

Using Objectives and Key Results for Project and Team Management IT service provider ergovia relies on Goalscape for Management by OKR



ergovia, a provider of software and services for the documentation of individual education based in Kiel (Germany) had some clear goals. The problem was in turning their annual goals into drivers for action plans for day-to-day business. So in 2016 they introduced the OKR Leadership approach (Objectives and Key Results). After four years of refining Management by OKR to their processes, ergovia CEO Jens Buchloh took it to the next level with the Goalscape visual goal management solution.

Holistic view of OKRs

The very challenges faced by IT and service providers like ergovia require agile methods to align the organization, processes and people with operational and strategic goals. 'Often, one department didn't even know what the other was working on. That was a big problem, especially in interdisciplinary projects. So we needed a way to take the agile Scrum and Kanban methods that we were using successfully in IT, and apply them to the entire organization, making projects more visible across the board. That's why we decided to introduce the OKR process,' explains ergovia

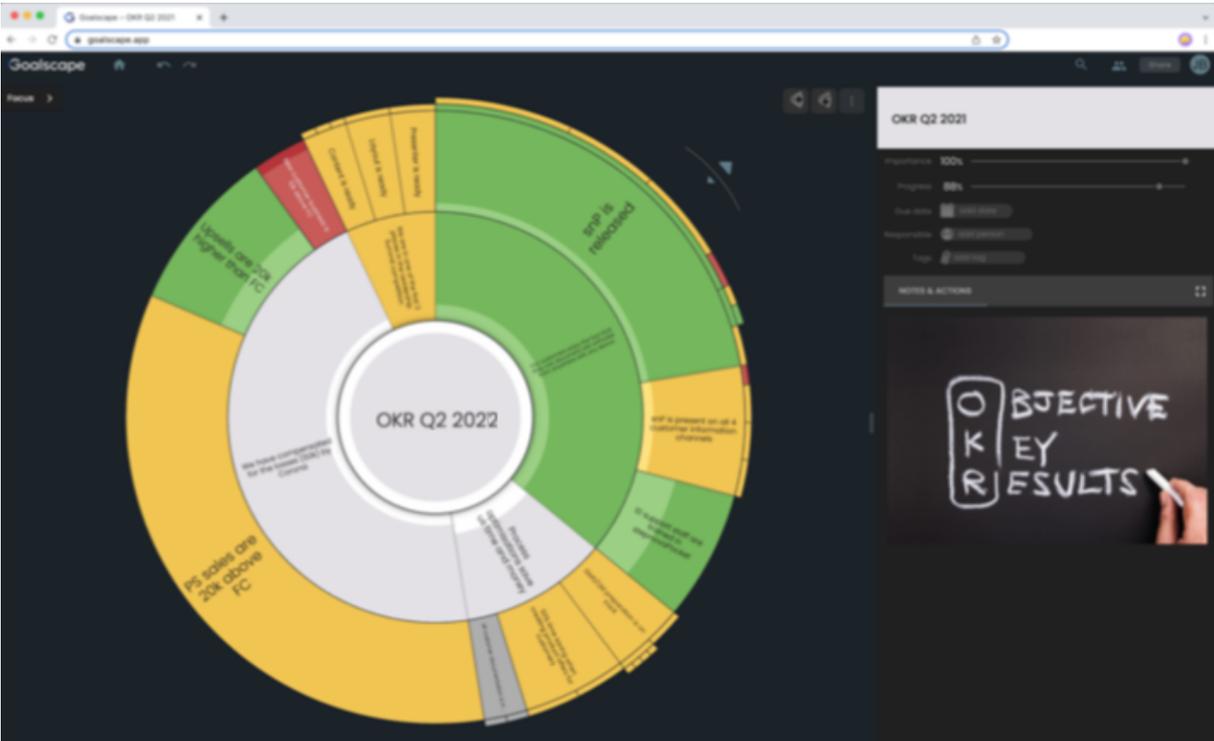


Jens Buchloh is CEO of two IT companies that use agile software development. For him, a quick visual overview of projects and hot spots is extremely important. (© ergovia GmbH)

CEO Jens Buchloh. 'The team first had to learn how to formulate objectives correctly and determine metrics and milestones along the way. When everyone in the company is ambitious, OKR can become very complicated and may seem overwhelming. So to make the process effective our key challenge was to map all this in a clearly understandable way. We were looking for something that provided the essential overview, along with the ability to dive into the detail in case of critical developments. We tried Confluence from Atlassian, but that came to nothing: the endless linking and branching from one text block to another did not provide the visual clarity that the team needed.

Set and track goals visually

In 2020, the ergovia team came across the Goalscape Visual Goal Management software. 'The unique visual approach is as simple as it is brilliant. In Goalscape, we see everything we need in a single image, without losing the detailed information we need for specific tasks. We can build a complete goal structure down to a granular level, then from the overview we can dive into the detail by centering on particular areas of the goal map. We can easily define our high-level goals for each quarter, then break them down into subgoals and specific actions. At the same time, we can zoom out to the 'view from 30,000 feet' and directly involve process participants in the formulation of the high-level goals: this massively improved team engagement and commitment to those goals. Only when everyone understands the interrelationships and mechanisms behind actions can they contribute their ideas for improving processes and achieving goals more quickly,' says Buchloh.



