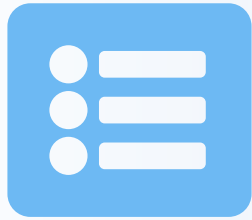


Step by Step Guide to



OKRs



WEEKDONE

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Introduction

Objective and Key Results (OKRs) are often seen as a simple framework with only a couple of principles to follow to help your business achieve its goals. It's so much more than that! "Measure What Matters" is great for motivation and overview, but you probably won't be an OKR expert after reading it. Even those so said "simple principles" are difficult for most to understand. As an OKR software, we have worked with hundreds of companies and we see them making the same common mistakes. Every day we see customers who say they are using OKRs, but when we look at them we cannot find one single OKR listed.

That doesn't mean that people are not able to understand or learn the methodology. They just are stuck in their old habits. Many people want to use new, popular methodologies, but they are not ready to put in the effort to change and adapt.

Now this isn't to discourage you and your lofty dreams of success, but rather to emphasize the point that learning and implementing OKRs takes time, patience, and a change in company culture. There are countless success stories of companies who have implemented the methodology and have had incredible success, with Google, Amazon, and Intel being some of the bigger names. But this then raises the question, what did these teams do right that so many others have struggles with? It doesn't have anything to do with size or funding. We have seen plenty of smaller and mid-sized companies, non-profits, and start-ups have incredible success. It really all comes down to the willingness to change the way things are done and understanding that implementing OKRs takes more than just implementing a methodology.

What do we mean by that? To put it simply, a methodology is not a method. A methodology is a way of understanding how to do something; you also need to have a method and a process for applying it. Many materials on OKRs out there teach you all the great things about the methodology and best practices without helping people understand the methods they need to actually implement OKRs. Beyond that, OKR methodology has quite a lot of nuance and terms such as 'cascading' and 'alignment' that can easily be confused and set you up for failure if not properly understood from the start. Understanding the fine details and finding a method that works for you and your company is often what makes or breaks successful OKR implementation.

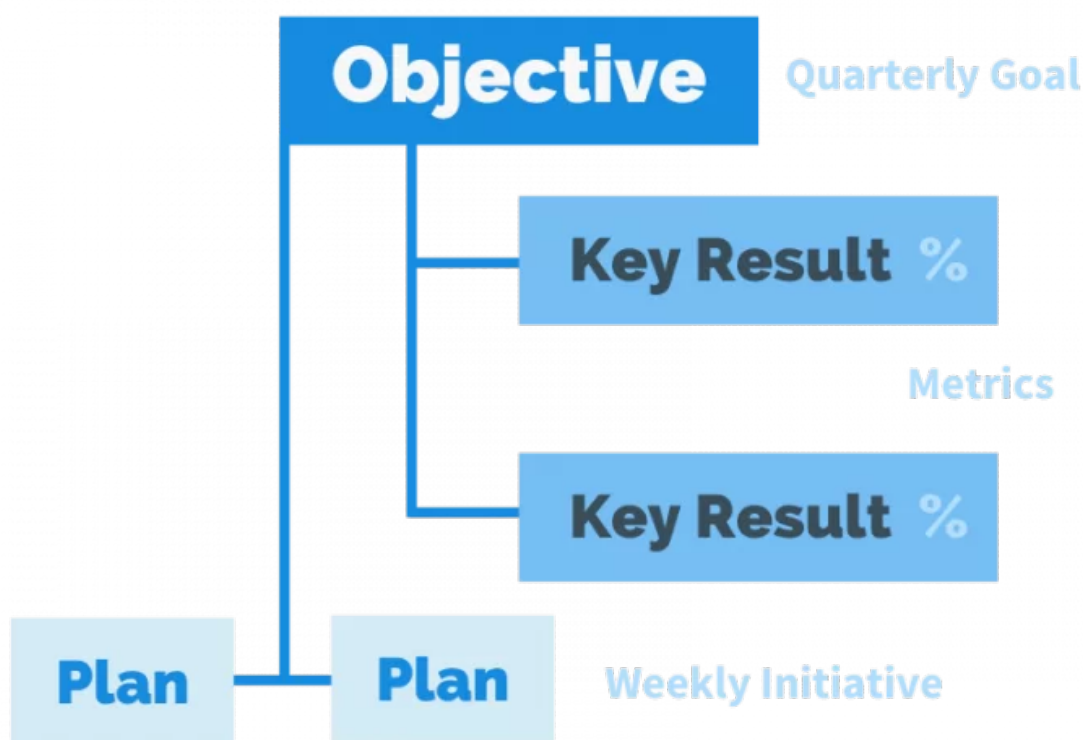
So that's why we wrote this book: to help companies and teams understand both the big and the small of Objectives and Key Result. The materials in this book will give you the foundation you need to master both the methodology and the method, so that you can be added to the list of OKR success stories.

