

How Gruppo Sella reached **90%+** OKR adoption and sets OKRs 2x as fast

BANKING & FINANCIAL SERVICES · 6,500 EMPLOYEES · WORKBOARD AI

Gruppo Sella started OKRs with its leadership team and a spreadsheet. With Wave Nine and WorkBoard AI, it built a group-wide OKR rhythm, an internal coaching community and AI-supported planning.

90%+

OKR adoption across the organization

2x

faster OKR setting

10x

better OKR quality

■ AT A GLANCE

CLIENT

Gruppo Sella, an independent international financial services group with more than 450 years of family history

INDUSTRY

Banking & Financial Services

EMPLOYEES

6,500

CHALLENGE

Take an OKR program that started with the executive team and a spreadsheet to the whole group, across 51 strategic programs, 554 projects and 2,000 people

SOLUTION

WorkBoard AI, implemented with Wave Nine: a platform set up around the group's planning cycle, trained OKR mentors and a phased rollout of generative AI

RESULTS

90%+ OKR adoption (up from 5%), OKRs set 2x as fast with 10x better quality, and an execution acceleration equal to 10 weeks of capacity for 100 teams

■ THE CHALLENGE

SCALING OKRS ACROSS A LARGE GROUP

Gruppo Sella is an independent international financial services group. Its businesses span banking, wealth management, payments and its own software development, and its family history goes back more than 450 years. Around 6,500 people work across the group.

In 2020, the leadership team began using OKRs to translate the long-term strategy into short-term objectives. Alessandro Basile, then Head of Group Planning & Execution and today the group's CFO, led the program. The first OKRs lived in Excel. That worked for the executive team. For a group with 51 strategic programs, 554 projects and 2,000 people to align, it did not.

The spreadsheets were hard to update, offered little visibility and turned every update into manual work. Coordinating across teams at the speed the strategy demanded was difficult, and monthly and quarterly business reviews took a lot of preparation. Alessandro and his team set out to find an OKR platform that would:

- ✓ be easy enough that people would actually use it
- ✓ remove the manual work of managing OKRs
- ✓ cover the full OKR life cycle, from strategy to quarterly OKRs to reviews
- ✓ give every level, from executives to frontline teams, a clear view of strategy and progress
- ✓ cut the overhead of monthly and quarterly business reviews while improving the flow of information

They looked at several platforms.

A PLATFORM BUILT AROUND THE GROUP'S RHYTHM

Gruppo Sella procured WorkBoard AI through Wave Nine and partnered with Wave Nine to implement it and get the most out of it. The goal was clear from the start: make the platform fit the way the group plans and reviews its strategy, and build the internal capability to run a program of this size.

- 1 Documented process** Configured WorkBoard AI around the group's planning cycle, with quarterly OKRs linked to the strategic plan and weekly, monthly and quarterly business reviews.
- 2 Training** Trained Gruppo Sella's internal OKR champions, the OKR mentors, on the platform and its most powerful features.
- 3 Team & community** Trained and empowered the internal coaches who carry a program of this size. Around them, Gruppo Sella built an active, cross-functional coaching community.
- 4 Role-based views** Set up dashboards and business reviews for each audience, from big-picture strategy for leaders to detailed reports for department heads.
- 5 Change management for AI** Supported the rollout of WorkBoard AI's generative features. It started with a limited pilot among the OKR mentors and expanded with workshops, internal communication, kickoff moments, user guidance and feature training.



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We researched other tools, but none offered the comprehensive OKR management capabilities that WorkBoard AI does. Between WorkBoard AI's intuitive interface and Wave Nine's training, our teams quickly adopted the platform, which meant we could focus more time on executing our strategy. Thanks to Wave Nine's WorkBoard AI implementation, we're now seeing clearer alignment across teams and faster decision-making!

Stefano Corradino
Head of Group PMO, Gruppo Sella

HOW GRUPPO SELLA WORKS WITH WORKBOARD AI

Today, WorkBoard AI is where Gruppo Sella plans, aligns and reviews its strategy.

Strategy planning

The long-term strategy is translated into quarterly OKRs that contribute to the objectives of the strategic plan. Weekly, monthly and quarterly business reviews keep them aligned through every cycle.

Company-wide transparency

Easy-to-update scorecards, business reviews and reporting give employees at every level a clear view of the strategy and of progress to plan. Executives set up their own dashboards, and those dashboards need no maintenance.

Alignment at scale

A clear line of sight from departmental OKRs to the strategic plan helps the group focus effort and resources across 51 strategic programs and 554 projects.

Views for every role

Tailored dashboards for internal coaches, OKR mentors and leaders give each person the information they need.

