

A FOUR-PART SERIES

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

PHASE 1: SETUP



SO, YOU WANT TO LAUNCH AN OKR PROGRAM. YOU'VE COME TO THE RIGHT PLACE!

This e-book series is designed to provide guidance and support for those running the implementation and management of a new OKR program. We like to refer to these individuals that are responsible for the orchestration of the program as the **Program Team Leads**. And chances are, if you're reading this, that's going to be you - congratulations on the promotion!

At Wave Nine, we take a four phased approach to implementing OKR programs:

- | | |
|---------------------|------------------------------|
| 1. Setup | 2. Launch |
| 3. OKR Cycle | 4. Mature & Scale |

We know, you're probably eager to get the ball rolling and want to skip ahead to the launch phase. Just take a deep breath. Before jumping in, think about the OKR process and the program's setup phase. As the program team lead, you should begin planning the OKR program before the first OKR is even set in Q1. Think of this as quarter 0 (no worries though, it doesn't last a quarter. It's usually only 3-4 weeks). This will allow you enough time to ensure that the program is set up for success and that all relevant stakeholders are informed and engaged.

The setup phase is exactly what we will cover in the first part of this 4-part series. The first phase will focus on setting up your program governance, OKR parameters, and onboarding executive leadership. So, buckle up, and let's start setting up 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**

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STEP 1

ESTABLISH THE PROGRAM TEAM

The first step is to identify the rest of your **program team**. This team will be responsible for overseeing the implementation and management of the OKR program along with you, the program team lead.



The best program team leads we've worked with all had these traits in common:

- Strong ownership for the success of the strategy and not only winning an OKR beauty contest
- The ability to set and meet realistic deadlines
- Great communication and leadership skills
- A deep understanding of how to get things done in the organization
- 5-10 years of experience in program management, project management, strategy execution, management consulting or a similar field



In our experience, the program team should spend approx. 8 hours per week dedicated to the OKR program. This amount of effort usually decreases during the second OKR cycle, and continues to decrease as the program matures.

The program team's size isn't fixed; it can consist of several members in larger rollouts, even with multiple people per function. In smaller rollouts, it can be owned by just two or three individuals. The key here is to ensure you have enough resources and experts on board to navigate through the implementation, which is why **we recommend bringing in people from areas like communications, HR, and IT.**

The program team is responsible for:



Establishing the program timeline, governance structure, OKRs for OKRs and other aspects of the program



Reporting progress and suggesting actions for continuous improvement to the executive team



Handling questions from leaders and individual contributors



Designing and executing the communication plan and schedule



Creating engaging and consistent content to engage stakeholders



Basically everything mentioned in this setup phase ;)

In order to keep the program running smoothly, **schedule weekly meetings** with the program team. These meetings should be used to review progress, discuss challenges, and make any necessary course corrections during the entire OKR implementation process.



STEP 2

ESTABLISH THE STEERING COMMITTEE

Once you have your program team in place, it's time to establish the **steering committee**. We like to call this the SteerCo, for short. This committee guides the program toward its goals by making key decisions, improvements and serving as a point of escalation should any issues arise. It usually consists of the program team lead and the executive sponsor, or sponsors, of the OKR program. 9 times out of 10, the executive sponsor is the CEO.

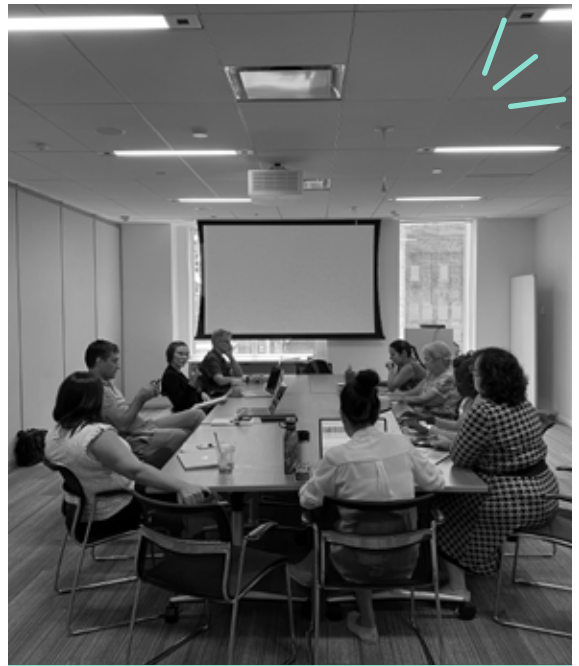
While the program team is responsible for the OKR program's day-to-day, the SteerCo is responsible to ensure that the OKR implementation achieves its value. More on that in the next step. The SteerCo should have regular meetings, preferably at least once per OKR cycle (likely quarterly), to report and strategize on the program's objectives.

"Are we moving in the right direction? Is the OKR program addressing our pain points? If not, how can we make sure it does?"

The steering committee members should be:

- Vocal supporters of the OKR program
- Committed to using OKRs in strategy execution
- Outstanding role models for a successful rollout

As an OKR program matures, your company's strategies and objectives might evolve. It's crucial to regularly assess progress in order to plan ahead. Consistent SteerCo meetings offer the chance to go over accomplishments, tackle obstacles, and talk about any adjustments needed to ensure all goals are met.