What are OKRs?

Objectives and Key Results (OKR) is a critical thinking framework and goal setting methodology that helps companies to align goals and ensure everyone is working collaboratively on goals that really matter. OKRs can be implemented using spreadsheets, or more commonly, with an OKR software. OKR methodology differs from other goal-setting methodologies such as balanced scorecards, and KPIs.

The OKR methodology is a simple process of setting and aligning company and team goals (Objectives) and connecting each Objective with 3-5 measurable results (Key Results) to measure progress. For example, increase ____ from X to Y. Reduce ____ by X%. Improve ____ up to X%. Key Results can be measured on a 0-100% scale or any numerical unit (ex: dollar amount, %, items, etc.).

As progress is made on each Key Result, progress on the Objective moves forward on a 0-100% scale. Objectives are also supported by your weekly activities and initiatives (plans) that you'll do to drive forward the progress of an Objective. Plans should be created on a weekly basis and be linked to your Objectives.



Objectives	Key Results	Plans
<ul style="list-style-type: none">• Aspirational• Qualitative• Time Bound	<ul style="list-style-type: none">• Measurable• Quantitative• Value-based	<ul style="list-style-type: none">• Actions/Initiatives• Tactical• Weekly Priorities

Example OKRs

Now that you have a basic idea of what an OKR is, let's run through some OKR examples and see what is good or could be improved about each.

Example 1:

Let's say that your company is ready for a growth phase and now you want to reach a lot of people. Marketing decides that they will focus on going viral online to drive more attention to your company. They set an OKR that look like this:

Objective: Make our company go viral

Key Results:

KR1: Generate 100,000 views on our Youtube channel

KR2: Get 10,000 new followers on Instagram

KR3: Increase organic search traffic to our website by 20%

This is a good example of an OKR. The Objective is aspirational and moves the company forward while the KRs are numeric and objectively quantify the success of the overall Objective. Bad Key Results for this Objective would include:

Bad Key Results:

KR1: Make videos for youtube,

KR2: Get more Instagram followers

KR3: Improve SEO

Those examples are bad because they are not focusing on [outcomes](#) but are just about getting something done. Just making videos doesn't always mean that people like them and a lot of people will see them. You need focus on the measurable result to see if your efforts are actually working.

Example 2:

Let's pretend that you are a software company who is selling a project planning software for businesses. You know that to keep up with competitors you need to develop your product to offer more functionalities for your customers. You have decided that you need to come out with a new feature. You set an OKR:

Objective: Design, create, and launch a new feature

Key Results:

KR1: Interview 50 existing customers on what are their needs regarding to project management tools

KR2: Create new feature

What do you think, is it a good OKR? We would say that the OKR could use some work. The Objective is likely not possible to achieve in a single quarter. And while the first KR is good, the second result is not quantifiable. Realistically, during the first quarter you will only manage researching the customer needs and designing the first prototype. Let's try again to set a better OKR:

Objective: Research our customers needs and design a new feature

Key Results:

KR1: Interview 50 existing customers on what are their needs regarding to project management tools

KR2: Choose 2 important needs that can be covered with one new feature

KR3: Test and review 10 competitor tools and document 2 ideas from each to design our new feature

Now our example is more realistic and doable in one quarter. Next quarter, when we are launching the feature, we can set another OKR that focuses on the success and usage of the new feature.

Example 3:

Your company is struggling with bringing enough money in. After looking into your data, you know that the problem is not having enough leads. You decide that you need to try some new ideas and marketing channels. Email campaigns seem to be the best thing to try so you set your goal:

Objective: Implement new outbound email campaign

Key Results:

KR1: Write email copy to send to outbound leads

KR2: Get a list of outbound leads

KR3: Send email to everyone on list

Unfortunately this would not be considered an OKR but rather a project with a task list. The Key Results do not contain any numbers. Remember, Objectives are large aspiration goals and KRs are a quantifiable measurement of that goal. If we were to rewrite the OKR, it would look like this:

Objective: Implement new outbound email campaign

Key Results:

KR1: Improve open rates from 15 to 25%

KR2: Increase monthly email sign-ups from 200 to 300

KR3: Grow email list from 30,000 to 40,000

Now the OKR is much better. The Objective is inspiring and the Key Results are now quantifiable. From there the team can ask how they can drive those Key Results forward with their work. For example, they may improve sign-ups through a better call to action or grow the email list through an advertising campaign or content exchanges.

