A FOUR-PART SERIES

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

PHASE 4: MATURE & SCALE

WAVENINE

YOU MADE IT TO THE LAST PHASE!

This is the final part of our "Ultimate Step-By-Step Guide to Launching an OKR Program." If you haven't read the first three parts yet, you can find links to all four phases below.

Let's recap what you should already have from the previous three phases.

At this point, you should have:

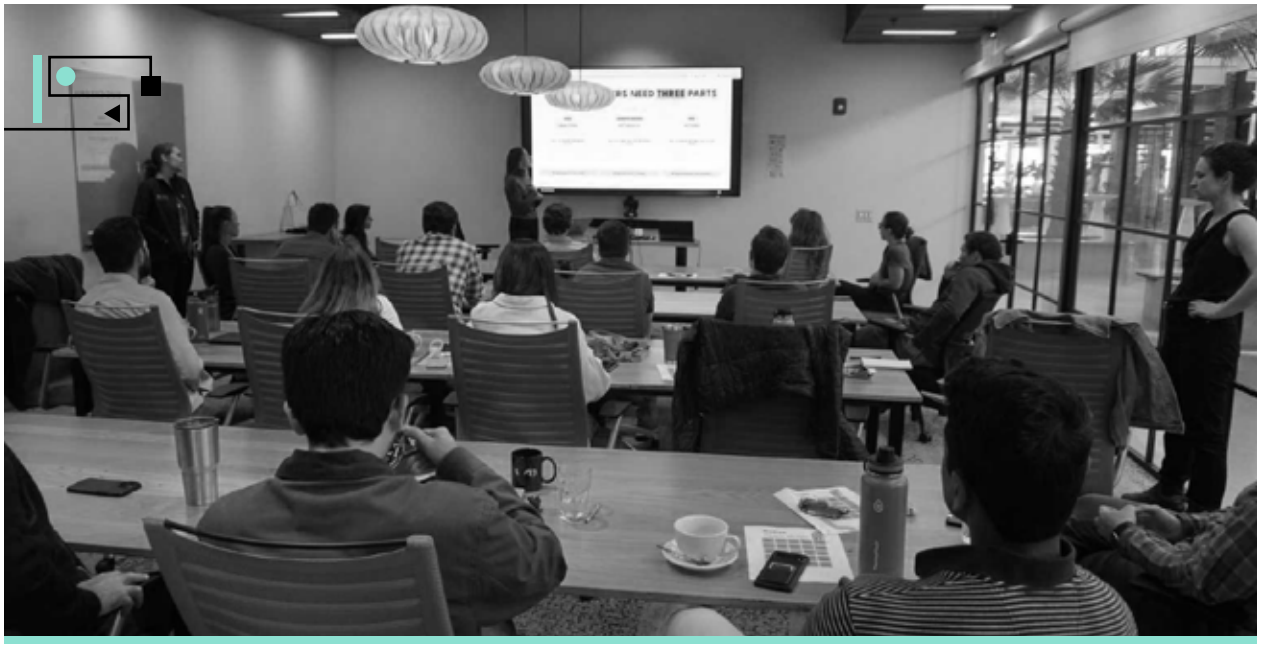
- A strong, documented OKR process that's accessible to everyone in the organization
- A dedicated program team overseeing the implementation
- A steering committee ready to assess the OKR program's success
- Vocal support from the executive leadership team
- An informed staff that is trained in OKRs
- A certified community of champions supporting your teams
- The first OKR cycle under your belt, where teams executed against the OKRs that they set in their OKR workshops
- OKRs set for the next OKR cycle

While the OKR program implementation was exciting, now is the time to keep the momentum going. It's best to start thinking about how to go about **maturing and scaling your OKR program going forward**. That's exactly what the next phase is all about.

In **phase 4,** we've put together some practical tips on how you can mature your program and how to get more levels of your organization involved.

Whereas the previous guides followed a step-by-step structure, this guide will simply contain practical suggestions that don't necessarily require to be completed in a specified order.

Even after one OKR cycle, most organizations haven't fully tapp ed into the OKR program's full potential. There is still room for improvement – it's about adapting, refining, and ensuring your OKRs reflect the dynamic reality of your organization. Here's how to improve your OKR program so that it's the best it can be.



