

How iDeals relaunched a stalling OKR program to execute **its new strategy**

SOFTWARE DEVELOPMENT · 450 EMPLOYEES · OKR RELAUNCH

iDeals launched a new strategy in 2023, and its OKR process couldn't carry it. Wave Nine helped relaunch the program from the ground up, built around iDeals' business needs, landscape and strategy.

4

focused company OKRs with measurable key results

12

employees certified as internal OKR coaches

5

building blocks behind the relaunch

AT A GLANCE

CLIENT

iDeals, a Virtual Data Room (VDR) software provider that simplifies secure confidential document sharing and corporate deal management

INDUSTRY

Software Development

COMPANY SIZE

450

CHALLENGE

Relaunch an OKR program that had drifted away from the strategy, with mixed OKR quality, a gap between strategy and daily work, a process that wasn't followed, and no co-authorship

SOLUTION

An OKR relaunch led by Wave Nine on five building blocks: a documented process, change management, leadership and team workshops, training, and a community of 12 certified internal coaches

RESULTS

Four focused company OKRs, team-authored OKRs linked to the strategy, OKRs in regular use, one documented process, and 12 certified coaches ready to scale the program

THE CHALLENGE

OKRS THAT HAD DRIFTED AWAY FROM THE STRATEGY

A new strategy in 2023, and an OKR process that couldn't carry it.

iDeals is a Virtual Data Room (VDR) software provider that simplifies secure confidential document sharing and corporate deal management. When it first introduced OKRs in 2018, the company had 120 employees. It has since grown to almost four times that size, and its strategic needs have evolved significantly.

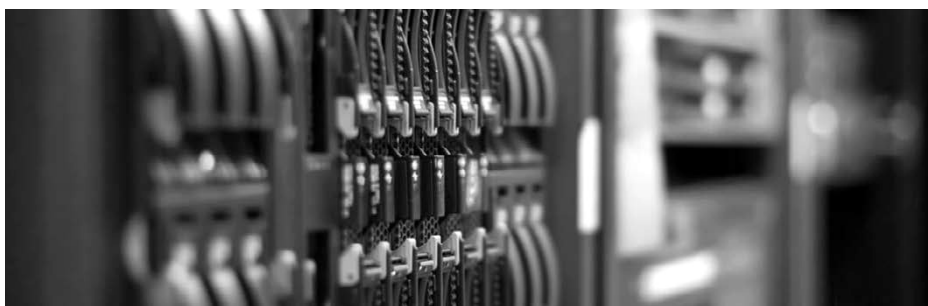
In 2023, iDeals launched a new strategy, a pivotal moment for the company. It quickly became clear to Anton Maslov, VP of Operations, that the current OKR process wouldn't help iDeals execute it.

“ We tried to put KPIs and everything together and call it OKRs.

Anton Maslov

VP of Operations, iDeals

That process simply wasn't going to work for this new era of the company. iDeals audited its OKR process every year and made adjustments over time, yet Anton and the leadership team found that many of the OKRs weren't connected to the strategy. A deeper look revealed several challenges.



THE CHALLENGE

FOUR PROBLEMS WITH THE FIRST OKR PROCESS

iDeals had first implemented OKRs to align teams and give them a cohesive direction. Over time, four problems emerged:

01

OKR quality

Different teams used different goal structures, and what everyone called OKRs differed a lot from team to team, often mixing projects, activities and KPIs.

02

Disconnected strategy

There was confusion over priorities, misalignment, and a gap between the strategy and daily initiatives.

03

An unfollowed OKR process

iDeals had a documented OKR process, but teams didn't consistently follow it, which led to different approaches to the methodology.

04

No co-authorship

Team leaders crafted OKRs without input from their team members. The lack of co-authorship led to low accountability and OKRs that weren't achieved.

The best approach was to re-implement the OKR program from the ground up, and that called for an external partner to help relaunch it effectively.