What is Goal Setting?

OKRs serve as a goal setting methodology. But before jumping into them in more depth, you should really understand what the term “goal” actually means. You’ve probably heard of different terms like goals, targets, OKRs, Key Performance Indicators (KPIs) and metrics. In many cases, these terms get mixed-up. Each of them needs to be defined so there’s no real confusion.



What are goals?

Goals in a business are something that a company plans to achieve in the future. A goal is the result you want to obtain. At their core, goals are all about commitment. They give a business direction and help you focus on what’s important. Goals can be overarching (directional) and focus on the largest aims of the company (aka company goals), or operational and focus on function-specific team level priorities. Depending on the level though, goals can fill specific niches based on development needs as well.

Goals should be known by everybody in the company and planned initiatives should help your team move towards those goals.

Goals vs Objectives

The line between goals and Objectives is so thin that it basically doesn't exist. They both represent a desired result or achievement. There are different theories saying that goals are usually more long-term and cover the big picture and Objectives are more specific, actionable and set quarterly.

Separating goals from Objectives may be relevant to some goal setting methods but it's definitely not needed while using OKRs. We say they are the same thing! Trying to separate those two terms doesn't actually give you any value, so why bother?

OKRs vs KPIs

Key Performance Indicators (aka business metrics) are numbers that you look at to make sure you are maintaining a healthy business. You need to set numeric expectations of performance and set clear targets for the company, departments, teams and individuals. These indicators direct your attention towards what they are monitoring, and they simply tell you if you are meeting your targets or not.

For example, your Sales team KPI might be a number of closed deals per week, and a target (expected level of performance) could be from 10 to 15 on average. So if you're meeting the KPI target of at least 10 deals, it means you're maintaining your efficiency.

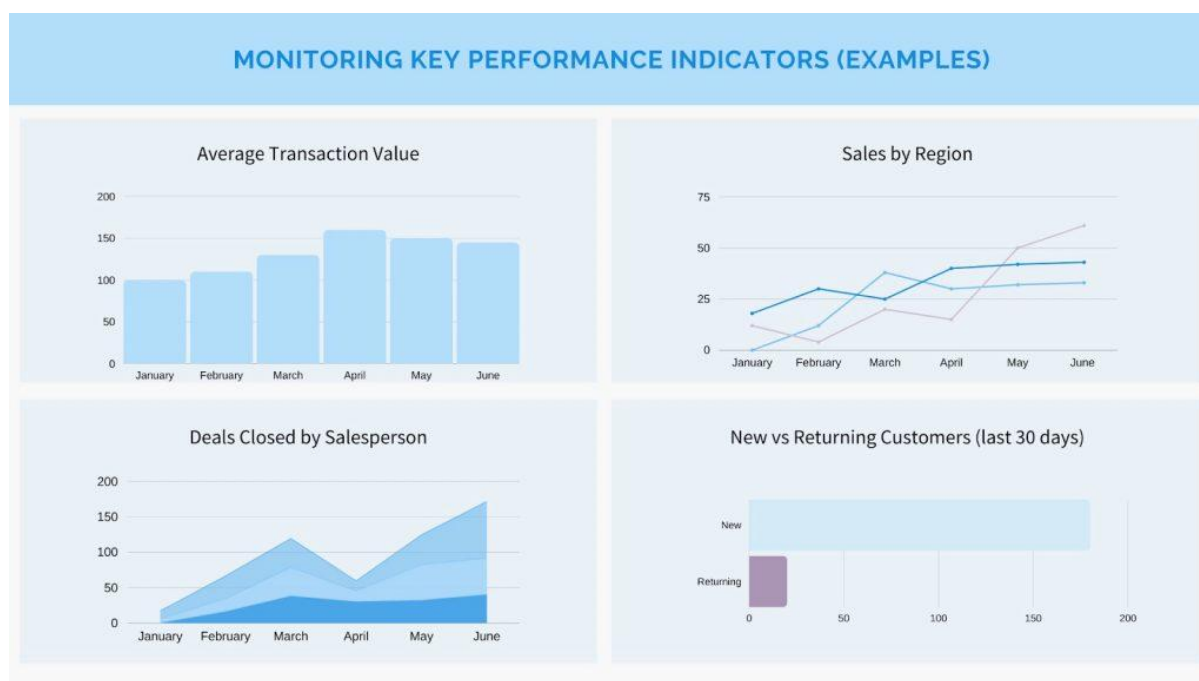
In most companies, KPIs reflect revenue targets and month-on-month growth of various business metrics. You can track all of your regular business activities with KPIs, such as:

- revenue,
- customer acquisition cost,
- changes in website traffic,
- ROI,
- market share,
- employee turnover rate,
- customer satisfaction,
- number of new and recurring purchases,
- sales by region,
- a number of daily meetings you have with potential clients, etc.

