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How do digital facilitation help aligning and implementing systematic strategy work in a fast-growing SaaS startup?

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ABSTRACT:

How do startups make sure they are driving towards the same goal? This research aims to explain the benefits of facilitated sessions with different departments and showcase the first round of implementing strategy work in a fast-growing startup. This research consists of background research for strategic alignment, its benefits and the challenges that companies generally meet while implementing strategy work and effective measuring. An important note for this research is that the research was concluded while the research company was doing their first implementation round. The second round is not included in this research, there is a clear gap to be totally sure if the implementation successfully continued after the research was done. The research considers this and understands that the wholeness of this implementation process includes further improvement and iteration rounds to make it more fit for the researched company. This research will not have the digital facilitation material, anonymous answers, or the gathered overall feedback answers as they include confidential information about the strategy and company's future. But all the analysis of the material is presented and analyzed. This research is carried out as qualitative research, based on digital facilitation sessions, gathered written answers and feedback forms.

Strategy implementation is something that several companies struggle with, and especially in their early days. This research is concluded with a company who were in their startup phase and wanted to bring clarity and become the next Atlassian or Google in the tech space. The aim is very relevant for almost all young companies, at some point only executing is not bringing the needed results. Some level of strategy is needed. Some companies are not keen to include their all employees on strategy work, but in this research the case company was excited to include everyone. During this research the OKR framework was implemented after several failed tries before. An important part of this research is to show how building department-based plans that mirror the values, ways of working, and clear metrics help teams across the company better understand their possibilities to make an impact and be part of something bigger.

The aim of this research is to answer if digital facilitation helps companies to implement strategic goals and Objectives and Key Results framework. And as an additional question, research figures out if this digital facilitation brings clarity and transparency while the implementation process is in action. Research briefly explains the difference between key performance indicators and Objectives and Key Results – framework, and how these two different measurements work together. And sheds a light what does Software-as-a-service startup really mean. This research aims to highlight the open discussion related to future goals in teams. Easily these are topics and themes that are overlooked in fast-growing companies, and those can make a difference in achieving future success and becoming the next big tech star.

KEYWORDS: Startup, Software-as-A-service, SaaS, OKR, Key Performance Indicator, KPI, Digital Facilitation,

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ABSTRACT:

Miten startup varmistaa että kaikki yrityksessä pyrkivät samaan suuntaan? Tämän tutkimuksen tarkoituksena on selkeyttää miten strategisten tavoitteiden implementointi digitaalisen fasilitoinnin avulla auttaa yritystä tekemisen virtaviivaistamisessa ja samalla havainnollistaa tätä tutkimusyriksen ensimmäisen implementointi kerran läpivalaisulla. Tämä tutkimus sisältää taustatutkimuksen strategisen linjauksen läpiviennistä, sekä kuvauksen tyyppisistä implementointiprosessin mahdollisista haasteista.

Tutkimus on toteutettu laadullisesti, kerätty aineisto on alkujaan digitaalisten fasilitaatio sessioiden nimettömästi toteutettujen kyselyiden analysointia, sessioissa käytyjä keskusteluja sekä fasilitointi kokemuksesta kerätty palaute. Kuitenkaan tässä tutkimuksessa ei esitellä kerättyä materiaalia sinänsä, vaan vain analyysit materiaaleista. Pääsyyinä on materiaalin pääsääntöisesti luottamuksellinen laatu. On huomioitavaa että tähän tutkimukseen ei sisälly toista implementoinnin iterointi vaihetta tai läpiviennistä, vaan tutkimus keskittyy täysin yrityksen ensimmäiseen laajaan implementointi kertaan.

Strategian implementointi yritykseen on monien yritysten haaste, varsinkin nuorten yritysten alkuajoina. Kuitenkaan yritykset eivät pääse kovin pitkälle kohti menestystä ilman pidempiaikaista strategiaa ja sen näkyväksi tekemistä. Tässä tutkimuksessa päätoimisesti käsitellään John Doerrin (2018) OKR mallin implementointia digitaalisen fasilitoinnin avulla, sekä tarkastellaan tiimin reaktioita uuteen läpinäkyvämpään strategisen työn implementointi prosessiin. Tutkittavassa yrityksessä strategisen työn implementointia OKR mallin avulla on yritetty aiemmin onnistumatta. Kuitenkin seurauksena kasvupyrähdyksestä yritykselle nousi tarve ja halu kommunikoida yrityksen suunnasta läpinäkyvästi ja työtä ohjaavasti. Tähän OKR malli sopii kevyeksi viitekehyyksi. Tutkimuksessa käsitellään ja sivutaan kevyesti miten KPI ja OKR malli toimivat yhteen toisiaan tukien.

Tutkimuksen tarkoituksena on vastata kysymyksiin digitaalisen fasilitoinnin hyödyistä kun implementoidaan strategiatyötä nuoreen yritykseen. Toisena olennaisena elementtinä tutkimus vastaa tuoko fasilitointi läpinäkyvyyttä ja selkeyttä? Sekä toteutuuko strategiatyö fasilitoinnin ansiosta niin että siitä on selkeää hyötyä yrityksen tulevaisuuden kannalta. On kuitenkin huomioitavaa että tutkimuksessa käsiteltävä yritys on strategian implementointinsa alkutaipaleella, ei kerätty data pysty vahvistamaan päätutkimuskysymystä. Tutkimuksessa on tiedostettu tarve jatkoiterointi kierroksista jotta OKR malli ja fasilitointi toimivat yrityksen hyödyksi eivätkä sitä vastaan. Aiheena nämä ovat helposti nuorissa yrityksissä ylenkatsottuja asioita, mutta pidemmällä tähtäimellä nämä voivat olla juuri se erottava tekijä joka ratkaisee yrityksen menestyksen.

Avainsanat: Startup, SaaS, OKR, KPI, digitaalinen fasilitointi, läpinäkyvyys, johtaminen

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Abbreviations

B2B	Business-to-business
VC	Venture capital (company)
OKR	Objectives, and Key Results – goal-setting framework
KPI	Key Performance Indicator – measuring framework
Company A	The case company where the research material is from
NDR	Net Dollar Retention
MVP	Minimum Viable Product
MLP	Minimum Lovable Product

1 Introduction

In 1999, Google involved its employees in building their team's strategy with OKRs, Objectives, and Key Results (Doerr, 2018). They shared the trust and engaged the employees in the bigger goal. It can be stated that “yes, but they are Google; they did everything differently”. And that is a somewhat relevant argument, but there is still a lot of wisdom on how especially startups can learn from those companies like Google, who made the waves by trusting and engaging rather than leading with a waterfall or some other strategy framework (Doerr 2018, Niven 2016). So what is the strategy? And who should participate in that? Leading companies have changed quite drastically during the last ten years, and it keeps changing, the history of strategy has described strategy for example as war, network and biology (Oliver 2001). We have seen some companies without a clear hierarchy and succeeding without one – and then we have seen examples where the old-school waterfall model still made the company rise relatively high. It is well researched and documented fact that strategy is always complex, dimensional and it is hardly something to be taught (Mukherji 2003). Porter (1985) presented his three main competitive advantage strategies for companies a years ago, and still when a young company starts its journey they need to figure out what works for their industry. This research tries to answer this from a startup perspective: what is the advantage of systematic strategy work and clarifying the big goals for everyone. How does strategy help the daily work and engage teams to the same ultimate bigger goal?

Companies easily fall into that strategic fatigue where they workshop, plan and discuss but will not build a concrete plan of action. As it is a complex and dimensional part of succeeding company's journey, it is almost too easy to make it difficult. According to military strategist Clausewitz (1976), the main challenge which makes strategies so complex and difficult is the friction that can not be predicted. An effective strategy should be possible to turn into several roadmaps, short-term projects, and sprints towards the shared goal (Doerr 2018, Grove 1983). It should be something where every team can

contribute to the more fantastic future of the company. It should be a living organism that is part of the company's ecosystem (Peltoniemi 2018, Rothschild 1990).

It is adjusted when the company learns more and prioritizes again — communicated to the whole company in every adjustment and turn. The strategy should be everywhere all the time, in a way that it is so well implemented that employees don't feel it is something big, unique, and only timely brought up. It should be an invisible part of everyday work when it is done right, almost like a behavioural pattern (Solive 2018).

While this research paper was written, case company A has ended its first part of successful implementation, including everyone in the company. Before that, the company tried to implement this process and failed approximately three times for different reasons. The main reason for these failed attempts was the lack of ownership of the whole process and the shortage of resources to make systematic strategy work effective and engaging at all levels.

Company A has a solid internal culture that works as an advantage when this implementation process occurs. The inner dialogue is intense, and teams come up with very relevant questions daily, all with the same goal – making this company the best possible it can be. Company A is approx. 100 team members strong SaaS start up who just before this research came out from extensive ramp up period. During that period the team grew from 30 people to approx. 100 people. So, during that very turbulent time the need for a strong strategy and participating employees came very clear. The company A wants to be the best in their own niche and the team strongly believes that culture with the right strategy will drive success.

1.1 Background and research questions

Richard W. Oliver (2001) has summarized strategy as several different buckets. He explains that during the times strategy has had a different definition. Now a days it depends a bit of which school the person talking about strategy is. Oliver (2001) mentioned that the definition for strategy has been described as War, Machine, Biology

and Network. This can be understood as strategy is what it is needed to be. For strategic efficiency to support strategy or strategies, there are several different concepts from Balanced Scorecard to simplified *Key Performance Indicators*, later called KPIs, and everything between. For this research understanding the key elements, concepts and aims of continuous business are needed. And at the same time understanding that startups lack most of the resources that bigger corporations have. For this research the main concept that is discussed is called OKRs, *Objectives and Key Results*. This is a quite famous strategic framework, which was made known by John Doerr and Google. According to Juuso Hämäläinen, global companies like Atlassian, Slack and Twitter have followed the path Google showed to us. And so has some of the Finnish companies like Nixu, Futurice and Heltti. One of the key elements of this concept is that if it is done right, the strategic advantages are notable, and the concept will deliver the wanted results again and again. In this research OKRs are the main concept, and in addition to that the KPI framework is introduced as a secondary element. OKRs are strongly driving the change and KPIs are more helping the decision making, if something needs the change. (Hämäläinen 2020)

For this research, the main research gap lies between startups and extensive efficient OKR strategy implementation which would have shown the clear connection between startups successes and failures. When Doerr introduced OKRs to Google, they were a young startup, but they as a one example are not enough to tell the story and back it up with data. Challenging to research OKRs and their effect on startups' success, makes the advantage that a company gets if OKRs are working. And the fact that OKR implementations rarely succeed on the first time and companies do not want to share their failures freely. Atlassian's and Slacks have shared their success way after they struggled through their own OKR implementation, there is no relatable data how many times these companies tried before succeeding. (Hämäläinen 2020)

This research is conducted by using mainly qualitative methods, which in this research are discussions and anonymous questionnaires filled by research Company A's employees

and observations while these digital facilitations were held. This brings some limitations for implementing these learnings for future or making strong conclusions. Mainly because the sampling size is smaller approx 100 people in total who took part in the researched process. Also a limiting element comes from the Company A, which was a young growing company with their first round of strategy digital facilitation where everyone were invited to build company's strategy, limitation comes from the lack of strong foundation and history for this kind of research. As this research was conducted for the first time ever, it is a known element that there is a lot of room for improvement when implementing this as a new standard practise for building strategy. Time was also presented as a quite big limiting element. As the leadership team in a growing company is always short in time, preparations were conducted with quite short timeline. The main method was based on the digital facilitation discussions and anonymous answers in questionnaire while digital facilitation was on going. The second research material was gathered after the digital facilitation for company strategy was done. The lack of participants on this part makes the material lacking assertiveness in a level that it could be used outside of the Company A. The approach was very much experimental for everyone who participated, this research need sparked from a need to try to engage everyone in the company to be part in the bigger picture. As a clear limitation the time line is notable frame. This meaning we are only concentrating this particular case, with Company A. The aim is to demonstrate the possibility that openness brings while everyone are collaboratively working together for the strategy. Anywho this research is aware the lack of previous research according this particular exercise with startups.