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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ASSESS OKR QUALITY AND HOW OKRS ENABLE TEAMS TO PRIORITIZE WORK

As teams mature in their OKR journey, the focus should sharpen on outcomes, not just outputs. Each quarter offers an opportunity to refine this mindset. By **prioritizing outcomes, teams identify what truly drives success**, allowing them to eliminate unnecessary tasks and concentrate on meaningful results.

Regularly reviewing outcome-focused Key Results prompts teams to ask important questions:

What actions **genuinely move the needle?**

How can we **measure success through impact** rather than activity?

This approach nurtures a culture of ownership, where teams take responsibility not just for completing tasks but for delivering measurable outcomes.

In the first OKR cycle, the most noticeable benefits often come from improved transparency and alignment. This initial phase can be transformative:

- Transparency ensures **everyone understands the organization's goals** and why they matter.
- Alignment **strengthens collaboration** by linking team objectives to broader organizational priorities.
- Leaders and teams **gain clarity into organizational priorities**.
- The process of setting and sharing OKRs **opens communication channels**.

These early wins lay the groundwork for deeper OKR maturity. With each quarter, teams can build on this foundation, shifting their focus even further toward impactful outcomes.

Here's a quick check list of things to keep an eye on while improving OKRs cycle after cycle:

Get Transparency

- ☑ Does everyone know executive priorities?
- ☑ Can managers connect their team goals to the strategy meaningfully?
- ☑ Are priorities and strategic impact is clearly understood by everyone

Increase Accountability

- ☑ Do we invest significant effort in reporting?
- ☑ Are goals and impact discussed in meetings and reports?
- ☑ Do teams feel goal ownership?
- ☑ Do team have visibility into other team goal?

Improve Alignment

- ☑ Is work producing the right impact?
- ☑ Are team blocked through cross-functional bottlenecks and unforeseen dependencies?
- ☑ Are we spending the most time (i.e. capital) on the work that is most aligned to our strategy?

Raise Velocity

- ☑ Is the organization able to react quickly to challenges or strategic changes?
- ☑ How long does it take for the organization to fully be aligned on the strategy?

Which of these are you currently doing?

Early on, teams may find it challenging to take accountability for their work, especially if they aren't directly responsible for customer-facing products. This is common for cross-functional teams that handle smaller, internal tasks.

To overcome this, guide teams through exercises that emphasize value creation, impact, and product thinking. Pair this with a culture of psychological safety and encourage the adoption of shared OKRs to align efforts and focus on outcomes.

IMPROVE THE OUTCOME FOCUS IN KEY RESULTS!

Key Results are at the heart of OKRs, but their value depends heavily on whether they focus on **outcomes** rather than mere **outputs**. Key Results are the cornerstone of the OKR framework, serving as the benchmarks that define success. However, the true power of Key Results lies in their ability to create clarity and alignment around what truly matters. A common pitfall is to design Key Results that focus too heavily on outputs—tasks and activities—rather than outcomes, which represent the real value and impact of those efforts.

Outcome-focused Key Results ensure that teams prioritize the right goals and adjust their work to maximize meaningful contributions to the organization's strategic objectives. On the other hand, output-focused Key Results can inadvertently lead teams to focus on completing tasks without considering whether those tasks are driving the desired impact.

Here's why it matters:

- **Outcome-focused KRs:** These guide teams to achieve meaningful progress by emphasizing the impact of their work rather than the work itself. By focusing on outcomes, teams can continually adapt their efforts to align with strategic goals, ensuring that their contributions drive measurable results. This approach keeps teams engaged, purposeful, and aligned with the broader objectives of the organization.

- **Output-focused KRs:** While these can show that specific tasks or milestones were completed, they often fall short of revealing whether those efforts truly mattered. Completing a task doesn't necessarily translate to achieving the desired impact or moving the needle on critical goals. As a result, output-focused KRs can lead to a false sense of accomplishment and misaligned priorities.

Shifting your mindset to embrace outcome-focused Key Results empowers teams to aim for transformational, rather than transactional, success. It's not just about checking boxes; it's about making a difference!

INTRODUCING CROSS-FUNCTIONAL OKRS: ALIGNING TEAMS FOR SHARED SUCCESS

As organizations grow and work becomes increasingly interconnected, the limitations of siloed goal-setting become more apparent. When you hear teams frequently say, **"We can't own that metric alone—we depend on others,"** it's a clear signal that it's time to implement Cross-Functional OKRs. These shared objectives foster collaboration and accountability across teams, ensuring that key initiatives with interdependencies achieve the desired impact.