These targets can be annual, quarterly, monthly, daily or even hourly, depending on your needs.

Numbers don't lie, and looking at KPIs in retrospect helps you to make predictions for the future: which months are going to be good, which potential clients are more likely to become paying customers, etc.

Analysing your performance against KPI targets allows you to understand how to keep your business going. Simply put, you cannot have a functional, well-organized company if you are not measuring your KPIs.



However, having these numbers doesn't really tell you directly how to improve them. You cannot grow a business by simply saying "we need to hit a higher revenue target". And if you're falling behind on your KPI targets, what exactly do you need to improve to put everything back on track?

This is where we begin to discuss the difference between OKR and KPI.

OKR vs. KPI: How can you tell the difference?

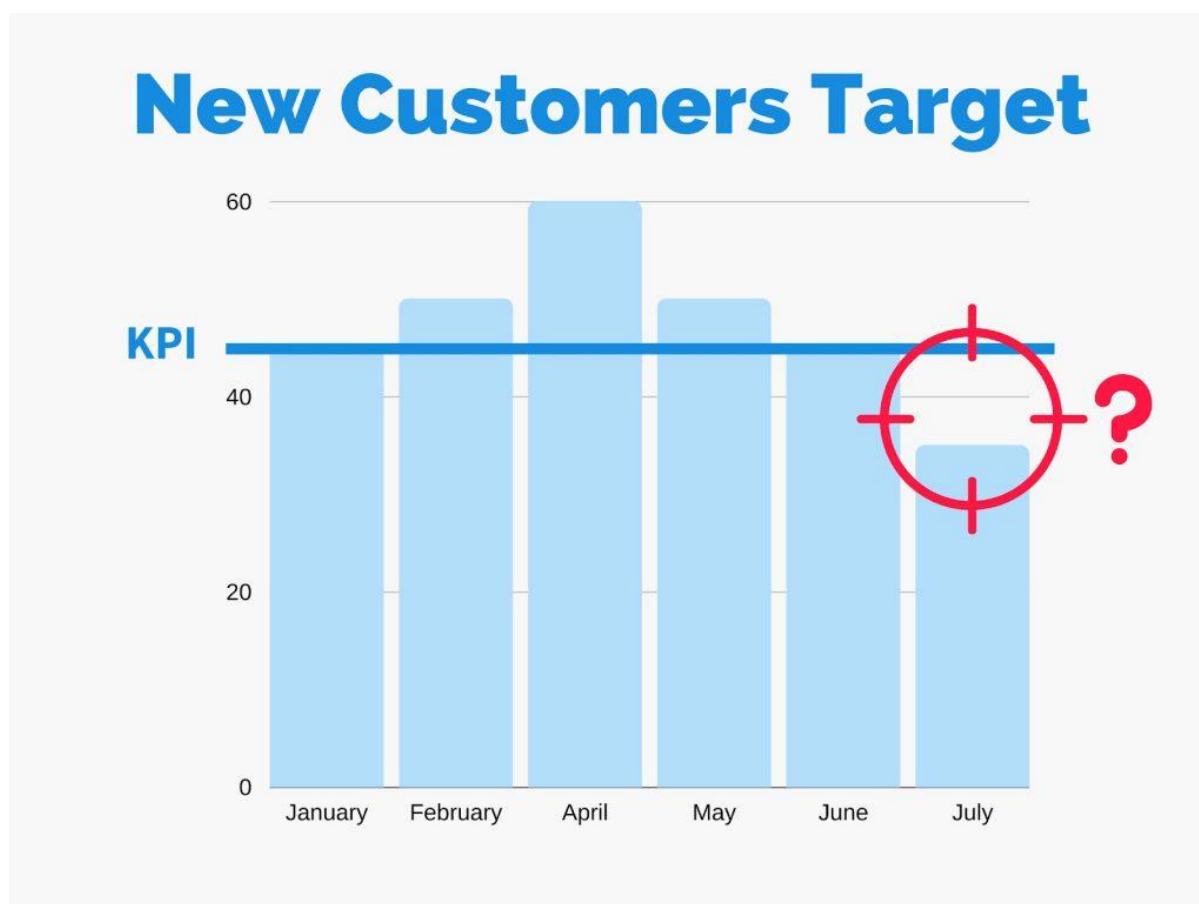
You cannot switch from KPIs to OKRs as they are not interchangeable and their purpose is completely different. If you want to grow, improve and sustain your business, you should learn to use both.

