



OKR
INSTITUTE

OKR
PRACTITIONER
COURSE

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OKR Playbook Checklist

- Purpose of OKRs in the company
- Strategies, Vision & Mission of the company
- How to write OKRs with examples
- Key lists of contacts of main OKR Participants
- How OKRs will interface with other key processes like project management, agile tools...

OKR Workshops



> 3 Monate



Setting up OKRs in Teams (1-1.5 hours workshops)

1st Workshop
Objectives

1. **5 min:** OKR Refresher (i.e. elements of an outcome-driven OKRs)
2. **55 min:** Choose Objectives (Rank them)

2nd Workshop
Key Results
Action Plan

3. **60 min:** Choose Key Results (Rank them)
4. **10 min:** Are the OKR(s) ambitious enough?
5. **20 min:** Next Steps (i.e. Action Plan)

OKR Spectrum



Operational OKRs

Aspirational OKRs



1

2

3

4

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OKRs set based on what is achievable

Moonshot OKRs set based aspiration

Ranking of OKRs

- Focus on what is essential for the organization
- Priorities objectives
- Rank best Objectives on the Executive level, then VP level, then HOD level
- Let team members come up with Key Results or even own OKRs linked to company tactical or strategic OKRs

Rank Strategic OKRs

- Rank your strategic OKRs from 1 to 10
- Present to the group and receive their feedback
- Is the desired outcome clearly stated?
- Are they ranked, and are there max. 5 OKRs?
- Are they measurable?
- Are the key results actionable (initiatives and quantitative measures)

Facilitating OKR workshop

The following agenda is based on a longer executive OKR workshop. You may want to cut it down for non-executive teams.

Agenda (simplify & shorten as desired):

- Score previous quarter and discuss outcomes - 20 minutes
- Retrospective on lessons learned - 20 minutes
- OKR Setting:
 - Strategic Discussion: What does success look like for your team this OKR cycle? Write it down on post it notes in the form of an Objective - 20 minutes
 - Vote on your favourite Objective (3 votes each) - 10 minutes
 - Create a draft Objective - 20 minutes
 - Connect with the why with an OKR story (Optional) - 0-20 minutes
 - Write down some measures that will tell you you're making progress - 10 minutes
 - Quality check and re-write - 10 minutes
 - Hands up if it's an outcome or an output
 - Hands up if it's a leading indicator
 - Vote on the Key Results which will have the greatest impact and pick 3-5 of them - 10 minutes
 - Refine your OKR - 20 minutes
 - Identify who in the team can champion a Key Result (they make sure it's not forgotten and gets due focus) - 10 minutes
 - Identify initiatives / projects / features / actions to support each Key Result - 20 minutes
- Communications plan - 20 minutes
- Close & retrospective on the day - 20 minutes

OKR Setting Template

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1. Planning

2. Review Last Quarter

4. OKR Setting

OKR PLANNING WORKSHOP

OKR REVIEW

PREWORK

WORKSHOP AGENDA

END OF OKR REVIEW

SCORES & AGREEMENTS

OKR	SCORE	AGREEMENTS
OKR 1	4	Agreed
OKR 2	3	Agreed
OKR 3	2	Agreed
OKR 4	1	Agreed

SCORES LAST QUARTER

RETROSPECTIVE

COMPANY OKR

STRATEGIC DISCUSSION

WHAT'S IMPORTANT THIS CYCLE

Area	Q1	Q2	Q3	Q4
Area 1	High	Medium	Low	None
Area 2	None	Low	Medium	High

1. OBJECTIVE IDEAS

What are your top 3-5 ideas for this OKR?

- Idea 1
- Idea 2
- Idea 3

2. REFINE YOUR OBJECTIVE

Objective goes here!

3. KEY RESULT IDEAS

What are your top 3-5 ideas for this OKR?

- KR 1
- KR 2
- KR 3

4. FINALISE YOUR OKR

OKR 1: [Objective] - [Key Results]

TEAM 1

STRATEGIC DISCUSSION

WHAT'S IMPORTANT THIS CYCLE

Area	Q1	Q2	Q3	Q4
Area 1	High	Medium	Low	None
Area 2	None	Low	Medium	High

1. OBJECTIVE IDEAS

What are your top 3-5 ideas for this OKR?

