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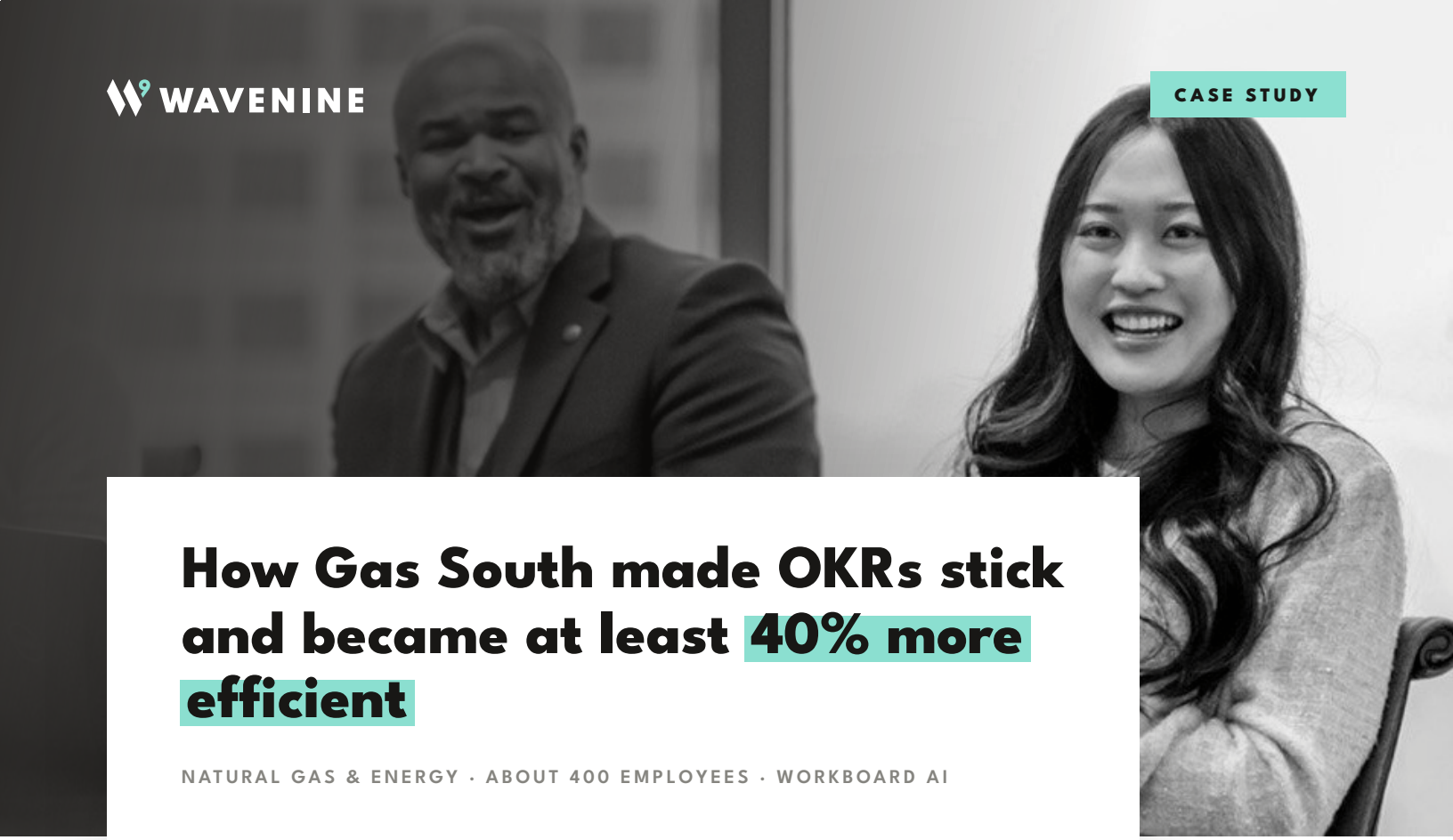
CASE STUDY



How Gas South made OKRs stick and became at least 40% more efficient

NATURAL GAS & ENERGY · ABOUT 400 EMPLOYEES · WORKBOARD AI

Gas South, a natural gas provider serving nearly 500,000 customers, relaunched OKRs with Wave Nine and WorkBoard AI. A co-created launch plan and a strong ambassador network turned OKRs into everyday practice.

