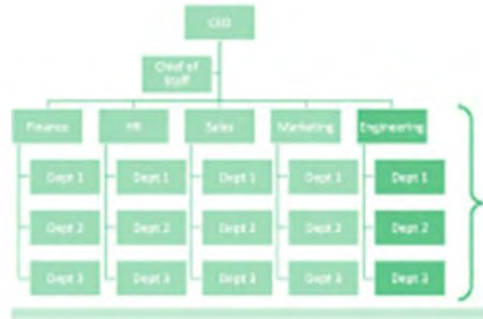# OKR Pilot Group

Test - Learn - Adapt

Pilot Pros:
- Test to see if OKRs are right for you
- Figure out what works (and doesn't) to share best practices
- Could work well for a really specific cross-functional initiative
- Can build out a playbook for the rest of the org to follow

Pilot Cons:
- Only includes a small part of an org
- Not everyone gets to participate in learnings

OKR Pilot Group

- **Option 1:** Executive Level

- **Option 2:** Department Level

- **Option 3:** Strategic Initiative

  Cross Functional / Squad Teams

Pilot Group Option 1: Executive Level

- This pilot option includes senior management at the executive level.

- The advantages of this pilot program are that key stakeholders from every department are involved from the start of the OKR program.

- Once they go through a few cycles, these leaders then establish cadence at the executive level and can include that rhythm throughout the rest of the company.

- A potential disadvantage to this pilot option is that teams may not have enough information to report on progress effectively, as this option does not involve key contributors.

Pilot Group Option 2: Department Level

- This pilot option begins with one particular department, commonly the product or engineering team, and involves all levels within that team.

- This piloting process more realistically simulates a company-wide OKR rollout because all levels of contributors are involved, enabling accurate reporting.

- Yet, the big risk with piloting OKRs at the department level is that it can reinforce silos. When starting with just one team, it causes a lack of cross-functional work due to the limitation of only one department.

- OKRs should be guided by strategic priorities, and contributors to each OKR should be drawn strategically from the different departments supporting that goal.

Pilot Group Option 3: Strategic Initiative

- This pilot option is focused on a specific strategic initiative that helps progress the annual OKRs established by executives.

- This is oftentimes a product launch or tactical campaign and spans cross-functionally across several departments. OKRs are a great way to monitor progress towards a big goal and the benefit to this option is that it includes multiple functions across the organization.

- The drawback to this approach is that if the initiative's stakeholder group is very large, it may be difficult to enable everyone on OKRs at the same time. Additionally, it may be a challenge to adequately train new users of the OKR methodology cross-functionally. Drawbacks aside, this is an excellent approach.

Big Bang OKR Roll-out

Big Bank OKR roll-out

This generally works better with smaller organizations as there are fewer layers to work through.

Big Bang Pros
- Teamwork; everyone is in this together and on the same page
- Aligned communication across the entire organization
- Faster OKR rollout to the entire company

Big Bang Cons
- Potentially challenging with larger organizations
- OKRs aren't easy, and many don't get them right the first time
- Loss of confidence in process if obstacles need to be overcome in the first implementation

Best way

You should take into account the complexities of your organization, the capacity for change and consider any cultural implications when it comes to adapting to that change.

Identify who is needed in Pilot Group (Strategic Initiative)

VP

Department Head

Product Manager

Product Owner

Team Lead

Team

Identify what roles are needed for events on all levels