STEP 3

SET OKRS FOR OKRS

Once the program team is in place, the next step is to set OKRs for the OKR program itself. We know, that might sound a little weird. OKRs for OKRs!? What kind of madness is this? Trust us, they're important! OKRs for OKRs will help to articulate the intended impact and outcome of this initiative. These will act as your **success criteria for the program.**

When setting OKRs for OKRs, keep these key points in mind

1. This may be the first time you're setting OKRs, so don't be afraid to start small and iterate as you go. **Progress is better than perfection.** and it's better to start with one simple yet inspiring objective with 4-6 outcome-focused key results than to try and tackle everything at once.
2. When setting key results, it is important to make them measurable and specific. This will help to track progress and ensure that everyone involved is working towards the same objectives.
3. Take into account the **pain points you want OKRs to solve**, your organization's overall strategic priorities, and what focus areas you need to tackle to ensure effective strategy execution.
4. What successes do you want to celebrate in the first cycle?
5. Finally, remember that OKRs are not set in stone. They should be regularly reviewed and updated every cycle to reflect the changing needs of your organization.



Not only will OKRs for OKRs help you to gauge the success of your OKR program over time, but you will also be able to share the progress being made with the rest of the organization, motivating teams and individuals in the process.

'OKRs for OKRs' example

Objective: We launch OKRs with high engagement and adoption.

- 100% of teams have their OKRs published.
- 100% of employees in scope have OKRs aligned to strategic priorities.
- 10% of individuals across the organization have been certified to become OKR coaches.
- 70% of teams update their OKRs every week.

STEP 4

NOMINATE CHAMPIONS

You can't have an effective OKR program without your very own community of certified OKR coaches! At Wave Nine, we like to refer to these coaches as champions. That's because they will be the mighty ones championing the success of the program.

Champions = Certified OKR Coaches

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quarter 0 (no worries though, it doesn't last a quarter. It's usually only 3-4 weeks). This will allow you enough time to ensure that the program is set up for success and that all relevant stakeholders are informed and engaged.

It is important to carefully consider the skills and expertise of each nominee, as well as their ability to effectively communicate and work with others.





The perfect candidates for this position have these traits

- At least 4+ years professional experience and 1 year working with your company
- Knowledge of the business, vocabulary and how to get things done
- Ideally currently a manager or senior individual contributor
- Strong presentation, time management and communication skills
- Great at conveying new concepts in a clear and understandable manner
- Openness to working with different teams and individuals at different levels
- Positivity and empathy, with tact and poise under pressure
- Bonus points: Previous coaching experience

After being certified, your champions will be able to:

- Lead OKR workshops to help teams set high-quality OKRs
- Train individuals and teams in the OKR methodology
- Provide support throughout the OKR cycle
- Be the go-to person for OKR related questions
- Work with other OKR coaches to identify/solve misalignments and risks

Once the initial batch of OKR coaches has been identified, they should be certified and given the necessary resources and support to succeed in their roles. More on this in Phase 2!



STEP 5

SET OKR PARAMETERS

How often should everybody update their progress on OKR s?

Weekly, biweekly, or monthly?

Will OKRs be localized down among teams or cascaded?

Should OKRs be set in workshops or async?

How many OKRs should each team set?

How long is an OKR cycle at our organization?

So many questions! And they should all have answers.

Simply winging it isn't going to cut it. Imagine having these questions asked to you every day by every single person in your organization. Nobody wants that. It's even worse if you, the program team lead, don't know the answers. If the answers to these questions are set in stone and documented early on, well...that just makes it so much easier.

Having a strong process in place with set OKR parameters is extremely important. It gives the OKR program a structure and provides guardrails to help teams stay on track.

Every organization is different - what works for one company doesn't necessarily mean that it will work for another. It's best to set OKR parameters that work for your organization. You wouldn't use a house's foundation to build a skyscraper, would you?

PRO TIP

When choosing a length for your OKR cycles, you should be aware that quarterly cycles are the most popular. By adhering to short OKR cycles, like fiscal quarters, organizations can not only respond swiftly to changes, but also maintain a sense of focus and direction. Short cycles allow you to pivot quickly and also provide a sense of urgency. Teams can regularly assess their progress, identify areas for improvement, and recalibrate their efforts accordingly.

STEP 6

BUILD YOUR OKR PLAYBOOK

Remember how we said that if the answers to common questions about the OKR process were set in stone and documented early on, that life would just be easier? Well, that's exactly what you should do in this next step.



The program governance (program team, steering committee, champions), OKR parameters, and OKRs for OKRs should be documented somewhere. And not in multiple Word Docs spread throughout vaguely named folders - just one, **single source of truth**. By having one document with your organization's approach to the OKR process clearly documented, you're giving everyone a roadmap to how they should approach OKRs. Not to mention, it will also come in handy when onboarding new employees.