40%+

more efficient, according to Gas South

100%

of OKR Ambassadors completed Wave Nine Academy

83%

of support tickets resolved within four days

AT A GLANCE

CLIENT

Gas South, a natural gas provider headquartered in Atlanta, Georgia, serving nearly 500,000 residential, commercial, industrial and wholesale customers

INDUSTRY

Natural Gas & Energy

COMPANY SIZE

~400

CHALLENGE

Strategic priorities that weren't aligned across teams, fragmented and output-driven OKRs, manual reporting, earlier OKR training that left leaders confused, and inconsistent collaboration across departments

SOLUTION

WorkBoard AI, rolled out by Wave Nine with a co-created launch plan: change management and communication, customized training, a network of OKR Ambassadors, IT integration with single sign-on, and weekly check-ins

RESULTS

At least 40% more efficient according to Gas South, 83% of support tickets resolved within four days, a billing module that kicked off on time, and automated reporting that saves leaders days of work each quarter

THE CHALLENGE

GROWTH BROUGHT COMPLEXITY

Teams worked hard, but they weren't always working on the right things.

Gas South is a natural gas provider headquartered in Atlanta, Georgia. The company operates in the middle of the energy chain, managing pricing, marketing and customer service for gas distributors that deliver gas to homes and businesses across the entire southern United States. In recent years, it has begun expanding to other regions. Today, Gas South serves nearly 500,000 residential, commercial, industrial and wholesale customers throughout the Southeast, Mid-Atlantic and Midwest.

That level of growth is an amazing feat, and it naturally brings complexity with it. Gas South found that strategic priorities weren't always aligned, and while teams worked hard, they weren't always working on the right things. To address these challenges, the company decided to adopt OKRs in late 2023.

To kick off this major shift, Gas South first engaged two outside companies to train senior leaders and department heads on the methodology. The sessions introduced the framework, but the training was overly complicated and didn't fit Gas South's culture. Many leaders came away more confused than confident. Tim Spearin, Director of Workforce Development at Gas South, recalls that the training often felt "too technical" and offered little practical guidance that leaders could apply in their day-to-day work.

THE CHALLENGE

SPREADSHEETS AND CONFUSED LEADERS

On top of that, it became clear that tracking OKR progress by hand in spreadsheets wasn't sustainable. Gas South needed a better approach: one that would give leaders real-time visibility into progress, scale across a growing organization, and fit the collaborative, people-first culture that defines the company. That set the stage for choosing both a platform and a partner to embed OKRs in how Gas South operates.

> **We had received OKR training from two different companies prior to Wave Nine. It was very technical, didn't meet our cultural needs and didn't give us what we needed to practically apply it. We had a lot of confused folks. Wave Nine's training on the other hand was simple, easy to follow, and really helped us to fully adopt the framework and software, and get the most out of them.**

Tim Spearin
Director of Workforce Development, Gas South

When Gas South started looking for a partner, it faced five challenges:

01
Strategic priorities weren't aligned across teams

02
OKRs were fragmented and output-driven

03
Manual reporting slowed decisions

04
Earlier OKR training was overly technical and left leaders confused

05
Collaboration across departments was inconsistent

THE SEARCH

TEN DEMOS AND A UNANIMOUS DECISION

Tim Spearin led a rigorous selection process. What began as an evaluation of five or so vendors turned into ten full demos, because he wanted to make sure of his due diligence.