- Idea 1
- Idea 2
- Idea 3

2. REFINE YOUR OBJECTIVE

Objective goes here!

3. KEY RESULT IDEAS

What are your top 3-5 ideas for this OKR?

- KR 1
- KR 2
- KR 3

4. FINALISE YOUR OKR

OKR 1: [Objective] - [Key Results]

TEAM 2

STRATEGIC DISCUSSION

WHAT'S IMPORTANT THIS CYCLE

Area	Q1	Q2	Q3	Q4
Area 1	High	Medium	Low	None
Area 2	None	Low	Medium	High

1. OBJECTIVE IDEAS

What are your top 3-5 ideas for this OKR?

- Idea 1
- Idea 2
- Idea 3

2. REFINE YOUR OBJECTIVE

Objective goes here!

3. KEY RESULT IDEAS

What are your top 3-5 ideas for this OKR?

- KR 1
- KR 2
- KR 3

4. FINALISE YOUR OKR

OKR 1: [Objective] - [Key Results]



1 1st: Your „top of the mountain“
Put here the purpose, vision, mission of your company or project.
Always remember that your Objectives should bring you close towards this higher goals.

3rd: Brainstorm your Objective
Every team member write all the Objectives that come to their mind, each on one Post-it.
Formulates concrete Objectives.
// that will have a high outcome to achieving your purpose, vision, and mission.
// that impact the achievement of your higher level OKRs (company OKRs, yearly OKRs).
// that are ambitious and inspiring.
// that are within your circle of influence.
// that are indispensable.
// that will be finished by the end of the cycle.
// and that have no quantitative target.

2nd: Your higher level OKRs
Put here already existing OKRs which you are referring to with this canvas:
long term, middle term, and/or higher OKRs of company or department.

4th: Put your focus on Objectives that matter
Are your Objectives in scope of your Vision, Mission, and long term OKRs and do you aim for an ambitious objective?

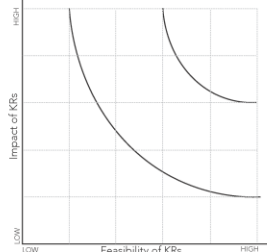
	High Ambition	Low Ambition
In-Scope	Select as Objectives	Revise Objective for higher ambition or put in backlog
Out of Scope	Put Objectives in backlog	Eliminate Objectives

Develop your Objectives

2 5th: Brainstorming of Key Results
Select the three Objectives from your „select as Objective“ quadrant of step 5. Brainstorm your corresponding Key Results.
Key Results are always quantitative, but are not binary.
// are not milestones or tasks.
// are independent from each other.
// are ambitious to achieve.
// and are never efforts (outputs) but **always impacts** (outcomes) towards achieving your objective!

Put here Objective 1	Put here Objective 2	Put here Objective 3
Brainstorm KR1	Brainstorm KR2	Brainstorm KR3

6th: Prioritization of Key Results
Estimate impact and feasibility for each of the Key Results and put it accordingly on the matrix.
Focus on Key Results that creates high impact but are achievable.
Consolidate similar Key Results to one specific new Key Result.



7th: Finalize your Objectives and Key Results
Put in Objectives and the corresponding Key Results 1-3 with highest estimation of impact and feasibility on achieving the Objective.
Try to focus on up to five Key Results. Don't select tasks or milestones as Key Result!

