WAVENINE

CASE STUDY

How Union Wireless broke down silos and got stalled projects over the line

TELECOMMUNICATIONS · 275 EMPLOYEES · WORKBOARD AI

Union Wireless runs everything in-house, from marketing to building cell towers. With Wave Nine, it turned OKRs into a shared operating rhythm that reaches executives, office teams and field crews alike.

70%

of the organization working with OKRs

100%

of directors and above certified by Wave Nine

All

employees on WorkBoard AI, from the C-suite to the field

AT A GLANCE

CLIENT

Union Wireless, a family-owned telecom founded 110 years ago in Wyoming, offering landline, wireless and internet service across five Rocky Mountain states

INDUSTRY

Telecommunications

COMPANY SIZE

275

CHALLENGE

Siloed departments, funding and effort that weren't tied to company goals, employees who couldn't see the impact of their work, limited visibility and accountability, and outdated, manual project management

SOLUTION

An OKR program delivered by Wave Nine: OKR certification for every director, leaders coaching departments other than their own, a large internal coach team, cross-functional OKR teams, strong OKR rituals, and WorkBoard AI for every employee

RESULTS

Silos broken down, long-forgotten initiatives completed, blind spots found and fixed, and visibility into strategy for everyone from executives to field crews

THE CHALLENGE

INTERCONNECTED WORK, SILOED TEAMS

A 110-year-old telecom that does it all itself, from marketing to cell towers.

Union Wireless is a rarity among telecom companies today. It's a family-owned business, launched 110 years ago in a small Wyoming town, where the founders connected ranchers to local telephone exchanges by stringing lines across barbed-wire fences. Today, Union Wireless offers landline, wireless and internet service across five Rocky Mountain states.

The company manages its entire business in-house: building cell towers, maintaining vehicles, marketing, customer service and much more. That brought challenges common to growing mid-size businesses. From misalignment across teams to outdated, manual project management processes, Union Wireless needed a methodology that would take it to the next level of operational effectiveness.

To address these challenges and move the company forward, Union Wireless launched an OKR program and engaged Wave Nine to deliver it.

> **Handling everything in-house, from marketing to building cell phone towers, it was often difficult to connect the dots and help each employee see how their work tied into our overall success. OKRs seemed to provide an opportunity for us to do that.**
>
> **David Ricley**
> Director of Customer Care, Union Wireless

THE CHALLENGE

PROJECTS THAT STOPPED AT 80%

As a long-standing mid-size business, Union Wireless had departments and teams that grew organically, each following its own priorities and goals. Many projects, however, were deeply interconnected. They required complex coordination, which often left them on the verge of completion without ever crossing the finish line. Becoming more operationally efficient and effective meant addressing five issues:

01
Siloed departments with little communication

02
Funding and efforts not aligned with company goals

03
Employees who didn't see the impact of their work

04
Limited visibility, oversight and accountability

05
Outdated, manual project management in the field

> **A lot of projects would reach 80% completion, but go no further. OKRs in general, and cross-functional teams in particular, helped us understand what contingencies exist and how to complete things in the right order.**

Tressa Barnes
Marketing Director, Union Wireless

The leadership team chose to address these issues by fully committing to an OKR program, working with Wave Nine to set aspirational, results-focused OKRs. Wave Nine would also help the company implement and train the habits that turn business priorities into action. On top of that, Union Wireless asked Wave Nine to:

01
Set aspirational, results-focused OKRs

02
Develop a large team of internal coaches

03
Build cross-functional OKR teams

04
Train everyone to use OKR insights in WorkBoard AI

THE APPROACH

BREAKING DOWN SILOS FROM THE START

100%

The executives at Union Wireless knew that their full commitment and engagement would greatly improve the odds of success. So every leader at director level and above completed Wave Nine's OKR certification program.

One of the critical learnings was to bridge the gaps across departments by rotating leaders to different teams. Each leader facilitated OKRs for a department other than their own, with Wave Nine coaches by their side to guide them.

THE LEADER
Certified director, coaching outside their own department

→

THE TEAM
Another department, free to have honest conversations

+

WAVE NINE
A coach at the leader's side for guidance and clarity

This broke down cross-functional silos and helped leaders identify and manage dependencies. It also gave employees more freedom to have difficult and honest conversations about the challenges and opportunities in their departments.

> **Rotating coaches between teams helped us, as directors, let go of our biases and stop favoring our own department's needs, and it gave people the safety to use their voices. They could open up and blossom, not afraid to speak their minds.**
>
> **Tressa Barnes**
> Marketing Director, Union Wireless

Wave Nine's coaches worked alongside each internal coach, giving guidance and clarification as the teams set actionable OKRs around financial goals, employee well-being and customer satisfaction.