~5	10	1
vendors on the initial evaluation list	full demos, for thorough due diligence	unanimous choice: Wave Nine and WorkBoard AI

Three criteria drove the search for an OKR platform:

Cultural fit

Gas South is consistently ranked as one of the best places to work in Atlanta, with high engagement and low attrition. Any solution had to feel approachable, people-focused and in line with that culture. Gas South wanted simplicity, clarity and a human touch.

User experience

With about 400 employees, the company didn't need an enterprise system designed for tens of thousands. It wanted something powerful and lightweight that busy leaders could adopt without extra complexity.

Analytical depth

As a data-driven company, Gas South needed robust analysis. Its teams already work deeply with pricing models, weather forecasting and scheduling analytics, so the platform had to deliver meaningful insights that go beyond status updates.

WorkBoard AI emerged as the clear leader, and the only true strategy execution platform in the group. The decision was unanimous. After demos with senior leaders and functional heads, everyone agreed that Wave Nine and WorkBoard AI stood head and shoulders above the competition.

> **When I asked the others to review the demos I had, they all said the same thing: 'Wave Nine and WorkBoard AI are the one.' There was no comparison. The fit was glaringly clear. We wanted something user-friendly, with great support and analysis. Wave Nine and WorkBoard AI met that need right away.**
>
> **Tim Spearin**
> Director of Workforce Development, Gas South

THE LAUNCH PLAN

CO-CREATING A LAUNCH PLAN

After selecting WorkBoard AI and Wave Nine, Gas South focused on creating the conditions for sustainable adoption. It chose a staged start, beginning with about 100 leaders and a carefully selected network of OKR Ambassadors. Wave Nine provided the guidelines and selection criteria, so each ambassador had the right background and influence to champion the program. The ambassadors had already been introduced to OKRs, but after the earlier training they still had many questions and needed more comprehensive learning.

Wave Nine worked with Gas South's internal change management lead to build a launch plan that fit the company's culture. Together, they co-created a comprehensive rollout plan:

01

Change management & communication

Clear messaging across the company about why OKRs were being re-adopted and how they connect to Gas South's strategy, with a clear cadence for reinforcement.

02

Customized training

Personalized materials for the areas where ambassadors and leaders had struggled with OKR concepts before, how to use the new platform, and access to Wave Nine Academy.

03

Technology integration

WorkBoard AI integrated with Gas South's IT systems to reduce friction, including single sign-on (SSO).

04

Hands-on support

Regular weekly check-ins with Wave Nine consultants, so Gas South always had responsive, personalized guidance.

100%

Ambassadors received early access to WorkBoard AI and were asked to complete Wave Nine Academy, Wave Nine's online OKR masterclass. Gas South tracked this as a key result, and hit 100%.

The ambassador group, drawn from every department, became the backbone of the rollout. The ambassadors acted as influencers:

They translated strategy into departmental OKRs

They flagged dependencies

They made sure of cross-functional alignment

THE LAUNCH PLAN

PLAIN LANGUAGE, STRONG ADOPTION

When teams began using WorkBoard AI, Wave Nine met regularly with Gas South to answer questions and help leaders adopt practices such as co-authoring, Scorecards and the platform's AI features. As the ambassador network grew more confident, Wave Nine kept reinforcing the learning with sessions that matched the company's expectations for clarity and simplicity. The materials used plain language, concrete examples and straightforward techniques, so OKR Ambassadors could coach their own departments effectively.

> **We worked closely with Wave Nine on a strategic launch plan that covered everything: change management, communication, training, and the IT side of things. It was a very detailed plan, and the launch went perfectly. Adoption has been strong from the start.**

Tim Spearin
Director of Workforce Development, Gas South

THE RESULTS

IMPROVEMENTS ON ALL FRONTS

Saying that the rollout of WorkBoard AI at Gas South was a success is an understatement. By embedding outcome-driven thinking and creating real-time visibility into progress, the company has seen improvements on all fronts.

