

How Grupo Moura built real-time visibility and **accountability** into its OKRs

AUTOMOTIVE ENERGY · 7,000-EMPLOYEE DIVISION · WORKBOARD AI

Grupo Moura tracked its OKRs in Excel and Power BI and chased updates by email. With WorkBoard AI, directors see current results automatically, and 100% of key result owners update their OKRs.

100%

of key result owners update
their OKRs

15 to 20

minute follow-up meetings,
down from about 45

1 to 2_h

of manual report updates
replaced by automatic director
reports

AT A GLANCE

CLIENT

Grupo Moura, an automotive energy company

INDUSTRY

Automotive Energy

DIVISION SIZE

7,000

CHALLENGE

OKRs tracked by hand in Excel and Power BI, little visibility into progress on initiatives and key results, an email-heavy update process with no accountability, and teams working in silos

SOLUTION

WorkBoard AI as the single source of truth for the OKR program, with scorecards, business reviews and Workstreams, supported by Wave Nine

RESULTS

100% key result owner participation in recent cycles, director reporting that updates automatically, follow-up meetings cut from about 45 minutes to between 15 and 20, and better alignment between the business and legal teams

THE CHALLENGE

SPREADSHEETS, POWER BI AND A STREAM OF EMAILS

Leadership needed to know, in real time, whether the business was on track.

For more than two years now, Grupo Moura has used WorkBoard AI to track and manage its OKR program. Before adopting the platform, the company's business analyst and its finance and administration manager say, the team relied on manual spreadsheets and disconnected reports that made it difficult to know, in real time, whether the business was on track.

Grupo Moura tracked its key results in a simple Excel spreadsheet paired with Power BI dashboards. Key result owners updated a shared spreadsheet, and the Power BI dashboard was then refreshed by hand, a process that depended on a steady stream of emails and reminders.



CHASING UPDATES, ONE EMAIL AT A TIME

15+

EMAILS EVERY QUARTER

The team recalls that "at least 15 emails" went out each quarter, chasing updates on 15 or more key results. When someone forgot to update their numbers, the team had to follow up individually to get the spreadsheet current.

“

The whole process was too much on our side. There wasn't accountability.

Daniel Garcia

Finance & Administration Manager, Grupo Moura

The manual approach also left leadership without a reliable, real-time picture of progress. The team was confident that the different areas of the business were generally aligned, but it had little visibility into how key results were actually progressing. That limited what it could tell company directors and, the team says, risked directors making decisions without accurate information. Grupo Moura faced four challenges:

01

OKRs tracked manually in Excel and Power BI

02

Little visibility into progress on initiatives and key results

03

A manual, email-heavy update process with no accountability

04

Teams and initiatives operating in silos

Choosing WorkBoard AI

Grupo Moura's leadership knew it needed stronger governance and better visibility into its OKR process. A director, to whom the platform had been recommended, introduced the leadership team to WorkBoard AI.

INTRODUCED

A director brings WorkBoard AI to the leadership team

→

TESTED

The team tries the platform on its OKR process

→

JULY 2024

WorkBoard AI comes into the business

Since then, the team says, every new key result the company has curated has been shaped by what it sees on the platform. The results reviewed in WorkBoard AI directly inform how new key results are defined.

VISIBILITY THAT DRIVES ACTION

Directors see their areas clearly

With WorkBoard AI in place, scorecards and business reviews now give directors clear, current visibility into their areas, which the team says was not available before. Directors use those reports to schedule follow-up meetings with their teams, specifically to close gaps and hit targets.

BEFORE

Key results in a shared Excel spreadsheet

Power BI refreshed by hand

At least 15 chase emails every quarter

Little visibility for directors

NOW

WorkBoard AI as the single source of truth

Scorecards and business reviews update automatically

Key result owners update their OKRs every week

Directors act on current results

Accountability is now a weekly habit

Accountability has shifted accordingly. Under the old spreadsheet process, engagement from key result owners was inconsistent. In Grupo Moura's most recent cycles with WorkBoard AI, the company reached 100% participation from key result owners in updating their OKRs, a habit the team says is now embedded weekly across the organization.

100%

OF KEY RESULT OWNERS
UPDATE THEIR OKRS

From inconsistent spreadsheet updates to full participation in Grupo Moura's most recent cycles, with updates now part of every week.