THE PARTNER

WHY IDEALS CHOSE WAVE NINE

EXPERTISE

Implementing OKRs for better strategy execution across large organizations

REPUTATION

Meaningfully customized, hands-on implementation services

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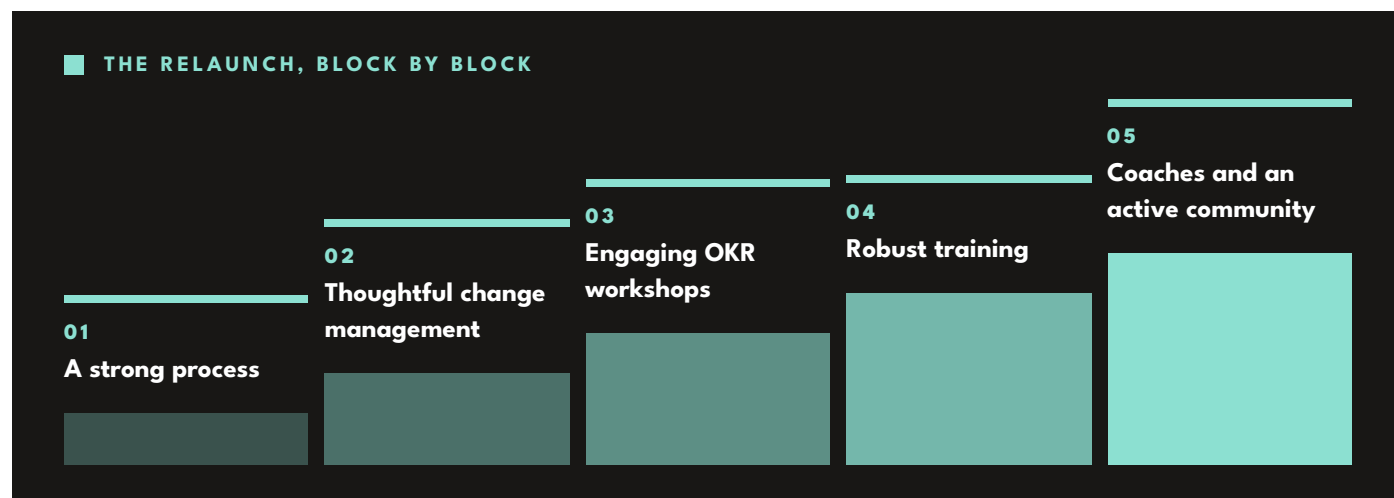
Wave Nine's dedication was amazing. We really didn't want to bring in a company that would just hand us some templates and call it a day. With Wave Nine, every aspect of the implementation had a customized approach. They went out of their way to understand our business needs, landscape, and strategy.

Agnieszka Hyla

Talent Development Head, iDeals

RELAUNCHING WITH FIVE BUILDING BLOCKS

Wave Nine based the relaunch of iDeals' OKR program on five building blocks. Each one played a crucial role in making the relaunch a success.



1 A STRONG PROCESS

Wave Nine helped iDeals establish a clear OKR process built for its needs, with no off-the-shelf program. The first step was to assess iDeals' current OKR and strategy execution maturity. Based on that assessment, Wave Nine worked with the program team to set up structured methods for creating, updating and evaluating OKRs. So that everyone approached the process the same way, all of these parameters and the program structure were documented in a custom OKR playbook for everyone at iDeals to follow.

2 THOUGHTFUL CHANGE MANAGEMENT

Organizational change is complex, so Wave Nine put a strong emphasis on careful change management. It ran kickoff events for the program team, the executives and everyone else in scope to explain the reasons for the re-implementation, the timeline, the next steps and everyone's role. Wave Nine also created customized communication materials to help iDeals' teams move smoothly into the revitalized OKR process.

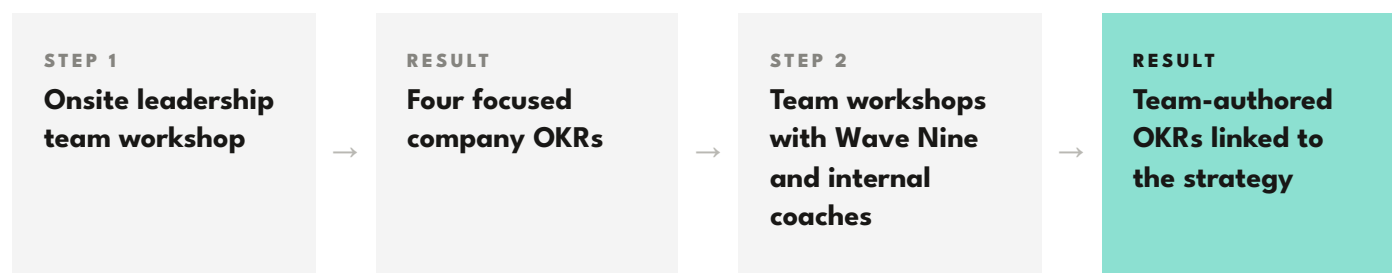


ENGAGING OKR WORKSHOPS

3 FROM THE LEADERSHIP TEAM TO EVERY TEAM

Workshops were a cornerstone of the transformation. They gave team members a sense of co-creation and a deeper understanding of the overarching strategy. It started with an onsite leadership team workshop, where Wave Nine helped the executives craft company OKRs based on the strategy. By the end of this workshop, iDeals had four highly focused company OKRs with measurable key results.

These company OKRs were then localized to the next level through team workshops. Facilitated by Wave Nine and iDeals' internal coaches, these workshops helped team members craft impactful, high-quality OKRs together, in the context of the overarching strategy.



The executive team workshop turned out to be a huge turning point.