KPIs as “Health Metrics” help to identify where attention is needed.

Do you know how much money your business is capable of making on a monthly basis? That is your monthly revenue KPI, and if your target is \$100,000, you would deem yourself in good shape if you were hitting it each month.

If suddenly revenue drops to \$90,000, you would direct your attention to this and start digging into the “why”.

Normally, each team will have a KPI to measure their own efficiency and analyze if everything is working as it should. For example, let’s take a look at Company A whose Sales team’s KPI target (health metric) is to bring 50 new paying customers each month.



KPIs are usually achieved with business-as-usual and as a part of the daily routine. In other words, when people are doing what their job description says they should be doing, they should be achieving these targets.

If in a given month, the team is bringing in at least 50 new customers, the team is hitting the KPI target and no extra attention is required. Whatever tactics they apply, it works.

But if new customers' number drops below 50, then both the team and the company know an extra focus is needed to analyze what happened and what needs to be improved. So a sudden drop in your KPI suggests that you need an OKR to improve a particular area in your business.

KPIs as business-as-usual growth targets help to specify expectations for performance.

Companies also use KPI targets to maintain steady business growth. Normally, each company has a revenue target and month-on-month growth expectations. It may be a 5% or 20% month-on-month increase in revenue or client base. Remember, a target is the level of performance you want to achieve.

But what if the company wants to achieve explosive growth in the foreseeable future?

Let's say, Company A has a revenue target in mind: they want to double their earnings in 5 months from now. This is a challenge that definitely requires an OKR goal-setting process.



As a first step, what would you need to improve, change and rethink as a company to drive growth? Would you consider expanding your business to a new market, or increasing revenue per customer, or leveraging unconventional marketing channels, or looking for new audiences? You should choose a specific area to focus on and set it as a Company Objective for a quarter.

When the Company level direction is clear, what can each team contribute to move the company forward?

Team OKRs should [align](#) with the company level overarching goal. If the company direction is to increase the revenue per customer,

- Sales team can focus on upselling to new customers,
- Product Development can increase engagement of the client base and make sure that the product becomes indispensable,
- Marketing can develop new subscription offers and packages to make longer-term cooperation more appealing.

As you can see, KPIs and OKRs actually work together quite nicely: KPI being a starting point of a conversation about improvements to implement or problems to solve, and OKR specifying a focus area and measurable outcomes to be achieved to deliver on those improvements.

Your goals are set, what's next?

Goals are driven forward by plans. If goals answer the question “where”, then initiatives are the “how” part. We like to use the term initiatives, but you may use different terms like – plans, tasks, (key) actions, projects, etc. Goals definitely aren't just a list of initiatives because completing one initiative doesn't mean that the [outcome](#) is what was expected.

Initiatives are important because if you don't focus on your goals and don't have a plan for how to achieve them, then there is a big chance you are going to fail. Whenever your goals aren't moving forward you need to change what you are doing or try new initiatives. It's crucial to have a readiness and open mindset to change methods or try new things in your company when you are trying to take it to new heights.

Benefits of OKRs

All companies recognize the importance of goal-setting. That is why there are so many articles on how to write goals and measure success.

The benefits of OKRs definitely come to those who follow best practices and avoid the most common mistakes. But remember, when you “do things your own way” and bend the methodology too much, you might lose the benefits.

Here we will discuss what benefits you can expect from OKRs and why you should implement this methodology. Whether you're a novice or an expert, you will find great insights in this chapter to understand the benefits of OKRs and explain these benefits to your teams.

OKR creates intense focus and teaches your team to be result-oriented.

Clear focus for the team and company

Their main purpose of OKRs is to better your business by singling out improvement areas for the quarter. You can either identify what needs fixing or brainstorm ideas for doing things in a new way.

Start by defining the direction for the whole company, and have teams write OKRs to align with the overarching, company goal. You win by having a clear destination for all teams in your organization. OKRs help you agree on the main focus for the quarter and make sure teams deliver the results that are bringing value for the business.