In this research, the aim is to open how the startup can benefit from strategy work without it becoming a task that is done but not followed and implemented. And it becomes relatively supportive and active work that directs to execution for every level in the hierarchy. Solive (2018) summarized that the Grand strategy can be a pattern behaviour, which means it would be then implemented so well that people execute it without even realising. The lowest level strategy is a most educated guess of what and how the company should concentrate on the decided timeframe. It is a plan towards a

clear goal where everyone plays a role. It is based on an analysis of the current state of business. As the great Micheal Porter (1980) said, *“the essence of strategy is choosing what not to do.”* It is a mission and vision put into clear goals where teams then aim together with a plan. It is a framework to understand where we need everyone to concentrate and how individuals can impact the company’s journey (Porter 1980, Kiechel 2010).

The main research question:

1. How does digital facilitation help align and implement systematic strategy work in a fast-growing SaaS startup?

Secondary research question

2. Does digital facilitation bring clarity and transparency of companies’ future to employees?

2 Theoretical background: SaaS-Startup, Strategy work, and measuring system

The startup idea is based on shipping MVPs and building while flying. Startups can survive quite a long without systematic strategy work (Gans & co 2018). When a company grows, the small core group of founders and first hires grow to over 100 people, the transparency, direction, and effective communication can take a hit. And this all can affect then the internal culture, which is the make it or break it, driver. You cannot repair it when it is lost. Strategy work aims to build a clear and transparent map for the company's bigger goal, the north star (Doerr 2018, Grove 1983). At the same time, make it so simple that it can be communicated to all levels, and everyone can feel engaged in it. One of the significant parts where especially young companies go wrong is that the strategy is too far from the standard work. It is an illusion that doesn't translate to the list of everyday jobs to be done. This theory of jobs to be done is fundamental in startups and translates to more prominent corporations. According to Anthony Ulwick's book "Jobs to be Done", the lack of knowledge related to jobs that need to be done is the key component of failure. It describes projects and product development if the company does not understand the customers' needs. And, of course, strategy work. Strategy work is one massive project that relates to everything and all the decisions in the company. So if the strategy related to "jobs to be done" knowledge is missing, the implementation of the strategy will fail, as with any other project. (Ulwick 2016)

Most of the time, companies do not implement strategy work effectively (Axelrod 2010, Grove 1983). Or it has become a standard practice behind closed doors. The company needs to have a robust internal understanding of valuing everyone's opinions objectively to avoid this. The title cannot be a decision driver when discussing strategy planning (Doerr 2018). The leadership team should have that confidence level where a team can openly bring ideas, worries, and questions to the table.

We read a lot about different company cultures and what makes or breaks one. When we talk about implementing the strategy work, this plays a significant role in it (Axelrod 2010, Doerr 2018). If the culture is built so that people have a say and use it when the team is building a strategy – that team has a superpower. They say that “culture eats strategy for breakfast” is somewhat true in the short-term, but in the long-term, you need some supporting structure like the strategy to help the culture drive excellence (Bergman 2013).

2.1 SaaS-startup

SaaS-startups are ideas that already have some level of execution on a technical part. They are on a journey to become the next Google or so. They solve a problem for a specific audience in a particular market (Gans & co, 2018). Or at least they are trying to do so. Ideally, they build something irresistible and irresistible for customers and the market they are from. Everything starts from an innovative idea to change something for to better. Sometimes, the team builds something so great that it becomes a new category in the industry or the market. That’s why many of these innovative startups hold the term “disruptors” of their industry. (Blank 2012, Thiel 2014)

Most companies operate through iteration loops. They ship the product and iterate it. There are many different ways to do this, like MVPs (minimum viable product) or MLPs (minimum lovable product), which are both very common. MLPs follow the same principles as building MVP, but often MLP state includes more customer interviews and usability testing, and the start up who is doing this has already several customers who are involved in the iteration. Still, the start up aims to find the best way for them. As Thiel addresses in his book Zero to One, there is only one time for startups to do the right thing, like publishing the product. (Thiel 2014, Brooks 2020)

As the start up iterates the product and, in some cases, they need to build it from scratch again. That can create other challenges for the startup’s journey. A new, clearer goal is to build an extensive customer base (Ries 2017). That often leads to investors’ interest.

Interest from investors will mean financial support for the team to build a bigger audience and keep iterating the product. (Brooks 2020)

For all the startups, the key is to find the product-market fit and working business model (Ries 2011, Kronenberger et co 2022). And hopefully then accomplish some level of monopoly in their industry, as Google has over the search engine industry (Thiel 2014). According to Thiel, the three key elements for the monopoly goal needed to succeed are the technological advantage, network effect, economies of scale and successful branding. The network effect means a mass of people affect that brings a snowball effect and rockets the growth of product usage. And the third mentioned economies of scale mean the cost savings when something is produced on a large rather small scale. And successful branding is a key element for differentiation in people's minds. (Ries, 2011 & 2013)

2.1.1 Funding

As the ultimate goal is going public, there are several steps before that. Companies need investments from very early on, which leads to a different number of investors joining the journey at different stages. Most motivation is built on the goal of going public. But they want to cash out their investment with some extra reward. The concept is called more familiarly a startup term "exit". (Baldrige 2022, Brooks 2020)

The number of resources a startup needs to have the time and space to build and iterate is extraordinary. You need a lot of human resources and all sorts of support resources, but to have that, you need capital to fund your actions. Generally, this capital is raised via several rounds of funding, and it is the moment new investors join to the company. Hopefully, with other resources like knowledge or connections to the industry and not only capital. (Katila et co 2012, Baldrige 2022)

While the SaaS startup is on a journey to become that public company, there are several steps to raise capital to keep the lights on and have the product iteration flowing. Often companies start with bootstrapping, which means founders and their close ones, i.e.,

friends and family, invest with some capital. Some companies, especially those where the founder is on the second or third round of startup building, can skip this phase. The next round is called seed funding or early-seed funding. In this part, the external investor, like a venture capital company or individual "angel-investor," i.e., high-net-worth individuals, invests in the potential of the company's idea. (Baldrige 2022, Ehrenberg 2010)

After these phases, the company moves to the series funding rounds; primarily, there are rounds from A, B, C, and D. Some companies go to E or F, but it is not that common. During these rounds, the capital comes from venture capital firms, and there is one leading venture capital firm. The capital that companies raise on these rounds is around tens to hundreds of millions of dollars for exchanges of shares to the company. The whole venture capital industry currently has a lot of capital to share, and there are few potential companies to give this capital to. According to Jessica Mathews from Fortune, during the first quarter of 2022, VC investments decreased by 19%, which meant \$144 billion compared to last year. Forbes listed six themes to follow in the VC scene for 2022: future of work, education, climate, health care, automation, supply chain and squeezed middle section, which means companies raising the A and B rounds. Also, according to Chris Smith from Forbes, inflation and interest rates will affect future investments. (Kronenberger, 2022, Baldrige 2022)

When the company has gone through these phases of investing, it is inevitable to go public, which means they open themselves for outside capital via IPO, initial public offering, a direct stock exchange listing, or SPAC, a special purpose acquisition company. That ends with the situation where early investors and founders can cash out and realize a significant return on investment. That happens with selling their piece of the company and continuing their life. Series-entrepreneurs are doing this; they invest their significant return to a new start up and skip the bootstrapping phase. (Katila et al 2012, Baldrige 2022)

2.1.2 Successful Startup

The elements of a successful startup are something early-stage investors are trying to identify and iterate on already built frameworks. A known risk for early-stage investors is the possibility that they will see a 0% return on their investment. According to Craig Kronenberger, 21% of startups fail within the first year. While the risk is accurate, and many startups fail, none meet this unfortunate destiny. Several elements need to go right and align to make that startup a success story. Elements that affect the success story possibility are listed below. (Gross 2015, Baldrige 2022)

1. **Teams' motivation for their idea.** Are they obsessed with making the change? There is a possibility they are ready to do anything it takes (Blank 2012, Gross, 2015, Kronenberger 2022)
2. **Level of expertise in the team.** Are they domain experts on the topic? An excellent example of Finnish venture capital funding is Icebreaker VC; they state on their website that there is no stage too early for funding - but the team should have domain expertise to be even considered. (Ehrenberg 2010, Icebreaker VC 2021)
3. **Are they so obsessed with the idea that they are ready to invest the hours?** Startup life is quite intense and asks for a lot of time and resources. Without it, the story of the startup will be short. (Gross, 2015, Katila et co 2012, Kronenberger, 2022)
4. **The timing of the idea. Is the market ready for the picture?** Has it been tried before? If the team has done the background research and believes the timing is ready, there is a possibility for a success story. (Ries 2011, Thiel 2014)
5. **The size of the market. Is there room to grow?** If so, and the company can be a never-ending money-making machine, it reflects strongly on the successful ground of building the company. (Thiel, 2014, Kronenberger, 2022)

Investors are looking for those early-stage teams with that golden idea and the attitude that reflects the list above. If the team can convince investors about the above, there is a

possibility that they are getting the needed funding and resources VCs bring to the table. (Blank 2012, Kronenberg 2022)

2.1.3 SaaS company

In the era of cloud-based services, there are a few different models of how companies build tech startup companies. These four different options need to be clarified as background information. There are the options On-Premises, where the company is responsible for everything from applications to servers and networks. The second option is IaaS, Infrastructure as a Service, where the company is responsible for everything that's not physical. The third option is PaaS, Platform as a Service, where the company is only responsible for applications and data. And then there is the fourth option SaaS, which stands for Software as a Service, where everything is cloud-based, from servers to the data and applications. Oracle(2021) states in their book "SaaS for dummies" that every company needs to decide their cloud strategy. For understanding which more prominent technology companies do what they are mapped as an example. (Oracle 2021, Lawton 2008, Weiss 2007, BCC Research 2018)

As in Picture 1. these three different possibilities have different responsibility areas. It helps companies to decide what fits their way of doing business (Tech Target 2020). In 2020 McAfee made a cyber security report which stated that most of the time, the breaches or other security problems are possible only because of the user, not the cloud service provider. This statement underlines the positive security element that comes with cloud computing solutions. We are living in the era where building a software company can happen anywhere where a person can have electricity and internet connection to their computer; we cannot bypass the security element when talking about SaaS companies (Oracle 2021). (IDM 2018)

Same time it is very important to understand the shared responsibility model and how these tech company models differ. Picture 1 is based on TechTarget's article and their simplified format of presenting the model in a way that with one look we understand why most of the new tech companies aim to be SaaS companies. As stated above the need for

security protocols and costs that come from that are lower. Main reason for this is that everything with SaaS happens in the cloud, so if the cloud is secured, the SaaS company can be sure that their security audits are not risking their sales in a same way than for example on-premises tech solutions. Stephen Watts and Muhammad Raza (2019) still highlight on their Multi Cloud blog that there are some challenges with SaaS solutions too. Main challenges being the integration possibility between other solutions, lack of control with third parties and other vendors and they also mention the possibility that if third parties and other vendors are not onboard with security protocols, data can be sent

U = User's responsibility S = Service providers responsibility		Application	Middleware	Virtualization	Data	O/S	Networking	Runtime	Servers	Storage
The service type	Example companies									
IaaS <i>Infrastructure as a Service</i>	DigitalOcean, Linode, Rackspace, Amazon Web Services (AWS), Cisco Metapod, Microsoft Azure, Google Compute Engine (GCE)	S	S	S	S	S	S	S	S	S
PaaS <i>Platform as a Service</i>	AWS Elastic Beanstalk, Windows Azure, Heroku, Force.com, Google App Engine, Apache Stratos, OpenShift	U	U	S	S	S	S	S	S	S
SaaS <i>Software as a Service</i>	Google Workspace, Dropbox, Salesforce, Cisco WebEx, Concur, GoToMeeting	U	U	U	U	U	U	U	S	S

Reference: TechTarget 2020, Guide to shared responsibility model

insecure ways.

