Pre-Flight Checklist for your OKR Rollout

Set the stage for your OKR rollout

DETECON
CONSULTING

PRE-FLIGHT CHECKLIST FOR YOUR OKR ROLL-OUT

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BACKGROUND

You've been tasked with delivering a seamless and effective OKR rollout to your entire organization. Where do you start?

We have encountered numerous clients that have failed to rollout an OKR program in their organizations because they lacked a proper plan to do so. Many OKR task forces go full speed ahead, blindfolded by an unstructured and unprofessional launch strategy. Having a proper checklist for an OKR rollout helps tremendously with setting the stage for the OKR project, and to create the foundations for effectively embedding OKRs into the standard operating procedures of your business.

Let's dive into what we recommend your pre-flight checklist should look like for rolling out an OKR program.

CHECKLIST

☐ **1) DETERMINE THE TIMELINE**
Create a timeline that is realistic for an org-wide transformation. We recommend using a 4-quarter cadence, so creating the timeline for the year to come. In this timeline, you should make the following considerations:
- Align with important events in the corporate calendar
- Include key milestone dates
- Include the teams that you want to rollout OKRs with and when
- Schedule enough time for pre-training and coaching. This will be facilitated by the communications plan (see step 2) with the dispersion of education material

It is helpful to create and share this timeline with the entire org to ensure maximum transparency. One step further would be to ensure that it is synced with their calendars.

☐ **2) DEVELOP THE COMMUNICATIONS PLAN**
OKR implementations require continual leadership attention, governance and communication. A communication plan needs to be established to ensure that the initiative is rolled out seamlessly, with minimal inertia and resistance to change. The plan needs should reinforce the following topics:
- Explain OKRs in depth
- Reinforce the value of OKRs
- How other similar-sized companies are using OKRs
- Provide a picture of where you are now, and where you expect to be once OKRs are implemented

It should include frequent and engaging communications which celebrate result achievement and share relevant OKR program information. Additionally, bi-weekly meetings should be held to enable horizontal and vertical alignment and maximum buy-in.
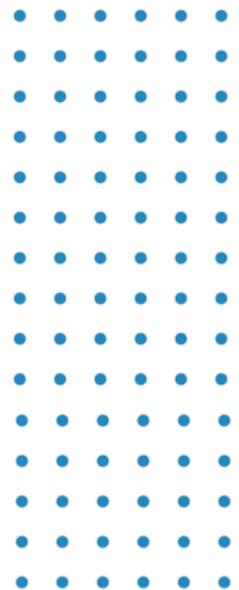
3) CHOOSE YOUR SOFTWARE

No one likes creating transparency with excel or PowerPoint. It's hard to manage 2020 with an early 2000s tool. They simply don't go far enough to ensure the level of transparency, accountability and more importantly, scalability, that you need. That is why you need to make a decision on the software tool that is right for you and unify that decision across the organization. When looking for a tool, consider whether:

- It has the functionality that we need and can grow as we do
- It has OKR management (cascade, mirror, add, edit, delete, etc.)
- It has OKR reporting mechanisms
- It can manage the tasks and actions I need to complete to achieve OKRs

No matter what software tool you end up choosing, adequate training and coaching needs to be provided to all levels of the organization to ensure maximum usage and benefit.

4) DEFINE THE SCOPE OF THE IMPLEMENTATION

You may be implementing your OKRs as a staged rollout. If this is the case, there are 3 dimensions to be considered: (1) By Business Area, (2) By Hierarchical Layer (e.g. management level), (3) By Cross Functional Initiatives. Once these have been selected, it is important to determine the teams which need OKRs. This may seem simple, but it can be quite a challenge, leading to major discrepancies in the traditional org chart.

5) DEFINE YOUR OKR GOVERNANCE STRUCTURE

OKR rollouts often fail due to a lack of proper governance, resources and owners. OKR rollouts only lift off the ground if there are specified groups dedicated to driving the OKR rollout and educating all relevant stakeholder groups. We've found that the following governance structure for OKR rollouts is the most appropriate in ensuring a successful and prosperous rollout, and continuation, of any OKR program:

- *Executive Champions/Steering Team*: e.g. CEO, CTO, CFO, COO etc.
- *OKR Task Force*: Run the PMO, communications and IT implementation aspect of the rollout e.g. an ELT owner, Project Team, Key Divisional Leads, IT Lead
- *OKR Coaches*: On the ground resources for others in the organization to refer to, certified in the OKR methodology. We recommend 1 certified resource per 50 people.
- *Super Users:* Selected ambassadors who are trained in the advanced app functionality of the chosen OKR software platform. We recommend 1 super user per 50 people.

MISSION ACCOMPLISHED

You're now all set to have a successful and prosperous OKR rollout!

Philipp Schett

Director of Strategy and Innovation
Philipp leads Detecon's global OKR practice with more than 20 experienced OKR consultants in America, Asia and Europe. As an expert in strategy execution, he and his team help leaders around the globe to fulfill their vision, align their organization around their strategic priorities and enable team members in every level of the organization to make entrepreneurial, autonomous decisions. Originally from Germany, he moved to San Francisco in 2014. He holds a M Sc. from Humboldt University Berlin and a Diploma in Economics from University of Kassel

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ABOUT DETECON

Detecon USA provides innovation, growth and digital technology advise to a range of clients from startups to global enterprises. Our core expertise includes growth advisory based on OKRs, innovation empowerment and connectivity services. We assist our clients to harness the latest technologies, agile frameworks and business models to drive step change performance improvements. Detecon Inc. is part of the Detecon Group.

The **Detecon Group** is a 1,100 person strong innovation-consulting powerhouse of Deutsche Telekom and T-Mobile and pioneer in digital strategy advisory. Detecon supports companies from all domains to adapt their business models and operational processes to the competitive conditions and customer requirements of the digitalized, globalized economy with state-of-the-art communication and information technology.

OKR ADVISORY

Detecon initially adopted OKRs as a way to drive better project outcomes in the innovation initiatives that Telekom and T-Mobile undertakes. Detecon also understood that to drive OKR success, we needed to select an OKR software platform.

From this experience, Detecon was approached by several of its existing external clients, which required OKR advice for their innovation initiatives, and Detecon founded its own OKRs practice, specifically dedicated to clients seeking to grow and transform their businesses.

We have now estbalished Detecon's OKR Advisory Offerings in all of Detecon's global offices, where dedicated Detecon's Certified OKR Consultants regularly advise on OKR initiatives.

Our strength is particularly strong in rolling out OKR initiatives in global enterprises where they require global co-ordination of the rollout. However, we are able to develop solutions tailored for all organizations.