

TREXIN CASE STUDY

USING OKRS FOR LONG-RANGE STRATEGIC PLANNING

Trexin helped a building products manufacturer define an operational roadmap in terms of Objectives & Key Results (OKRs).

BUSINESS DRIVER

Our Client, a leading manufacturer of consumer and commercial building products, recently adopted a new corporate vision & mission statement and was embarking on an enterprise-wide initiative to translate that mission into a long-range strategic plan that would more than triple the size of the business within 10 years. The Executive Leadership Team asked Trexin to help get the strategic planning process started by leading the development of an operational roadmap expressed in terms of Objectives and Key Results.

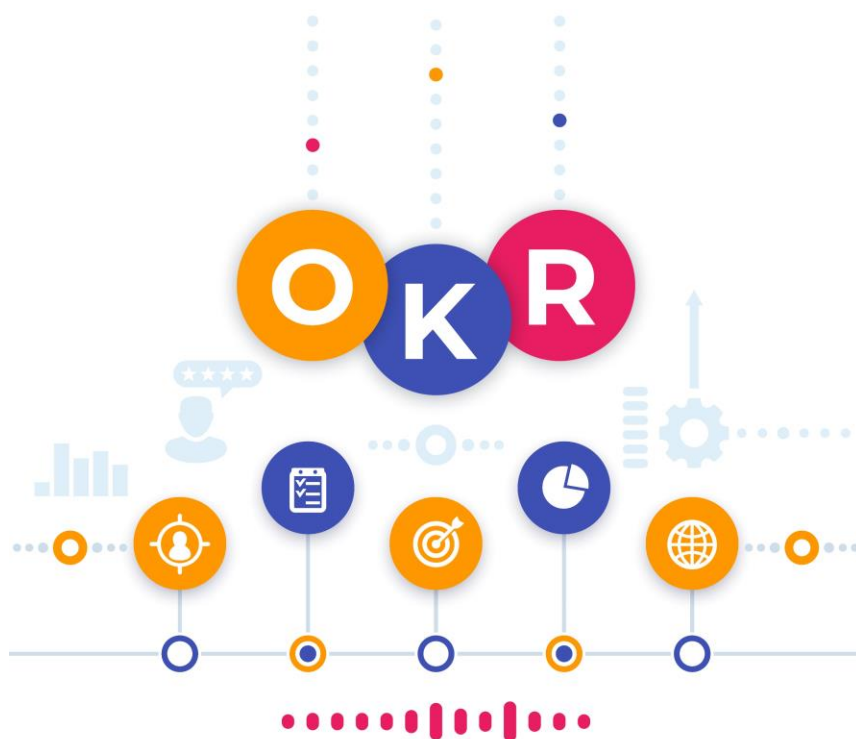
APPROACH

Familiar with the strengths and weaknesses of management by objective, Trexin first reviewed the way our Client had been experimenting with the use of OKRs. Like most organizations, our Client started using OKRs in a “bottom-up” approach characterized by independently defined and maintained OKRs that were only loosely integrated with one another. To ensure strategic alignment both vertically and horizontally throughout the enterprise, Trexin recommended that activities be explicitly represented as Initiatives (as opposed to embedding them within Key Results) so that an overarching enterprise strategy could be cascaded top-down from a single, unified OKR into integrated divisional-, departmental-, and personal OKRs.

As that more scalable OKR implementation model was being established, Trexin led a series of individual interviews and group discussions involving the entire ELT as well as the division Operating Committees to clarify the newly defined mission statement and its accompanying high-level strategy. Segmenting the 10-year long-range strategic plan into 3 components representing the short-, mid-, and long term, Trexin next led the extended 30-person team through a series of exercises to drive a consensus view of the short-term Objectives and Key Results. Trexin then worked with the divisional and functional leadership to identify what top-level Initiatives would be needed to attain those Objectives ... and then cascaded those Initiatives down to “level two” Objectives that had their own set of more detailed, compositional Key Results and Initiatives.

RESULTS

Trexin successfully completed the short-term operational roadmap expressed in terms of a multi-level, cascading set of OKRs, establishing the foundation for our Client to continue their strategic planning for the mid- and long term. Trexin also took steps to align the long-range strategic plan with the long-range financial plan and worked directly with the project portfolio management (PPM) technology team to consider how to best incorporate the OKR-based operational roadmap into a newly deployed Clarity PPM tool.



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