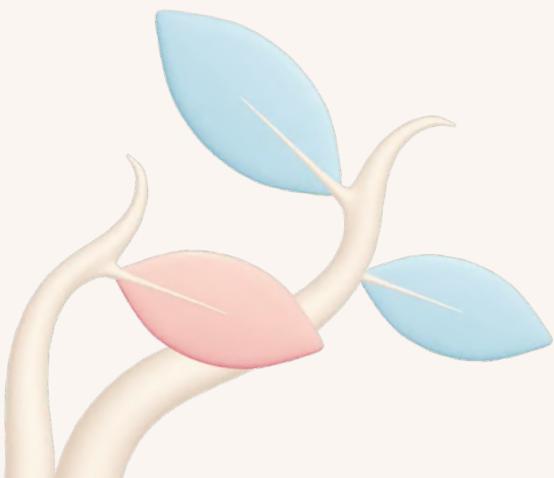




The OKR Rollout Guide for Enterprises

How to scale OKRs to
thousands of employees





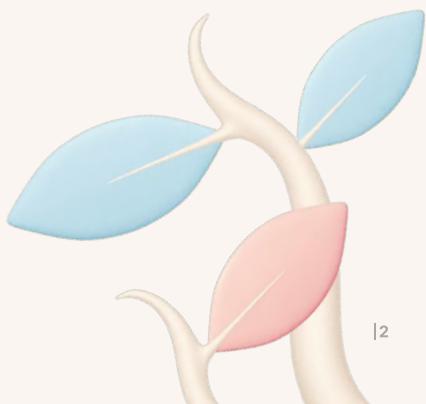
The OKR Rollout Guide for Enterprises

How to scale OKRs to thousands of employees

More and more companies are opting for OKRs. This guide shows how to successfully roll out OKRs step by step – not just for individual teams, but for the entire organization. The guide explains how to **effectively prepare, execute and scale an OKR rollout for thousands of employees.**

The benefits of OKRs are many. In a fast-paced and competitive business environment, OKRs help companies focus on what matters most, bring strategic goals into focus, and adapt business processes to new challenges.

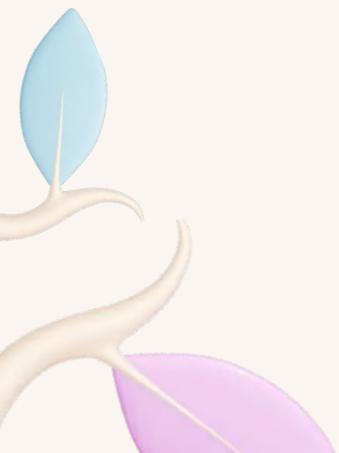
Of course, every company is unique. Nevertheless, there are general insights and rules that make it easier to get started with OKRs. From fundamental knowledge over different rollout approaches to scaling options, this guide provides everything needed to implement and scale OKRs in large enterprises.





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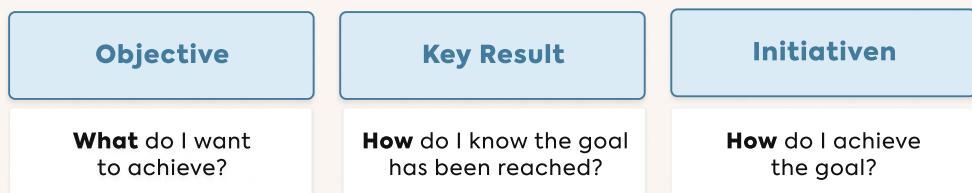




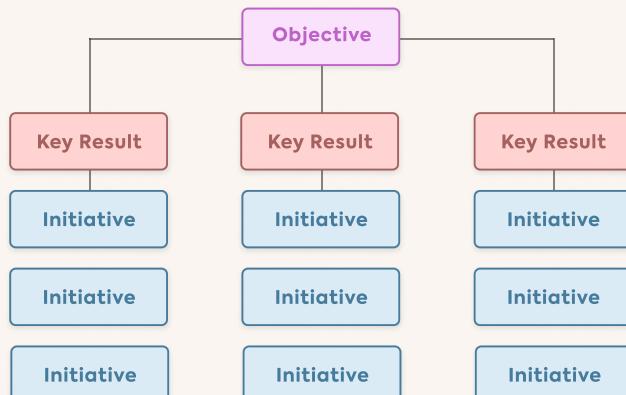
Getting started with OKRs: Fundamentals

What are OKRs?

