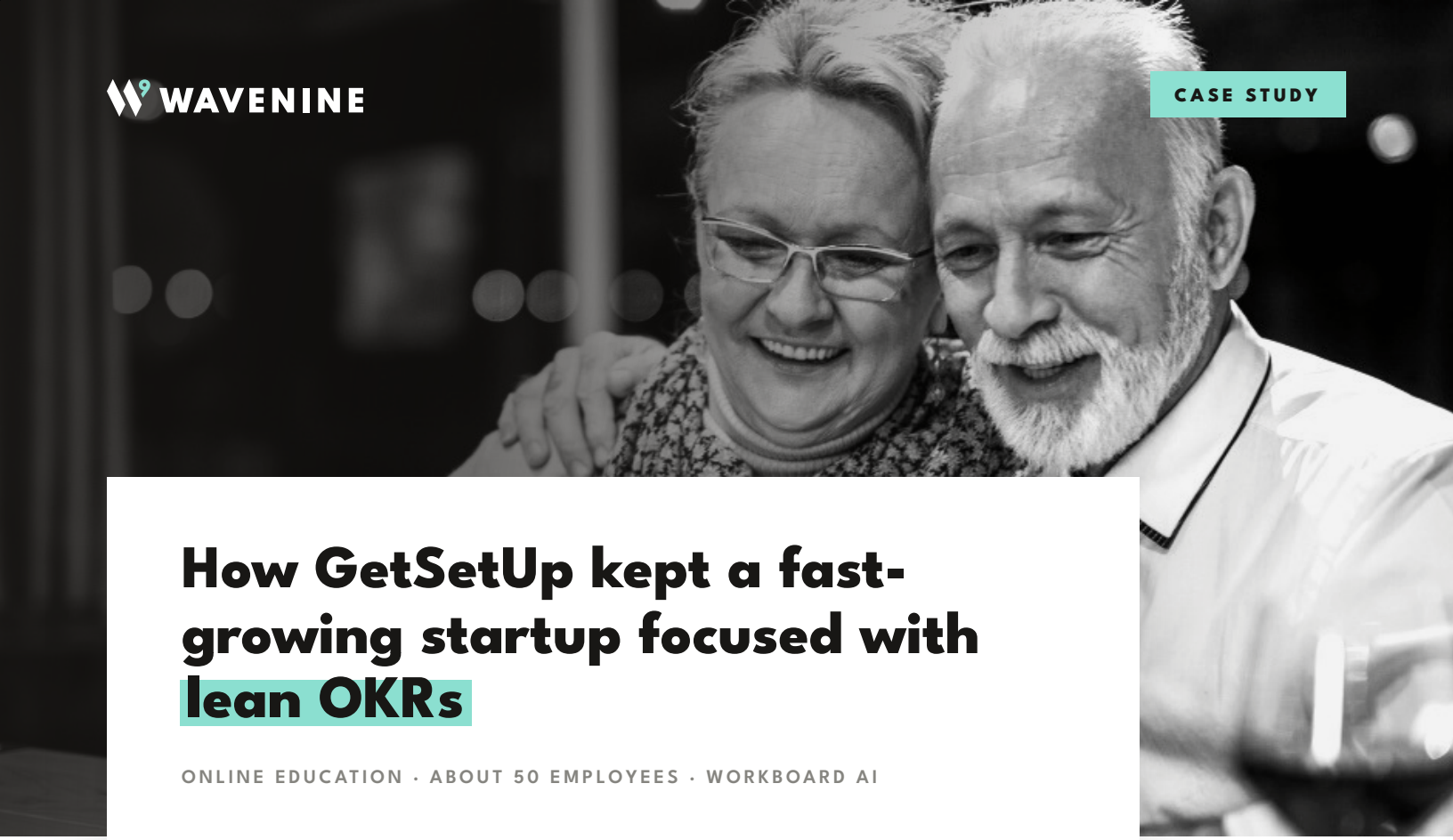
WAVENINE

CASE STUDY



How GetSetUp kept a fast-growing startup focused with lean OKRs

ONLINE EDUCATION · ABOUT 50 EMPLOYEES · WORKBOARD AI

GetSetUp grew from a handful of people to about 50 almost overnight. Wave Nine helped it replace pages of detailed goals with a short set of OKRs that teams own and act on.

