



OKR INSTITUTE

THE LEADING GLOBAL OKR INSTITUTE

— CLIENT ANALYSIS BROCHURE · INSURANCE

TURNING STRATEGY INTO MEASURABLE EXECUTION ACROSS INSURANCE

A cross-client analysis of how we have helped insurers, from a national health insurer to a global life and financial-services group, align leadership, integrate OKRs with agile ways of working, and connect regional execution to headquarters strategy.

Daman Health

Pasha Life

Manulife

3

INSURANCE
CLIENTS

3

MARKETS ACROSS 3
REGIONS

42k+

PEOPLE ACROSS THE
COHORT

Prepared for internal
review
Confidential

OKRS FOR A SECTOR BUILT ON TRUST, SCALE & REGULATION

Insurance runs on a demanding mix: strict regulation, long-horizon promises to customers, and the need to modernise, digitalise, and grow, often across many regions and lines of business at once. Strategy is rarely the problem; the hard part is translating it into focused, measurable execution and keeping diverse teams aligned to it.

This report brings together our work with three insurers. With **Daman Health**, the UAE's national health insurer, we helped leadership turn a transformation agenda into measurable outcomes

across a large, regulated organisation. With **Pasha Life**, we equipped agile coaches to embed OKRs sustainably within agile ways of working. And with **Manulife**, we connected regional sales teams to headquarters strategy across a 40,000-person global group.

Different as they are, all three draw on the same practice: **hands-on enablement, workshop-led translation of strategy into outcomes, real OKR drafting, and a disciplined cadence**, capability we build to last, not a template we hand over.

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Insurers across the UAE, Azerbaijan & global markets

40k

Employees at Manulife, the largest organisation in the cohort

Agile

OKRs integrated with agile ways of working across the cohort

100%

Context-led programmes tailored to each insurer's reality

HOW WE BUILD OKR CAPABILITY IN INSURANCE

1 Context-led enablement

We ground leaders, agile coaches, and teams in OKR principles and behaviours, tailored to each insurer's regulatory and operating context.

2 Strategy-to-OKR translation

We facilitate workshops that convert strategic priorities into clear, outcome-based Objectives and measurable Key Results.

3 Alignment across regions

We connect team and regional OKRs to headquarters strategy, so local execution reinforces enterprise goals.

4 Coaching, cadence & culture

We coach agile coaches and leaders, embed a review rhythm, and adapt culture so OKRs become a living, self-owned system.

DAMAN HEALTH

TURNING TRANSFORMATION INTO MEASURABLE OUTCOMES

INDUSTRY
Health insurance

HEADQUARTERS
Abu Dhabi, UAE

WORKFORCE
1,700 employees

OKR COACH
Dirk Coetsee

Daman is the UAE's national health insurer, protecting the health of millions of members across the Emirates. We partnered with Daman to turn an ambitious transformation and service-excellence agenda into measurable outcomes, helping leadership adopt OKRs as the way to focus effort and align a large, regulated organisation.

THE CHALLENGE WE FOUND

- 01 Strategy-to-execution gap.** A clear transformation agenda needed translating into measurable, outcome-focused goals that departments and teams could own and act on.
- 02 Alignment across a regulated organisation.** Many functions, service lines, and stakeholders needed a shared, outcome-focused language to pull in the same direction.
- 03 Outcomes over activity.** As in many established insurers, performance conversations leaned on activity and compliance metrics rather than the outcomes that define member value.

WHY IT MATTERED

As the UAE's national health insurer, Daman operates under close regulatory oversight and a mandate that touches millions of members, a context where reliability and public accountability are non-negotiable.

Advancing its transformation without losing focus demanded a unified execution framework connecting strategic priorities to the everyday work of teams.

THE OBJECTIVE WE SET

Enable leadership to translate Daman's transformation agenda into clear, outcome-focused OKRs, aligning a large regulated organisation and shifting performance conversations from activity to impact.

FOCUS AREAS

Transformation

Member value

Alignment

OUR APPROACH

01 Leadership OKR enablement

Education for senior and mid-level leaders on OKR principles, governance, and outcome-driven leadership in a regulated health-insurance context.