The world's most successful organizations set OKRs quarterly. Three months is enough time to deliver valuable outcomes. During this time you will learn what works best and adjust your focus areas for the next quarterly cycle. By reviewing your Objectives and Key Results every 3 months, you have 4 chances per year to respond to the changes in the real world. As opposed to having an annual review and realizing that you've been on the wrong path for a year. The world is constantly changing, and so is the market. You have to respond!

Teams take ownership of moving the company forward

Team OKRs should align with the Company Objectives and contribute to them. This means that the company is creating a unified direction through Objectives, and **teams will take ownership of delivering on their OKRs to move the company forward.**

Ownership mentality cannot be assigned, it rather comes naturally to the teams who are trusted to do the right thing. That is why, to live up to their potential, teams should be responsible for writing their own collaborative OKRs and deciding on how to invest their time and energy in the best possible way: i.e. what can they fix, change or improve? The OKR framework encourages teams to think about what kind of role they are playing and what they can do to make their contributions more valuable.

Unified understanding of success

According to the OKR method, an Objective should have 3 to 5 Key Results to define what exactly you want to achieve. So Key Results are measurable [outcomes](#) that determine the success of a particular Objective. When the Key Results are clear, the teams then have freedom in deciding which plans are more likely to deliver on the desired outcomes. They can try different approaches and tactics until the Key Results are achieved.

With OKRs, your whole company is aligned and moving in the same direction.

[Alignment](#) is often the very reason why companies want to implement OKRs in the first place. And if the framework is implemented properly, all teams will move in a unified direction.

OKRs make sure your whole company understands what's important right now. It sounds quite simple, but in reality, it's all too common for teams to work on their own things in silos, use valuable resources (like time and money), and pull the company in different directions. If you're not rowing in the same direction, you're either moving slowly or not moving at all.

That doesn't mean that all teams should have exactly the same shared OKR. What it actually means is that teams would be approaching a bigger overarching Objective from a team-specific perspective, function, and expertise.

There are always many things for teams to do, but if they are not working towards the same company goals, they are most probably slowing down the entire organization. Alignment (if done right) has strong implications for growth and efficiency.

You gain organization-wide transparency and build effective communication.

To align the teams and have everyone move in the same direction you need to allow transparency throughout the entire organization. Ideas and pieces of information, like pieces of a puzzle, need to connect to produce a bigger picture.

This is not about sharing high-level financial targets; transparency comes from meaningful discussions led by the OKR process. It begins with communicating Company Objectives for the quarter with context and background information. What problems are we facing? What areas should we improve? What's stopping us? Encouraging everyone to share ideas and participate in these discussions creates an environment for effective communication among teams and individuals.

Sharing information and key learnings in the company (either in meetings or in organized digital workspaces) is crucial for healthy work relationships, nurturing trust, and connecting ideas. It's definitely worth doing because transparency leads to effective communication and improved productivity.

By using an OKR software like [Weekdone](#), you effortlessly allow full visibility of OKRs, Weekly Check-ins (Plans, Progress, and Problems), comments, and updates related to them. They are clearly structured and easy to access.

Here's what you get with full visibility and easy access to quarterly OKRs and weekly plans:

- It **saves teams time in meetings** so they can focus on execution. Team discussions should be about getting organized and keeping track of their progress: what's working, what's not. Everything else people can read on their own time.

- **Business processes run faster.** Since people know what's going on in the company's life, it's much easier to maintain a sense of urgency for Company Objectives.
- **It boosts engagement and fuels accountability.** When a team's priorities and achievements are seen by others, there's no place for excuses or just pretending to be busy. There's also no place for procrastination. And, more importantly, when they get it done, others can see how valuable their work is, and they feel appreciated. Motivated teams who take ownership of their OKRs is the dream of every leader.

OKRs lead growth, improvement, and innovation.

Companies use OKRs to drive growth through improvement and innovation. This means OKRs are not a list of everything you do in your business. Business-as-usual operations are your regular day-to-day work, and OKRs focus on change: either in what you're doing or how you're doing it.

Working with OKRs means that all teams need to think about what they can contribute to achieving Company Objectives. What can they do better? What should they improve? Is there something they are doing great and can they raise the bar and bring even better results?

These questions start meaningful conversations in your teams and your company would benefit greatly from knowing the answers. To get incredible results you need a goal-setting methodology that leads you to think outside of the box. While agreeing on the ambitious results (measurable outcomes), you leave a lot of room for creativity on how to achieve them. Versus, if you just tell people what to do (outputs) and might be completely wrong about what works and what doesn't.

OKRs put great emphasis on effective teamwork, alignment, and accountability which is achieved through focusing the entire team on working smarter, not harder.