Picture 1. The shared responsibility model (TechTarget 2020)

2.1.4 The business model

As Peter Thiel described in his book "Zero to One", the main aim for a startup is always to find a winning business model. As always that needs some testing and iteration. The software field has several different options for business models, but what fits the market depends on the customers (Bontis 2000, Buxmann 2008, Lawton 2008). A SaaS company

usually works with a subscription fee for the customers. Ideally, they can access the software with any device from a web browser. With a subscription, the customer gets access to the cloud-based application. For example, if the subscription is prespecified much data can be stored like Dropbox, how many users will get the access, or what level of technical support is included. The business model always includes a revenue model in the software industry (Brugxmann 2008). (Gross, 2015, Bontis 2000)

In 2006 Ferrante listed the following.

- Packaged – Single software license based on a single user or a machine. It is paid once.
- Perpetual – A permit is bought upfront.
- Trial – A free access before paying for the product.
- Server (per CPU) – The number of licenses is based on the amount of hardware in use
- Network-based – Bases access to a centralized system and its users.
- Subscription-based – A license gives access for a decided time period.
- Pay-per-use – When a customer uses, they pay. The customer is in charge.

SaaS companies can be found in almost any business function market. The most common ones are customer resource management CRM, enterprise resource planning ERP, accounting and invoicing, project and process management, human resources, data management, web hosting, and eCommerce. According to BCC reports, global SaaS business market size has grown; between 2017 and 2022, the compound annual growth rate was 16.4 %. In dollars, the SaaS market will go from \$44.4 billion in 2017 to \$94.4 by the end of 2022, the report took the global pandemic and its effects into consideration, and the growth is still exceptional. (BCC 2018, Lawton 2008, Weiss 2007, Oracle 2021)

2.2 Strategy the work in general

What does strategy work, in general, mean for an organization? It easily looks different for every organization and evolves while the company matures, it is hard to explain shortly or simplify. In spite of that, the aim is always the same. Companies want a strategy that structures the goals to streamline the daily work aiming in the same direction. Along with that it is almost needless to say, the size of the company has a big impact. Throughout academic history, experts and businesspeople have tried to state and simplify the ways of implementing strategy work. They have built strategic frameworks, written articles and books, and experimented with their hypotheses in real businesses. (Kiechel 2010, Katila et co 2012, Gans 2018)

For an employee, the strategy often feels and seems absurd, not tangible and for a smaller group of people to decide. But as a part of this research, the aim is to show how everyone in the company has knowledge and wisdom to share. And building a structure where sharing engages employees very differently. It is very much “new era” thinking, far from top-down industrial leading. It is essential to have buy-in. If the team does not agree with the goal, the execution will fail. (Grove 1984, Doerr 2018, Wodtke 2015, Katila et co 2012)

2.3 Measuring Frameworks

Measuring strategy is a challenge, and especially in a young company, it can set the working culture wrong. Azadin Khalifa published a research on 2008 about four E’s which are the drivers for strategy. He aimed to simplify and summarize the different fields and schools of strategy. The purpose was to give some answers for what strategy is. Even it is very known fact that the concept of strategy is always moving and depending on which school i stalking about it. Its value lies in making sure the company moves in the right direction. There is this quite famous saying of company culture that eats strategy any day. This highlights that strategy itself isn’t the answer if there are deeper cultural problems. Culture itself is not something tangible or easy to measure. Which makes room for a strategy to build those structures and then use culture as a positive driver. (Bergman

2013) They can live without each other, but they are not thriving without each other in most cases. For a line employee, the strategy quickly feels like something decided behind closed doors. The top-down strategy work was a famous way of leading in the 60s and 70s, but during the 80s, 90s and 2000-century, the work itself has changed with the digital revolution. When the work that needed thinking was not happening anymore behind closed doors, employees wanted to give their thoughts and have more say in how and when the work was done. Especially when almost every industry has its segment of specialists and experts. (Caitlin 2001, Ries 2011, Wright 1992)

2.3.1 Defining the company and its culture

The general aim of businesses has always been to try to find the strategies to be more sufficient and optimize all their moves toward a working business model (Thiel 2014). A lot of this depends on how the leadership sees the company. Companies can be seen as mechanisms, ecosystems or organisms. The rarest being organisms. If the leaders in charge see the company as a mechanism full of processes, it feeds the need to optimize. The challenge is reciprocity and engaging teams. The one who sees the success is the operative leader, but most of those who are working towards it cannot see it. Businesses as ecosystems fall quite to the same ideology to feed the need to optimize. But in ecosystems, the motivation is for utilizing it for individuals, and efficiency leads to survival, which ends up driving unhealthy competition and lack of engagement in organizations. (Lewis 2010, CIO). Still Peltoniemi and co stated that a successful organization should be an ecosystem to survive. They presented the concept of a self-sufficient ecosystem in their research *“Business ecosystem as the new approach to complex adaptive business environments”*, which would connect the elements of organism and ecosystem driven organizations.

“Every organism is defined by the information in its genes, but a living thing also is defined by its relationships to its prey, competitors, and predators. In the same way, an organization is defined by its technology and by its associations with its suppliers, competitors, and customers. From a bionomic perspective, organisms

and organizations are nodes in networks of relationships. As time passes and evolution proceeds, some nodes are wiped out and new ones crop up, triggering adjustments that ripple across each network. Constrained by its key relationships, each organism and each organization is held in its niche, pursuing the same goal – the genetic or technological information it carries.” (Rothschild 1990, 213)

During the 2000s, leading with empathy and leadership skills that are seen as softer have become more important (Caitlin 2001). Most of the technical skill sets are seen as skills to be learned. Part of understanding what kind of company is talked about, culture needs to be evaluated. The famous mantra from Peter Drucker, “Culture eats strategy for breakfast”, is a somewhat difficult topic but essential when thinking about the right strategic framework. Culture always involves social constructs within a group of people but defining them is hard. Most of the cultures can be broken down to sub-cultures, which highlights the defining culture is very challenging almost as an impossible task. According to Captain David M Bergman (2013), from Swedish Armed Forces, when one element changes in the cultural construct everything changes. Captain Bergman and the team wrote about cultural myths in soldier training, and it can be transformed into the company cultures. Even teams which operate under the same company logo work very differently depending on their sub-culture based geologically in Finland or US. And that is only one factor. (Murray 2017)

As good as the aim of this Peter Drucker’s mantra is, culture itself is a strong component in the success story, but it does not survive on its own. Culture is an important element for keeping your company thriving and employees coming to work (Ries 2011, 2017). A culture that is not open to the strategy and wants to achieve the goals together will stop the progress before it even begins. And as this research will explain further, some companies have a culture that cannot implement the measurement and goal system presented in this research. The main reason for that is the risk that comes with open communication, inclusion and transparency. Culture and strategy should be seen as two components towards success; one without another will not succeed. (Doerr 2018, Grove

1983, Thiel 2014) And as Porter's book Competitive Advantage implies culture and hardworking teams are advantageous in the long-run.

2.3.2 What is a Northstar?

To understand how the strategy framework company A wants to implement works, a notable element is the Northstar. Andrew Miller described it as a *“concept originally emerged from Silicon Valley and is best utilized by companies that invest in long-term sustainable growth. It focuses on the product and the core value it delivers to customers. The value your customers receive from your product is measured by key steps in the consumer lifecycle. Very often (especially in technology and SaaS companies), the North Star is related to the acquisition of new users and the engagement of existing users.”* It is one of the most important metrics for a growth company that wants to succeed. This is also foundational for the thought Christina Wodtke talks about in her book Radical Focus, where she underlines the prioritization and need to just have one big goal, Northstar. In the field of strategy the northstar is connected to some level of Grand strategy or Ultimate plan. (Akhrin 2020, Miller 2017, Solive 2018)

2.3.3 OKR, Objectives, and Key Results

Everything we know today about OKRs started with Andrew Grove and Intel. That success with the framework has been documented in his book High Input Management which was published in 1983. But to understand how this strategic framework ended up being the success element for companies like Google, John Doerr's role is important. He was working at Intel in 1975 and attended one of the companies of the course provided. That course was taught by Grove. The topic was not directly stating OKRs at the time it was called iMBOs, Intel's Management by Objectives. Doerr worked with Intel for a quiet time, but by 1999 he had moved to the venture capital side of the business. At the time the company he worked for was Kleiner Perkins. And while Doerr worked there he met Google's founders Larry Page and Sergey Brin. During 1999 Kleiner Perkins ended up being part of a 25-million-dollar investment funding round for Google. After that Doerr

presented the strategic framework to founders, who were amazed and took it as part of their company culture. (Doerr 2018, Grove 1983, Klau 2013, Niven and co 2016)

The definition of OKR methodology is to drive change that is needed for achieving the most prioritized goals, sometimes called the ultimate goal or Northstar. The Northstar is an agreed-upon bigger goal that should drive companies' actions. Sometimes the mission and vision narratives are written around it. The benefits of this structure are described in John Doerr's famous OKR deck. The benefits listed in it mention discipline thinking, accurate communications, focused efforts and establishing indicators for measuring success progress.

The OKR methodology includes 3 elements: objective, key results and initiatives. The aim of this is to keep the team concentrating on the main objective, tuned in, and make sure actions are working towards them. As Doerr highlights in his OKR presentation deck, all of the objectives need to be agreed upon together, there cannot be dictating around them. It would negatively affect the engaging side of the goal and then execution. Relevant for OKRs is that they are stretched goals, they should drive for growth and extend the obvious. The objective should be inspiring and describe a successful future. The key results should be the measurement of objectives' success. With key results, most of the teams go wrong the first times they try OKRs. Key results easily become a list of tasks to do. The tasks to do are called initiatives which go under the key results. It is a very common mistake, and somewhat part of learning the way around OKRs. (Doerr 1999, 2018)

It can get confusing if there are too many objectives. And that is one of the stated challenges for setting up good and sufficient OKRs. Teams have the tendency to overdo the goals, especially the first time. Understanding the difference between key results and initiatives is one of the first ones. Doerr mentions in his book that teams easily use key results as a task list rather than as they should be used. To get OKRs right, teams need to use the time to find the common ground and have very transparent discussions. In the

best-case scenario, OKRs drive cross-functional communication which enables better results than siloed execution inside the specific team. In the interview with Doerr, he was asked why some of the companies who are presented with the OKR framework. He explained that for some company cultures the level of transparency the OKR structure needs to flourish is too much. Those companies are running differently, and the transparent open communication does not fit. (Doerr 2018, McGinn 2018, Grove 1984, Hämäläinen 2020)

2.3.4 KPI, Key Performance Indicator

The history of KPI, Key Performance Indicators is not very clearly known, it is said to go all over back to the third century. KPI is a measurement tool for performance. It can be used for several different matters. To understand how key performance indicators work, it could be seen as the dashboard of the car, when OKRs are the signs to your destination. And together they build the framework for the successful strategy execution which is backed by data and continuous improvement. KPIs help with decision making and strategy building, and if KPIs show that some area is not performing as it should, they should become the OKR goal. (CA Technologies 2015, Jan van der Pol 2021)

The definition of KPIs can change depending on the company. The amount of monitored KPIs can vary based on the department. However, most of the time they are more suitable for monitoring weekly or bi-weekly success and indicating if the actions taken are keeping the needed level or the specific metric. A good example of this is thinking all of those “XY should be 8.2 or over”. When compared to OKR which is driving the change like “XY is 8.5”. If KPI goes under 8.2 and does not bounce back shortly, then it would be turning into OKR which is driving the change that is needed so that we even can have KPI monitoring weekly success. (Jan van der Pol 2021)

2.4 The look of successful strategy

As discussed above there are few elements for successful strategy implementation and getting it to support the needed actions. The four main ideas are described in the beginning and the main answer or thought around it by the main research sources are next to it. The four main sources for OKRs and successful strategy implementation are Juuso Hämäläinen, John Doerr, Andrew Grove and Peter Drucker. These four have been the biggest impact on this research's main topics and scope.