The acronym OKR (or OKRs) stands for “Objectives and Key Results” and refers to an **agile framework for formulating and implementing strategic goals in organizations.**



A total of 3 to 4 Objectives per team and 2 to 5 Key Results per Objective are formulated. The output is mapped in initiatives (= concrete activities).





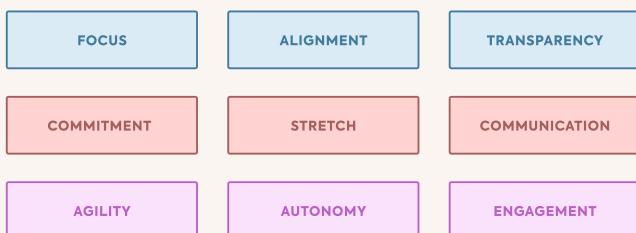
How does the OKR process look like?

The **OKR process** comprises a total of **five essential elements**: OKR Cycle, OKR Planning, OKR Weekly, OKR Review and OKR Retrospective.



Why should companies implement OKRs?

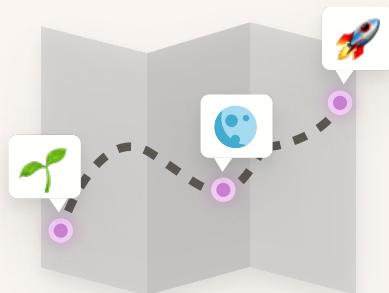
Implementing OKRs has several **benefits** for companies:





Introducing OKRs in enterprises: Step-by-step rollout

The switch to agile working with OKRs does not happen overnight. It takes time, money and resources – and a well thought-out rollout with subsequent scaling. The best way to establish OKRs is to create success stories early on and demonstrate the impact in pilot groups of no more than 100 to 250 employees.



Before the start: Check the prerequisites

OKRs only work if the framework within the company is right. Before starting to introduce OKRs, it is therefore worth taking a close look at the status quo.

The following **prerequisites** should be in place:

Openness and transparency	Vision and mission	Corporate culture	Delimitation of assessments	Proper Leadership
Everyone is open to the new way of working and ready for change.	A meaningful vision and mission provides a clear strategic direction.	An open and appreciative culture prevails in the company. Mistakes are seen as an opportunity to learn.	OKRs are intended to encourage higher performance and not to be used to evaluate employees.	OKRs require a flat structure and leadership that emphasizes coaching over control.



The pilot phase: Implementing OKRs in 8 steps

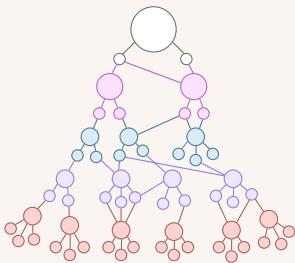
Implementing OKRs in enterprises with several thousand employees requires thorough planning and a clear approach. Our experience with large customers shows that a successful OKR implementation usually follows **eight steps**:

-  **1 Set a clear goal** Become fully agile or aim for a mixed approach
-  **2 Define the scope and parameters** Pilot group size, scope, duration, lead time, success criteria, systems, communication, meetings
-  **3 Select pilot group** Create basis for change; involve different hierarchy levels and departments
-  **4 Get all important people on board** OKR Executive Sponsor, OKR HR/People Lead, OKR Coach/Master
-  **5 Provide coaching sessions** Provide leadership workshops, theory training, training for OKR coaches, alignment workshops
-  **6 Implement first OKR cycle in pilot group** Start cycle and measure progress
-  **7 Reflect on pilot phase** Reflect on results in the OKR retrospective and conduct surveys
-  **8 Plan rollout** Scale top-down, bottom-up, or mixed; expand project to neighboring teams and departments