When you work hard, you cross 50 items off your list, and nothing changes in your business. Working smart, however, means figuring out high-level priorities, defining measurable outcomes that you want to achieve, and taking immediate massive action.

The benefits of OKRs are not circumstantial or accidental. You can enjoy them fully only if you are being intentional in your goal-setting process and follow the main principles and guidelines.

Getting Started with OKR

Before we go into specifics about OKRs, let's go over the basic OKR process to give you some overview about how all this works. The basic OKR structure is rather simple and streamlined. You can define OKRs in a spreadsheet or special OKR software like [Weekdone](#).

1. Set your Objectives

As you begin setting your first OKRs start by defining 1 Objective for your company. (As you get more comfortable using OKRs, you can add more Company Objectives, but you will never want more than 5.) Communicate and explain this Objective to your functional teams (for example, Product Development, Marketing, Sales, etc.) and ask the teams to set their contributing Objectives to be aligned with the Company Objective. Each team should think about how they can help move forward the company goals.

Remember, Objectives should be ambitious, qualitative, achievable in a quarter, and actionable.

2. Define your Key Results

Under each Team Objective set 3-4 measurable Key Results. The job of Key Results is to measure how close you're getting to achieving your Team Objective. The company Objectives don't need Key Results because those goals will be moved forward by Team OKRs.

Measurable Key Results can be set in a different ways:

Increase _____ from X to Y

Reduce _____ by X%

Improve _____ up to X%

Achieve X amount of _____

By moving the needle on Key Results, you're driving the Objective forward. Key Results can be based on growth, performance, revenue, or engagement.

3. Update your OKRs

While you should set Team OKRs quarterly, it is important to go over your OKRs every week. This way you can make sure you stay on track with your goals and provide feedback to team members as necessary.

4. Plan your activities and have weekly check-ins

It is also important to incorporate OKRs into your weekly activities. Each week think about what projects and plans you should focus on to achieve those Objectives and write them out. This way you can see how all your efforts help you achieve your goals. It's good if once a week you check-in with your team to see how the OKRs are progressing and what they have been up to.

You will learn more about [weekly plans](#) and how to run good [weekly OKR check-ins](#) in future chapters.

5. Review your OKRs

At the end of the quarter each team should then look back at the accomplishment of their OKRs. See what you did well and what you can improve. It's really important that you mark down your learnings. Even if you failed moving your Objectives forward percent wise, you might have gained a lot of new knowledge. From there you can start planning your team's OKRs for the next quarter.

Company wide, you should have an OKR review 2-3 times a quarter to share thoughts and learnings.

We will go over in depth what it takes for a [successful OKR quarterly review](#) in a future chapter.

Writing Good Objectives

Before writing an OKR you need a good understanding of what you want to accomplish. First focus on your Objective. Think of the potential Objectives you'd like to accomplish this quarter, and ask yourself the following questions:

1. Does the Objective help achieve company goals?
2. Is the Objective inspiring?
3. Does this Objective provide business value?
4. Is this Objective really achievable in one quarter?
5. Is this Objective solving the problems our team is having?
6. Is this Objective actionable and achievable by just us?

It is also important to consider what Objectives are not:

Objectives should not be easy.

If you are starting out with OKRs, create [committed](#) OKRs and try achieving 100% of your Objective in 3 months. It will help to support team morale and motivate people to set more ambitious goals next quarter.

If an Objective is achieved well before the end of the quarter you weren't thinking big enough. If you don't reach anywhere near that, you may have set an annual goal instead.

When you become more comfortable with OKRs, you will want to make them [aspirational OKRs](#). When you hit 65-70% of an ambitious goal, it is still quite an accomplishment! This is why you should be satisfied if you only achieve two-thirds of your Objective in a quarter.

That being said, you want to make sure that two-thirds doesn't become the new 100% for your team! Everyone should always aim to achieve 100% of their Objective by coming up with new ways to produce better results.

We will talk more about [committed vs aspirational OKRs](#) in a future chapter.

Objectives are not projects with sub tasks.

Objectives are [aspirational](#) goals. They are not one-off activities, which would be considered tasks or plans.

So if we wanted to write an Objective for a company to increase their revenue, a good Objective would be:

O: Increase product reach in Germany in Q3

This Objective works, since it's aspirational, time bound, and helps move the company forward.

An example of a bad Objective would be:

Objective: Write a product marketing plan for Germany

This is a bad Objective as it is not something that you will do all quarter, it's not inspiring, and not forward-looking.