> **One thing I love about Philip and Johannes is their compassion. You feel comfortable asking any question knowing you're not going to be judged, and we all felt a level of comfort learning from them. They were also willing to experiment with us and try new things.**
>
> **Tressa Barnes**
> Marketing Director, Union Wireless

TRANSPARENCY

WALL-TO-WALL VISIBILITY

Union Wireless broke down silos further by making transparency the default. It brought every employee onto WorkBoard AI and encouraged people to explore the OKRs of other departments, so they could see the big picture. Employees at every level can now see how their work affects other departments and the company as a whole.

> **Giving employees access to WorkBoard AI means they can see any team's progression, and we encouraged them to look around and see what the chief officers want us to achieve. This means that every associate can see how their day-to-day work impacts the company's overall health.**
>
> **Tressa Barnes**
> Marketing Director, Union Wireless

The teams gained more than cross-functional transparency. Union Wireless now runs focused business reviews and team meetings in WorkBoard AI. Large status-update calls have given way to focused weekly leadership meetings, which address the biggest risks and opportunities in the company as they surface in WorkBoard AI.

WorkBoard AI and Wave Nine's enablement gave Union Wireless a stronger team focus, with consistent, up-to-date agendas and focused meetings. These structured and transparent OKR rituals created more ownership and clarity across top leadership and management, and deep within the organization. Even non-desk workers, a good portion of Union Wireless employees, stay aligned and focused on key results, using the WorkBoard AI app to have focused meetings and conversations wherever they are.

BEFORE	NOW
Large status-update calls	Focused weekly leadership meetings in WorkBoard AI
Each department focused on its own goals	Every employee can explore every department's OKRs
Manual note taking in the field	Field crews on the WorkBoard AI app, wherever they are

THE RHYTHM

DEVELOPING OKR RITUALS AND MEANINGFUL HABITS

Wave Nine worked with the internal coaches to develop strong, consistent OKR rituals:

EVERY KEY RESULT

Action plans

Day-to-day execution feeds into the larger mission, stakeholders collaborate, and misalignment gets addressed.

EVERY WEEK

Monday calibration, Friday celebration

Discuss progress and calibrate on Monday, review the week and celebrate successes on Friday.

EVERY MONTH

Business reviews

The leadership team identifies bottlenecks and resolves cross-functional alignment challenges.

MID-QUARTER

Check-ins

Internal coaches help teams update OKRs, plan for at-risk OKRs and solve dependencies.

ONGOING

OKRs in one-on-ones

Managers explore solutions, remove obstacles and support the larger mission.

Sticking to these rituals helped Union Wireless:

- **Create greater OKR ownership across leadership and management**
- **Keep the organization aligned**
- **Connect non-desk workers to the strategy and specific initiatives**
- **Improve coordination around cross-functional work**

REFLECT AND RESET

No OKRs are ever perfect. Union Wireless accelerated its journey to high-quality OKRs with its OKR coach community, Wave Nine's training and WorkBoard AI's Canvas. Thanks to Wave Nine's guidance on the OKR implementation, its WorkBoard AI training and the coaching community it helped build, Union Wireless quickly learned to set meaningful OKRs.

BUILT TO FIT

TAILORING THE PROCESS TO HOW UNION WIRELESS WORKS

The OKR process is never one-size-fits-all, and Union Wireless shows why. Jed Vigil, Director of IT Infrastructure and Cybersecurity, describes a business with field and operational teams, cross-functional execution needs and a working rhythm that doesn't fit neatly into a standard quarterly reset. Before committing to OKRs, the company ran leadership workshops with all of its directors and looked for explicit buy-in from every one of them.

> **Strategy execution and alignment were the big reasons we moved forward, but we also learned right away that the process could not just be copied and pasted. It had to fit how Union actually works.**
>
> **Jed Vigil**
> Director of IT Infrastructure and Cybersecurity, Union Wireless

L1	**Executive team:** sets the annual OKRs
L2	**Director team:** localizes the annual OKRs for each trimester
TEAMS	**Managers and teams:** their own localized OKRs on the same trimester cycle

Today, about 70% of the organization works with OKRs in some form. Some field teams, who travel and work out in the field, get their OKR information through supervisors or managers. The company started with quarters and moved to trimesters on purpose.

> **One of the things we found that was unique about our company is that we operate a lot like a build or construction company. Between Q2 and Q3, people were hard at work. Pulling them out to stop, reset, and run a whole new localization process was just too disruptive.**
>
> **Jed Vigil**
> Director of IT Infrastructure and Cybersecurity, Union Wireless

The cycles stay short enough to create focus and urgency, and the weekly rhythm keeps the conversation going: short Monday check-ins about the plan and the barriers for the week, and Friday sessions to celebrate what got done. Over time, Union Wireless also learned to tell committed targets from ambitious ones, and to give every localized OKR one owner who reports, updates and facilitates the work.

TEAMWORK

CROSS-FUNCTIONAL TEAMS

The final measure in the alignment strategy was creating cross-functional teams. By combining members of different departments to work on specific OKRs and tasks, these teams gain a unique perspective. They can see every step required to complete a project, including all contingencies, and communicate those requirements to everyone involved.

The cross-functional part of the program is still young, and it is already showing results: previously delayed projects are finally reaching completion.