How to Create Cross-Functional OKRs:

01

Review Collaborative Efforts from the Last Quarter

Begin by identifying Key Results from the previous quarter that required substantial input or effort from multiple teams. These insights can serve as a foundation for crafting Cross-Functional OKRs, ensuring that shared goals reflect the realities of your operational interdependencies.

02

Set Goals That Reflect Shared Ownership

Design OKRs that span teams, clearly outlining shared Key Results that depend on collaboration. Be specific about which teams are responsible for each aspect of the OKR, while maintaining collective accountability for the overall outcome.

Supporting Cross-Functional OKRs with Regular Reviews:

To ensure these goals succeed, it's essential to have robust review mechanisms in place:

Schedule Cross-Functional Monthly Business Reviews (MBRs)

Regular touchpoints are crucial for tracking progress, aligning efforts, and resolving challenges. Schedule at least two MBRs within the quarter to monitor how these shared objectives are progressing.

Focus on Alignment and Accountability:

During these reviews, emphasize open communication about progress, obstacles, and dependencies. Encourage teams to address issues in real-time to avoid delays and misalignment. Use these sessions to recalibrate efforts and ensure that all teams are working toward a common purpose.

By embracing Cross-Functional OKRs, organizations can break down silos, create alignment on critical priorities, and drive greater impact across interconnected areas of the business. These shared objectives not only clarify what success looks like but also foster a culture of collaboration and collective responsibility.

RESETTING OBJECTIVES AND KEY RESULTS AND LEARNING FROM YOUR FIRST CYCLE

The OKR data you see is important for understanding how you're executing your strategy and getting results. If your OKRs aren't great, they might not accurately reflect your current status or the benefits of setting them. Therefore, focus on improving your OKR maturity by prioritizing the quality of your OKRs. Here are three recommendations:

1. **Resets:** he OKR journey is a continuous improvement process. Each cycle provides valuable insights into how well your organization is executing its strategy and delivering results. However, OKRs from the first cycle may not always reflect current realities or demonstrate their full potential. As you progress, resetting your OKRs—either through a Soft Reset or Hard Reset—becomes essential for improving their quality and aligning them with your evolving strategy.

The Difference Between a Hard Reset and a Soft Reset

Hard Reset: Starting Fresh

A Hard Reset involves completely revamping your OKRs by creating new objectives and key results from the ground up. Instead of copying or modifying existing OKRs, you start with a clean slate. This method is typically used once a year to ensure that your OKRs reflect new strategic priorities, changing market conditions, or organizational shifts.

- **When to Use:**
  - At the start of a new fiscal or planning year.
  - After major changes in strategy, structure, or market dynamics.
  - To reset focus and eliminate outdated goals.
- **Benefits:**
  - Encourages innovation and fresh thinking.
  - Ensures alignment with current and future priorities.
  - Avoids carrying forward goals that are no longer relevant.

Soft Reset: Adjusting and Refining

A Soft Reset, by contrast, involves keeping the same overall objectives but making minor adjustments to the key results. This could mean refining the scope of individual key results, replacing one or two key results, or updating metrics to reflect progress or new data. The main direction and message of the OKRs remain unchanged.

- **When to Use:**
  - Mid-year or mid-cycle, particularly at Level 1 (organization-wide OKRs).
  - To sense-check goals and ensure they're still achievable and relevant.
  - When small course corrections are needed rather than a full overhaul.
- **Benefits:**
  - Maintains continuity and focus on long-term goals.
  - Allows for adjustments without disrupting alignment.
  - Provides flexibility to account for new challenges or opportunities.

How Organizations Use Resets Effectively

Most organizations combine both approaches throughout the year. For instance:

1. **Soft Resets for Mid-Year Adjustments:**

In the middle of the fiscal year, particularly for quarterly OKRs, organizations often conduct a Soft Reset at the Level 1 (company-wide) OKRs. This ensures that the overarching goals remain relevant and aligned without disrupting ongoing work. Teams can adjust key results to reflect current realities, correct overly ambitious targets, or refine metrics for better clarity.

Example:

- **Objective:** Grow market share in Europe by improving regional presence.
- **Previous KR:** Launch three new sales offices by Q3.
- **Updated KR:** Launch two new sales offices and expand regional partnerships in Q3.

2 **Hard Resets for Annual Goal Refresh:**

At the end of the fiscal year, organizations typically conduct a Hard Reset to redefine their OKRs entirely. This ensures that goals align with the new strategic plan, reflect market conditions, and account for lessons learned from the past year.