Objective 1	Objective 2	Objective 3
KR 1.1 No	KR 2.1 No	KR 3.1 No
KR 1.2 No	KR 2.2 No	KR 3.2 No
KR 1.3 No	KR 2.3 No	KR 3.3 No
KR 1.4 No	KR 2.4 No	KR 3.4 No
KR 1.5 No	KR 2.5 No	KR 3.5 No

Develop your corresponding Key Results

EMBEDDING OKR WORKSHEET

Group/Team Name:

OKR Champ:

1. Team mission:

2. People/team working on our OKR:

3. How will OKR benefits us?

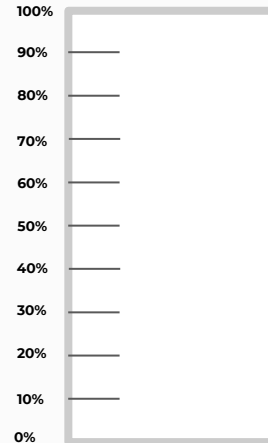
4. OKR Check-in Meeting cadence/day/time:

5. When is the update due?

6. Dependency Mapping

	Soft dependency Input / feedback only	Hard dependency Build / Sign Off etc.
Us dependent on others		
Others dependent on us		

7. How much time we will spend on OKR?



9. OKR Hopes:

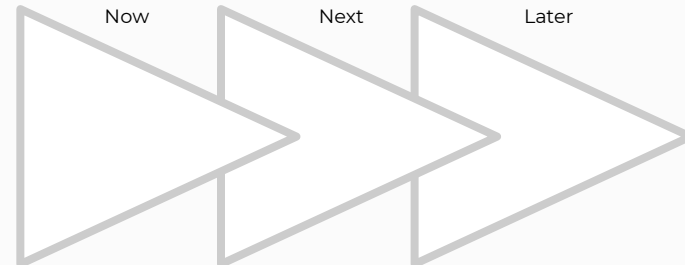
10. OKR Fears:

11. Metrics Mapping

Outputs	Leading	Lagging

OKR Sweet Spot

12. Upcoming OKR Themes:



STRATEGIC DISCUSSION

Problem: What are your biggest problems to solve this cycle?

Impact: What will be the impact of solving the problem?

Solution: What does complete look like?

OKR candidates
If we don't do this, then we have failed.



Other priorities
These are important, but we can be successful without them.

OKR FACILITATION SHEET - IF WE WERE TO MOVE THE NEEDLE ON ONE THING ONLY - THIS IS IT!

OBJECTIVE:

WHY THIS MATTERS:

KEY RESULT 1:

HOW TO MEASURE/DATA SOURCE

KEY RESULT 2:

HOW TO MEASURE/DATA SOURCE

KEY RESULT 3:

HOW TO MEASURE/DATA SOURCE

KEY RESULT 4:

HOW TO MEASURE/DATA SOURCE

- OBJECTIVE**
- Inspirational
 - Manageable outcomes
 - Provides focus
 - Action oriented
 - Change, not maintain
 - Time bound

- KEY RESULT**
- Results based
 - Aligned
 - Directly measurable
 - Indicates progress
 - Challenging
 - Accountability clarity
 - Leading indicator

HOW TO ACHIEVE THE OBJECTIVE
INITIATIVE, ACTION & TASK IDEAS

OKR FACILITATION SHEET - IF WE WERE TO MOVE THE NEEDLE ON ONE THING ONLY - THIS IS IT!

OBJECTIVE:

WHY THIS MATTERS:

- OBJECTIVE**
- Inspirational
 - Manageable outcomes
 - Provides focus
 - Action oriented
 - Change, not maintain
 - Time bound

KEY RESULT 1:

KEY INITIATIVES

DATA SOURCE

- KEY RESULT**
- Results based
 - Aligned
 - Directly measurable
 - Indicates progress
 - Challenging
 - Accountability clarity
 - Leading indicator

KEY RESULT 2:

KEY INITIATIVES

DATA SOURCE

KEY RESULT 3:

KEY INITIATIVES

DATA SOURCE

KEY RESULT 4:

KEY INITIATIVES

DATA SOURCE

NOTES

EXERCISE: OKR STORY

CHARACTER: WHO DO WE NEED TO BENEFIT THIS OKR CYCLE? WHAT IS THEIR ORDINARY LIFE?

GOAL: WHAT IS THEIR PRIMARY OBJECTIVE? WHAT ARE THEY TRYING TO ACHIEVE?

OBSTACLE: WHAT IS CURRENTLY GETTING IN THEIR WAY?

RESOLUTION: WHAT'S THE OUTCOME OF THEM BEING SUCCESSFUL? WHAT CAN THEY DO BETTER THAN THEY COULD BEFORE?

