



IDEALS

How a high-growth SaaS leader relaunched their stalling OKR program to improve strategic clarity, alignment and impact

CLIENT

iDeals

INDUSTRY

Software Development

SIZE

450

CHALLENGES

iDeals wanted to relaunch their OKR program so that they could effectively execute their strategy. To do this, they not only needed to ensure that OKRs were constructed correctly, but they also needed to increase their strategic visibility to ensure OKRs were connected to their strategy.

iDeals is a Virtual Data Room (VDR) software provider that simplifies secure confidential document sharing and corporate deal management. When they first introduced the OKR framework in 2018, the company consisted of 120 employees. Over the years, the company has expanded to almost four times that and iDeals' strategic needs evolved significantly.

In 2023, iDeals launched a new strategy, marking a pivotal moment for the company. It quickly became clear to iDeals' VP of Operations, Anton Maslov, that the current state of their OKR process wasn't going to effectively aid them in executing their new strategy. "We tried to put KPIs and everything together and call it OKRs," says Anton.

This OKR process simply wasn't going to cut it for this new era of the company. Even though they audited their OKR process every year, and adjustments were made over time, Anton and the leadership team discovered that many of the OKRs at iDeals weren't connected to their strategy. Upon taking a deeper look, they quickly realized that they were facing multiple challenges with their current OKR process.



RESULTS

Wave Nine worked with iDeals to relaunch their OKR program by implementing five essential building blocks. With these building blocks in place, iDeals now has a revitalized OKR program that aids them in executing their strategy with more transparency, alignment and accountability.

“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

IDEALS FACED SOME CHALLENGES WITH THEIR INITIAL OKR PROCESS

Initially, iDeals implemented OKRs to align teams and provide a cohesive direction. However, several challenges emerged:



OKR Quality: Different teams used different goal structures and what everyone called OKRs differed a lot from team to team, often including a mix of projects, activities, and KPIs.



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



Unfollowed OKR Process: Despite having a documented OKR process, it wasn’t being consistently adhered to, leading to different approaches to the methodology.



No Co-Authorship: Team leaders were crafting OKRs without input from the team members. This lack of co-authorship resulted in low accountability and OKRs not being achieved.

It was decided that the best approach would be to re-implement the OKR program from the ground up. This highlighted the necessity for an external partner to help relaunch their OKR program effectively. Enter, Wave Nine.

iDeals chose Wave Nine due to their specific expertise in implementing OKRs for improved strategy execution across large organizations. What ultimately

brought iDeals to Wave Nine was the reputation for meaningfully customized hands-on implementation services.

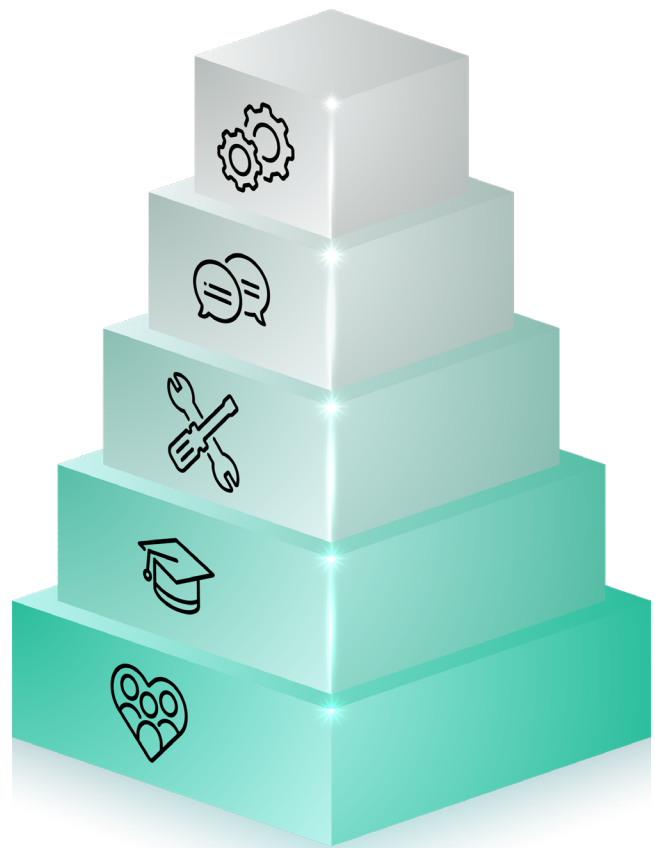
RELAUNCHING WITH THE FIVE BUILDING BLOCKS

Wave Nine supported iDeals with their OKR program relaunch and based it on five main building blocks. Each one played a crucial role in making the relaunch a success.