Table 1. Research synthesis

	Juuso Hämäläinen	John Doerr	Andrew Grove	Peter Drucker
Idea1: Successful company at any level needs a goal, northstar or some equivalent aim to work towards	To streamline the operations, the company should have a bigger goal and collateral understanding of the company's aim. This should be easy to find and clearly communicated.	From all the learnings that Doerr gained with Google, he came to the quite same conclusion as Andrew Grove that for a forward moving company, goals are relevant drivers.	When a company has clear goals and communicates them effectively, this has a positive effect on employee engagement. They are able to connect their efforts to the bigger goal and this supports employee happiness and meaningfulness.	While building the MBO framework, Drucker believed that giving a clear direction for people, they felt more confident to go towards it.
Idea 2: Culture can be the maker or breaker of strategy execution		Doerr mentions that the OKR framework should not fit everyone. What he meant by it was the fact that some companies feel the honesty and transparency from top to bottom of the organizational chart is seen as a threat. And for this kind of company the OKR framework which needs transparency from all parties, would never work.		His theory of MBO, Management by Objectives highlights how employees are more engaged if they have clear goals to work towards.
Idea 3: OKRs or	Hämäläinen lists several global or	As Doerr's OKR are having some	For management to manage they need a	Goals clarify the aim of work, and that supports

equivalent goal frameworks are behind of several successful companies	Finnish companies who have taken the OKR framework into use successfully.	similarities with Grove's MBO, they both talk about the success with execution and management that comes when the team works in the same direction. And that is what needs to happen for companies to become successful	framework and clear vision to put it into action.	the work that needs to be done. When it is set right.
Idea 4: OKRs together with KPIs give leadership foundation to do more efficient and data driven decisions	He describes these two as follows: KPI is measuring the overall picture and OKRs are giving the direction.		Evaluating the performance of the company but also the employees is possible only if there is an effective framework to measure wanted results and given direction.	

3 Methodology

The methodology that has been mainly used in this research has been qualitative and observational data. This section will explain extensively what, how, and why. While research takes place in Company A's first run for implementing strategy work for everyone in the company, it is notable to point out its shortcomings in the wider amount of data to research. The case company A is approx. 100 employees strong and that can be too small number for believable data and drawing real conclusions.

3.1 Research strategy

Qualitative research is something where data collection is done by collecting items or matters that are not numerical or something that would be easily made into quantitative form. According to Creswell (2003), this includes words, pictures, and audio. In this research it includes mainly words and notes from discussions. The aim often is to better understand the person's point of view and thought process according to the specific topic. (Ghuri & Grønhaug 2005, 110). One reason for choosing the qualitative method for this

research is the fact that we are still living in a pandemic and the case company A is a global company, which meant that digital facilitation was happening virtually. The approach for data gathering is through group digital facilitation which was arranged on an anonymous form and an after-session feedback questionnaire, which also was anonymous for securing as open feedback as possible. (Saunders et al. 2007, Clippinger 2018)

The main research question is “How does digital facilitation help align and implement systematic strategy work in a fast-growing SaaS start up?” and secondary question is “Does digital facilitation bring clarity and transparency of companies' future to employees?”. The main question is directly related to the process and the outcome of the successful implementation of strategy work and measurements. The secondary question is more about describing how the clear output of the main question is looking at a deeper level and in action. And how this whole process could bring clarity for everyone participating.

It is important to state here that in this research, there will not be presented any specific goals which were presented in the digital facilitation. The reason for this is the confidentiality of company A's future moves and strategies. As company A is in a role where any specific information of strategy can endanger the company's future. This research wants to be mindful of sharing too much of information that can be seen as competitive advantage, but same time it is important to share relevant discussed topics honestly. The research concentrates on the submitted answers, the after discussions, operational and goals related challenges teams brought during the walkthroughs.

3.2 Approach

The strategy for this research started with having a pilot group that examined the needed ground elements before the whole company can be involved. This started already during the first half of 2021 when the strategy team workshopped and discussed what is needed before effective measurements can even be thought of on a higher company level. Leadership team identified with external support that we needed to understand better

the ultimate strategy that was not visible or agreed on. This is a very common challenge for start-ups, and it is a roadblock for growth if not fixed (Hämäläinen 202, Ries 2011, 2014). After this roadblock was identified it was clear that the team cannot move forward before the higher ultimate strategy is written out and shared internally with the strategy team.

Another effective challenge that the research met was the changes during summer for the strategy team. The positive effect was that after summer there was an owner for this whole strategy work implementation process. Approach itself to this, in general, is to involve everyone in the company in the building phase of their departments' quarterly goals, strategy, and ways of working. This is accomplished in digital facilitation workshops; the process is explained in 3.3 Data collection and analysis. In addition to this gathered data is a literature review which strengthens the described research's data collection and analysis.

3.3 Data collection and analysis

This research uses mainly qualitative and observational data as stated above. The data collection is based on digital facilitation of what happened on a specific platform for all departments in company A, discussion related to the anonymous comments during the digital facilitation, and an after-session feedback questionnaire about the whole experience and process. The platform provider has been supporting our internal work during this process, but they have not been a third party for the digital facilitation. The departments from company A that participated in this were Operations & HR, Customer Success, Revenue, Marketing, Engineering, and Product. Every department had its own page where the department leader collected the following elements:

1. Vision and purpose of team
2. Team OKRs and KPIs
3. Methods and ways of working and possible obstacles and dependencies

Team sizes differ a quite bit, which made it challenging to find a working framework for all. It was concluded to the fact that this was the first time this kind of digital facilitation took place, so every team went through the same program. After all digital facilitations were over teams filled feedback, which then worked as a foundation for future iterations. The aim was to keep these sessions as one long session. But with Customer Success, this needed to be divided. The reason for that was time zones and the team being on different continents. All teams in Company A went through the digital facilitation, but HR & Operations team was excluded in this research as they were the party to arrange these facilitations and are not suitable for research scope.

Table 2. Team structure.

Team	Size (approx.)	The length of the session
HR&Operations	5	2 hours
Customer Success	28	2.5 hours <i>(divided into 1.5 + 1-hour sessions because of timezones)</i>
Revenue	26	2 hours
Marketing	4	1.5 hours
Engineering	21	2 hours
Product	8	2 hours

3.3.1 The data collecting process

The digital facilitation session needed 1,5 - 2,5 hours, depending on the teams' size. All of them got the rights to the platform just before the event and there was no expectation for them to look into it before. The structure for these sessions was every time the same. The structure for digital facilitation was following:

1. **Team strategy and measurement presentation:** Department leaders' presentation of the material related to strategy and metrics

2. **Engaging Digital Facilitation:** questionnaire batteries for specific elements listed above answers were anonymous
3. **Engaging Digital Facilitation:** after every questionnaire battery participant liked anonymously on those anonymous answers
4. **Discussional Digital Facilitation:** three most liked comments viewed from all questions in every questionnaire battery, if something else alerting(positive/negative) it is brought up as a discussion point

The digital facilitation session started with the facilitator explaining why we are here and why these matters. After that walking group through the session agenda and making sure the team knows all will be anonymous. After this, the first part of digital facilitation was started with the department leader explaining how she or he sees their 1-5. points, how those connect to the company level ultimate strategy and yearly goals, and what is the thought process behind each one of them. The time used for this walk-through was something from 20 to 40 minutes, depending on the extensivity of the material. This first part of the session was recorded for later use and deeper analysis if there is a need for that. As this is the first time so the team was aware that there will be improvement needs. After the monologue the group had a pause for 2 to 5 minutes, to read the material, or use it to fill their cup before moving to the second phase.

In the first more active part of digital facilitation “Engaging Digital Facilitation”, as called above, participants commented on four different elements with four open-ended questions. For this teams got 2-4 minutes to share their primary thoughts. Questions were chosen based on open-ended questions so there is space to comment, even the comment would not be directly for that specific topic. But that all ideas, concerns, and thoughts came out with the lowest possible barrier for sharing. As easily in fast-growth companies time is the most valuable capital and too often that means people do not take the time to communicate and share their thoughts (Thiel 2014, Ries 2011&2014). The questionnaire questions were the following:

1. Did we get it right?
2. What would you change?
3. What would you add?
4. How do you feel about it?

Aim was to keep the questions as simple and open as possible. After the group has answered four elements with these questionnaires' batteries, the group liked the ones they mirrored and identified to agree on. All the answers and comments came visible and then the group used 2 to 4 minutes to read them through and like the ones they wanted to give their +1 like. There was possible to vote your own comment and they had an eternally number of likes in use. This means that they had the possibility to vote for everything if it was something that they wished and felt. After going through this active and more engaging part of facilitation with commenting and the voting group had a 5 to 10-minute break before moving to the last discussion and reflective group exercise.

The last part of digital facilitation was the part where the department leader stepped into the note-taking mode and listened to their team while the facilitator asked questions related to the most voted comments. Depending on the group the discussions varied a lot. Some groups did not need that many directing questions and some groups needed more open-ended questions. Part of this was the fact that some of the participants were sitting in the same room and some were remotely online.

After every session, the participants got a feedback form related to the whole process and experience. This was sent out to gather the improvement thought and ideas as this was the first time almost 100-person company facilitated their strategy and measurements with participating, everyone.

3.4 Validity and reliability

For this research as the data are only qualitative and observational data, the validity and reliability mean more the needed integrity and application of the methods. There is

always the human error possibility when datasets are based on open-ended questions and analysis is fully qualitative. In this research, inherently qualitative data is something that is based on anonymous groups given comments, and voting's and then one person analysis of those comments and voting's.

Risks that can affect the results are the list of emotions that groups were going through during the last six months. All the groups have had some kind of effect of fast growth. This has been shown in different ways but the list of emotions there is quite the same. Changes in department leadership, new construction of the team, role changes, and rising workload are all very common effects of the explosive growth period and that can affect the honesty of the opinions and the willingness to bring topics up. This was one reason the questionnaire and voting part happened anonymously. That reflected the discussion part where we were able to see the biggest difference in how open teams were to talk about the topics that were most voted on.

A notable element of this research is to understand the young age of this company and its limits. While this research is conducted for the first time, most of the team members have never been part of this kind of exercise where they are included in building a strategy and evaluating their confidence in it.

