

How Community Housing Works aligned **every employee** on one strategy

NON-PROFIT & AFFORDABLE HOUSING · 80 EMPLOYEES · WORKBOARD AI

Community Housing Works provides affordable housing and services in San Diego. With Wave Nine's hands-on support, CHW turned its OKR program into a shared rhythm that connects every employee to the strategy.

100%

of employees with their own WorkBoard AI login

10%

of staff certified as internal OKR coaches

Weekly

OKR rhythm: update Monday, celebrate Friday

■ AT A GLANCE

CLIENT

Community Housing Works (CHW), a San Diego non-profit providing affordable housing and residential services to seniors, families and people with disabilities

INDUSTRY

Non-Profit & Affordable Housing

COMPANY SIZE

80

CHALLENGE

A methodology that couldn't forge alignment, foster communication or create transparency, a platform with no way to capture the long-term strategic plan, and a previous OKR partner whose approach was less interactive

SOLUTION

Hands-on support from Wave Nine, with regular check-ins and in-depth consulting: strong OKR rituals, better internal training, advanced reporting in WorkBoard AI, stronger messaging around results and long-term strategic planning

RESULTS

Every employee on WorkBoard AI, strategic alignment across the organization, full transparency into each department's work, a common language for progress and a coaching team that makes up 10% of the organization

■ THE CHALLENGE

A METHODOLOGY THAT DIDN'T FIT

CHW needed alignment, communication and transparency, and a home for its long-term plan.

Community Housing Works (CHW) provides high-quality affordable housing and residential services to seniors, families and people with disabilities in San Diego, California. The 80-person non-profit adopted OKRs in 2020, after struggling to get the most out of a methodology called the Entrepreneurial Operating System (EOS).

IT Operations Manager Tricia Woodworth found that EOS fell short in the three areas CHW needed most: forging alignment, fostering communication and creating transparency. On top of that, the platform CHW used to manage its EOS program had no way to outline and update the organization's long-term strategic plan.

So CHW moved to OKRs and WorkBoard AI. It worked with a third-party consulting firm for two years, then switched to Wave Nine in 2022. CHW needed a better way to:

Forge alignment

across all departments

Foster communication

about goals and progress

Create transparency

into how each team's work connects to the strategy

Capture its strategic plan

and keep it up to date

This case study shows how Wave Nine's hands-on approach to consulting and its WorkBoard AI guidance helped CHW refine its OKR program and reach greater alignment, communication and transparency.

HANDS-ON OKR CONSULTING AND WORKBOARD AI TRAINING

CHW's previous OKR firm helped establish the program and supported the effort to build an internal coaching staff. Its approach, though, was less interactive than Wave Nine's. Wave Nine provided hands-on support, regular check-ins and in-depth consulting that went above and beyond what CHW had experienced before.

“Wave Nine provided regular check-ins, and the level of collaboration really stood out. Caroline was just so available and helpful. No matter what I asked, she always found a way to help.

Tricia Woodworth
IT Operations Manager, Community Housing Works

Wave Nine's focused attention helped CHW to:

1	Connect every role to the strategy	Make sure everyone understands how their work ties into the larger strategy.
2	Build strong OKR rituals	A regular meeting cadence that keeps the organization committed to its OKRs.
3	Improve internal training	Stronger OKR training, and a staff that knows WorkBoard AI well.
4	Master advanced reporting	Reports in WorkBoard AI that bring out the specific data CHW wants to highlight in its quarterly meetings.
5	Message around results	A stronger ability to build messaging around results and explain why OKRs matter.
6	Keep adoption going	Continuous OKR adoption throughout the organization.
7	Plan for the long term	Full use of WorkBoard AI's strategic planning capabilities to capture and update the long-term plan.

A PARTNER WHO STAYS CLOSE

Caroline also helped Tricia and her team stay current with the new WorkBoard AI features released with each update, so everyone could get the most out of the platform.

THE PREVIOUS PARTNER

Helped establish the OKR program

Supported the effort to build an internal coaching staff

Took a less interactive approach

WITH WAVE NINE

Hands-on support and regular check-ins

In-depth consulting on rituals, training and reporting

New WorkBoard AI features explained with each update

“

Wave Nine's consultants are very good at finding solutions, and working with Caroline increased my ability to message the importance of OKRs throughout the organization. She helped us increase our staff's WorkBoard AI skillset.