10

department OKR workshops

4

company focus areas, down from pages of goals

2

workshops per team to set its own OKRs

AT A GLANCE

CLIENT

GetSetUp, a mission-driven startup with an e-learning platform for older adults

INDUSTRY

Online Education

COMPANY SIZE

~50

CHALLENGE

Rapid growth after a $10 million funding round, with goals too detailed to communicate, top-down processes and metrics that were hard to track

SOLUTION

A lean, participatory OKR rollout on WorkBoard AI with Wave Nine: an executive goal-setting workshop, 10 departmental workshops and clear, easy-to-track KPIs

RESULTS

Leaner processes, better communication, cross-functional cohesion and alignment across departments around a common definition of success

THE CHALLENGE

GROWTH THAT OUTPACED THE STARTUP PLAYBOOK

From a handful of people to around 50, almost overnight.

GetSetUp, a mission-driven startup that offers an e-learning platform for older adults, found itself in the middle of a massive growth spurt in 2021. The company had just received $10 million in venture funding, and it had grown almost overnight from a handful of employees to around 50 people.

Every startup works toward results like these, and massive growth comes with its share of hurdles. GetSetUp was no exception. What works in a small startup does not often work for a larger company, and the rapid scaling meant GetSetUp had to rethink its systems and processes.

Skyrocketing growth often requires:

01	**Recalibrating goals** to make them more streamlined and easier to communicate to the larger organization
02	**Rethinking processes** to make them simpler and less top-down, encouraging greater ownership among employees and departments
03	**Setting clearer metrics** with key performance indicators (KPIs) that are easy to track

THE CHALLENGE

A DISTRIBUTED TEAM THAT NEEDED ONE FOCUS

Without streamlined goals, scalable processes and clear metrics, a growing startup can lose its focus and fall short of its potential. That is especially true for a company like GetSetUp, whose distributed workforce needed to collaborate seamlessly. That's where WorkBoard AI and Wave Nine entered the picture.

THE PARTNER

FINDING THE RIGHT IMPLEMENTATION PARTNER

GetSetUp's VP of Operations, Larry Sanford, approached WorkBoard AI in search of an implementation partner. He had seen an OKR rollout fail at another organization, and he knew it would be difficult to succeed without the right guidance. WorkBoard AI referred him to Wave Nine.

Originally, Larry and his team intended to rely on Wave Nine to implement the software, then have his staff take over internally. They soon realized that Wave Nine's expertise could also help them define clearly what success would look like, with precise metrics to measure it.

THE PLAN
Wave Nine implements the software, then staff take over

→

THE INSIGHT
Wave Nine can help define what success looks like

→

THE RESULT
A full OKR rollout with precise metrics

> **I was impressed by the Wave Nine team's engagement from the start. They were highly responsive and they worked to understand our business. They came to serve as an extension of our company, making sure we were doing everything right as we streamlined our implementation.**

Larry Sanford
Vice President of Operations, GetSetUp

THE OKR ROLLOUT

FROM PAGES OF GOALS TO A FEW CLEAR OKRS

GetSetUp's leadership came to Wave Nine with an extensive, detailed plan for improvement. In fact, the plan turned out to be a little too detailed and extensive, with pages and pages of goals that focused on micro-level outcomes and results.

During the first goal-setting workshop with the executive team, Wave Nine helped leadership focus its goals and identify a smaller set of measurable, easy-to-communicate OKRs.

BEFORE THE WORKSHOP

Pages of goals on micro-level outcomes

→

AFTER THE WORKSHOP

A small set of measurable, easy-to-communicate OKRs

THE PRINCIPLE BEHIND IT

Each OKR should clearly define what success looks like, so employees and department leads can act autonomously and hold themselves accountable for reaching the goal.