2. **In your resets, consider the following:**

   a. **Remove Evergreen OKRs:**

   Replace generic **"infinity"** objectives with concise, specific objectives tailored to each team. Shift away from initial "mission statement" objectives such as "our customers love our products" towards objectives that truly represent real strategic initiatives. Use the following OKR formulation formula for better OKRs:

      i. **Objectives Formula: [**Desired state and/or impact] through/by [strategic choice]
      ii. **Key Results Formula:** [verb] + [what] from [initial metric] to [target metric].

   b. **Hard Resets for Annual Goal Refresh:**

   At the end of the fiscal year, organizations typically conduct a Hard Reset to redefine their OKRs entirely. This ensures that goals align with the new strategic plan, reflect market conditions, and account for lessons learned from the past year.

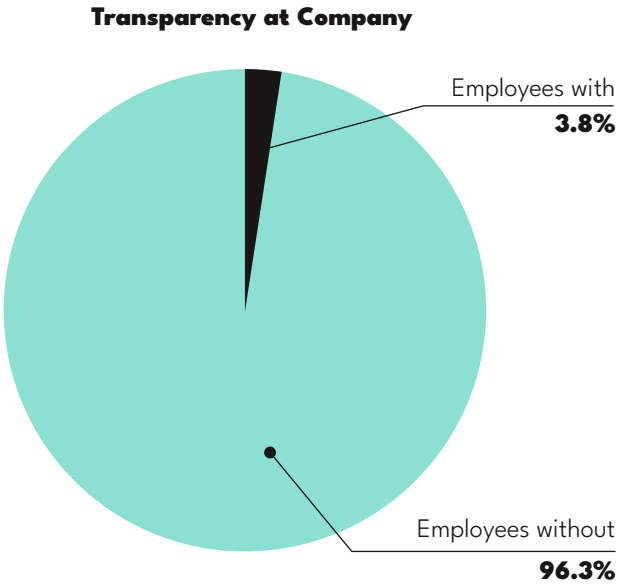
ONBOARD MORE TEAMS

Organizations are sometimes hesitant to scale their OKR program, keeping it confined to certain levels for too long. The problem with this approach is that the biggest benefits of OKRs—such as alignment—are actually realized at lower levels of the organization, where most employees do the nitty-gritty work.

Real alignment and impact with OKRs happen when team members involved in daily metrics and updates are part of the process. If only higher levels are setting OKRs, a disconnect forms between the strategic objectives and the teams responsible for execution. If OKRs are only used in certain parts of the organization, you end up with some teams aligned to the strategy and others out of sync, complicating overall alignment.

Here's an example from an early stage customer:

Those that aren't using OKRs don't have visibility into priorities, and leadership doesn't have visibility into their progress.



OKR Transparency is a function of width and depths

At Company, 20% functional leaders have transparency into OKRs and publish OKRs themselves (**Wide**/narrow adoption).

With only 3.8% of employees seeing the OKRs, the majority of the organization does not have visibility into the priorities (**Low**/deep adoption).

Treat the new wave of people just like the first one. New employees require a fresh implementation, so go back to the previous phases and repeat the process, from training to communication. Identify key stakeholders within the new wave and set/manage their expectations.

When introducing a new wave of people to your program, there's a tendency to primarily focus on these newcomers and overlook those already in the program. It's important not to create two separate programs, but to maintain a unified approach, as strategy execution is a company initiative. Ensure your communication is clear and reaches everyone in the program as needed. Continue sharing updates, suggestions, and improvements with the initial program participants while helping everyone else catch up on OKRs.

As you scale up, keep an eye out for these achievements:

- The implementation and onboarding of the new wave was straightforward and successful, as was the last
- Existing champions introduce new champions to their new role, allowing them to learn more from day one.
- More champions mean more experts supporting your organization in executing its strategy.
- There's full transparency of the new teams' OKRs, and with it, deeper insights into the strategy and progress.
- Finding and fixing organizational blind spots, silos or duplicate efforts is easier.

CONTINUE COMMUNICATING

After the first quarter, teams may be asking: **“Are we continuing this? What will this look like in the second quarter?”**

Bring examples of teams that did well, of achievements that the org did, of areas where you felt really aligned and thank everyone for participating. Encourage teams to share their best practices for meetings or reports. Communicate the expectations for the second quarter and celebrate the progress of the first!