Tricia Woodworth

IT Operations Manager, Community Housing Works



ALIGNMENT, TRANSPARENCY AND A COMMON LANGUAGE FOR PROGRESS

Thanks to the CHW team's focus and its commitment to taking the program to the next level, CHW has come to exemplify what a successful OKR program looks like, despite some initial internal skepticism.

By giving every employee a WorkBoard AI account, CHW gave the entire organization immediate access to the company strategy. Each employee can see how every department's work supports the broader company objectives. Everyone is also plugged into a single source of truth that tracks everyone's activities and how those actions connect to critical results.

100%

OF EMPLOYEES ON
WORKBOARD AI

I don't know how anyone could do OKRs without giving WorkBoard AI access to everyone. It was key to helping us achieve alignment and unity around our objectives.

Tricia Woodworth

IT Operations Manager, Community Housing Works

CHW's OKR program delivers clear benefits:

Strategic alignment across the organization

Everyone is on the same page about the goals they pursue.

Full transparency into each department's efforts

Everyone in the organization has their own WorkBoard AI login.

Better communication

OKRs give the whole organization a common language and terminology for progress.

A coaching team in every department

CHW's certified internal OKR coaches make up 10% of the organization, so every employee has a go-to person for OKRs.

A WEEKLY RHYTHM THAT STICKS

With strong OKR rituals and a regular meeting cadence, such as updating OKRs on Monday and celebrating on Friday, CHW has significantly improved its training, coaching, reporting and overall OKR adoption.



MONDAY UPDATE

Teams update their
OKRs

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY CELEBRATE

Progress and wins
get recognized

“Wave Nine really elevated our game—in the training we offer, in how we use WorkBoard AI and other OKR tools, and in consistently walking us through the latest software updates. They also help us understand new WorkBoard AI features so we can get the most out of them.

Tricia Woodworth

IT Operations Manager, Community Housing Works

WORKBOARD SHOWCASE

How Community Housing Works uses WorkBoard AI and its AI agents to keep 80 people aligned on one strategy.

01 • AI CHIEF OF STAFF AGENT

Automate Executive & Initiative Briefings

Ahead of CHW's quarterly meetings, the AI Chief of Staff Agent drafts a summary of progress, risks and wins from live OKR data, building on the advanced reports CHW set up with Wave Nine.

BENEFITS

- ✓ Quarterly meetings start from the same live picture
- ✓ Less manual report building before each review
- ✓ Leaders focus the conversation on the results that matter most

02 • AI CHIEF OF STAFF AGENT

Nudges and status requests

CHW's weekly rhythm starts with OKR updates on Monday. The agent reminds owners to update their key results and flags the ones that are overdue, so Friday's celebration is about real progress.

BENEFITS

- ✓ OKRs stay current week by week
- ✓ Fewer manual reminders for CHW's internal coaches
- ✓ Progress and wins recognized every Friday

03 • AI OKR DRAFTING

OKR creation, alignment and cycle

With every employee on WorkBoard AI, CHW's internal coaches use AI OKR drafting to help teams write outcome-focused OKRs that connect to the company objectives.

BENEFITS

- ✓ Higher-quality OKRs across departments
- ✓ Every person sees how their work supports the strategy
- ✓ Coaches spend less time reworking drafts

■ KEY TAKEAWAYS

LESSONS FOR OTHERS IMPLEMENTING OKRS

Tricia and her team learned a few lessons from their highly successful OKR program:

01

Work to achieve full leadership buy-in

Tricia maintains that a successful OKR implementation begins at the top, and getting leadership on board helps ensure success.

02

Create consistent messaging

Consistent messaging from leadership about the OKR strategy, the platform and the OKR rituals increases buy-in and commitment.

03

Certify at least one coach from each department

CHW's coaching team makes up 10% of the organization. Every team's voice is heard, and every employee has a go-to person for OKRs.

04

Give everyone WorkBoard AI access

Tricia contends that wall-to-wall licensing was essential for establishing alignment across the organization.

By engaging the entire non-profit in its OKR program in a thoughtful, strategic way, CHW has reached a level of focus, transparency and alignment that few organizations achieve.

STRATEGY EXECUTION WITH OKRS AND AI

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

wavenine.com



Wave Nine Inc.
490 43rd Street, Suite 90
Oakland, CA 94609
United States

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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