With that premise, Wave Nine helped Larry and the other executives refine their OKRs around four focus areas:

01

MEMBER GROWTH

02

RETENTION

03

REVENUE GROWTH AND TRACKING

04

CUSTOMER SATISFACTION

TEN DEPARTMENTAL WORKSHOPS

10

WORKSHOPS, TWO PER TEAM

In the 10 departmental workshops that followed, Wave Nine worked with department heads and their teams to identify clearly defined, measurable OKRs that didn't require constant oversight from the CEO or other executives. For a startup that wants to scale, that independence is essential.

Wave Nine's guidance made the department-level OKRs:

Clear

They define what success looks like in the months and quarters ahead.

Straightforward

They are easy to understand and communicate.

Participatory

They encourage buy-in and commitment from staff, unlike a series of top-down mandates.

Cross-functional

They span teams to break up silos and support cooperation between departments.

Altogether, Wave Nine worked closely with GetSetUp to develop a lean, focused OKR strategy:

1	**Recalibrated goals**	A streamlined set of goals that is easy to communicate.
2	**Simpler processes**	Processes that are more distributed, encouraging ownership and buy-in at every level.
3	**Clear metrics**	Crystal-clear metrics with easy-to-track KPIs.

THE RESULTS

A STARTUP ALIGNED AROUND A SHARED PURPOSE

In the end, Larry credits Wave Nine's work with helping GetSetUp achieve:

01

Leaner processes

for greater efficiency

02

Better communication

throughout the company

03

Cross-functional cohesion

with a shared purpose

04

Alignment between departments

built on a collective vision and a common definition of success

GetSetUp now works from a short set of OKRs that every team understands. Department heads and their teams own their results, and the company can keep scaling without every decision running through the executive team.

> **It was the Wave Nine team's eagerness to help that made them stand out. They were available whenever we needed them, and that made them different than a typical implementation partner. I honestly don't think we could have done this without them.**

Larry Sanford
Vice President of Operations, GetSetUp

A FEW SHARED GOALS

WORKBOARD AI SHOWCASE

How GetSetUp uses WorkBoard AI to keep a fast-growing, distributed company focused on a few shared goals.

01 · OKRS

OKR Management

GetSetUp keeps its streamlined company OKRs and each department's OKRs in WorkBoard AI. Every team sees its own measurable results and how they connect to the company's focus areas.

BENEFITS

- One place for a short, clear set of company and team OKRs
- Clear owners for every key result
- Progress visible without CEO-level oversight

02 · ALIGNMENT

Alignment

GetSetUp uses alignment views to connect department OKRs to company goals and to each other. Cross-functional OKRs are visible across teams, which helps break up silos.

BENEFITS

- Departments see how their work feeds company priorities
- Dependencies between teams are visible
- A shared view for a distributed workforce

03 · RHYTHM

Operating Model & Cadence

GetSetUp runs regular OKR check-ins in WorkBoard AI to review progress and keep the new habits going as the company grows.

BENEFITS

- A steady rhythm for reviewing progress
- Issues raised early in check-ins
- OKR habits that scale with headcount

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

WAVENINE

KEY TAKEAWAYS

THREE LESSONS FROM GETSETUP'S OKR PROGRAM

Every Wave Nine engagement is unique, and each OKR program needs nuanced guidance. Still, customer stories tend to highlight lessons other companies can learn from. GetSetUp's OKR program offers three.

1

Successful scaling means rethinking systems and processes

As startups scale to 50 to 100+ employees, they need to rethink their systems and processes to reduce complexity, so they can work in a more distributed, less top-down way. OKRs work best when they're tied to results that are simple to measure and communicate, so they inspire ownership and autonomy.

2

OKR setting works best when it's participatory

When executives work with department heads, and those department heads work with their staff, the OKRs become easier for everyone to wrap their heads around. It also lets employees see the big picture, contribute to the strategy and align their actions with the company's most important priorities. That is what OKRs are all about.

3

Lean goals and radically honest discussion achieve buy-in

It can be tempting to set dozens of complex, detailed goals without gathering employee feedback. But an OKR program is worthless if employees across departments don't engage with it. Simple, lean, focused goals tend to win company-wide buy-in.

STRATEGY EXECUTION WITH OKRS AND AI

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

wavenine.com

WAVENINE

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.

wavenine.com · linkedin.com/company/wavenine