METRIC IDEAS: WHAT METRICS WOULD TELL US STRAIGHT AWAY THAT WE'RE PROGRESSING ON OUR JOURNEY?

OBJECTIVE:			
KEY RESULT 1:	LEADS	METRIC ACTUAL	CONFIDENCE
KEY RESULT 2:	LEADS	METRIC ACTUAL	CONFIDENCE
KEY RESULT 3:	LEADS	METRIC ACTUAL	CONFIDENCE
KEY RESULT 4:	LEADS	METRIC ACTUAL	CONFIDENCE

OPERATIONAL HEALTH

MoM Sales ●●●●

Team engagement ●●●●

Customer First Call Resolution rate ●●●●

WEEKLY FOCUS

- Near term priorities

PRIORITY PIPELINE

- Big projects and initiatives
- Critical events

A BUSINESS LEVEL EXAMPLE

OBJECTIVE

Become the number one accounting provider for Small Business in San Francisco

KEY RESULTS

HOW TO MEASURE

INITIATIVES

KRI: Increase the reorder rate from 45% to 70% for San Fran Small Business

Tracked in weekly order report

1. Subscription service for Small Business
2. Checkout CX

KR2: Customer first call resolution from 75% to 90% maintaining our per customer case rate

Tracked using weekly support report and introducing per customer case rate

1. CRM optimisation
2. Customer experience training
3. Telephony upgrade

KR3: Increase Marketing Qualified Leads from 60 MoM to 200

Tracked in weekly sales report and small sample survey for excluded products

1. Run internal sales conf
2. CRM optimisation
3. Social & TV campaign

Company OKR

Objective: Build a Great Workplace Culture

KR 1: Achieve a weekly Employee Pulse Score of >8

KR 2: Celebrate at least 3 “small wins” in every monthly team meeting

KR 3: Organize monthly town hall meetings with speeches of the CEO and VPs

More Examples: <https://okrinstitute.org/okr-examples> or in the OKR e-learning access

A HR EXAMPLE

OBJECTIVE

Create high impact leaders across the business

KEY RESULTS

HOW TO MEASURE

1. Leaders believe they have the tools and practices needed to effectively lead from 50% to 100%

Feedback survey with people managers

2. Team members believe managers help set performance goals from a median of 2 to 4

Engagement pulse check survey

3. Team members believe their leaders communicates an inspiring vision from 52% currently to 75%

Engagement pulse check survey

SALES EXAMPLES

BECOME THE GO TO ACCOUNTING PLATFORM FOR NCY INDEPENDENT CONSULTANTS

1. Increase Marketing Qualified Leads from \$600K to \$1M for NCY independent consultants
2. Increase Sales Qualified Leads from \$400K to \$600K NCY independent consultants
3. Reduce time from Marketing Qualified Leads to Sales Qualified Leads from 10 days to 2 days
4. Increase Sales journey customer satisfaction from 4 to 5

CRUSH OUR LAUNCH IN MELBOURNE AUSTRALIA

1. Generate \$200K in Sales Qualified Leads in Australia
2. Progress leads from Marketing Qualified Leads to Sales Qualified Leads within 2 days
3. Maintain a Sales Qualified Leads to Close conversion ratio of above 20%
4. Maintain a profit margin ratio of 45%

BE THE BEST SALES TEAM IN THE INDUSTRY

1. Increase speed to respond to leads from 2 days to 2 business hours
2. Increase Sales journey customer satisfaction from 4 to 5
3. Reduce cool down period cancellations from 5% to 1%
4. 100% of customers are informed of cool down cancelation policy (countermeasure for KR3)

FINANCE EXAMPLES

CREATE A LEAN AND MEAN FINANCE MACHINE

1. Speed up end of month cycle time from 2 weeks to 4 days
2. Increase accuracy of financial inputs from 95% to 100%
3. Increase end of month cycle employee satisfaction from 2 to 5

CREATE A LEAN OPERATION BUSINESS

1. Reduce failure demand across technology and operations teams from 25% to 10%
2. Increase team turnaround time from average of 20 days to 10 days
3. Increase customer satisfaction from 4 to 4.5

