inspire

PARTNER STORY | HEAVY CIVIL CONSTRUCTION

One plan. Three partners.

How a family-owned construction company, its OKR consultant and Inspire turned a referral into an OKR rollout led from the top.

The rollout is still in progress. This story is about how the three teams work together, not about OKR results.

THE CLIENT

Family-owned construction group

Heavy civil construction and materials. Northeast U.S. More than 75 years in business. 500+ employees. About $300M in annual revenue (est.).

THE PARTNER

Independent OKR consultant

Career strategy consultant and published author on OKRs, engaged by the client's executive team.

THE PLATFORM

Inspire

Strategy, OKRs, check-ins and 1:1s in one place, connected to the client's Microsoft 365 with single sign-on and the Teams app.

10 weeks
from kickoff to Executive Committee training

12+
working sessions since kickoff

5 hours
Executive Committee OKR session, consultant onsite

24
leaders in the rollout by year-end

01 It started with a referral

The company brought in an independent OKR consultant to help its executive team put OKRs to work. Once the direction was set, they gave the consultant a second job: find a platform that would keep the process simple and measurable, and work with the Microsoft tools the company already runs on.

The consultant vetted the options, brought Inspire in for a demo in June, and stayed close as the deal came together. The agreement was signed in July. Single sign-on and the Teams app were live the day after kickoff.

02 We followed the consultant's lead

Most software vendors arrive with their own playbook. We did the opposite. When the first OKR drafts came to us for review in August, we held our feedback until we had talked with the consultant, so the client would not hear two experts pulling in different directions.

The consultant merged the competing drafts into one document. We gave the consultant full access to Inspire, and our Client Success Manager loaded that work straight into the platform. The direction to the team was simple: draft in Inspire, not in Word documents passed around by email.

> *"We then tasked him with finding us a platform to help measure so this doesn't become complicated, which led him to Inspire."*
>
> **Executive Vice President**
> The client company

> *"Rather than giving you a completely polar opposite opinion to [the consultant], we're going to try and make sure that we're all on the same page."*
>
> **Sales Director**
> Inspire, at the first OKR review

> *"I've never worked with a software vendor this early in the process... And I'm always open to suggestions about better ways to coordinate on the next client!"*
>
> **The consultant**
> Independent OKR consultant

03 The executive team showed up

This is the part we rarely see. In mid-September, the company's President worked through its Safety and Employer of Choice OKRs with the consultant and the owners of each one. A week later, the Executive Committee spent five hours in the board room with the consultant onsite and the Inspire team on the line, and agreed on a simpler structure built around three corporate themes.

Then the leaders carried it forward themselves. The President and the Executive Vice President walked the next level of leaders through the corporate strategy, and in October the Executive Committee sat down for Inspire training of their own.

> *"The objective is to have all Executive Committee members, Group Leaders, and Functional Leaders trained and actively using Inspire to manage and track their OKRs by year-end."*
>
> **Executive Vice President**
> The client company

04 Communication ran three ways

- **One plan.** The consultant and Inspire met ahead of each milestone, so the client heard one plan, not two.
- **Everyone informed.** A written recap after every training, with progress updates sent to the consultant as well as the client.
- **A coordinator on the inside.** The client's office manager tracked attendance, logins and completed sessions.
- **A steady rhythm.** Bi-weekly check-ins on the calendar into next year, and a quarterly business review in October.
- **A personal touch.** The consultant asked Inspire's CEO to join a working session so two company leaders could compare notes on building and running a business.

HOW IT UNFOLDED, 2026

- **MAY** — The consultant brings Inspire to the client
- **JUN 2** — Demo, with the consultant on the call
- **JUL 15** — Agreement signed
- **JUL 30** — Kickoff
- **AUG 25** — First OKR review; Inspire aligns with the consultant
- **SEP 1** — Three-way planning session
- **SEP 14** — First champions trained
- **SEP 16** — OKR working sessions with the President
- **SEP 23** — Five-hour Executive Committee session, consultant onsite
- **OCT 7** — Executive Committee trains on Inspire
- **OCT 29 (NEXT)** — First quarterly business review

> *"[The coordinator] has been wonderful to work with. She's coordinating training attendance and keeping track of who has logged in and completed each session. [The EVP] is fully behind the rollout."*
>
> **Client Success Manager**
> Inspire, in an update to the consultant

What this means for consultants

You keep the methodology.
We build the rollout around your framework, not ours.

You stay in the loop.
Planning calls, recaps and check-ins include you.

Your client gets a team.
Our Client Success Manager runs setup and training, so your time goes to the strategy work.

It runs both ways.
When our customers need advisory, OKR facilitation or coaching, we refer them to Inspire Preferred Consultants.

Become an Inspire partner: inspiresoftware.com/partners

Bill Pappa, Sales Director
wpappa@inspiresoftware.com | (203) 858-5243