83%

OF TICKETS RESOLVED WITHIN FOUR DAYS

Higher-quality OKRs have sharpened everyone's focus

One of the clearest wins came in customer support. The People Assist team dramatically improved its performance, resolving 83% of tickets within four days. This improvement is directly tied to better goal-setting and tracking in WorkBoard AI, which clarified ownership and focused the team on outcomes.

On time

BILLING MODULE KICK-OFF IN MID-Q2

Greater transparency has reduced delays and financial losses

OKRs have sharpened the focus on strategic accounts, where increased MVP matching led to fewer financial losses. In mid-Q2, visibility into OKR progress made sure the new billing module kicked off on time, directly supporting strategic account goals. Without the transparency WorkBoard AI provided, the project was expected to be delayed, with downstream impacts across multiple teams.

More accountability has enabled proactive problem-solving

Gas South's culture of accountability grew stronger with OKRs and WorkBoard AI. Ownership of key results is now visible across the organization, which makes it easier to flag issues before they become bottlenecks. When delays in legal request turnaround time showed up in WorkBoard AI, for example, the key result owner raised the issue early, so the team could take corrective action and avoid broader disruption.

SPOTTED
Delays in legal request turnaround show up in WorkBoard AI

→

RAISED
The key result owner flags the issue early

→

SOLVED
Corrective action, and no broader disruption

THE RESULTS

LESS REPORTING, MORE DECIDING

Visual alignment has helped Gas South prioritize and pivot

Gas South's Data Transformation initiative included the deployment of Microsoft Fabric and the resolution of sensitive records. It was a massive undertaking, tightly aligned with strategic OKRs tracked in WorkBoard AI. Teams could prioritize effectively, spot interdependencies and move resources where they were needed, because they could see cross-functional alignment visually in WorkBoard AI. This has reduced silos and improved collaboration between departments.

Automated reporting has saved leaders days of work

WorkBoard AI has also streamlined business reviews. Automated dashboards and scorecards now replace hours of manual spreadsheet updates, saving leaders days of work each quarter and shifting meetings from status reporting to data-driven decisions. With more time for strategic discussions, Gas South can move faster and with more confidence.

BEFORE
Leaders drowning in spreadsheets
Hours of manual spreadsheet updates
Teams working in silos
Accountability buried in email threads

NOW
Automated dashboards and scorecards
Business reviews focused on data-driven decisions
Visible interdependencies across departments
Ownership of key results visible across the organization

Leaders no longer drown in spreadsheets, teams no longer work in silos, and accountability isn't buried in email threads. With WorkBoard AI and Wave Nine, Gas South turned OKRs into a muscle the whole organization uses.

40%+

MORE EFFICIENT

With WorkBoard AI, we are at least 40% more efficient. People feel less stress, less tension, and there are fewer silos. The transparency has completely changed how we operate.

— **Tim Spearin**
Director of Workforce Development, Gas South

SHARPER OKRS, AUTOMATED REPORTING

WORKBOARD AI SHOWCASE

How Gas South uses WorkBoard AI and its AI agents to write sharper OKRs, automate reporting and keep cross-functional work aligned.

01 · AI OKR DRAFTING

OKR creation, alignment and cycle

Wave Nine taught Gas South's leaders to draft OKRs with WorkBoard AI. It helps leaders check whether their key results measure outcomes, or are just to-do lists with due dates.

BENEFITS

- Outcome-focused key results
- Faster OKR drafting for busy leaders
- Higher-quality OKRs across departments

02 · BUSINESS REVIEWS

Instant Scorecards & Dashboards

Gas South's leaders update only their metrics and confidence levels. WorkBoard AI builds the scorecards and dashboards for business reviews automatically.