Other notable challenges are related to the young growing company and the structure that is most of the time something in the building. A matter to keep clarified and on teams' minds is the difference between OKRs and KPIs, which evidently can confuse team members if they are not familiar with it. That's one of the reasons why this research and the data have been very down to earth and simplified, as this was implemented for the first time. Expectations for future iterations are positive and the company wishes that employees engage also to improve this new way of working strategy altogether.

4 Empirical: Implementing strategy work and measurement to the startup company

Case company A is an approx 100 employee strong global startup. Headquarters are in Helsinki; company has other global offices. Company A's values include terms trustworthiness and community, which support this whole empirical case study of how digital facilitation for strategy work and measurement engages everyone in the company too. In this particular company implementing success metrics to support the work has been on the table several times before. And it has not succeeded because several challenges in startup were prioritized. Like so many other startups, this company found bigger challenges than having a clear strategy to be followed and measured in a concrete and consistent form, before prioritizing strategy work. (Doerr 2018)

After a successful funding round, fast-paced hiring ramp-up from approx 30 to 100 employees - the need for transparent and clear goals became an inevitable next step. The company hired the talent it needed but to get the greater results some structure in place for smarter working was needed (Doerr 2018, Thiel 2014). This meant strong alignment from the leadership team and an understanding what are the urgent cross-functional challenges that they need to figure out first. How does the company concentrate only on the main and urgent roadblock issues - when there are so many challenges at the same time? Prioritization is one of the most crucial skills that leaders should have, and it is not a light weighted job (Blank 2012). Every leader has their own experience of how they have done something in the past and what kind of roadblocks they want to avoid during this time around. Getting everyone moving in sync needs a lot of discussions and alignment. But if the leadership is synced the information flow between departments and in departments will flow smoother towards the shared company goal.

Used data on this business case is based on workshops between the leadership team, the one-to-one workshop sessions between the process owner, and the digital facilitations

within departments. Section 3.2 explains the whole structure of this implementation process.

The first implementation round consisted of a leadership sync where they presented their plans for the last quarter of 2021, then the same is presented to the individual department and digitally facilitated so the leader gets the valuable feedback and can adjust if needed, the whole process ends with a company-wide strategy session where the leader of the department showcased their quarterly goals and explained which company-level goals those were directed to. All teams in Company A went through the digital facilitation, but HR & Operations team was excluded in this research as they were the party to arrange these facilitations.

When this level of strategy work is implemented for the first time it is quite an extensive process, including a lot of clarifying basics the work team is already doing. A lot of this process is explained in the book by Juuso Hämäläinen. He describes the process and needed events, but those elements have been adjusted to fit Company A's specific needs. Every plan presented included the following aspects explained from the perspective of the department:

- Vision and purpose, including the relevant values
- Team metrics, i.e., OKRs and/or KPIs
- Possible obstacles
- The ways to achieving the goals and where we do not want our focus to go

After the whole so-called plan was presented, the team was asked to answer four presented topics with four different open questions during the digital facilitation. The answering period and voting period were quite short, between two to four minutes each. The reason for this was to get only the first thought out. The thought was coming to their mind right away. If there was more to unfold in the discussion part - the team was able

to pin that and make it an offline discussion. After the session this part gained the most critic, as most of the team would have wanted to use more time on writing their answers and reflecting presented information.

Questions for each topic were:

- Did we get it right?
- What would you change?
- What would you add?
- How do you feel about it?

In the discussion, the team sees the answers and most voted ones and the facilitator asks the team to talk about what comes to their mind about those. Are they agreeing or are they seeing something that they did not expect to come up with? From the facilitator's point of view, the idea is to make sure this session is a safe space to share. Everyone who wants to share their thoughts is able to do so and the leader is able to sit back and make notes on how to adjust or if there are thoughts they have not heard before. For the leader, this meeting is more active listening than answering any upcoming questions.

4.1 Team structure

As in this research there are several different sized teams, it is important to highlight their differences to understand the teams' internal communication. Most of the teams were under some kind of organizational change while the first digital facilitation for OKRs took place.

Table 3. Team structure explained

Team	Team structure explained
Customer Success	If any team in a startup knows as a fact that working smart rather than working hard is very important learning. When thinking about the growth funnel, understanding team struggles and daily challenges is crucial. Examples of successful startups growing into unicorns and executing customer success have been presented before, but none of them has shared how smooth the

Team	Team structure explained
	<p>road has been. It is a known fact that scaling customer success departments can set the successor to be the setback if their internal processes aren't ready for fast growth.(Catlin 2001, Thiel 2014)</p> <p>This team consists of plus 30 people, they have language skills from over 10 languages and there are teams on both sides of the Atlantic sea. In this team, the fast growth of customer space and their rising needs are felt right after they are signed off by the sales team. While this research was made, the customer success team was divided into two. These two different teams were directly customer-facing and the one more internal and technical facing. They are referred to as customer success managers and customer success technical managers. While this research took place the team was entering into a "new era" where there would be a third team called onboarding. These elements are needed to understand that this team was under constant change, as many teams are in a startup.</p>
Marketing	<p>Marketing team was a small and agile team of individuals. Most of the topics have been in their discussions before and they had seen some glimpses of their own Objectives and Key Results before the session. It is notable for this team to underline that this is the first session with a new department leader.</p>
Revenue (Sales)	<p>In this research, we use the term revenue team of this team, but at the time the team consisted mostly of sales team members, direct salespeople or more operational roles. The team is divided into three different continents and several time zones. As a global sales team, this team has been in the middle of organizational change and a lot of new growth. This reflects this team as quite many changes in a short period of time and roles are still taking place.</p> <p>Also, a piece of noteworthy information regarding this team was that the team had not gathered up after the big and new changes had taken place. These organizational changes set the stage for our digital facilitation and their answers, which were seen from their shared thoughts. And from the discussion, there were a lot of general questions that were not so connected to the future goals. The number of common questions for the new department lead proved the need for this quarterly session about the direction of the team in general.</p>
Engineering	<p>As one of the biggest groups with sales and customer success teams, this team had the systems to run sprints and ship the product, but they also were in the middle of process changes and process pivots to secure safer and more stable product shipping. They had a growth period in team size and organization structure change. Within that team also got a new department lead. This team has sat down before the meeting several times and they all work mainly in the same continent, which makes reorganizing and discussing changes easier. As this team is the crucial machine under everything, they are very connected to the product team's goals and direction.</p>
Product	<p>When product team digital facilitation took place, there was an idea of the real product team and how that would be combined. For this first product team digital facilitation, the team included the engineering department lead, future product department lead, and members from the engineering and customer success teams. These people were picked as they are the foundation for the current product state and forming the future product team. The team is still under ten people, which means the digital facilitation takes more of a discussion form when compared to customer success, engineering, or revenue teams digital facilitation. As the team is the newest addition, it still holds a big role in company A. Nevertheless, they have their OKRs, and the team is in charge of usability and long-term research and development.</p>

4.2 Session summary

Mainly all teams were very excited that Company A wanted to try something different like this. There were some team members who were more cautious about this and if this new way will have any relevant change.

Table 4. Team Feedback

Team	Session Summary
Customer Success	<p>With this team, the session was cut into parts for two different days. This was made only for making sure it fits most of the team when they are located in different time zones. The session was divided into a one and half hour session where we walked through the plan and measurement OKRs, short break, and then used the end of the meeting to do the anonymous commenting on topics of the plan which were decided beforehand. The second session was arranged for the next day including one hour for discussion.</p> <p>With the customer success team following three topics were decided to be the digital facilitation agenda; vision & purpose, team measurements OKRs & KPI (they are two different topics instead of one, but in this research, they are analysed together), and methods for achieving aforesaid. As described above, first these were presented by the leader then open questions were answered related to them and then voted and as the last part, these were openly discussed.</p>
Marketing	<p>While this session took place, one of the main differences with this team was the level of discussion as they were a small team. Their discussion took place at a more concrete level and not so much strategy or long-term discussion. This team has a lot of unpredictable or urgent needs that can affect the team and its success. Worth mentioning is the fact that this team was very much in the middle of a time and resource heavy project while this digital facilitation took place.</p>
Revenue (Sales)	<p>As noted above, this team has not sat down together since the new organizational changes have taken place. That affected the atmosphere and the emotional safety in this session. Emotional safety is one of the key elements of these meetings and risking it makes the meeting different from others. At the time the teams were somewhat siloed based on continents, which also brought a bit of uncertainty and some confrontation related to the priorities and resources. All of these matters needed to be discussed and answered, nevertheless that was taking the concentration out of teams goals for the following three months.</p>
Engineering	<p>For the engineering team the continuing goal consists of two elements, faster version package shipping and a stable product. A lot of their OKRs started sounding like KPIs in the beginning but the main reason behind that was the need to build a structure where they are able to measure and then aim higher with OKR goals. The engineering team's role has changed a bit after organizational change where the product team was established. Before their role was more connected to the overall product and direct connection to customer success, now they are able to use more time to solve the challenges in the product and not around the product.</p>

Team	Session Summary
	Of all of the facilitated teams, engineering was the most positive for the future and engaged with the presented plan.
Product	As stated above, the product team is a fairly new concept to company A. The group included two new department leaders who brought a lot of new thinking and experience to teams. The people gathered from different departments, like customer success and engineering, have had digital facilitation for their teams. The effect of that was the information that they brought to the table. They had the experience and knowledge of that digital facilitation, and the pain points teams brought up there, which was very valuable for this digital facilitation.

4.3 Specific facilitated topics

In this summary of the events, we are concentrating on the main themes and takeaways related to the open question answers and discussions we got around the three main topics.

4.3.1 Vision and Purpose

All teams went through their individual vision and purpose for their team. These are strongly reflecting the company vision and purpose, but as every team is a bit different this was seen as something valuable for teams to agree on.

Table 5. Vision and purpose

Team	Session Summary
Customer Success	<p>The first topic the team went through was the vision and purpose of the customer success team. Overall feedback was positive, and they felt the team vision and purpose were fitting. For context, in this research, it is important to understand that even in a 100 people company there are already sub-communities whose values can differ from the big picture and company level values (Bergman 2013, Murray 2017). That is why this was an important topic to discuss with this +30 people team.</p> <p>For this team, their values and purpose were connected to the company values but defined what it actually means for the team on a regular basis. The team has also presented a list of what kind of actions are not seen as lined with this team's values and those are not tolerated. In the group discussion, this was seen as a good foundation to set the boundaries and basic expectations for everyone in the team.</p>
Marketing	In general, the new vision and purpose were accepted and seen as familiar. The team wished that experimentation and testing is added to the visual level. The need for that came from writing down the way of working and making testing part of the purpose. Marketing, in