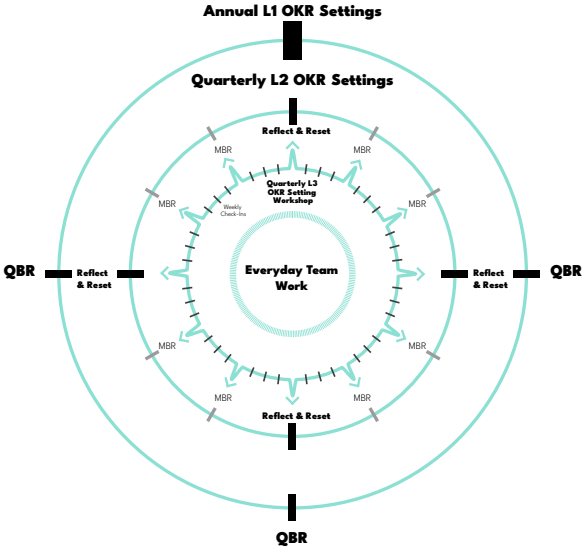
Showcase teams or departments that have successfully adopted OKR rituals or found creative ways to make OKR meetings work for them.

Ask them to record a short 2-minute video sharing their approach and circulate it across the organization.
To reinforce the message, your executive sponsor can share their perspective, emphasizing how OKRs drove progress and alignment in the first quarter. They can highlight specific initiatives that were unlocked earlier than expected thanks to the clarity and focus provided by OKRs.

IMPROVE ACCOUNTABILITY WITH BETTER QBR & MBRs

The OKR process becomes an organically driven process if the value derived from it exceeds the effort put in. Frequently reviewing OKRs to derive action plans, decide project prioritization, flag bottlenecks and communicate risks are the insights that make OKRs valuable to teams and allow them to better execute.

Valuable OKR reviews re-enforce accountability for OKRs.



At this stage, OKRs might not yet be integrated into budgeting or initiative planning at the executive leadership team (ELT) level. If OKR planning happens after initiative planning, you're missing out on significant benefits.

Shift OKR Planning Earlier

Move OKR planning earlier in the process so that L1 (organization-level) and L2 (department-level) initiatives aren't finalized yet. This ensures OKRs can influence priorities rather than being retrofitted to existing plans. To add more alignment:

- Develop a 3-5 year strategy outlining long-term outcomes.
- This **"golden thread"** connects the strategy to your OKR planning at the L1 level.

Restructure L1 Meetings

Schedule Monthly Business Reviews (MBRs) for L1 teams to focus on the value created over the past month, specifically KR progress. Align MBRs with department planning cycles so L2 leaders can use insights from the reviews to inform their plans.

Address Misalignment with Cross-Functional MBRs

If misalignment arises due to gaps in communication or updates, introduce cross-functional MBRs with relevant L2 leaders. These reviews help synchronize efforts and ensure clarity across teams working on shared objectives.

SET UP OKR ONBOARDING FOR NEW HIRES

Don't assume that new employees will figure it out for themselves. This often leads to employees not really understanding the benefits and the reasoning behind OKRs and adopting the "wrong" habits.

Make OKRs a key part of how you run your business, and allow new joiners to understand how your org runs things right away by integrating on-demand OKR education and training into the hiring process.

Train your new employees on OKRs during onboarding to avoid inconsistent approaches within the organization and to prevent quality risks. This is where your OKR champions can really come in handy.

Even if they have prior experience with OKRs, it's still a great idea to provide them with your OKR playbook, so that they can read up on your organization's unique approach.

STRENGTHEN YOUR COACH COMMUNITY

Being a coach is difficult. Some coaches may even drop out after the first cycle. Re-certify more OKR Coaches and improve OKR workshop planning mechanism.

As more teams join the program, check if you need extra champions to avoid overwhelming the current ones. Find the right people in the new wave, certify them as OKR coaches, and assign them to the new teams for proper support and accountability.

Time efficiency is a common concern for many OKR coaches when it comes to facilitating OKR setting workshops. Even though teams become more proficient at setting OKRs over time, the process can still be time-consuming, especially when OKRs are set on all levels of a large-scale organization. A proven method to speed up the process is to organize Supersets - an event where all teams on one level set OKRs simultaneously in one meeting.