A STRONG PROCESS

Rather than just introducing a standard off-the-shelf program, **Wave Nine helped iDeals establish a clear OKR process that worked for their needs**. The first step was to assess iDeals' current OKR and strategy execution maturity. Based on this, Wave Nine worked with the program team to set up structured methods for creating, updating, and evaluating OKRs.

To ensure that everyone was on the same page and approached the process the same way, all of these parameters and program structure were then documented in a custom OKR playbook for everyone in iDeals to follow.



THOUGHTFUL CHANGE MANAGEMENT

Recognizing the complexities involved in organizational change, Wave Nine emphasized careful change management.

They conducted various kickoff events for the program team, executives and everyone else in scope to explain the reasoning behind the reimplementation, the timeline, next steps and everyone's roles.

In addition, Wave Nine crafted customized communication materials to help iDeals' teams transition smoothly into the revitalized OKR process.

“A huge turning point was the executive team OKR workshop with Jessica and Johannes from Wave Nine. 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

ENGAGING OKR WORKSHOPS

Workshops were a cornerstone of the transformation, as they gave team members a sense of co-creation and a deeper understanding of the overarching strategy. Starting with the onsite leadership team workshop, Wave Nine helped them craft company OKRs based on the strategy at hand. **By the end of this executive workshop, iDeals had four, highly focused company OKRs with measurable key results.**

These company OKRs were then localized down into the next level via team workshops. These workshops, facilitated by Wave Nine and iDeals' internal coaches, helped team members collaboratively craft impactful, high-quality OKRs in context to the overarching strategy.

ROBUST TRAINING

Wave Nine provided extensive training on the OKR methodology and best practices. To avoid everyone approaching the process differently, it was paramount to establish an organization-wide standard at iDeals. Through live training and on-demand resources provided by Wave Nine, iDeals was able to get everyone in scope on the same page.

They not only learned how to craft impactful OKRs, but also received training in how to effectively implement them into their day-to-day operations.

These habits and rituals went a long way in making sure that OKRs were always top-of-mind at iDeals.



DEDICATED PROGRAM TEAM AND ACTIVE COMMUNITY

Despite already using OKRs, iDeals didn't have a certified team in place to provide guidance and keep teams on track with their OKRs. In order for iDeals to foster an active community of OKR champions that could continue to sustain and scale the program, **Wave Nine provided OKR coach training and certifications to 12 employees.**

This team not only learned about advanced OKR concepts, but also became masters in effective change management and workshop facilitation. With these skills, these certified coaches are able to facilitate OKR workshops and provide OKR training to new employees in the future, further solidifying a uniform understanding of the methodology and process at iDeals.

“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



RESULTS OF THE NEW OKR PROGRAM

Wave Nine supported iDeals with their OKR program relaunch and based it on five main building blocks. Each one played a crucial role in making the relaunch a success.

- o There is a revamped, documented OKR process in place that is tailored to iDeals, that can be referenced and easily followed by everyone in the company.
- o The company OKRs are clear and focused, making it far easier for functional teams to develop higher-quality OKRs that stem from them.
- o Teams are now authoring impactful OKRs that are measurable and linked to the company OKRs and overarching strategy, rather than being assigned OKRs by their managers.
- o OKRs are being updated regularly and are now a part of regular communications.
- o With more visibility into the strategy, teams now have a better sense of how their work directly plays a role in its execution.

KEY ACHIEVEMENTS

**Focused company
OKRs**

**Functional OKRs linked to the
strategy**

**Clear visibility of
the strategy**

**OKRs are part of regular
communications**

**Uniform understanding of
the process**

**More team collaboration and
alignment**

THE FUTURE OF OKRS AT IDEALS

iDeals aims to continue refining their OKR process, with a long-term vision of integrating OKRs into a holistic management model. “This new OKR program will help us get to the next level,” says Anton, “It helps us prioritize and allocate resources for those priorities.”

With signs pointing toward the company growing by more than 50% in the coming years, iDeals plans to scale their OKR program by ensuring new hires are effectively onboarded and trained in OKR practices with the help of their community of champions.

The collaboration with Wave Nine not only brought new life to iDeals' OKR program but also instilled a culture of strategic clarity and alignment, two essential elements for achieving sustained success. With this OKR program relaunch, iDeals can now 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

LOOKING TO BECOME AN OKR ORGANIZATION?

Let's Talk

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Wave Nine empowers companies to achieve business goals through the OKR framework and the OKR rhythm. For enterprises fully committed to the OKR process, we provide comprehensive playbooks, OKR templates, and resources that invigorate teams, clarify strategies, and enhance accountability. Our hands-on approach involves consulting, coaching and multi-modal education, engaging executive and teams alike. Headquartered in Silicon Valley, with additional offices in Germany, the UK, Australia, and Portugal, our international team can bring your strategy to fruition.