Team	Session Summary
	<p>general, is seen as a crucial part of business, but as in every market and niche, what works for someone else does not guarantee that it will work for you. Testing as part of the marketing purpose then makes space for trial and error, which is the way for learning. Especially young companies like this research company, need to take the time and use resources for testing and figuring out their own audience. Another element that came for vision and purpose was the need to understand how the new rebranding project will affect it. The team were open in the discussion that several elements related to the short future changes are still unknown, like most of this goal setting as the rebranding project is new and still finding its place and scope.</p> <p>One theme that came up with marketing, especially with branding, was the aim of consistency. What kind of actions a team needs to take and have a place where marketing has consistency in place, and they quickly get the feedback if that is not the case? The consistency is not limited to the teams' internal workflow but to every department. Rebranding needs a lot of training and instructions for other stakeholders to take the new brand and start using it.</p>
Revenue (Sales)	<p>As a vision and purpose team felt that bringing everyone closer together and making sure they are team players should be highlighted and kept high in the vision and purpose level. Strongly related to this team felt that transparency and better open feedback should be listed. As part of the team's mission, they wanted to also reflect somehow internal stakeholders and collaboration. They felt that it is one of the main needs the team needs to keep in a good state. The team agreed on this but having a clear picture of what that would look like was still a bit blurry. When this sized team goes through an enormous organizational change and several matters are still looking for their place and structure the main feeling of the team was "waiting". They strongly agreed that they believed in the new better structure, but as it was just implemented, they did not have a vision of where and how it went. Notable for this part of digital facilitation was the need for the department lead to join the discussion and state the fact that as there was an organizational change, it does not mean that people are getting fired. If team members are not fitting to the new organizational structure for the revenue team, the company will find them a new role from some other department which fits better. After this was stated, the session got a bit more relaxed and the team was not so reserved while continuing the discussion.</p>
Engineering	<p>Vision toward a well-rounded product and productization of development work was seen as truly positive and if it will be connected to a product roadmap in the future, it is exactly what the team felt they needed. Theme felt that if they will have access to the product roadmap their understanding of product direction becomes easier, and they know where they need to address their energy.</p> <p>Another theme team brought up was the knowledge and need to understand the purpose of the work they do. Especially how the work they do affects the industry and what kind of impact possibilities the team has in the big picture. Related to this team felt that this kind of knowledge would help them to build more sustainable solutions and block the extensive customer support needs. As that is a quite strong argument and looking into the future, it was a good point of view to bring up while discussing vision. Future directed vision works as a good road sign for where the team should be aiming. Some comments and the discussion around the vision and purpose were summarized nicely in one comment "Feeling inclusive to be part of the team", which is quite a nice way to comment on the team's vision and purpose.</p>
Product	The vision for the future product team was strongly leaning toward being the category

Team	Session Summary
	<p>definer and being more data driven. This got a warm acceptance from the team. As a vision, they felt engaged with it, and it felt concrete enough. One of the comments from the team was, <i>"Love the change we plan to make & the data-driven roadmap"</i>, which concludes the team's purpose too. During the discussion, the team talked quite a bit about the same topics that engineering was covering, the resources and the possibility of automating everything convenient. One important finding that came from the discussion was the need to turn to work towards educating customers to use the product how it has been designed to work and not to do things for them. This was stated to be one of the most significant resource eaters, and it also blocks the success of category leaders. Hopefully, these would leave space for the team to concentrate their purpose and drive the vision into action.</p>

4.3.2 Objects and Key Results and Key Performance Indicators

For the first time all the teams were presented their quarterly goals and asked for feedback. These summaries reflect the discussions and the possible worries that teams raised while seeing the goals. These were the main topic for all of the digital facilitations, and these were followed in a monthly meetings after the first presentation. For context it is important to underline the fact that methodology Objectives and Key Results were presented for the first time to the team in active use. It was very new, and it was stated to the team that if these key results under the objectives start to seem wrong when we go to the quarter, we need to adjust with the learnings we get. It is notable that these teams are just starting to build their everyday KPIs at all levels. Until this moment these KPIs have not been visible or brought to the discussion.

Table 6. OKRs and KPIs

Team	OKRs & KPIs
Customer Success	<p>For both KPIs and OKRs, the common comment was the worry of turning into a sales-led organization in cost to the customer service. Notable here, some of the team's customers are needing more attention than others and with some, there is a long customer relationship that the team does not want to put into danger. And at the same time the team was cautiously interested to hear more defined metrics and goals for their collaborations with the sales team and the handover process, which has been somewhat challenging before.</p> <p>One of the Objectives was strongly considering the work around the customer accounts, and the net dollar retention (in the future referred to as NDR). Net dollar retention means the metric that tells the current state, how much our annual/monthly recurring revenue has grown or shrunk. This was the same objective that brought the sales-led organization question to the discussion. As the customer success team has been very much customer-centric before and the team wanted to keep it that way, there was a need for clarifying a few</p>

Team	OKRs & KPIs
	<p>elements. The team leader did mention the customer's stable growth status and health score, which were not clear to the team to move forward. After a good discussion of what kind of possibilities, the team had for defining these, there was a common ground which was good and clear enough for everyone. For this same objective, there was a need to talk about the handover with the sales team and what the customer success team could do better. As mentioned above, the team was in a process of building sufficient onboarding which in the future would take some weight off this challenge between departments. As both customer success and sales are dependent on the product, there was a comment related to the possibility of even doing the extra, which would directly affect to the NDR. Which was a very valuable point to make. Sometimes the team is in a situation where they can only make the best of what they have, and sometimes it does not build a foundation for an extra sale. After a good discussion and evaluation of possible KPIs around this to support specific activities, the team was happy to move forward.</p> <p>In conclusion, after reading the answers with the team and having the discussion, the team felt that these KPIs and OKRs the team lead presented to them were directing them to the future where they felt engaged. As this was the first time the team went through this kind of exercise, this can be seen as a success.</p>
Marketing	<p>The team felt that they would want to add a bit more experimentation-led goals. The need for this came from doing some research for better experimentation, especially when during these last year's marketing has needed to consider those inconvenient ways of marketing. As part of previous, sponsorships and events have been a very convenient way of marketing. The team wished that its role would be clarified and defined at the goal level to have a clearer understanding that this small team should reserve resources for this kind of work. The main concerns or questions were more concrete questions about how these new ways will affect every day work. The team was quite aware of their resources, and this came up several times. How do they make sure that they get to the goals with the very limited resources and hand-pairs they have in use?</p> <p>The team had good ideas on how they can speed their processes with external help or reach out to other departments where they know some marketing orientated colleagues to work with. Reaching out beyond the department borders in a startup is not an uncommon activity, especially if the team needs help for example writing customer stories. Team did not make any decision on the topic but listed it as a topic that needs more discussion.</p>
Revenue (Sales)	<p>For the revenue team their goals were quite straightforward and related to setting the last pieces of organizational change into motion. There were a few clear themes the team wanted to get clarity on and those were roles and career paths, territorial targeting and targeting in general, processes between sales and other departments especially customer success. These three themes came up from different points of view several times.</p> <p>As part of the goals, the department lead mentioned the new roles called account executives. This raised questions about how they fit into the organization and what kind of career paths the team members have. As the team has more junior employees this was a well-supported topic. The aim of the goal wisely was to get these new roles filled and get them to start working, but as stated above for this team the discussion was not purely OKR or KPI related hence the organizational change they were at the time. For this topic, it was very needed from department leaders to reassure the fact that people are not getting fired even if there would be new hiring for new roles.</p>

Team	OKRs & KPIs
	<p>The second theme, territorial targeting and targeting in general revived a lot of discussions. The discussion was based on the answers and comments related to unbalance in resources between territories. While the team commented on the topic and opened their point of view it came to clear that the general direction was somewhat blurry for several of them. This was exceptionally helpful learning and gave the department lead opportunity to walk the team through the longer-term goals and how the success looks within a year. The discussion about territories and general targeting furthermore sparked some good comments related to the resources and how the team is collaborating with other departments.</p> <p>The collaboration with other teams and better communications regarding the processes was the third theme that was widely commented on and discussed during digital facilitation. This theme is something that will be part of digital facilitations always, but this time it was exceptionally strongly present. The team felt that they did not have enough transparency or guidance where they could look for answers when the question was related to other departments or the collaborative actions. A good example of this kind of matter was the process between sales and customer success and how they have a smooth handover of a customer. While the team discussed it became clear that this lack of smooth process between sales and customer success was a known challenge and it was going to be fixed in the near future, but when this facilitation session took place there was not yet a shareable action plan in place for the team to go through.</p>
Engineering	<p>With the engineering team they were pretty interested in understanding how they will be measured and is it sustainable in the long run. Mostly the team was positive towards the presented goals, but there were few discorded comments related to the possible success of achieving these goals. During the discussion, the team was concerned about the need to clarify several metrics and if it is even possible to measure at the moment.</p> <p>At this point, the department lead joined the discussion and stated that if the needed measurement is not visible, they would not need to build the framework for measuring it. The team had a bit of hesitation in achieving all listed. It was essential to show them and underline the possibility of adjusting the goals if we learn that the team cannot achieve them as planned. As this team has gone from a small engineering team to three small engineering teams, some of the internal measuring systems, requirements and structures were discussed. The team wished they could take a deeper look into team-specific measurements and understand how, for example, front-end developing teams and back-end developing teams differ in workload wisely.</p> <p>The third stronger theme was the quality of work tasks specifications and design. The team stated that it should be added as a goal between the newly added product team and engineering. This statement had a bit of history before the company had a proper product team. The engineering team was too involved in building the specification for needed product features, and it took much time out from the standard work itself. Strongly related to the specification and better designing the work tasks before they arrived at the engineering and developers table was the need to automate quality assurance. The team responsible for quality agreed strongly to finding automated quality test possibilities as much as doable.</p> <p>Overall feedback for goals written or in the discussion was hopeful, and the team was engaged in the discussion. As the team and their structure still try to find its most optimized ways, it was essential to get them around the same table and share their thoughts anonymously. The worries were clear and addressed during the session, with sincere</p>

Team	OKRs & KPIs
	<p>comments from the department lead. Some questions were not answered as they were still strongly under discussion, but the department lead took a note of those and promised to update the team when there was a solution or plan to be presented.</p>
Product	<p>The main findings from this facilitation and discussion were more tangible and concrete, clarifying the team's needs. Teams' concerns were related to the metrics and numbers seen as goals; they wanted to understand those better, and where they were coming. After these numbers and their backgrounds were cleared and the agreed team was able to move forward with the specific objectives and goals. When we moved to discuss the goals for the next three months, the department lead stated that as this is the first time the team even has tier OKRs in place, it can be expected that those need to be adjusted at some point. This disclaimer was stated more for foundational reasons as most of the team members have never worked with OKRs before or at least to that extent Company A wants them to be implemented.</p> <p>One significant finding from this digital facilitation was the urgent need for a product roadmap — the need for better transparency and understanding of when and who was planning the future developed features. The team commented quite strongly that they wish to be included when decisions on product features are made. During the discussion, they presented the question: would it be possible to try to finish product features before starting new ones? Which is an absolutely legit question to ask when the team was working with limited resources. The engineering department lead clarified that new features and old one's live side by side at all times in every company. The difference was that those old ones were more maintainable and did not need so many resources if they needed to be developed or fixed. Then he compared that to Company A's current situation where he admitted that there is a quiet workload that needs to be prioritized and scoped better.</p> <p>The product roadmap that was mentioned above was something the team circled back several times. Part of the reason was that this new department was also in charge of future customer interviews and the research around it. That would help the validation process and give knowledge if some of those new features are needed. The overall operational way of working was strongly related to the product roadmap and customer interviews. The team brought up the processes and the ownership of decision making a few times. The product department lead commented on this with a similar take on as the engineering lead and customer success lead, underlining that most of the messiness and broken processes are growing pains that we can overcome together. One strong comment related to processes was the urgent need for better feedback loops, internal but also with customers. This comment sparked a discussion when the material from customer interviews will be visible in use for teams to learn and gain knowledge. The engineering and Product lead ensured that there was going to be a presented plan and addressed places where everyone could see, hear and learn more about how our customers see the product.</p>

4.3.3 The methods for achieving goals

For succeeding with the goals, teams need methods on how to get there. While teams were discussing the presented methods, they also discussed a lot of the working rules in general. This was a very fruitful part of all sessions. Some teams wanted to highlight the

possibility for exhaustion and the need for finding solutions before it happens. Some wanted to discuss more of the operational part of working together with other departments. For all teams this part of facilitation looked very different. Their needs to succeed with given goals were very different.