THE PLATFORM ALSO CARRIES THE GROUP'S OKR RITUALS

■ Meetings	Focused meetings with WorkBoard AI's meeting and agenda features, including one-on-ones
■ Business reviews	Business reviews and scorecards for executive reviews and briefings, without complicated slide decks
■ Alignment	Alignment features to track dependencies between the work behind each OKR
■ Heatmap	The Heatmap as the central source of truth for group progress
■ Workstreams	Workstreams that connect actions and tasks to OKRs, so they actually get done

WORKBOARD SHOWCASE

Gruppo Sella has used WorkBoard AI's generative features since 2023. Stefano Corradino, Head of Group PMO, describes the role AI now plays as **"almost like a strategic assistant."**

01 · AI OKR DRAFTING

Co-Author

Teams use Co-Author to turn the multi-year strategy into quarterly OKR drafts that are more detailed, measurable and impact-oriented. AI checks coherence and helps teams avoid the most common mistakes, such as vague or activity-based key results. OKR mentors and owners then review, discuss and commit.

BENEFITS

- ✓ OKRs set 2x as fast
- ✓ 10x better OKR quality, with measures that went from OK to great
- ✓ Alignment improved right away

02 · AI CHIEF OF STAFF AGENT

Automate Executive & Initiative Briefings

Every Friday, Gruppo Sella's top management receives an AI brief from WorkBoard AI on progress against the strategic priorities, covering progress, blockers and delays. Leaders start the week with a synthesized view, so meetings spend less time recapping and more time deciding.

BENEFITS

- ✓ Leaders are ready for Monday without manual status compilation
- ✓ Progress on every strategic priority in one weekly brief
- ✓ 25% of employees use the daily AI summaries

03 · ALIGNMENT

Drive cross-team alignment

Because WorkBoard AI works with Gruppo Sella's own strategy and execution data, it sees related work across teams. In one case it showed that two teams were building the same Power BI dashboard from the same data source.

BENEFITS

- ✓ Duplicate work spotted across teams
- ✓ Cross-team transparency on 51 strategic programs and 554 projects
- ✓ Stronger alignment checks at planning time

■ WORKBOARD AI SHOWCASE

CLEAR BOUNDARIES

At Gruppo Sella, AI is a co-pilot and the decisions stay with people. Final strategic approvals, sensitive regulatory and reputational matters and performance evaluation remain human. OKRs are still the product of discussion, prioritization and commitment, and AI helps those conversations happen faster and better informed. What surprised Stefano most was how quickly adoption picked up once people saw the benefit in their own work.

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Co-Author's generative AI capabilities helped us create quality OKRs that were more detailed, measurable, and impact-oriented.

— **Stefano Corradino**

Head of Group PMO, Gruppo Sella

■ INTERNAL COACHES

EMPOWERING INTERNAL COACHES TO MANAGE LARGE-SCALE ALIGNMENT

As the program champion, Alessandro built and maintained a strong internal coaching community, supported by a network of OKR mentors. Wave Nine's WorkBoard AI training played a critical role in empowering these coaches to run such a large program, and they made full use of the platform. The community kept the momentum going as the program grew from the boardroom to the whole organization.

Alessandro's work on transparency, accountability and alignment did not go unnoticed. Leadership recognized the more efficient and effective way of managing strategy and execution that his team had created. Today he serves as Gruppo Sella's CFO and relies on WorkBoard AI for a clear view of how each team's work contributes to the group's major objectives.

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WorkBoard AI allowed us to scale our OKR process companywide faster than ever before. It gives us visibility into how each team's work contributes to our overall strategy. The real-time insights helped us identify where we were making progress and where we needed to course-correct. We now have a clear view of how all the moving parts are driving us toward our business objectives, and we're executing more efficiently as a result.

— **Stefano Corradino**

Head of Group PMO, Gruppo Sella

STRATEGIC ALIGNMENT AND TRANSPARENCY AT SCALE

90%+

OKR adoption across the organization, up from 5% at the start.

2x / 10x

OKRs set 2x as fast, with 10x better quality.

10 weeks

of capacity for 100 teams: the execution acceleration the group gained.

51 / 554

Cross-team transparency on all 51 strategic programs and 554 projects.



Maintenance-free dashboards that executives enjoy setting up themselves.



Vertical and horizontal alignment across the group and its companies, so executives, directors, managers and frontline employees see how their work contributes to the overall mission.

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The quality of our measures went from OK to great and alignment got much better right away.

Stefano Corradino

Head of Group PMO, Gruppo Sella

Gruppo Sella shows how a large, regulated organization can take OKRs from the boardroom to the whole group, then use AI to make the rhythm faster and the goals better, with people firmly in charge of the decisions.

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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