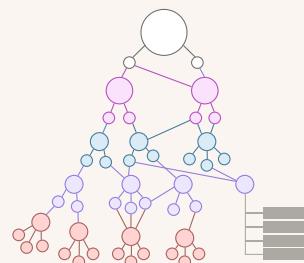
Step 1: Set a clear goal

Before moving on to specific planning, it should be clear **what the goal of the transformation is**. This usually involves bringing the organization together, but the goal does not always have to be a complete OKR rollout throughout the organization.



Become fully agile

This goal is recommended if a company is strongly market-oriented, the framework conditions change quickly and often, and competencies are heavily distributed within the company.



Aim for a mixed approach

If there are divisions in the company that can be controlled more predictably, it may make sense not to introduce OKRs everywhere, but still to align all departments to a common goal.

Depending on what the overriding goal is, the approach to the introduction (pilot phase) or scaling in the company differs. Therefore, the final goal for the transformation should already be defined at the beginning.



Checklist: Has this step been completed?

Can all questions be answered with "Yes"? Continue to the next step!

- Is it clear which goal is being pursued with the introduction of OKRs?
- Is it clear whether full or partial agility is the goal?
- Has the goal for the transformation been recorded in writing?



Step 2: Define the scope and parameters

Once the goal for the transformation is set, the next step is to define the scope for the step-by-step implementation. The cornerstones that matter are:

Pilot group size: The rule of thumb is to start with pilot groups of 100 to a maximum of 250 employees.

Area: It is advisable to start with a unit that already has experience with agility or has an affinity for it. Areas that are determined by contract work and external dependencies are less suitable. Plus: If management is involved and supportive, the transformation is easier.

Duration: The duration of the pilot phase depends on the cycle length, but should be at least two cycles (six to eight months). In the event of unexpected obstacles, the introduction phase should be extended.

Lead time: The introduction should be started at least one or two months before the first active OKR cycle, allowing enough time for training, onboarding and education.

Success criteria: Before the first active cycle, it should be determined how progress will be tracked and evaluated. Many companies use a scale of 0.0 to 1.0, with a goal considered achieved at a score between 0.7 and 1.0.



Systems: The question of where OKRs are centrally managed should be addressed. OKR software such as [Mooncamp](#) greatly facilitates the process and helps to manage the OKRs as well as to keep track of them later during the rollout.



Important: In order to actually simplify and support the process, the [OKR software](#) should adapt to the needs of the company – not the other way around.

Communication: Alongside the planning of the pilot phase and rollout, an accompanying communication strategy should be developed and implemented right from the start.

Meetings: The necessary meetings (weekly check-ins, review, etc.) for the first cycle should be firmly scheduled into the timeline early on.



Checklist: Has this step been completed?

Can all questions be answered with "Yes"? Continue to the next step!

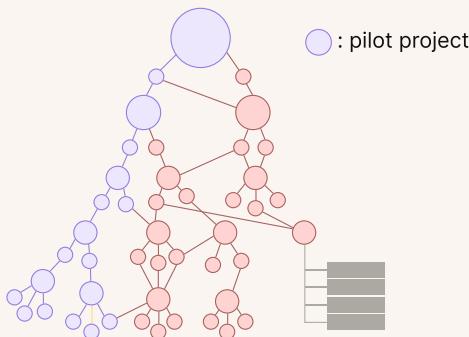
- Are all parameters defined and recorded in writing?
- Has it been decided in which system the OKRs will be managed?
- Has an accompanying communication strategy been developed?
- Have specific dates been agreed for all relevant meetings?