PRIME OURSELVES FOR GROWTH WITH STELLAR FUNDING OPTIONS

1. Reduce average funding costs from federal funds rate +2% to federal funds rate +.5%
2. Reduce additional funding approval time from 30 day average to 2 day average
3. Increase loans with early repayment option from 25% of loans to 75% of loans

OPERATIONS EXAMPLES

CREATE A WORLD CLASS CUSTOMER CONTACT CENTRE

1. Increase first call resolution from 90% to 98%
2. Increase customer satisfaction from 4 to 4.5
3. Increase customer retention rate from 85% to 95%

SURPRISE OUR CUSTOMERS WITH RAPID DELIVERY

1. Reduce average time to ship from 48 hours to 10 hours
2. Reduce parcel damage rate from .02% to .01%
3. Increase delivery address accuracy from 98% to 100%
4. Speed up return restocking from average of 10 hours down to 2 hours

CRUSH OUR APPROACH TO MANAGING RISK EVENTS

1. Increase flow efficiency of risk events from 20% to 60%
2. Reduce 12 month or greater open risk events from 55 to 10
3. Increase risk event closure customer satisfaction from 20% to 60%

OPERATIONS EXAMPLES

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NGO EXAMPLES

HAVE OUR DONORS BECOME OUR BIGGEST ADVOCATES

1. Reduce time to thank donors for contributions from 7 days to 8 business hours
2. Increase twice weekly use rate from 2% of donors to 15%
3. Increase donor referral rate from 5% to 15%

SAVE LIVES IN 1 VILLAGE OF A DEVELOPING NATION BY REDUCING PREVENTABLE DISEASE

KR #1: <outcome, leading> observation and survey results show 80% increase in hand washing with soap

KR #2: <outcome, lagging> rate of communicable disease decreases by 60%

RESEARCH & DEVELOPMENT EXAMPLES

GROW BY MAKING OUR UPGRADE PATH FEEL LIKE BUTTER

1. Increase sign-up to trial conversion ratio from 10% to 30%
2. Increase trial to paid conversion ratio from 5% to 7%
3. Increase referral rate for < 1 month paid accounts from 2% to 30%

MAKE IT EASIER THAN EVER TO SHARE AN ARTICLE

1. Reduce time to publish post from 5 seconds to 3 seconds
2. Reduce time to reshare a post from 7 seconds to 2 seconds
3. Increase customer share satisfaction from 3 to 4

Strategy OKR

Objective: From Startup to Scaleup

KR 1: 10 fold our customer base growth

KR 2: 1 MVPs introduction

KR 3: Company valuation to increase at least 120%

KR 4: At least 1 Private Equity Fund to commit to investing in our company

Sales OKR

Objective: Revive our Referral Program

KR 1: Get 40 client case studies

KR 2: 15% of our revenue comes from referrals

KR 3: 230 customers signed up for a new setup referral program

Accounting OKR

Objective: Increase our Collection Targets

KR 1: Reduce bad debt provision by 15%

KR 2: Reduce receivable days by 3

KR 3: 10% overdue vs open balance

More Examples: <https://okrinstitute.org/okr-examples> or in the OKR e-learning access

Types of OKR Participants

- OKR Sponsor
- Internal Coaches – OKR Practitioner, 1 for every 50 employees
- External Coaches (optional)
- OKR Program Owner - CEO, COO, Chief of Staff, executive assistant...
- OKR Coordinator
- OKR Lead
- Key Result Lead
- OKR Contributors

OKR Sponsor

Responsibilities of the executive sponsor include

1. Communicate why the organization is adopting OKRs.
2. Confirm deployment parameters as recommended by OKRs project leads.
3. Help gather top-level objectives before the top-level OKRs drafting workshop.
4. Participate in top-level OKRs workshops.
5. Meet with team leads to confirm team-level OKRs are aligned with company goals.
6. Communicate openly with OKRs project leads.
7. Bring energy and life to the OKRs program (e.g., secure resources, make opening remarks at OKRs training, present top-level OKRs at companywide meetings, etc.).

