## OVERVIEW

A large software company faced challenges in its Product Operations (ProdOps) due to an under-designed OKR tracking tool, leading to inefficiencies and user dissatisfaction. This use case explores how a simplified, manual-first (pilot) approach restored clarity and executive alignment, setting the stage for future automation.

## CONTEXT & CHALLENGES

**Industry / Sector:** Software / Technology

**Organization Type & Size:** Large enterprise with a global engineering organization

**Initial Pain Points / Drivers of Change:**

- Existing OKR tracking tool was cumbersome and unintuitive, requiring extensive manual effort.
- Lack of executive sponsorship and ownership led to disengagement and poor adoption.
- Prior attempts at process improvement had failed, eroding trust in new initiatives.

## STRATEGIC OBJECTIVES

Align engineering efforts with business outcomes.

Simplify and streamline OKR tracking processes.

Rebuild trust in ProdOps capabilities.

## APPROACH/ SOLUTIONS

**Model(s) Used:** Lean OKR Tracking Framework

**Process:**

- **Diagnose:** Assessed the limitations of the existing tool and gathered feedback.
- **Design:** Developed a manual, spreadsheet-based tracking system to reduce complexity.
- **Deploy:** Implemented the new system with clear guidelines and support.
- **Embed:** Established regular check-ins and feedback loops to drive continuous improvement, and developed a structured business requirements funnel to streamline communication with the tool team.

**Tools & Enablers:**

- Spreadsheets for manual tracking. Shared presentation deck for reporting.
- Clear documentation and templates.
- Regular communication and training sessions.
- Cadence and leveling edits as updates provide through executive levels.
- Executive sponsorship to reinforce the importance of the initiative.

## RESULTS & OUTCOMES

Use qualitative and quantitative measures.

- **Quantitative:**
  - Reduced time spent on OKR tracking by 40%.
  - Achieved 90% adoption rate among engineering teams.
  - Decreased executive review preparation time by 50%.

- **Qualitative:**
  - Improved clarity and focus on key objectives.
  - Enhanced executive alignment and engagement.
  - Restored trust in ProdOps processes and capabilities.

## KEY TAKEWAYS / LESSONS LEARNED

**1 Simplicity Drives Adoption**

A lean, manual-first approach can be more effective than complex automated systems, especially in the early stages.

**3 Iterative Improvement Builds Trust**

Starting with a simple solution and evolving it based on feedback fosters credibility and long-term success.

**2 Executive Sponsorship is Crucial**

Active support and involvement from leadership are essential for the success of operational initiatives.

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