Step 3: Select pilot group

Once the benchmarks and parameters have been established, the next step is to select the right **pilot group**. This not only depends on the size, but also on,

- 1 creating a solid basis for the agile transformation,
- 2 selecting a pilot group in which OKRs can be easily integrated into existing planning and reporting processes, and,
- 3 if possible, involving employees and managers from different hierarchical levels and departments.



At [Mooncamp](#), in our work with hundreds of companies around the world, we have found that involving top management horizontally and selecting one or two departments or functions vertically (e.g., IT or marketing) works really well.



Checklist: Has this step been completed?

Can all questions be answered with "Yes"? Continue to the next step!

- Does the pilot group include people from different hierarchical levels?
- Are the processes within the pilot group compatible with OKRs?
- Is it specified in writing who is part of the pilot?



Step 4: Get all important people on board

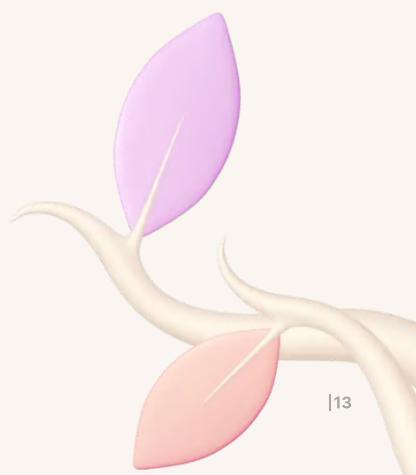
A key part of planning is to address the following question early on: Who should be involved? This usually includes assigning a few **key roles**:

OKR Executive Sponsor: A member of the leadership team (ideally the CEO) who can provide high-level support for the project, make key decisions, and provide the necessary resources and strategic direction.

OKR Project Lead: A senior executive with long-term responsibility for the overall success of the OKR process.

OKR HR/People Lead: A person from HR who ensures that HR processes are also aligned accordingly.

OKR Coach (or OKR Master): Persons who provide long-term support on the topic of OKRs as experts, moderate the process, advise on the method, contribute best practices, and involve all key stakeholders.





Larger organizations often have multiple OKR coaches. According to [Mooncamp's OKR impact report](#), the number of teams supported by an OKR coach can vary from 1 to more than 10, with most OKR coaches responsible for 1 to 5 teams.

Especially for the first OKR cycle, it may also make sense to rely on an external consultancy at this point to bring in expertise and train the various stakeholders (more on this in step 5).

In addition, all key stakeholders and the works council should be informed about the project and involved at an early stage.



Checklist: Has this step been completed?

Can all questions be answered with "Yes"? Continue to the next step!

- Are all roles assigned?
- Have all responsibilities been recorded in writing?
- Have all interest groups and the works council been informed?



Step 5: Offer coaching

Working with OKRs requires specific knowledge. To ensure that everyone involved has this knowledge, it makes sense to accompany the process with **training, workshops and coaching**.

The various roles should receive tailored training:

- Trainings for leading with OKRs
- Workshops on how to continuously improve the OKR system
- Trainings on the communication of OKRs
- Theoretical training on the OKR method
- Targeted training for OKR coaches
- Alignment workshops that provide strategic alignment in the process
- Q&A sessions for feedback and specific input
- On-the-job training in all situations throughout the initial OKR cycle

It may be useful to bring in an **external consultancy** for the initial training and coaching sessions to provide targeted training to the various stakeholders. Later, the knowledge can be shared internally. The stakeholders from the pilot phase remain in their roles and additionally act as **ambassadors or OKR champions** who pass on their best practices.

In terms of timing, **training and coaching should be completed or started before the launch of the first OKR cycle** and continued throughout the pilot.



Checklist: Has this step been completed?

Can all questions be answered with "Yes"? Continue to the next step!