Example Status Documentation in ergovia's OKR Goalscape

Traffic lights show 'hot spots'

In the past, there were always events in software development that jeopardized release deadlines. And although any critical issue would have been recognizable to at least one team member at an early stage, any warnings they raised never reached the right person early enough. 'As a manager, I need an overview of any current 'hot spots' so that I can identify and implement any action directly – without having to run from office to office looking for it. Goalscape has allowed us to take a bird's eye view of our projects, yet at the same time, go into detail where needed. A clearly defined color scheme makes it much easier to see the status of all project milestones at a glance. Red means: the project is faltering, there is an urgent need for action here: then we can look at all the subgoals in a systematic manner and dissolve the bottleneck,' Buchloh explains.

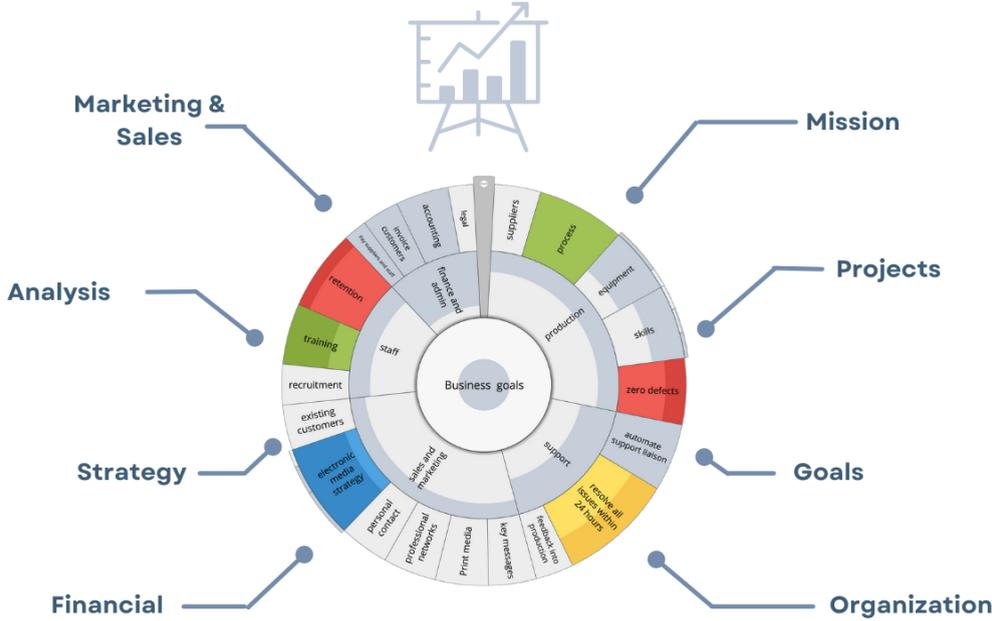
Confidence level for goal achievement

To indicate the likelihood that a goal will be achieved by its due date, the team member Responsible enters a Confidence level (0 - 10) in the Notes. They update this number every week, taking into account any disruptive factors as they occur. So a diminishing Confidence is an early warning of a potential hot-spot, enabling a timely response. At least once a month, the teams get together and the project managers use Goalscape to present their goalscapes to keep everyone else in the picture.



Once a month, the teams come together to use Goalscape to present their successes and project progress (© ergovia GmbH)

Visualize OKRs in Goalscape



Note: Shading represents Progress and the relative size signifies Importance.

Meetings based on the 'KISS' principle: Keep It Smart & Simple

'With our OKRs and the visual representation in Goalscape, we can quickly identify bottlenecks, even very technical ones, without leaving our strategic altitude. We see where the problem lies and can discuss possible solutions together without going into too much detail at this point,' according to ergovia CEO Jens Buchloh. 'The easy communication about company and team goals, and on the progress in individual segments is enormously important for the ongoing planning and success. And this approach has really improved everyone's motivation and productivity, because milestones reached and project successes no longer remain under the radar, but are recognized and duly celebrated. In which areas did we have the greatest development? Through which channels and acquirers came the most new customers? All the factors that affect the achievement of our goals are visualized easily and shared transparently. Everyone can see what we have achieved as a team in every area, and the contribution that the achieved subgoals have made to the success of the relevant business units.

Everyone involved in the project can see the big goals, contribute to them and commit to them: they don't just see what's going on in their own work area. Apart from that, it makes meetings more efficient – and shorter! To put it in a nutshell: Goalscape delivers time savings, more transparency for project management and has taken our collaboration to the next level.'



Click to view video testimonial: <https://vimeo.com/693063152>

About Goalscape Software

Goalscape Software GmbH, founded in 2009 and headquartered in Kiel, Germany, develops visual goal setting and goal management solutions for businesses, teams and individuals to increase motivation, improve performance and achieve success. Designed by Olympic athletes and coaches to run winning campaigns, the Goalscape goal setting software spread rapidly in the business world and it is now used by more than 50,000 people in major corporations, sports organizations and collaborative teams worldwide, for thousands of successful projects and hundreds of medals across a variety of sports. Goalscape Software helps ambitious businesses, knowledge workers, coaches, teams, athletes and individuals to define, share and track their goals, develop flexible strategies, self-organize, activate powerful motivational mechanisms and team communication for sustained high performance and consistent goal achievement.

Company contact:

Goalscape Software GmbH

Marcus Baur

Esmarchstrasse 51

24105 Kiel, Germany

Phone: +49 (0)4315 - 560 7950

Web: www.goalscape.com

eMail: info@goalscape.com