BENEFITS

- Days of manual reporting saved each quarter
- Business reviews that focus on decisions
- One live source of truth, with no spreadsheets to maintain

03 · AI CHIEF OF STAFF AGENT

Automate Executive & Initiative Briefings

Ahead of each business review, the AI Chief of Staff Agent sends Gas South's leaders a brief on progress, risks and blockers, built from the metrics and confidence levels their teams update. Leaders walk in knowing where to look.

BENEFITS

- Risks surface before the review
- No manual status compiling
- Leaders arrive prepared

04 · ALIGNMENT

Drive cross-team alignment

During its Data Transformation initiative, including the Microsoft Fabric deployment, Gas South used WorkBoard AI to see cross-functional alignment and the interdependencies between OKRs.

BENEFITS

- Dependencies visible early
- Resources shifted to where they matter most
- Fewer silos between departments

Implemented with **Wave Nine**, the No. 1 implementation partner for WorkBoard AI.

WAVENINE

SPOTLIGHT

Q&A WITH TIM SPEARIN

Q

Despite already being experienced with OKRs, did you learn anything new by working with Wave Nine?

"Definitely. The whole AI aspect of OKRs was new for me. Wave Nine taught us how to leverage AI when creating OKRs and it has made it so much easier for leaders to see if we're actually measuring outcomes, rather than just creating fancy to-do lists with due dates. Learning how to use the AI functions in WorkBoard AI was really a game changer for us."

Q

If you could give one piece of advice to a company that is new to OKRs, what would it be?

"You can't just launch a software or framework and expect all of your challenges to go away. For it to be successful, it takes hard work, collaboration, and sometimes changing mindsets. You need consistency and cultural alignment to really make OKRs stick."

Q

What is your favorite WorkBoard AI feature?

"I really like the scorecard feature. We were doing so much manually before, and now, all people need to do is update their metrics and confidence level, and everything else is done automatically. It saves so much time."

Wave Nine's Alexander Campo (left) and Gas South's Tim Spearin (right) at WorkBoard AI's 2025 Accelerate event

> The Wave Nine team has been top-notch, caring, and responsive. And even a year after the contract was signed, I still have direct access to the same people I met in the beginning. In my 30 years of working with many different vendors, I have to say: that's rare in this industry.

Tim Spearin
Director of Workforce Development, Gas South

LOOKING AHEAD

WHAT'S NEXT FOR GAS SOUTH

Gas South isn't slowing down. Survey results from its OKR Ambassadors reflect both enthusiasm and opportunity. Respondents who were "not familiar" or only "moderately familiar" with OKRs before the rollout now report a "very clear" understanding of their purpose, thanks to Wave Nine's training.

BEFORE THE ROLLOUT
"Not familiar" or "moderately familiar"

→

NOW
A "very clear" understanding

Gas South is ready to strengthen its OKR process even more:

Earlier visibility

Ambassadors will see senior leadership OKRs earlier, to strengthen the connections between company-level priorities and departmental goals.

Ambassador onboarding

A dedicated onboarding process for new OKR Ambassadors will make expectations and best practices crystal clear.

Reset and Reflect

Wave Nine will begin facilitating live training sessions that teach leaders how to run stronger "Reset and Reflect" routines.

More integrations

Salesforce, Power BI and Azure DevOps will be integrated with WorkBoard AI to automate data flows and strengthen its role as the single source of truth.

> **Working with Wave Nine has been stellar. We feel we've invested not only in a tool, but in a partnership, a relationship, that's ongoing and completely sustainable.**

Tim Spearin
Director of Workforce Development, Gas South

STRATEGY EXECUTION WITH OKRS AND AI

Let's talk about what this could look like in your organization.

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About Wave Nine. Wave Nine are AI and OKR consultants for complex organizations. Founded in Silicon Valley, we have guided 300+ transformations in 30+ countries, trained 50,000+ people and are the No. 1 implementation partner for WorkBoard AI. We help leadership teams turn strategy into results: the right goals, a steady operating rhythm, and AI that the whole organization uses to run the business.

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