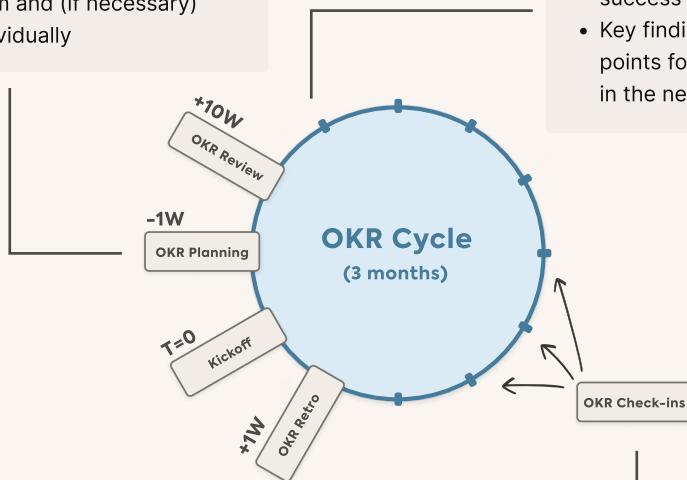
- Have the training needs for all roles been identified?
- Has it been defined who is responsible for conducting the training?
(Has an external consultant been involved, if necessary?)
- Have dates been agreed for all workshops, trainings and coaching sessions?
- Have all participants completed their trainings?
- Have the dates for on-the-job training in the first OKR cycle been set?



Step 6: Implement the first OKR cycle in the pilot group

Once all preparations have been made, the first OKR cycle can be implemented in the pilot group. For this purpose, concrete OKRs for the first cycle are developed and agreed upon in corresponding workshops (OKR Planning). The cycle then starts, the OKRs are implemented, progress is measured and reflected in check-ins.

- Alignment of objectives in team workshops based on strategy and other priorities
- Assignment of tasks in the team and (if necessary) individually



- Final evaluation highlights/lowlights
- Team update and success celebration
- Key findings and starting points for improvement in the next cycle

- Regular check-ins as needed
- Assessment and monitoring of results, progress and obstacles
- Need for communication



Checklist: Has this step been completed?

Can all questions be answered with "Yes"? Continue to the next step!

- Have the OKRs for the first cycle been created and put in writing?
- Has top-down and bottom-up goal setting taken place?
- Have the OKRs for the first cycle been communicated to all stakeholders?
- Has everyone on the team been able to work independently on their goals?
- Have (weekly) check-ins taken place to review and transparently communicate progress?
- Have all results of the first cycle been presented and evaluated in terms of content in the OKR review, have successes been celebrated and optimizations been agreed upon?

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Invite people Help & Support

Dashboards

Performance Health

Default View Q1 2023 Filter Compare to One week ago

Overview

Overall progress

46%
+46% (+∞%)
expected value: 55%

Overall confidence

6.3
+6.3 (+∞%)

Goals by type

Total:	10 (+10)
Strategic Pillar:	0 (±0)
Objective:	3 (+3)
Key Result:	4 (+4)
Progress:	0 (-10)

Progress

Average progress

Trend

Progress distribution

Progress Range	Count	Change
≥ 80%	1	(+1)
60 - 80%	2	(+2)
40 - 60%	4	(+4)
20 - 40%	2	(+2)
0 - 20%	0	(-10)

OKR Review Dashboard



Step 7: Reflect on the pilot phase



The goal of this phase is to create an example of success on which the scaling phase can build and which inspires and motivates other areas.

In order to scale OKRs in the company, it is essential to reflect in detail on the first OKR cycle at the process level as well. This happens in the OKR retrospective.

It is important that this meeting is well prepared.

This means:

- The date should be communicated with adequate lead time. It is best to schedule it right at the beginning and remind everyone two weeks in advance.
- All participants should individually review the last OKR cycle and analyze the process before the meeting.
- The meeting should be conducted according to a set agenda.