02 Strategy-to-OKR workshops

Facilitated workshops converting transformation and service-excellence priorities into clear, outcome-driven Objectives and Key Results.

03 Alignment & cascading

Sessions aligning departmental objectives with organisational OKRs, while teams retained clear ownership of execution.

04 Coaching & cadence

Coaching through OKR cycles and a structured review rhythm, integrated with Daman's existing governance and reporting.

THE RESULTS WE SAW TOGETHER

- **Enhanced strategic alignment.** We established a clear line of sight from Daman's strategic priorities to departmental and team execution, so a large organisation could pull in one direction.
- **A shift from activity to outcomes.** We moved performance conversations away from activity and compliance metrics toward the outcomes that define member value and service quality.
- **Confident, capable leaders.** We equipped leaders to run OKR cycles themselves and cascade them to their teams, building capability that stays with the organisation.
- **A recognised, valued partnership.** The engagement earned a formal letter of recommendation from Daman, a clear signal of the impact and trust built through the work.

"The OKR Institute helped our leadership turn a broad transformation agenda into focused, measurable outcomes, and gave our teams the confidence to own and drive them."

— Daman Health Leadership Team

PASHA LIFE

EMBEDDING OKRS SUSTAINABLY WITHIN AGILE

INDUSTRY
Life insurance

HEADQUARTERS
Baku, Azerbaijan

WORKFORCE
~500 employees

OKR COACH
Dirk Schmellenkamp

Pasha Life is a prominent life insurer building a modern, agile organisation. We partnered with Pasha Life to empower its agile coaches with the skills and knowledge to implement OKRs sustainably, using the framework to strengthen agility, strategic focus, and operational efficiency.

THE CHALLENGE WE FOUND

- 01 Skill gaps among agile coaches.** There was a noticeable gap in understanding and experience among agile coaches on integrating OKRs effectively within agile frameworks.
- 02 Consistency & sustainability.** Ensuring OKRs were adopted consistently and durably across diverse teams and projects was a significant challenge.
- 03 Cultural integration.** Embedding OKRs into the company's agile culture required care to avoid resistance and integrate seamlessly with existing practices.

WHY IT MATTERED

Pasha Life had already invested in agile ways of working, so the opportunity was to make OKRs strengthen that model rather than compete with it.

Because agile coaches shape how teams work day to day, equipping them first was the surest route to consistent, lasting adoption across the organisation.

THE OBJECTIVE WE SET

Empower Pasha Life's agile coaches to implement OKRs sustainably within agile ways of working, strengthening agility, strategic focus, and operational efficiency across teams.

FOCUS AREAS

Agile coaching

Sustainable adoption

Cultural integration

OUR APPROACH

01

Specialised coach training

Training focused on OKR principles, their integration with agile methodologies, and effective implementation and coaching.

02

Framework customisation

Support in tailoring the OKR framework to Pasha Life's needs, so it complemented their agile practices and objectives.

03

Culture & process adaptation

Guidance on adapting processes and culture to embrace OKRs, overcoming resistance, and fostering continuous improvement.

THE RESULTS WE SAW TOGETHER

- **Enhanced coaching capabilities.** We equipped Pasha Life's agile coaches with the skills and knowledge to integrate and sustain OKRs within their teams, strengthening their coaching from the inside out.
- **Improved strategic alignment and execution.** With OKRs in place, teams aligned and executed more effectively, giving the organisation a more focused and efficient operational approach.
- **Cultural cohesion and agility.** We guided a smooth cultural integration of OKRs, leading to greater agility, a stronger focus on outcomes, and a more adaptive, collaborative way of working.
- **A self-sustaining practice.** By building the capability in coaches rather than delivering a one-off, we left Pasha Life able to run, adapt, and improve its OKRs independently.

OUR REFLECTION

Pasha Life is a story about who you enable. Rather than train everyone at once, we invested in the agile coaches who shape how teams work day to day, so OKRs took root in behaviour and culture, not just process. In an organisation already committed to agile, making OKRs a natural extension of that model was what turned adoption into something sustainable.