Table 7. Methods for achieving the goals

Team	Methods for achieving the goals
Customer Success	<p>As there were two different teams present in this session, the first comment came on the level of how these methods were described. Teams wanted to hear as deeply described methods and actions as possible. With this note the team also brought up the visibility of the product and the missing knowledge between the customer success team and product development. This was an extraordinary finding, as several team members were pointing this out and sharing the same feeling. As a possible solution for this teams were discussing having better documentation which would build the needed foundation and show more clearly where the knowledge gaps were. The team pointed out that general better-documented processes are already helpful, but if it could include customer stories with it that would make it more concrete and help build the knowledge.</p> <p>As one of the questions, the team is sharing what they would add to the methods. Two different themes were brought up, better and more sufficient internal communications with other teams and customer success training which includes empathy and listening skills. These two were interesting findings and they were strongly supported by the team. Most of the internal communication blockers were identified as growing pains that will be fixed together, but it was valuable to underline and agree that several processes were somewhat insufficient or broken. Team had quite fruitful discussion of workload and possible exhaustion and how to work more smarter to avoid burnout possibility. Team shared honestly their feelings and tricks to not overwork themselves when everyone in the team knew that in startup the work is never fully done. The team lead agreed that team would benefit from time management training which would help them to work hard and smart but not overwork themselves.</p>
Marketing	<p>With methods to succeed with set goals, the team was seeing the challenges of a rebranding project. They felt that there is a timeline challenge when working with external vendors. On the one hand, they are the extra pair of hands that help to make new materials faster, but at the same time, the vendor management and processes related to it are something that takes a lot of work before it is in a steady state. This team works a lot internally or with their external vendors and stakeholders. This easily directed their interest to the outside of the company. One point which was mentioned was the clear feedback loops from the product to marketing. This was mentioned as a foundational part of making content as product marketing. In the discussion, this was then noted as more of an interlock with the other department. It is something the team needs to take into consideration, if it is something that needs to be addressed as a roadblock right away or if the situation is noted and resolved in the future. Someway this is also a reflection of growing pains that each department goes through and the connections between departments can broke for a while.</p> <p>As this team works very closely with sales and they are enabling the very first touchpoints in the funnel, the team pointed out the need to clean and make sure the shared CRM is working also for marketing needs. Until this session, it has been more of the sales team's responsibility and there have been several challenges to make a clear connection between</p>

Team	Methods for achieving the goals
	<p>marketing bringing leads to enter the funnel and sales to take it forward. It was stated in the discussion that this is a crucial and needed fix for marketing to be part of the funnel. This includes clear KPI metrics for the team, which then would work as a foundation for the future OKRs. The need to add this was agreed together but the needed actions were still a bit blurry for the team. The department lead took note of this and promised to add it as a needed action point and a method to achieve the goals.</p> <p>Related to taking the advantage of our shared CRM and building the foundation for marketing to be part of the revenue funnel, the team raised a point that it is not quite clear how the leadership team sees marketing in the company. This was an interesting take on, as it should be quite clear for the team what role they are holding in the bigger picture. Same time this was a very valuable point to rise. As marketing is normally seen as a crucial part of revenue, it may need to be addressed with the revenue team. The department leader was able to take note of that and make sure the team knows their role in the future.</p>
Revenue (Sales)	<p>With this team the methods included comments on industry-specific training but also understanding and becoming better salespeople. While the organizational change took place, the team got a new role called sales enablement as part of their operative support. During the discussions, the team had a lot of wishes and needs about how that department could start helping them to do their work better and enabling the great work they want to do. As some were quite excited to learn more about SaaS methodology and become better saas salespeople, some of the team arose a worry. The concern was related to the industry's understanding of how the SaaS business works. The argument is that the industry is very much relationship-based which can reject the typical SaaS methodology approach. This concern also included the differences in territorial SaaS methodologies. After the team discussed this, they decided that this is definitely something the team need to be aware of, but it cannot become a road blocker for the team's success.</p> <p>Above in the Objectives and Key Results section, territorial targeting and targeting, in general, were mentioned. It came up with methods to achieve goals too. The need for clarifying the targeting groups and ICP, Ideal Customer Profile, was apparent. The team wanted to prioritize this as a clarifying point and make sure they use their time and resources to connect with the right people. This was also something that the department lead identified to be a known challenge and it was taken as a note to put more sales enablement resources to clarify it. At the end of the session, the team had a very diverse list of feelings, uncertainty and hesitation but also confidence and curiosity for the future.</p>
Engineering	<p>The team did already bring up several good questions during the vision and purpose and then the OKR goals. Few of them were related to the methods and clarified the work needed to be done. The team commented that they wish to continue the discussion after this session to make sure every team is heard. They have somewhat smooth continuity for releasing packages even though processes around will change. One specific topic the team wished to continue to talk about was the measurements and how they are defined and decided. From a goal facilitation point of view, this kind of wish is seen as very positive. The team wants to be included in the decision making and be heard.</p> <p>There were few clear themes when it came to the additions and changes the team wished to have. The first is the stakeholders and the cross-functionality. The team wished to see a clear plan of how they can interact better cross-functionally so that the team would have a working feedback loop and continuous learning possibility. Related to this theme, the team also raised a need to see and hear the actual customers. They felt it would be beneficial to</p>

Team	Methods for achieving the goals
	<p>see them using the product and commenting on it, and they could get the feedback faster to improve what they are currently working on. The department lead mentioned that there is already some sort of a plan that will take place, and it will give the team visibility to customers and their way of using the product.</p> <p>The second clear theme was better visibility of the product roadmap. This was a comprehensive discussion point, and there were several layers to it. The first one is the need to know when some feature is done and released. The team felt that this brings unnecessary stress when they have an endless list of tickets to a feature, and they do not know when it is moved to the done pile. Notable here is the comment from the department lead, who stated that “nothing is done”, but the done pile would be more of maintaining the pile rather than still in the development pile. Conclusion this was quite a fruitful discussion where the team agreed that product owners' needs and roles would help as they will be the persons in charge of the “good enough” level.</p> <p>The third clear theme was related to the resources as hand pairs. The team felt that there had been situations when the team needed to bend because there were not enough people. They agreed that partly this is coming from insufficient processes known to be broken at the moment. For the team atmosphere, saying this kind of feeling out loud was important. It was a good sign that the team feels they can comment and be heard. The department lead commented on this by mentioning that this challenge is part of every start-up’s growing pains. At the same time, he underlined that it is nobody’s benefit to drive the team towards exhaustion or burnout, and he wishes that the team will come further if they start feeling too overworked. Overall, the engineering team left the session to understand better what was to come and what was expected in the following three months.</p>
Product	<p>Great part of the method discussion was the thoughts around what was working and what needs to change. The team strongly agreed on a “progression over perfection” - mentality, which meant more openness and a need to say no. During the goals, the discussion team touched on the workflows and processes, but especially on this method the moment team discussed how they can make better workflows, touchpoints, and efficient meetings in general. Part of that was the need for standardizing the feature needs before it moves forward from the product team. In order to be able to standardize, the team hoped they could have more themed units when making tickets or projects. They stated that it somewhat felt scattered at the moment when there were no themed units.</p> <p>A lot of the discussion has related to working and solving the problems and communication issues with this new team and other departments. However, one very interesting and more motivational theme was celebrating done work. A Member of the team mentioned the lack of motivation as there is no explicit feedback from customers. Moreover, that raises the topic of if the team does not get anything to the “Done” pile, it is tough to be proud and motivated to continue the work. Each department leads present agreed, and they said that it would be something teams are working together to define. They want to find those success moments and possibilities to celebrate, as it engages and motivates a team to move forward. The same goes for the feedback, internally or from customers. It was agreed to be one of the processes or feedback loops that have taken some hit while company was growing rapidly. But as it was something team agreed on and it was noted, it can be fixed in the following months.</p>

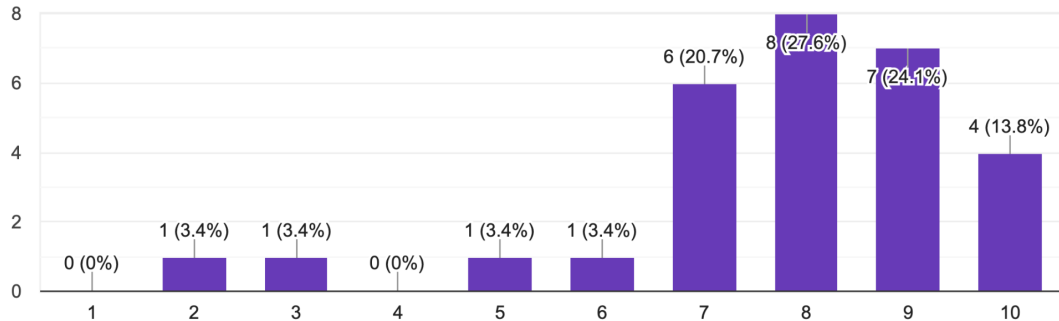
4.4 Team feedback summary

In general, the feedback was very positive, and the team felt that this is what they want to be part of. The first time around there was not that much constructive feedback or ideas on how we could make this better and bring it to the next level. From approx 90 active participants (excluding department leads and the facilitator herself), we got 29 answers to the feedback form. That was one-third of employees. At least one of every team answered, excluding the HR/operations team, who were the same team as the facilitator, the feedback was received by discussion, and they did not feel a need for anonymous comments.

The feedback was asked by using the same questions the team answered for their digital facilitation and addition to that they were asked to give a number between 1-10 to gather some evaluable metric for future. As this was the first time for the team, there was no clear expectations or hypothesis for the evaluation from the team. But as 29 people answered there was a quite nice variation of thoughts and evaluation. There were several who gave a good number i.e., ten or nine, but we had some who were not so delighted of this process or did not have trust on it. Overall, this numeric metric gave as the possibility to evaluate the starting point giving us 7,75 as an average evaluation. The leadership team was happily surprised of this quite open welcome for this new way of working around strategy and participating in building the bigger picture.

What number you would give for the digital facilitation?

29 responses



Picture 2. Digital facilitation – numeric evaluation

As this was the first time for all the teams to use these new platforms and go through the session, there were some comments on better preparations for teams to know what is expected from them and how to use the needed tools, i.e., the anonymous commenting platform. Some participants felt that the presented information was not that clarifying as hoped or that it felt repetitive. Other participants felt that they gained information, and they strongly hoped that this would be used for team levels too, not only on department level strategy work. Related to that, some of the participants suggested that these sessions be divided into two different sessions, so it would be more participant-friendly and possibly increase the activity level.

After extensive analysis of the feedback, it is clear that the first version of this process is not sustainable for us. The main critique for the session was much solo discussion from the department leader and less busy work together for strategy work. The length of the session was commented on a few times. The length and the long solo discussion made the session frustrating and not active participation, which was the main aim. Teams felt that this was still too much top-down communication for them and questioned the possibility of making an impact. One feedback stated that they “do not believe that these feedbacks are taken forward as it feels everything is already decided”. This pointed out

an obvious need for improving the process and the session to not be a platform only to share made decisions with a top-down style but to engage and tackle challenges together.

Notable for this feedback was the feedback that came through after discussions. Several employees and department lead wanted to highlight these sessions, the insight and the uniting energy they gave to them. They felt that even though it was not the perfect form, it was a start for transparent and open communications at all levels. It builds the foundation for people in the company to feel heard when we are talking about strategy and prioritization. There is no strategy made behind closed doors with only a chosen few. Strategy is built and executed together.