Once the process has been documented, the program team can make it official by signing their names in **blood**. Just kidding, don't do that! We had to make sure you were still paying attention ;)

Once the process has been documented, publish the 'playbook' and make it easily accessible to everyone in the organization. The point of documenting this information is to make sure everyone is on the same page and has a uniform approach to the OKR process. What good is it if nobody can find it? If there are ever any doubts or discrepancies, this playbook will act as **your organization's OKR constitution**.

STEP 7

LEADERSHIP BRIEFING

The program team lead should engage with the executive sponsor(s) to provide a briefing to the executive leadership team (ELT) about the OKR program. This briefing should include information about the timeline of the program, as well as individual roles and responsibilities. This communication is all about building trust, transparency and buy-in. The leadership team needs to feel ownership of the program. Thus, the briefing should be designed in an inclusive way, rather than being strictly informational.

Gain their support

The visible support from executive sponsors is key, and you have to do everything in your power to get them behind the new program. If leadership doesn't fully support the program, how can you expect others to?

When communicating the OKR program to the ELT, it's crucial to articulate a compelling rationale for adopting OKRs - one that resonates with your organization's unique challenges and objectives. Explain why YOUR organization needs this. It might be that you are experiencing rapid growth, or perhaps there are changes being made in your industry that require a new strategic path. Be open about this in your initial introduction.



We break down how to approach getting support from CEOs, COOs, CFOs, and more in our other guide:

Gaining Support For Your New OKR Program

Once the executive team is up to speed and excited about this new initiative, it's time to work with them and think about everyone else in scope.

STEP 8

PREPARE COMPANY-WIDE COMMUNICATION

In order to ensure that the OKR program is successful, it's important that the rationale, goals, timeline and responsibilities are effectively communicated to the entire organization. It's best to complete this next step with the executive leadership team.

Preparing Company-wide Communication

Communicating the OKR program to everyone else in scope will help to build excitement and buy-in for the new initiative. In a perfect world, this communication should come from the executive sponsor or someone else from the ELT. The higher up the corporate ladder, the better.

When we work with our clients, we recommend having the executive sponsor announce the OKR program via a brief email and invite everyone to an all-hands meeting where aspects of the OKR program can be explained in more detail.

Set a Date for the All-Hands Kickoff

The **All-Hands Kickoff** will be the official start of the OKR program and will give everyone an opportunity to ask any questions about the process. This All-Hands Kickoff should 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. We'll provide more details about this event in Phase 2, but for now, you can set a date and prepare the invite.



Here's an example of a company-wide OKR program announcement/all-hands kickoff invite. Feel free to steal it and make it your own!

Dear All,

I'm excited to share a significant update – we're adopting Objectives and Key Results (OKRs)! If this term seems foreign to you, don't worry. It will all make sense soon, as we plan on providing training in the methodology. This decision aims to improve our alignment, efficiency and transparency when it comes to executing our organization's strategy.

Why This Matters

With this OKR program, everyone will gain a better sense of direction in terms of where they should prioritize their efforts. OKRs aren't just about setting goals; they're about ensuring we all understand and work collectively towards them. Many successful companies, operating in highly complex, fast-moving environments, credit their achievements to adopting OKRs, so I am very optimistic that integrating them into our strategic initiatives will have a positive impact. This won't be just an extra process on the side - it will become fully integrated into our day-to-day operations. By the end of the implementation, we will be a strategically aligned and focused organization!

What's Happening

This shift promises benefits not only for the company but also for your teams and everyone involved. We're gearing up to launch our new OKR program and your active participation is crucial—you're a key driver in ensuring the OKR program's success. This framework is about bringing everyone onto the same page, which is why I wanted to personally invite you to our upcoming All Hands Kickoff. There, we will explain a bit more about the methodology and how the implementation will proceed at **Company XYZ**.

Here is the agenda for the call:

1. Welcome & Introduction
2. The Problem
3. What's Changing & Why?
4. What Are OKRs?
5. Timeline & Support
6. Next Steps & Asks

The kickoff is set for **<date & time>**. Please prioritize this kickoff in your calendar—it's a crucial step in shaping our shared success! I'm excited to start this journey with you all!

Best,

The Executive Sponsor (CEO, CFO, etc)

CONCLUSION OF PHASE 1



Hey, you're ¼ of the way there!

At this point, you should have:

- A strong, documented OKR process
- A dedicated program team
- An excited steering committee
- A list of champions to get certified
- Support from the ELT
- A plan for change

As you can see, the program team lead plays a crucial role in the success of the OKR program, and should be involved in every stage of the rollout. That being said, **they don't act alone.** They need support and active engagement from their peers in order for the OKR program to be implemented effectively.

Even though a successful OKR rollout relies heavily on the foundation set in the setup phase, the remaining three phases are just as important.

In phase 2, you will officially launch and announce the OKR program to your organization, get your champions certified, and prepare for the first round of OKR workshops! If you don't have phase 2 of this step-by-step series, you can click below and grab your copy.

Thanks for reading, and we'll see you in Phase 2 ;)

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↓ Phase 1: **Setup**

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↓ Phase 4: **Mature & Scale**

PHASE 1

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!



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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.