

## ICON CUSTOMER SUCCESS WITH SCALED OKRS

As Scaled OKRs, Inc's first delivery partner, ICON brings a complete Scaled OKRs approach to market.



### OVERVIEW

The Scaled OKRs Business System provides clear, comprehensive guidance on how to viably enable enterprise-wide OKRs. ICON applies three decades of change management experience in the disciplines of Strategic Planning, Value Stream Optimization, Lean Portfolio Management, & Product Development Flow. Together, these practices ensure that the work being done aligns to clear strategic goals.

### AT A GLANCE

#### Challenges Overcome

- Lack of clarity & focus
- Poor alignment & prioritization of work
- Insufficient transparency & accountability
- No clear measures of success

#### Benefits

- Align strategy & execution
- Inspiring & quantifiable key results
- Healthy habits that build & grow the OKRs muscle
- Integrates with the Scaled Agile Framework® (SAFe)

### KEY ENGAGEMENTS HIGHLIGHTS

#### 2018: Global Financial Technology Company

- Introduced OKRs to CIO & direct reports, improving utilization & prioritization of corporate resources across shared value streams.
- Facilitated OKR development sessions with VPs of multiple departments to create a strategic foundation for prioritizing & funding large-scale initiatives.
- Helped leaders of shared value streams understand & apply OKRs to their annual & quarterly planning cycles.

#### 2019: Leading North American Food Distribution Company

- Supported the implementation of the Lean Portfolio Management practice & worked with leadership to develop OKRs Integration Strategy to support Portfolio-Specific OKRs.
- Facilitated multiple OKR creation workshops, training sessions, & executive overviews.

#### 2019-2020: Global Insurance & Wealth Management Company

- Brought OKRs to company's marketing organization to address timely, high-profile initiatives designed to increase membership by 20% over 3 years.
- Facilitated integration of OKRs with the Scaled Agile Framework (SAFe).

#### 2020-2021: Fortune 500 Private Mutual Company

- Introduced OKRs to company's finance department for coordinating portfolio management activities.
- Implemented a formal OKRs practice to complement the organization's talent development & PMO practices.
- Facilitated integration of OKRs into the organization's PI Planning activities to inform both product vision & PI objectives.