From this feedback form, we could see meaningful themes that were highlighted

1. The aim is good and very welcomed at all employee levels; it gave clarity and visibility for the company's future
2. We should take this kind of approach more often when discussing strategy and the future
3. Taking time to sit down with the whole team and exchange thoughts is important

4.5 Research findings

As a first-time implementation for a company which just came out of an extensive ramp-up phase, this can be seen as a success. Company A's leadership was delighted with the new information team members shared and the new transparent way of communicating about the future direction and consensus. After all digital facilitations were done, teams felt more engaged and calmer – which can be seen in their overall answers to the feedback form. One main future process changes which is probably needed is to divide these sessions into two for each team. Even though this was a very welcomed new way of working, it was still seen as quite an extensive and heavy load of information for once to go through together.

The major help this research gave for leadership team was the visibility and transparency for the thoughts that were underlying in the teams. For colleagues and team members this gave visibility to the emotional elements and the shared hardships. Azaddin Khalifa (2008) explained in his article that this kind of framing and reframing of complex elements that strategies include gives people the birds view on things. Sometimes it is hard to see things when we are too close, and for that this exercise to come together and take a step back gave for the teams.

What comes to the research questions and the reflection between this empiria, they reflect strongly the literature review. A lot of the elements that Juuso Hämäläinen, John Doerr, and previous OKR masters Andrew Grove and Peter Drucker highlighted were seen activating in these sessions. The answer for the question *“How does digital facilitation help align and implement systematic strategy work in a fast-growing SaaS startup?”* was quite present in all the sessions. The emotional load that teams were able to unload and share their thoughts gave them better visibility and alignment. This was the hope for this implementation and with Company A, we were fortunate to get to see the first steps of successful implementation. But it is still too early to conclude if this research was able to answer this question. More righteous question could have been a *“How does a startup benefit from the start of implementing strategy?”*

The secondary question *“Does digital facilitation bring clarity and transparency of companies' future to employees?”* was most strongly answered in the revenue team meeting. Where they all came together for the first time after the ramp up. For them the opportunity to ask those worrying questions anonymously while they were somewhat still in shock of the ramp up turbulence, was extremely valuable. For other teams it brought a lot of open discussion and shared feelings, for example overworking and the burnout feelings – which were not visible before. And these sessions were able to then take action and notes to fix the broken processes together. Still, even though mostly all feedback was positive, we got some good critique for making sure these raised voices and worries

should be taken forward. Comments were anonymous, but they stated that they wish to see leadership really making changes towards suggested ways.

4.6 Research discussion

As Kim Eungsu and co (2021), summarized one of the main success factors is proposed to be a clear business strategy for ICT companies. This research reflected the need for clarity and some agreed goal from the Company A's internal point of view quite strongly. Team members talked quite highly how they felt more engaged and the direction of the company was more clearer. While this research was the first one for the company and brought teams together to talk about strategy for the first time ever, as important was to understand what will not be discussed or added as strategy. John Singer(2008) highlighted in his article the need to understand that technology, internet or generally different tools or frameworks are not a strategy itself. This was something that came up few times when fast-growth broke some of the early stage processes and challenged the team to think through their strategy around work. New tool or technology is not the savior if the need is not connected to the strategy itself. When a startup grows, the need for automating can come as a surprise and it is easy to decide that implementing a technology is the new strategic move, which it never is.

In 1997 Porter suggested that companies should choose the strategy that is right for them and execute with that path. With this research and the discussions the need for having even an idea or a vision which is communicated transparently helps teams to aim higher. The needed understanding for building succeeding strategy is still something Company A is growing into, but when the need is knowledged – it already helps(Khalifa 2008). It is still clear that the bigger picture for several years isn't possible for Company A to draft and communicate as the field of ICT startups and the right strategies for those is relatively unknown and constantly changing (Eungsu 2021). Understanding the human limitations is a crucial part of building an effective strategy, or any systematic framework and that was discussed with several teams(Singer 2008). The want to be fast and agile was agreed with many but same time understanding the need for training or accepting human errors

was presented as a counter argument. As strategy is a complex concept which includes a strong human dimension it needs to take humanity into consideration (Singer 2008).

Several times during the digital facilitation teams fall into discussing day-to-day activities or challenges, and they lost a bit of touch with the bigger strategic thinking and visioning. Ananda Mukherji and co (2003) listed three different levels for thinking, and they stated that it gives a bit of clarity why it is sometimes hard for people to think about thinking process and some abstract frameworks or concepts. Especially when the company is growing fast and change is part of everyday activities, thinking far to future or even with three months can be hard to grasp. Mukherji(2003) explains that the level of knowledge and understanding for how world works is essential to be able to think strategically. Previously in this research we have mentioned John Doerr(2018) and how he stated strongly that OKR framework works for some, but not for everyone. Complex strategies thriving simultaneously is a bit similar. It needs a quite high level of maturity from company and employees to execute and succeed. (Gray 1999a, 1996)

Big part of strategy and building a successful one is that it is easily understandable.(Khalifa 2008) Eisenhardt and Sull saw strategy as a simple rules(2001), which grasps the main idea of strategy nicely. Teams can not build something hard to explain or execute, they should be able to understand their teams strategy. While it would be logical to think from history that concentrating one strategy is the key for success, but according to Eungsu and co(2021) there needs to be several thriving strategies that support each other. According to Eungsu and Co the synergies are the power behind the rocketing success of ICT startups. This reflects the research findings from Company A's digital facilitations and the needs for different goals between teams. The strategy that helps Revenue team to aim higher should have different concentrating points than what Product team should be concentrating to. Singer(2008) underlined that understanding people and the limitations that they bring to the strategy execution is as important than having a systematic framework. (Eisenhardt 2002)

Nina Silove (2018) summarized the three meanings of grand strategy and its' possibilities. For Company A's case the grand strategy was called Ultimate strategy, but as semantics – they mean the same grand, huge great, plan for future. She explains that Grand strategy can be seen as the Plan, Organizing Principles or Pattern of behaviour. For Company A, the two firsts are quite accurate and the third one is something they are aiming for in the future. Strategy to be part of behavioural pattern is a strategy that is light enough and simple enough for teams to carry and execute. Teams were quite excited of this new way of working which gave at least some level of approval for implementing this to be part of organizational behaviour patterns.

5 Conclusion

This research paper aimed to evaluate how engaging everyone in the company to be part of strategy building will positively affect the strategy implementation and the buy-in from employees. With that as the aim, one of the main themes was to make a space where employees feel they have been heard and know what to expect from the future. As company A is a start up growing fast, it made an interesting foundation for this kind of research. It is normal for start-ups to emphasize “let’s do and figure strategy out later”, but as it has been proven several times in the history of start-ups, strategy is needed for success (Thiel 2014, Ries 2011). The research answered the research questions quite nicely. All of the digital facilitations held proved a need and helped teams align for the next three months.

When this research took place, the company came out of an intense ramp-up, and several development needs and processes were taking place. Some would argue that it would be the worst time to openly ask teams' thoughts about direction, strategy, and prioritization, but as this research shows, it was quite the opposite. The main aim of this research was to find out how the team feels after presenting this kind of transparent and visible approach to the company’s strategy. The hypothesis was to expect some kind of positive welcome and open criticism, which would give the department leads more insight into their own teams' strategy and execution. After these sessions were over and the feedback gathered, this could be concluded as quite successful research for the teams in their daily lives. We cannot say if these sessions truly helped implement the strategy work itself. It helped to present it and make it visible, but the answer from a successful implementation point of view is that there are no reliable results. The start for successful implementation is indeed accomplished, but time will tell if it is so.

Most of the feedback was positive, and participants felt this was building a good foundation for better communication and transparency. Participants were quite excited that this new way of doing strategy was implemented, leading to a lack of constructive

criticism. Still, the hypothesis for this is that when teams go through the digital facilitation for the second time, there will be more constructive criticism to make sessions better and more fitting. However, the main message and implementation ideology, strategy is built and executed together, got the buy-in. Moreover, that was the hoped result.

As mentioned in the research findings, the research questions are somewhat answered. The main research question *“How does digital facilitation help align and implement systematic strategy work in a fast-growing SaaS startup?”* was something this research could not directly answer. Company A took their first steps with this study and those were quite successful steps, but they are not enough to prove this question true or false. Maybe the more righteous question could have been a *“How does a startup benefit from the start of implementing strategy?”* which could have been easier to answer based on this research. The secondary question *“Does digital facilitation bring clarity and transparency of companies' future to employees?”* was still quite proven true. The immediate relief and emotional acceptance for this new process proved that Company A is on the right track with the communication and transparency of the company's direction.

5.1 Suggestions for digital facilitation process

For future digital facilitation, a few suggestions should be placed. They are not significant changes, more iterations of the already established process. The first suggestion mentioned before as a comment is dividing these sessions into two individual sessions. This could be worth testing and seeing if the activity levels are higher. If the session is divided into a two-day strategy workshop and strategy facilitation could be a dividend. A strategy workshop is more of knowledge gathering and discussion of priorities within the team, with widespread preparations, needs and primarily open-ended questions. Strategy facilitation including those goals for the next three months, and those should be based on the learnings from the strategy workshop. This way the department lead would not need to use that much time to gather the knowledge and information to make efficient goals, but it would have been done already with the team. Then the department

leader's role would be more of prioritization, which is the hardest part of a leader's job (Catlin 2001).

Making these sessions better is to divide them at the department level already. This would help target the discussion more directly to specific teams' challenges. Moreover, this is something at some level that needs to happen when the company grows, and it is not sustainable to have department-level strategy sessions to this extent. This would need more resources from the department that owns this digital facilitation; it is the Operations team. The company needs to train people to facilitate these discussions and manage the emotional safety of the sessions. Company A is not quite yet there, but they possibly are after their next ramp-up period.

The easiest change to implement for this process would be to make the material visible and accessible earlier. It was commented on the feedback form that the team would appreciate it if they would get the access earlier. This is an operational factor and needs to be adjusted with department leaders. The real value of this is minor, but it would bring teams a more polished feeling of the process. Furthermore, as the process is under continuous iteration, this is quite an easy adjustment to the timelines.

5.2 Suggestions for managers and leadership

The main benefit of this whole process of implementing digital facilitation for company strategy and future goals is the embracing of transparency and open communication. For managers this means they will be more informed, than through the one-to-one discussions and their visibility for the bigger picture within their team comes clearer. While with Company A several teams went through the discussion of workloads, team rules and expectations of working in general. This was one of the most fruitful elements for managers to understand the capacity of their team and if there is a bottleneck, or something is becoming a bottleneck soon.

For the future, managers could run mini-digital facilitations even in a mid-quarter to have a pulse check on teams' thoughts. This should not be as extensive as this once in a quarter one, but while teams follow their OKR success throughout the quarter, there could be a place for facilitating the methods in a shorter meeting. And as the Company A grows, these digital facilitations should be held in smaller groups inside of the department. At the moment it was not convenient to divide around 30 people teams into smaller ones, but in the future that size of team is quite the maximum to have a sustainable and efficient digital facilitation in place.

For managers in the future, the main suggestion is to keep the relevance of these digital facilitations going and embrace those as possibilities to be part of the company's future successes. This would make the difference in team engagement and hopefully keep all of the teams excited to be part of strategy work. Another benefit is lowering the standard for talking openly when someone has an idea or thought which could bring some competitive advantage and support the company's internal innovation.

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Appendix

Appendix 1. Digital Facilitation anonymous feedback (*not included*)