Here's how it works:

1. Set up a virtual meeting with breakout room capabilities (e.g., Zoom or Microsoft Teams).
2. Invite all teams from one level along with your OKR coaches.
3. During the meeting, jointly review the leadership OKRs, clarify any questions, and then break out into teams.
4. OKR coaches jump around the rooms and provide support as teams set their OKRs.
5. At the end of the meeting, typically within 3 hours, all teams on that level will have set their OKRs, and you can even review their alignment.

This approach significantly reduces the time needed for setting and aligning OKRs. **Teams can establish OKRs across all levels in just a few days, preventing any delays in the process.**

LEVERAGE OKR SOFTWARE FUNCTIONALITY

As your OKR program matures and scales, managing increased data and complexity becomes essential. The right tools can:

- Provide early risk signals.
- Visualize dependencies.
- Streamline QBRs, MBRs, and workshops.
- Enhance OKR quality.
- Clarify each manager's focus.
- Improve communication and alignment around OKRs.
- Show clear links between KRs, actions, and initiatives (while distinguishing them).
- Enable focused 1:1s for coaching and progress discussions.

To scale effectively, you need processes and tools that deliver more insights and value than the effort required to maintain them. If your current process feels like a chore—focused on updating KRs without leveraging data—it's time to invest in a tool that delivers customized insights. This helps leaders, teams, and individuals easily see the value of OKRs by "spoonfeeding" actionable updates tailored to their needs.

WorkBoard

Which tool do we recommend? **WorkBoard**, of course. It's the leading OKR and strategy execution platform on the market.

WORKBOARD

OKR Breakthrough is even more effective with state-of-the-art strategy execution software

HEATMAPS

Instant health-checks reveal risks, allowing you to take action and alleviate obstacles.

TEAMS/SLACK INTEGRATION

Integrate transparency into the tools you already use and automate weekly focus reports.

WORKSTREAMS & ACTIONS

Drive focus and accountability by tracking progress towards the most important outcomes.

SCORECARDS & BUSINESS REVIEWS

Replace manual powerpoint decks with no-maintenance reporting and access to critical results.

ALIGNMENT TREE

Visualize OKR alignment across the company and monitor dependencies.

OKR CANVAS

Collaboratively define high-quality, aligned OKRs and leverage insights from past achievements.

CONCLUSION OF PHASE 4

Hey, you made it all the way to the end!

You've accomplished a lot during the four phases:

- You are now running an impactful OKR program that produces results.
- Each department, team, and individual are finely tuned into your organization's goals, resulting in a symphony of efforts.
- Teams have clarity on how their work impacts the bigger picture, cultivating engagement and accountability.
- The habits instilled during the initial phases are now second nature
- Teams are operating at an increased pace, not because they're working harder, but because they're working smarter.

You and your program team should now have everything in place to run and continue to improve your organization's OKR process. If you need any help along the way, don't hesitate to reach out!

Wave Nine's Services

OKR Implementation
OKR Setting Workshops
OKR Training/Certifications
OKR Software Rollouts

Thanks for reading our four-part series!

Download all four step-by-step guides here:

- Phase 1: **Setup**
- Phase 2: **Launch**
- Phase 3: **OKR Cycle**
- Phase 4: **Mature & Scale**

PHASE 4
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 2: Launch

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

Phase 3: OKR Cycle

ALIGN & LOCALIZE

- ☑ Run an OKR Workshop with the Executive Leadership Team
- ☑ Finalize the Leadership OKRs
- ☑ Localize the Leadership OKRs in Team Workshops
- ☑ Ensure Alignment with Tie-Off Sessions

FOCUS & EXECUTE

- ☑ Start Taking Action!
- ☑ Practice the Results Rituals
  - Action Plans
  - Calibrate Monday & Celebrate Friday
  - Monthly Business Reviews
  - 1:1s
  - Mid-Quarter Check-Ins
- ☑ Continue to Monitor Progress & Flag Risks
- ☑ Discuss Progress with the Steering Committee

REFLECT & RESET

- ☑ Reflect on the OKR Cycle with the ELT & Reset the
- ☑ Leadership OKRs
- ☑ Close Out the OKR Cycle
- ☑ Reflect & Reset OKRs with Your Teams
- ☑ Ensure Alignment Again for the New Cycle

Phase 4: Mature & Scale

- ☑ Assess OKR quality and how OKRs enable teams to prioritize work
- ☑ Onboard more teams
- ☑ Continue communicating
- ☑ Improve accountability with better QBRs and MBRs
- ☑ Set up OKR onboarding for new hires
- ☑ Strengthen your coach community
- ☑ Leverage OKR software functionality

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.