Example: Structure for the OKR retrospective (Start/Stop/Continue method)



What should we start with?

What can we improve?



What should we stop doing?

What did not work?



What should we continue with?

What has worked well?

In addition, surveys among the employees participating in the pilot phase can provide important insights and indications of key levers at this point.



Example: Survey on the pilot phase

- 1 We work more focused in our team because of OKRs.
- 2 Our priorities and tasks in our daily work add up to the OKRs.
- 3 In retrospect, we have correctly chosen and formulated our Key Results.
- 4 Looking back, we can be satisfied with the OKR process, including its events such as planning, check-ins, review, and retrospective.

Rating: Agreement with a scale of 1 (strongly disagree) to 5 (strongly agree) plus a free response field per question for additional comments.



Checklist: Has this step been completed?

Can all questions be answered with "Yes"? Continue to the next step!

- Has an OKR retrospective been conducted?
- Have concrete suggestions for improvement and measures been defined?



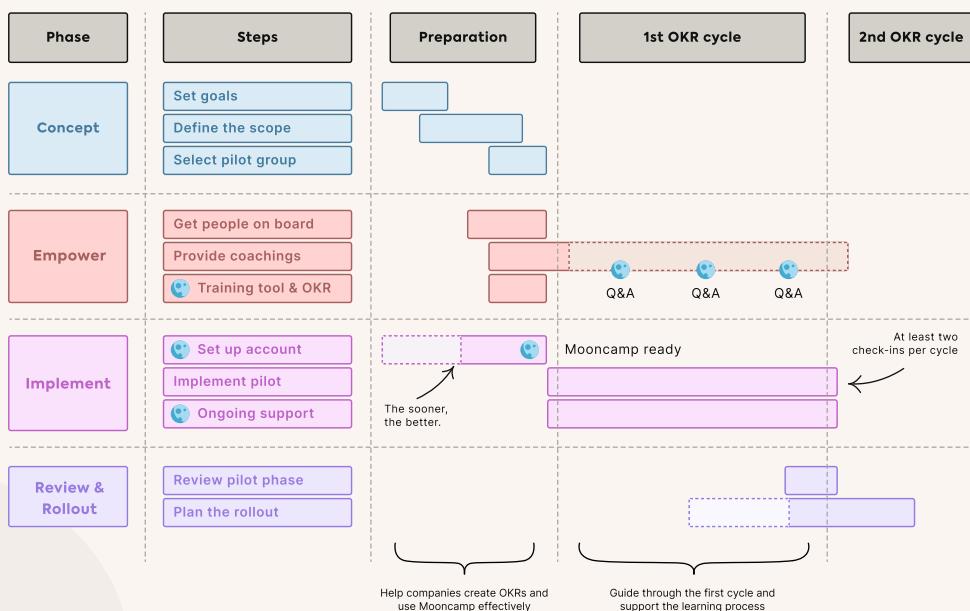
Step 8: Plan rollout

Once the pilot has proven successful, it is time to plan the **rollout** to neighboring teams and departments. It usually takes at least two cycles until the pilot phase provides sufficient insights for this.



Important: OKRs provide a framework, not a fixed set of rules. It can take time to adapt all aspects of working with OKRs to the individual organizational context. In doing so, it is normal to struggle at first and find the initial cycles chaotic. One should keep at it, reflect on mistakes and see them as an opportunity to learn. True to Ben Lamorte's motto "Crawl, walk, run".

Example: Timeline with Mooncamp





The rollout: Scaling OKRs in enterprises

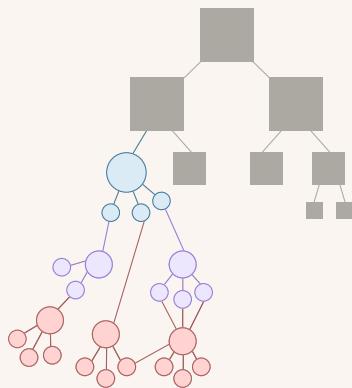
A successful pilot phase is the basis for scaling OKRs in the company. Depending on how the pilot group was selected, different rollout approaches are recommended.