> **OKRs have brought a level of introspection to the table that we've never had before, along with movement on several large projects that, in the past, we just shoved in a drawer.**
>
> **Tressa Barnes**
> Marketing Director, Union Wireless

> Alignment was so difficult for us in the past, with forces moving in the opposite direction. The OKR Breakthrough program with Wave Nine brought cohesion that I don't believe ever existed in the company, and that became clear to our longtime employees. Many seemed skeptical at first, but they became advocates after they saw the results.
>
> **David Ricley**
> Director of Customer Care, Union Wireless

David, Tressa and the other OKR coaches keep developing their cross-functional OKR teams and refining other parts of the program with Wave Nine. Guided by their willingness to have critical discussions and ask tough questions, Union Wireless is taking the company into the future.

> **We have two remarkable coaches in Philip and Johannes, who walked us hand-in-hand through our adoption. Whether it meant working with the C-Suite or with individual managers, they rolled up their sleeves and did what it took to get us to the next level of OKR maturity.**
>
> **David Ricley**
> Director of Customer Care, Union Wireless

THE RESULTS

ALIGNMENT, VISIBILITY AND OPERATIONAL GROWTH

The internal OKR coaching team at Union Wireless has begun to take the reins, and Wave Nine has moved into more of an advisory role. The executives keep experimenting and improving what works for their organization. Thanks to its OKR program, Union Wireless has:

- **Identified operational and marketing blind spots,** and addressed them and other inefficiencies through targeted programs
- **Given visibility to everyone in the organization,** from executives to the crews in the field
- **Helped everyone see the impact of their work** on company goals
- **Completed long-forgotten initiatives,** turning skeptics into advocates
- **Brought about 70% of the organization into working with OKRs,** with annual goals localized on a trimester cycle

OKRs have given Union Wireless the framework to have challenging but necessary conversations. The company has also learned to prioritize the initiatives that truly matter, and to say "no" to projects that would distract it from its highest priorities.

70%

of the organization working with OKRs

5

OKR rituals, from action plans to one-on-ones

All

employees can see every department's OKRs

> **We had to commit to learning through trial and error. Without that commitment, and the guidance from Wave Nine, we wouldn't be where we are today.**

Tressa Barnes
Marketing Director, Union Wireless

FROM THE C-SUITE TO THE FIELD

WORKBOARD AI SHOWCASE

How Union Wireless uses WorkBoard AI to keep 275 people, from the C-suite to field crews, working on the same priorities.

01 · TRANSPARENCY

Alignment

Union Wireless gave every employee access to WorkBoard AI and encouraged them to explore other departments' OKRs and see what the chief officers want to achieve. Alignment views make each team's progress visible across the company.

BENEFITS

- Every associate sees how their work connects to company goals
- Cross-department dependencies become visible early
- Public commitments strengthen accountability and engagement

02 · RHYTHM

Meetings and Operating Model & Cadence

Union Wireless replaced large status-update calls with small, focused weekly leadership and team meetings run in WorkBoard AI, with up-to-date agendas built around OKR progress. Field teams join the same rhythm through the WorkBoard AI mobile app.

BENEFITS

- Shorter meetings centered on the biggest risks and opportunities
- A consistent Monday and Friday rhythm across office and field teams
- Clear ownership at leadership, management and team level

03 · MONTHLY REVIEWS

Biz Reviews (Dynamic Business Reviews)

Union Wireless runs its monthly business reviews in WorkBoard AI, where leaders work from live OKR progress to spot bottlenecks and resolve cross-functional issues.

BENEFITS

- Bottlenecks and risks surface quickly
- Leadership sees plan versus actual in one place
- Cross-functional blockers resolved during the review

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

WAVENINE

LESSONS

KEY TAKEAWAYS

Open access drives adoption

Union Wireless gave the entire company access to WorkBoard AI, so everyone can see the big picture and their place in it.

Leaders as coaches for other departments

Rotating leaders helped them see past their biases, and employees felt comfortable addressing real issues.

Quality OKRs and steady rituals go together

Focusing on both brought strong focus and greater collaboration throughout each cycle, and the goals came fast.

Tailor the process to the business

Trimester cycles, localization from L1 to L2 and down to the teams, and a short weekly rhythm make OKRs fit.

> **As much as OKRs are a framework, we feel like they are more of a mindset. Getting that mindset propagated through the organization has been very helpful. It has given us a common language.**

Jed Vigil
Director of IT Infrastructure and Cybersecurity, Union Wireless

The Union Wireless team describes its story as a true David vs. Goliath tale: competing against AT&T and Verizon with a corporate budget that David Ricley calls a rounding error for the telecom giants. What gives Union Wireless a distinct advantage is its ability to embrace change and act quickly, in the bold, pioneering spirit of its founders.

> **Our goal is to fight for the people of rural Wyoming and the Rockies, who would otherwise be overlooked by the big telecoms. That's been our legacy for the past 110 years.**

David Ricley
Director of Customer Care, Union Wireless

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