanding of what OKRs are and how to work with them.

4. Timeline & Support

Give everyone a basic timeline and let them know who they can reach out to if they have any questions or concerns (this should be you and/or other members of the program team). You don't want to overwhelm everyone, so we recommend staying clear of showing a huge calendar full of events. That being said, you also don't want to provide too little information. Nobody likes getting an invite in their inbox without context. When somebody does get an invite, they should think: Oh yeah, we talked about that in the kickoff. It's all about balance. In addition, the timeline should detail their involvement in the coming weeks and make sure everyone understands what is expected of them. An OKR implementation is not a show that people watch passively. It requires active participation. The timeline should detail what and when they need to act.

A basic timeline like this works best:

OKR Training	Champion Certification	OKR Workshops	Execution (OKR Cycle)
(Date - Date)	(Date - Date)	(Date - Date)	(Date - Date)

5. Next Steps and Asks

At the end of the kickoff, you can ask everyone to take a look at the OKR playbook that you prepared in phase 1. This will be their OKR Constitution, and will ensure everyone approaches the methodology the same way. Tell everyone that they should be expecting invites in their calendars soon, and that their active participation is crucial for the success of the OKR rollout. Now is a good time to let the champions that you nominated in phase 1 know that they will, in fact, become certified OKR coaches soon. But first, let's give everyone in scope some proper OKR training.



STEP 2

PROVIDE BASIC OKR TRAINING

You've officially launched and announced the OKR program! There's no turning back now. The next step is to provide everyone with a deeper understanding of the OKR framework.

Have you ever played a team sport, but with everyone following a different set of rules? Sounds like a mess, right!? Without a uniform understanding of the framework, that's what an OKR program can be like. The crux of many OKR program failures is a lack of standardization. There is a lot of information out there about OKRs, but it all seems to be different. That's why it's imperative that everyone in your organization is on the same page about what OKRs are (and what they aren't). The best way to do that is by making sure everyone in your organization receives the same training in the methodology. You can always opt for external OKR experts to run the training for you.

Looking for help? wavenine.com



The OKR training should be designed to provide a thorough understanding of the OKR framework and its principles. This should include best practices when it comes to actually creating OKRs as well as Results Rituals (the habits and operating rhythms that help keep OKRs relevant and consistently managed). We will explain these rituals more in phase 3, when your teams start to use them.

Results Rituals

Action Plans

Calibrate Monday & Celebrate Friday

Monthly Business Reviews

1:1s

Mid-Quarter Check-Ins

Looking for a great place to start with your OKR training? Our free OKR crash course is the perfect introduction (or refresher) to the OKR methodology!

STEP 3

GET CHAMPIONS CERTIFIED

After everyone has been trained in OKRs, it's time for (you guessed it) more training!

This training is different though. Remember those champions that you nominated in phase 1? Well, now we need to get them certified.

The OKR coach certification is a two-day course that provides participants with a deep understanding of the OKR framework and how to facilitate OKR setting workshops. This will be the community of champions that will support your teams going forward in creating and working towards their OKRs. In our coach certification classes, we conduct extensive training in the following:

- The Role of an OKR Coach
- Intro to OKRs and the OKR Cycle
- Crafting High-Quality OKRs
- Change Management Strategies
- Workshop Facilitation & Alignment Best Practices
- Bringing OKRs to Action
- Building a Coach Community



Once certified, these individuals will be able to **facilitate thought-provoking discussions** with your teams that will lead them to create impactful OKRs that align with your organization's strategic intent. They will also play a pivotal role in driving cross-functional alignment, identifying roadblocks, and addressing questions. Have your OKR champions join the largest community of certified OKR coaches: www.wavenine.com

STEP 4

LEADERSHIP ALIGNMENT SURVEY

In preparation for phase 3, where you will begin setting impactful OKRs in the executive OKR workshop, the executive leadership team (ELT) should participate in a leadership alignment survey. This survey will provide input and guidance for the content of the OKRs, and will help to ensure that the OKRs align with the actual goals and priorities of the organization.



This survey is especially important for organizations that don't "feel ready". The fact is, you don't need to have a 12-year strategy figured out to start using OKRs. The process of setting company OKRs (aka. top-of-house OKRs) is designed to fill in the gaps that exist when the leadership team isn't aligned. The whole point of this step is for you to get **a solid hypothesis for the strategic direction** that the executive OKR workshops should head in.

The leadership alignment survey can be conducted through a variety of methods, such as with online tools or in-person interviews. The survey should include questions about the organization's goals and priorities, the current state of the organization, and any challenges or opportunities that the organization is facing. This will provide valuable insights that can be leveraged to develop effective OKRs in the upcoming executive OKR workshop.