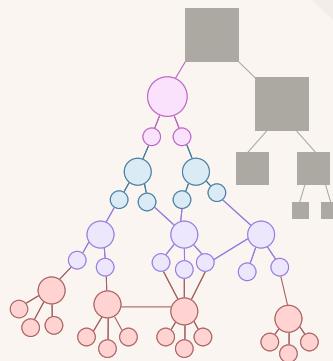
Scaling from the bottom up

In the bottom-up approach, starting from the pilot team, other teams with overlapping responsibilities are first involved horizontally before moving up one hierarchical level. The focus is on breaking down silos and reducing friction between teams.

For example, if the pilot was started in Sales, it may make sense to next create OKRs with the Marketing team and improve communication and collaboration across team and hierarchical boundaries.



Implement OKRs within the team



Expand horizontally and include the next hierarchical level

Advantages and risks of bottom-up scaling:

Advantages

- OKRs can grow organically, low-threshold adoption is possible
- The adaptation of processes is facilitated
- A success story to learn from is created

Risks

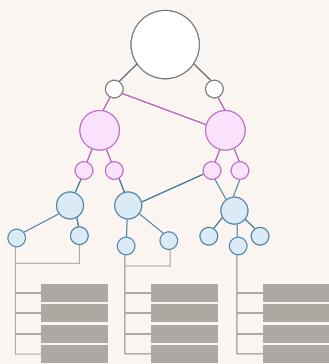
- The pilot project initially covers only a small part of the business
- The connection to the management level is missing at the beginning
- Obstacles at the team level may not be overcome without leadership support



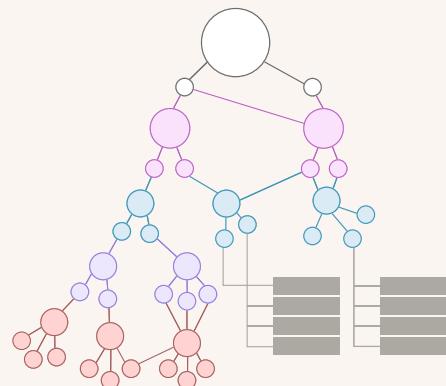
Scaling top-down

In top-down scaling, the pilot ideally starts at the management level. It is mostly focused on strategy first and less on the implementation level. Then the OKRs are expanded from the top down to the team level along value streams.

For example, if there is a strategic Objective that focuses on customer retention, this is rolled out across the departments and teams that deal with existing customers in their day-to-day work.



Implementation at leadership and management level



Extending downward into individual teams and departments



Advantages and risks of top-down scaling:

Advantages	Risks
 All employees receive an overview of the overall strategy	 The rollout can get stuck at the upper levels of the hierarchy
 All levels know which goals they are working towards together (higher motivation)	 Existing (non-agile) ways of working may be difficult to dissolve
 Suboptimal (e.g., non-agile) ways of working are gradually modified	 The advantage of teams contributing to strategic goals remains untapped
 Management support ensures better acceptance and security	 Employees may feel left out

Mixed Scaling

Several hundred successful OKR implementations with [Mooncamp](#) worldwide have shown: The most promising and at the same time most challenging approach is a mix of bottom-up and top-down. Here, OKRs are introduced in a complete business unit from the management level to implementation.

Advantages and risks:

Mixed Scaling combines all the previously mentioned advantages, but at the same time also amplifies the risks. In particular, communication and collaboration with adjacent teams and departments in which OKRs have not yet been implemented require good change management and competent (possibly external) OKR coaches during the pilot phase.



Tips for scaling: Gathering learnings and building structures

This guide is designed for Mixed Scaling. Accordingly, the following six tips for scaling also refer to a mixed step-by-step approach.