THE RESULTS

BREAKING DOWN SILOS

Before WorkBoard AI, teams and initiatives at Grupo Moura often operated in silos, without visibility into how their efforts connected to other parts of the business. One example the team points to is a key result to build a standardized contract document, which directly involves both the business area and the company's legal team. WorkBoard AI has made it possible to track progress on shared key results across both teams, which has improved the underlying process.

BUSINESS AREA

Owns the commercial side of the contract

LEGAL TEAM

Owns the legal side of the contract

SHARED KEY RESULT

A standardized contract document, tracked by both teams in WorkBoard AI

Measurable results

FASTER REPORTING

1 to 2 hours

Building scorecards and business reviews in WorkBoard AI replaced manual updates to presentation materials that used to take one to two hours. The results now update automatically.

SHORTER MEETINGS

15 to 20 min

Follow-up meetings that once ran around 45 minutes now take roughly 15 to 20 minutes.

FULL PARTICIPATION

100%

Of key result owners updated their OKRs in Grupo Moura's most recent cycles.

BETTER ALIGNMENT

2 teams

The business and legal teams now track shared key results together.

BEFORE AND AFTER WORKBOARD AI

Follow-up meetings

Before		about 45 min
Now		15 to 20 min

Director reports

Before		1 to 2 hours by hand
Now		Automatic

THE FEATURES THAT MADE THE BIGGEST DIFFERENCE

Asked what they love most about WorkBoard AI, both Daniel and Lucas point to Business Review and Workstreams.

BUSINESS REVIEW

Director reports in less time

Business Review cut the time spent building director-facing reports and freed the team up for other work.

REPLACES

1 to 2 hours of manual presentation updates

DRIVES

Follow-up meetings to close gaps and hit targets

WORKSTREAMS

People connected across the business

The team creates initiatives and actions, links everyone back to the relevant key results, and gets clear visibility into exactly what stage each effort is in.

CONNECTS

People, initiatives and actions

SHOWS

The stage of each effort, linked to its key result



Daniel Garcia

Finance & Administration Manager, Grupo Moura

WAVE NINE: A GREAT PARTNERSHIP

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A partnership in which we could count on each other, the support of the professionals whenever we need it. We also have a great tool available to us, which contributes a lot to the results we achieve as a company.

WORKBOARD SHOWCASE

How Grupo Moura uses the WorkBoard AI platform to give directors real-time visibility and keep shared work connected.

01 • BUSINESS REVIEWS

Business Reviews and Scorecards

Directors get scorecards and business reviews with current results for their areas. The reports update automatically, which replaced one to two hours of manual work on presentation materials, and directors use them to schedule focused follow-up meetings.

BENEFITS

- ✓ Director reporting without manual updates
- ✓ Follow-up meetings of 15 to 20 minutes, down from about 45
- ✓ Decisions based on current data

02 • WORKSTREAMS

Initiatives linked to key results

Grupo Moura uses Workstreams to create initiatives and actions, connect people across the business and link everyone back to the relevant key results, with clear visibility into the stage of each effort.

BENEFITS

- ✓ Every initiative tied to a key result
- ✓ Clear status for each effort
- ✓ People connected across areas

03 • ALIGNMENT

Shared key results across teams

Shared key results, such as building a standardized contract document, are tracked across the business area and the legal team in one place.

BENEFITS

- ✓ Cross-functional work visible to both teams
- ✓ Fewer silos between business and legal
- ✓ A better underlying process

WHAT GRUPO MOURA'S JOURNEY SHOWS

01

A dedicated platform closes the visibility gap.

Moving from spreadsheets to WorkBoard AI closed the gap between key result owners and company directors.

02

A single source of truth cuts manual follow-up.

One place for Strategic Priorities reduced the email-driven follow-up that used to fall on the team.

03

Automated reporting frees up time.

Automated scorecards and business reviews freed up significant time previously spent building reports by hand.

04

Shared key results connect teams.

Cross-functional key results helped connect teams, such as business and legal, that had previously worked in silos.

05

Visibility drives participation.

Consistent visibility into progress drove participation from key result owners to 100% in recent cycles.



Lucas Antonio
Business Analyst,
Grupo Moura

“

A great step up for us, and proof for us.

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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