OKR Project Lead / Program Owner

Responsibilities of the OKRs project lead include

1. Attend all deployment coaching sessions. Present recommendations to leadership (e.g., how to score key results). Work with the OKRs coach to create an in-house OKRs tracker tool for the learning cycle.
2. Coordinate and help facilitate OKRs training (e.g., send workshop invites, compile objectives to be used at training workshops, share training materials with trainees).
3. Attend some, but not all, OKRs cycle coaching sessions.
4. Coordinate and schedule OKRs coaching sessions.

OKR Coordinator

Responsibilities of the OKRs coordinator include

1. Coordinate and schedule OKRs coaching sessions.
2. Send email reminders to ensure OKRs cycle stays on track, such as:
 - Step 1: Send an email a week or two into the process with a link to the OKRS tracker to ensure everyone posts their OKRs to a single location by a target date.
 - Step 2: Send email reminders to identify key results to be shared at mid-cycle check-ins.
 - Step 3: Remind each team to publish their learnings at the end of the OKRs cycle.
3. Collect learnings from Step 3 and/or feedback and ideas for improving the OKR program.

OKR Lead

Responsibilities of team leads include

1. Participate in OKRs training.
2. Facilitate OKRs development with their team.
3. Complete an OKRs cycle; attend OKRs cycle coaching sessions.
4. Document and apply learnings to the next cycle.

Key Result Lead

Responsibilities of the key result lead include

1. Update progress and enter scoring for the key result throughout the OKRs cycle.
2. Serve as point person for questions related to progress or issues on the key result.
3. Welcome input and ideas for moving the key result forward.
4. Continuously communicate and ensure alignment on work related to the key result. For example, ensure teams are performing all the tasks and projects in order.
5. Apply learnings from the key result to the next cycle. Whether or not the key result is achieved, champions communicate final scores, assess impact, capture learnings, and recommend whether to keep, modify, or remove key results.

OKR Contributor

Responsibilities of members include

1. Participate in drafting team-level OKRs.
2. Help refine key results at the team level, especially when aligning on pre-scoring.
3. Continuously apply OKR critical thinking to connect work to the bigger picture.
4. Participate in action plan for achieving Key Results

Checklist for OKRs

Is your organization ready for OKRs?

- Is your OKR program backed by leadership / management / CEO?
- Have you defined your mission and vision?
- Are you and your team(s) willing to commit the time and effort to your OKR program?
- Do you have an OKR champion / practitioner?
- Are you committed to transparency and accountability across teams / company?

Checklist for drafting OKRs

Are your Objective:

- Achievable
- Actionable
- Qualitative
- Ambitious
- Aligned with company mission and vision
- Time-bound, (ideally a quarterly basis)
- There are only 1-5 Objectives

Are your Key Results:

- getting closer to the objective
- Realistically targeted
- Measurable
- Assigned a lead (someone is responsible)
- Not a task or to-do list

Download Checklist: <https://okrinstitute.org/okr-checklist>
or in the OKR e-learning access

Checklist Best Practise

- You published an OKR Playbook (Guideline for Your Organization how to use OKRs)
- Your organization is educated on OKRs
- Too many OKRs? Ideally 1-5 Objectives and 3-5 Key Results per objective (also can start only with 1 OKR first to build up your OKR muscle)
- OKRs aren't too easy or unrealistic
- OKRs are shared publicly (sensitive OKRs can be hidden)
- OKRs are focused on outcomes, not tasks
- Our OKRs process allows for flexibility and change (vs. seeking perfection)
- Review what went well and what didn't (at the end of the quarter)
- Celebrate your wins / successes

Checklist for OKR Practitioner

- Our entire company participates
- We facilitated OKR training across the company
- We set OKRs on a quarterly basis
- Every team has healthy OKRs (1-5 Objectives, each with 3-5 KR's)
- Everyone updates progress minimum weekly
- Our OKRs process allows for flexibility and change (vs. seeking perfection)

Checklist for Enterprise Context

Establish Enterprise Context

- Announce the process. Describe why you implement now this OKR, describe the problems a formal OKR process will solve, or how they will improve the company's performance.
- Set company goals for the quarter. Management (and the CEO) should be responsible for defining and choosing these goals.
- Share goals with the company. 2-weeks before the start of the quarter, publish the company's OKRs in a highly-visible and transparent location, best via OKR software

Checklist to Co-create

Co-create and Localize OKRs

- Each team publishes their goals ~2 weeks before the start of the quarter.
- In the week preceding the quarter, teams collaborate and review each other's OKRs and adjust accordingly
- Teams publish and commit to their shared and reviewed OKRs before the start of the quarter.