1



Reflect on the pilot project and analyze where the company stands:

Focus on the questions: What is working well? What should be done better?

2



Assess readiness to change and work with OKRs:

Teams for the next scaling steps should always be carefully selected based on the following criteria:

- a. How willing are employees to take responsibility for strategic issues?
- b. Are the teams empowered to make their own decisions?
- c. Are managers willing to support the OKRs?

3



Communicate findings and progress from the pilot transparently:

All stakeholders should be sufficiently trained and understand the OKRs before further departments, teams and resources are involved.

4



Establish clear structures:

A stable system with established roles (e.g., OKR Project Lead, OKR coaches) is needed to unify processes and drive transformation across all areas.



5

**Pool resources:**

In large organizations with locations all over the world, multiple teams may start OKRs simultaneously without knowing about each other. To scale effectively on a large scale, the various pilot groups and OKR coaches should talk to each other, and resources and learnings should be gathered centrally and accessible to all.

6

**Turn employees into champions and ambassadors:**

People are often skeptical or reluctant to change. This makes it all the more valuable to recruit participants from the pilot phase as strong ambassadors. As mentors and internal OKR experts, they can answer questions, dispel the concerns of their colleagues and win them over for the change.

**Checklist: Has this step been completed?**

Can all questions be answered with "Yes"? Continue to the next step!

- Has the pilot phase been reflected upon comprehensively?
- Has feedback been obtained from all stakeholders? (e.g., via survey)
- Were the results from the pilot phase communicated transparently?
- Has the workforce's readiness for change been surveyed?
- Were the teams to work with OKRs next selected wisely (according to their readiness for change and planning)?
- Have all roles (OKR coaches, Project Lead, etc.) been established?
- Are all learnings and resources centrally bundled in one place (e.g., an OKR software) and accessible to all?
- Are the participants from the pilot phase ready to become OKR champions and to win other employees for the transformation?



Which role does OKR software play?

The challenge in introducing OKRs is not the methodology per se, but that new ways of thinking and working must be established so that the framework can develop its full effect. A fundamental change in the company is required, routines have to be broken.

OKR software can support the sustainable integration of new processes and structures into everyday work:



OKR software **visualizes goals, structures, responsibilities and progress** in a clear way, no matter how many teams are involved.



It can serve as a **central hub for communication and provide orientation**.



Many OKR softwares can be **integrated with tools already in use**, such as Slack, Microsoft Teams, Jira or Asana. This makes the transition feel **less burdensome** for employees.



Additionally, OKRs that are managed using software can be more **easily evaluated** for goal achievement, quality of goals, and alignment, and can be **adjusted and improved in a data-driven way**.



Weekly check-ins, which can be conducted directly from the software with **a handful of clear questions**, save time and ensure everyone is keeping their OKRs in focus.



Collected data can be filtered as desired. This provides new insights and allows you to dive even deeper into your analyses.



Via custom features and properties, a good OKR software is able to create a **flexible and completely individualized OKR platform** that maps the entire OKR process clearly and tailored to the specific company.



The more employees the company has, the more important and useful OKR software becomes.

A rule of thumb: OKR software can be helpful for smaller companies with up to 100 employees, from 100 employees it becomes important and unfolds its full potential, from 1,000 employees it is even indispensable.



The bottom line: As soon as OKRs are to be scaled, it is advisable to use a specialized OKR software that combines all steps in the OKR process in one place, and offers extensive functions to roll out OKRs.

With [Mooncamp](#), every part of your OKR system can be adapted to individual needs and internal processes (custom wordings, OKR rules, cycle lengths, and much more). On top, the intuitive and simple user interface makes it easy for employees to adopt the tool and embrace OKRs.



More resources

Any questions? For more information about OKRs, visit the [Mooncamp blog](#) or the [Mooncamp help center](#).

You can also [contact us](#) or [request a demo](#) to learn how Mooncamp helps roll out OKRs across an organization.



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