“Before that workshop, there were a few team members that weren't fully on board with the reimplementation. Once they saw how this one workshop allowed us to effectively prioritize and have meaningful discussions, there was a clear mindset shift. Those that were originally against the implementation were convinced this was exactly what we needed.

Anton Maslov

VP of Operations, iDeals

TRAINING AND A COMMUNITY OF COACHES

4 ROBUST TRAINING

Wave Nine provided extensive training on the OKR methodology and best practices. To keep teams from approaching the process differently, it was essential to set one organization-wide standard at iDeals. Through live training and on-demand resources from Wave Nine, iDeals got everyone in scope on the same page.

Teams learned how to craft impactful OKRs, and how to build them into their day-to-day operations. These habits and rituals went a long way in keeping OKRs top of mind at iDeals.

5 A DEDICATED PROGRAM TEAM AND AN ACTIVE COMMUNITY



iDeals already used OKRs, but it had no certified team in place to provide guidance and keep teams on track. To build an active community of OKR champions that could sustain and scale the program, Wave Nine trained and certified 12 employees as OKR coaches.

12

employees trained and certified as OKR coaches by Wave Nine

Advanced OKR
concepts

Change
management

Workshop
facilitation

With these skills, the coaches can facilitate OKR workshops and train new employees in the future, which keeps the understanding of the methodology and process uniform across iDeals.

THE RESULTS

A REVITALIZED OKR PROGRAM

With the five building blocks in place, iDeals now has a revitalized OKR program that helps it execute its strategy with more transparency, alignment and accountability:

- **A documented process:** a revamped OKR process tailored to iDeals, which everyone in the company can reference and easily follow.
- **Focused company OKRs:** clear, focused company OKRs make it far easier for functional teams to develop higher-quality OKRs that stem from them.
- **Team-authored OKRs:** teams now author impactful OKRs that are measurable and linked to the company OKRs and the overarching strategy. Managers no longer assign them.
- **OKRs in regular use:** OKRs are updated regularly and are part of regular communications.
- **A visible strategy:** with more visibility into the strategy, teams have a better sense of how their work plays a role in executing it.

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I see that teams are updating their OKRs regularly and actually incorporating OKRs into their meetings, which is something that wasn't apparent before.

Anton Maslov

VP of Operations, iDeals

KEY ACHIEVEMENTS

Focused company OKRs

Functional OKRs linked to the strategy

Clear visibility of the strategy

OKRs as part of regular communications

A uniform understanding of the process

More team collaboration and alignment

WORKBOARD SHOWCASE

iDeals runs its OKR program on WorkBoard AI. How iDeals uses WorkBoard AI and its AI Chief of Staff Agent to keep team OKRs connected to the strategy.

01 • AI OKR DRAFTING

OKR creation, alignment and cycle

iDeals' teams use WorkBoard AI to draft their OKRs together, starting from the four company OKRs. The AI helps them write measurable key results and keeps every team OKR linked to the strategy.

BENEFITS

- ✓ Consistent OKR quality across teams
- ✓ Team-authored OKRs tied to the four company OKRs
- ✓ Faster quarterly planning

02 • ALIGNMENT

Drive cross-team alignment

WorkBoard AI shows how each team's OKRs connect to the company OKRs and to each other, so iDeals' 12 internal coaches can spot gaps and overlaps early.

BENEFITS

- ✓ A clear line of sight from strategy to daily work
- ✓ Dependencies visible before they become blockers
- ✓ Coaches focus their support where it's needed

03 • AI CHIEF OF STAFF AGENT

Automate Executive & Initiative Briefings

Leaders get regular AI summaries of progress against the four company OKRs, so OKRs stay in regular use between reviews.

BENEFITS

- ✓ Leaders see progress without chasing updates
- ✓ OKRs stay part of the regular rhythm
- ✓ Risks surface early

THE FUTURE OF OKRS AT IDEALS

iDeals aims to keep refining its OKR process, with a long-term vision of integrating OKRs into a holistic management model. With signs pointing toward more than 50% growth in the coming years, iDeals plans to scale its OKR program by making sure new hires are onboarded and trained in OKR practices, with help from its community of champions.

120

employees when iDeals introduced
OKRs in 2018

~4x

that size today, with a new
strategy since 2023

50%+

growth expected in the coming
years

“

This new OKR program will help us get to the next level. It helps us prioritize and allocate resources for those priorities.

Anton Maslov

VP of Operations, iDeals

The collaboration with Wave Nine brought new life to iDeals' OKR program and built a culture of strategic clarity and alignment, two essential elements of sustained success. With the relaunch, iDeals can execute its strategy with greater efficiency and impact.

“

I can't imagine how the implementation would have gone without the services and project design from Wave Nine - It would have been nearly impossible.

Anton Maslov

VP of Operations, iDeals

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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