Checklist for Action Plan

Develop Action Plans

- Identify the leads and contributors who are responsible (leads) for delivering each KR.
- Establish a regular check-in schedule to evaluate progress, ideally on a weekly cadence. (via OKR software emails can be sent on a weekly base)
- Schedule bi-weekly or monthly reviews and quarterly retrospectives.

Checklist for Check-ins and Scoring

Check-ins and Scoring

- Set aside time each week (during team meetings if possible) to discuss objectives. Keep these meetings short and crisp - they shouldn't turn into a long status update.
 - Every other week the team should do a confidence check-in to discuss progress and whether or not the team's OKRs will be achieved. (can be updated via the OKR software)
- Ask hard questions:
- What changed in the Key Results since the last meeting / check-in?
 - What is the confidence level that we can deliver our key results?
 - What is slowing us down or jeopardizing our progress as a team?
 - How can we increase confidence or remove hurdles?

Checklist for Reviews

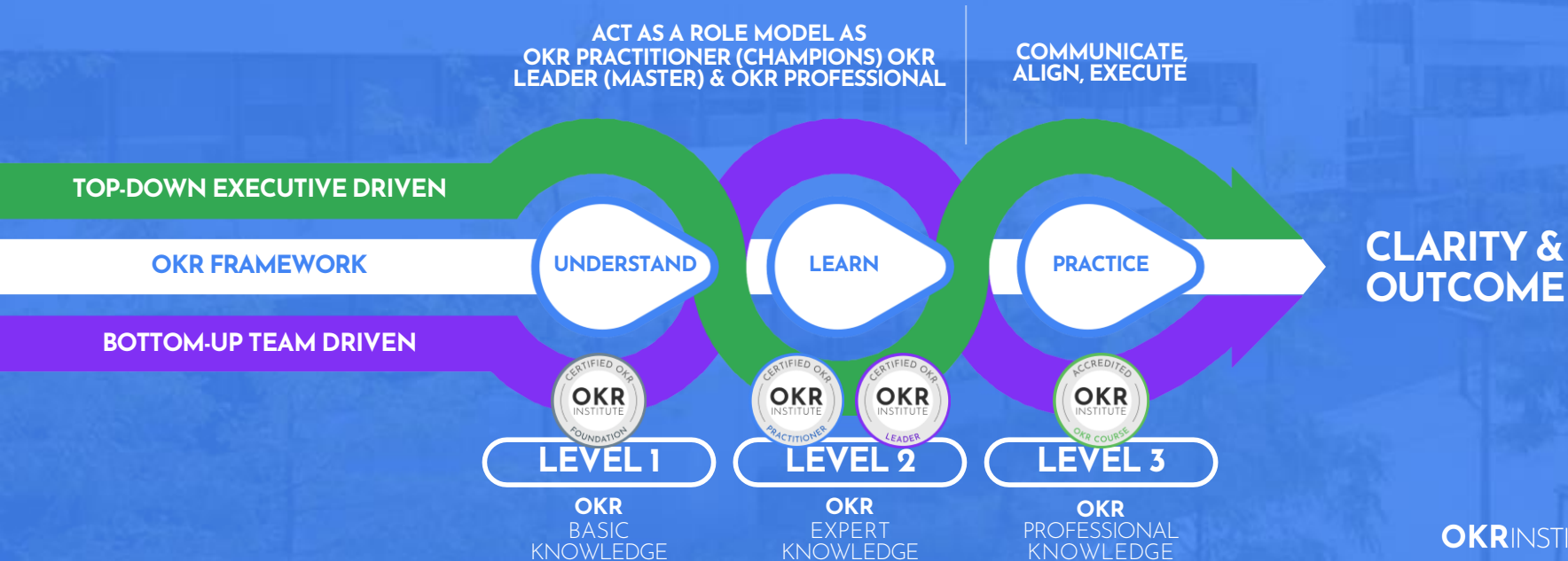
Quarterly Reviews

- Have the lead (owner) of each KR scored the result based on how much was accomplished
- Discuss as a team what went well for each KR, as well as obstacles and blockers. Common questions to help guide the review process include: What came up unexpectedly? Did priorities shift and impact OKRs? How did you do on each KR? What worked, what didn't, and why? What adjustments will we make for the next cycle?
- Talk through what your team should start doing for goals, stop doing, and continue doing. Use this to create an action plan moving forward.
Common questions to help guide the review process include: What came up unexpectedly? Did priorities shift and
- impact OKRs? How did you do on each KR? What worked, what didn't, and why? What adjustments will we make for the next cycle?



OKRI PATH

TOP-DOWN DRIVEN BOTTOM-UP SUPPORT



OKR TRANSITION FRAMEWORK

TRANSITION TOWARDS
OUTCOME-DRIVEN CULTURE

OKRINSTITUTE®

1 - 2 MONTHS

Roll-out OKR crash or practitioner courses for learning the Why of OKRs and how to align and execute

Develop and monitor the new key competencies for OKR Crash Course and Practitioner participants

3 MONTHS

Integrate roll-out methodology to all relevant team members. Start with weekly check-ins

Create an OKR / agile mindset and understanding within the organization via OKR Leadership & Professional Courses