OKRs should reflect the actual priorities and the biggest concerns of the organization. If we create OKRs that don't honestly reflect what's top of mind, then you run the risk of creating an 'academic' set of goals that isn't applicable to the reality of the business. You won't get traction on those. You also don't need to already have priorities and metrics articulated. The best OKR setting workshops don't 'rearticulate' what everyone already knows, but they are the actual process that creates (not just rephrases) clarity. Without this survey, OKRs run the risk of being meaningless. And if the company OKRs are meaningless, then the team OKRs that are localized from them will also be meaningless.

OKRs don't exist in a vacuum; rather, they should be shaped by the strategic decisions made by the executive team. There should always be context. This preparation is essential and will prevent you from potentially going down rabbit holes when starting with a blank canvas. Executive time is precious, so approach the workshop with a hypothesis and draft based on input that you collect ahead of time from each executive individually.

Get a grasp on the 3-5 year strategy

- Take a look at board presentations, annual operating plans, and general strategy memos/powerpoints that have been previously distributed to staff. These can prove to be useful in understanding the strategic direction.
- Additionally, tapping into the latest insights from the executive team is essential. Conducting personal interviews with the CEO and quick surveys among the broader C-suite can provide valuable perspectives.

Strategic Pillars:

These broad themes set the course for OKRs that drive progress. Examples of such pillars include business growth, customer service excellence, innovation, etc. Defining strategy pillars helps us prevent broad objectives like “grow our business” or “make our customers happy” - those are at best pillars, not objectives.

Once you have gathered all this input, you'll be able to assess what the most pressing priorities are, and if there are any overarching strategic pillars. You can share it with the executive sponsor and CEO, if they are not the same person. With this, they will be able to confirm the strategic direction that the organization should travel in. This will also give them a preview of what is to come in the workshop, and give you a chance to address their feedback as well as gain their support even further. Having an ally during the workshop will help you focus the discussion on what matters most!



CONCLUSION OF PHASE 2



**Whoa, we're
halfway there!**

After this phase, you should have:

- An informed workforce that is trained in OKRs and excited to get started
- A certified community of champions ready to support the initiative
- A strategic direction in place for the upcoming executive OKR setting workshop

There is a lot of prep work that goes into an OKR rollout. Just think - we are at the end of phase 2, and no one has set a single OKR yet. Don't worry. That all changes in the next phase! In phase 3, the executive leadership team will create the company OKRs. Then, those OKRs will be localized down into the team level and teams will start taking action on those OKRs.



We'll see you in Phase 3 ;)

Download all four step-by-step guides here:

↓ Phase 1: **Setup**

↓ Phase 2: **Launch**

↓ Phase 3: **OKR Cycle**

↓ Phase 4: **Mature & Scale**

PHASE 2

CHECKLIST

Phase 1: Setup

- ☑ Establish the Program Team
- ☑ Establish the Steering Committee
- ☑ Set OKRs for OKRs
- ☑ Nominate Champions
- ☑ Set OKR Parameters
- ☑ Build Your OKR Playbook
- ☑ Leadership Briefing
- ☑ Prepare Company-Wide Communication

Phase 3: OKR Cycle

- Executive OKR Workshop
- Finalize Company OKRs
- Localize Company OKRs in Team Workshops
- Action Plans
- Ensure Alignment with Tie-Off Sessions
- Start Taking Action!
- Practice Results Rituals
 - Calibrate Monday & Celebrate Friday
 - Monthly Business Reviews
 - 1:1s
 - Mid-Quarter Check-Ins
- Monitor Progress & Flag Risks
- Steering Committee Meeting

Phase 2: Launch

- ☑ Announce the Program to Everyone in Scope
- ☑ Provide Basic OKR Training
- ☑ Get Champions Certified
- ☑ Leadership Alignment Survey

Phase 4: Mature & Scale

- Reflect & Reset Company OKRs in an Executive Workshop
- Close Out the OKR Cycle
- Reflect & Reset OKRs in Team Workshops
- Tie-Off OKRs for the Reset
- Start Executing Again!
- Continuously Improve





WAVENINE

THANK YOU!



www.wavenine.com



www.linkedin.com/company/wavenine

Wave Nine Inc.

490 43rd Street
Suite 90
Oakland, CA 94609
United States
wavenine.com

Wave Nine empowers companies to achieve business goals through the OKR framework and the OKR operating rhythm. For enterprises fully committed to the OKR process, we provide comprehensive playbooks, OKR templates, and resources that invigorate teams, clarify strategies, and enhance accountability. Our hands-on approach involves consulting, coaching and multi-modal education, engaging executives and teams alike. Headquartered in Silicon Valley, with additional offices in Germany, the UK, Australia, and Portugal, our international team can bring your strategy to fruition.