MANULIFE

ALIGNING REGIONAL SALES TEAMS WITH HQ STRATEGY

INDUSTRY
Life & financial services

FOOTPRINT
Global group

WORKFORCE
40,000 employees

OKR COACH
Dirk Schmellenkamp

Manulife is a leading global life-insurance and financial-services group. We partnered with Manulife to equip its regional sales teams with the skills to draft and execute OKRs and align their regional goals with headquarters strategy, improving strategic cohesion and ensuring regional effort contributed to the group's overarching goals.

THE CHALLENGE WE FOUND

- 01 Alignment with HQ strategies.** Ensuring regional sales OKRs contributed directly to HQ's strategic objectives was hard, given differences in regional markets and priorities.
- 02 Consistency across regions.** Achieving a consistent approach to drafting and executing OKRs across diverse regional teams, each with unique market dynamics, was difficult.
- 03 Engagement & understanding.** Building understanding of OKRs among regional teams was key to fostering ownership and motivation toward the aligned goals.

WHY IT MATTERED

As a 40,000-person global group operating across many markets, Manulife depends on regional teams to deliver a shared strategy in very different local contexts.

OKRs offered a way to keep regional sales effort aligned to headquarters strategy, so local autonomy strengthened, rather than diluted, the group's global goals.

THE OBJECTIVE WE SET

Equip regional sales teams to draft and execute OKRs and align their regional goals with headquarters strategy, improving strategic cohesion, performance, and ownership across the group.

FOCUS AREAS

Regional-HQ alignment

Sales execution

Engagement

OUR APPROACH

01

Customised training & workshops

Tailored sessions for regional sales teams on OKR fundamentals, drafting, and execution techniques aligned with corporate strategy.

02

Regional–HQ alignment sessions

Sessions between regional teams and HQ to build a shared understanding of strategy and how regional OKRs contribute to it.

03

Ongoing support & tools

Access to OKR tracking tools and resources to keep application consistent across regions and sustain engagement.

THE RESULTS WE SAW TOGETHER

- **Strategic alignment and cohesion.** We helped regional sales teams align their OKRs with HQ strategy, so their efforts contributed directly to Manulife's global objectives rather than pulling in different directions.
- **Enhanced execution and accountability.** We improved how regional teams execute OKRs, with clearer accountability and a more consistent approach to achieving key results across markets.
- **Increased engagement and ownership.** Regional teams showed greater engagement with and ownership of their OKRs, motivated by the clear link between their goals and the company's strategic direction.
- **A repeatable, scalable model.** With consistent tools and a shared approach, Manulife gained a way to extend the same regional–HQ alignment to more teams and markets over time.

OUR REFLECTION

Manulife is fundamentally an alignment story across distance. The challenge in a 40,000-person global group is that strong regional teams can optimise locally and drift from the centre. The turning point was the alignment sessions that connected regional and HQ objectives directly, so local ownership and global strategy reinforced each other. That linkage is what converts regional energy into shared, measurable momentum.

THREE ENGAGEMENTS, ONE DISCIPLINE

CLIENT	PROFILE	CORE CHALLENGE	HOW WE HELPED
Daman Health	National health insurer · UAE · 1,700	Turning transformation into measurable outcomes	Leadership enablement + strategy-to-OKR workshops + coaching
Pasha Life	Life insurer · Azerbaijan · ~500	Embedding OKRs sustainably within agile	Agile-coach training + framework customisation + culture guidance
Manulife	Global life & financial services · 40,000	Aligning regional sales teams with HQ strategy	Training + HQ alignment sessions + tools & support

Three lessons we carry across the sector

01 · Enable leaders & coaches first

From Daman's leadership to Pasha Life's agile coaches, adoption sticks when the people who set the tone learn OKRs first and can carry the practice themselves.

02 · Fit OKRs to the operating model

Whether inside agile ways of working or a regional-HQ structure, OKRs work best when shaped to how the insurer already operates, not layered on top.

03 · Connect local to enterprise

Manulife's lesson: alignment sessions that link regional and team OKRs to headquarters strategy turn scattered effort into shared momentum.

BUILD YOUR OWN SUCCESS STORY

READY TO TURN YOUR INSURANCE STRATEGY INTO MEASURABLE EXECUTION?

From national health insurers to global life and financial-services groups, we help insurers align, execute, and deliver on their strategy, within the realities of a regulated sector. We would welcome the chance to do the same with you.

Contact us →

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