Learn & share with other teams via weekly check-ins, and self-assessment and reflection workshops



UNDERSTAND



LEARN

INVESTMENT

LEVEL 4

CERTIFIED OKR PROFESSIONAL

LEVEL 3

CERTIFIED OKR LEADER

LEVEL 2

CERTIFIED OKR PRACTITIONER

LEVEL 1

CERTIFIED OKR FOUNDATION



Personas and OKR Certification Paths



Business Leader

Leader who drives company, group, or team strategy, creates and approves team / organizational goals, and reviews progress.

Recommended Training:
[OKR Practitioner Course](#)
[OKR Leadership Course](#)

Typical titles: C-Suite, Vice President, General Manager



Practitioner

Central expert and axis that keeps programs on track and connected. Drive overall program and rhythm of the business across the entire organization (multiple teams).

Recommended Training:
[OKR Practitioner Course](#)

Typical titles: Chief of Staff, Planning Lead, Strategy & Operations, Agile Coach



Planning Manager

Individuals and team managers who drive planning & tracking process on a given team. They ensure check-ins, reporting, and meetings follow prescribed rhythm of business.

Recommended Training:
[OKR Practitioner Course](#)
[OKR Leadership Course](#)

Typical titles: Team Manager, Business Manager, Chief of Staff, Data Analytics Manager, Agile Coach



Goal Owner

Users who own goals and are accountable to drive and report progress on goals.

Recommended Training:
[OKR Practitioner Course](#)

Typical titles: Anything from Individual Contributor to Vice President or beyond



Stakeholder

Users who engage with updates on progress of goals.

Recommended Training:
[OKR Foundation Course](#)
[OKR Practitioner Course](#)

Typical titles: Anything from Individual Contributor to Vice President or beyond



Tech Admin

User who does the technical setup & responsible for managing the software and ensures licenses are assigned and security/compliance needs are met.

Recommended Training:
[OKR Foundation](#)
[OKR Software Demos](#)

Typical titles: IT Admin, Technical Operations

Our Advice for OKRs

- Think Big, Start Small, and Start
- Be patient, to fully embrace OKRs 2-8 OKR Cycles before you roll it out
- Introduce OKRs as **vegetables**
- Take time to figure out **what matters**
- Use OKRs to **build, improve and innovate**
- Keep it **simple**
- **Tailor** the framework to your organization (Heartbeat)
- Reviewing OKRs on **regular basis**
- **Not too many** Objectives and Key Results

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