With Objectives, it's all about being qualitative. They should describe the desired outcome. For example: **Understand customer needs** is a good Objective because it's clear and aspirational. You don't need Objectives to be measurable, unlike with Key Results.

Keep in mind that Objectives should also be time-bound. Either quarterly for Company or Team Objectives, or annually for Company Objectives. If you are setting company annual goals, you should further break them down into quarterly Objectives.

There's no point in setting goals at all if they'll just carry over quarter to quarter without any improvement. They would then be KPIs, which are useful for monitoring the status quo.

You can see more examples of Objectives for your given field at okrexamples.co. To play around with defining OKRs, [sign up for free at Weekdone](#) and try setting some OKRs with our OKR Wizard.

Setting Key Results

Key Results measure how close you're getting to achieving your quarterly Objectives. After analyzing your major priorities and deciding to focus on a particular Objective, you then need to decide on your Key Results. Remember Key Results are the way you measure your Objective.

Key Results should be specific, measurable (quantifiable), achievable, actionable, objectively graded, and be difficult but not impossible.

Key Results are:

- Specific
- Measurable or quantifiable
- Achievable
- Actionable
- Objectively graded
- Be difficult, but not impossible

It's also important to think about what Key Results are not as well:

They are not binary.

Key Results should be numeric and be updated throughout the quarter. If your Key Result is binary it may be a task or plan and not a Key Result. Which moves us to the next point.

They are not tasks to be completed.

While plans and projects are important in supporting your objectives, Key Results are measurable business outcomes and should be treated as such.

Before we made a good Objective example stating “**Increase product reach in Germany**”. Some good examples of Key Results for that Objective would include:

KR1: Increase German Sign-up to MQL conversion rate from **15 to 20%**

KR2: Increase German MQLs from **300 to 500**

KR3: Increase German SQLs from **200 to 300**

These examples are measurable (quantifiable), objectively graded, and while challenging they should be achievable.

A bad example of a Key Result would be:

KR: Discuss how to market our product in Germany

This Key Result is not numerically measurable and it is not objectively clear how it contributes to the Objective, as just discussing something doesn't show any kind of progress. This would be considered as a thing to do. Remember that Objectives are large aspirational goals and Key Results are a quantifiable measurement of that goal. You can see more examples of Key Results for your given field at okrexamples.co.

Outputs vs Outcomes

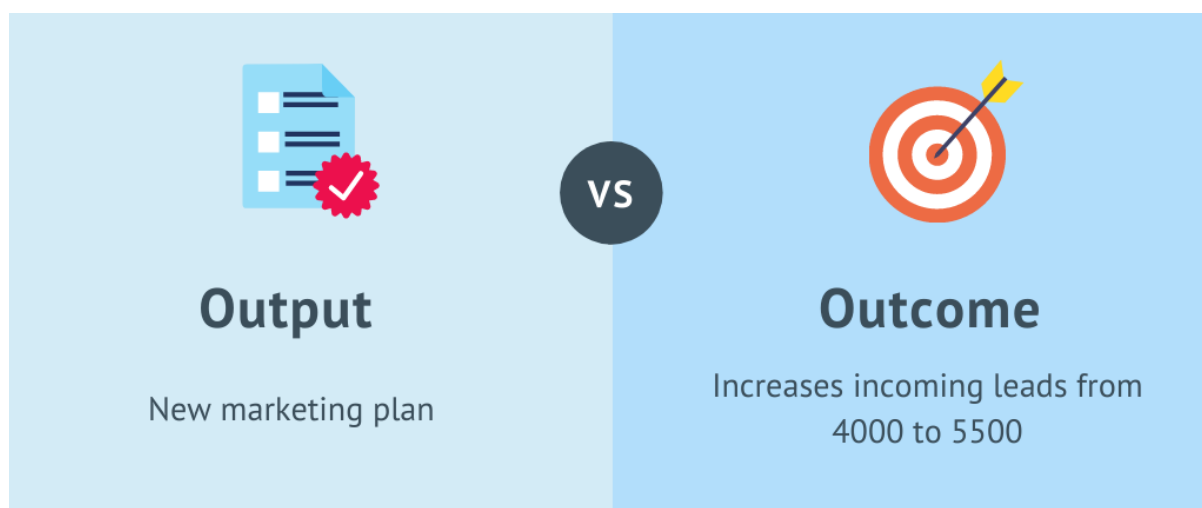
The biggest challenge that most companies face is that instead of defining Key Results as measurable outcomes, they set a list of action based outputs. This goes against the

whole point of OKRs. Let's look at the difference between outputs and outcomes and why this topic is important.

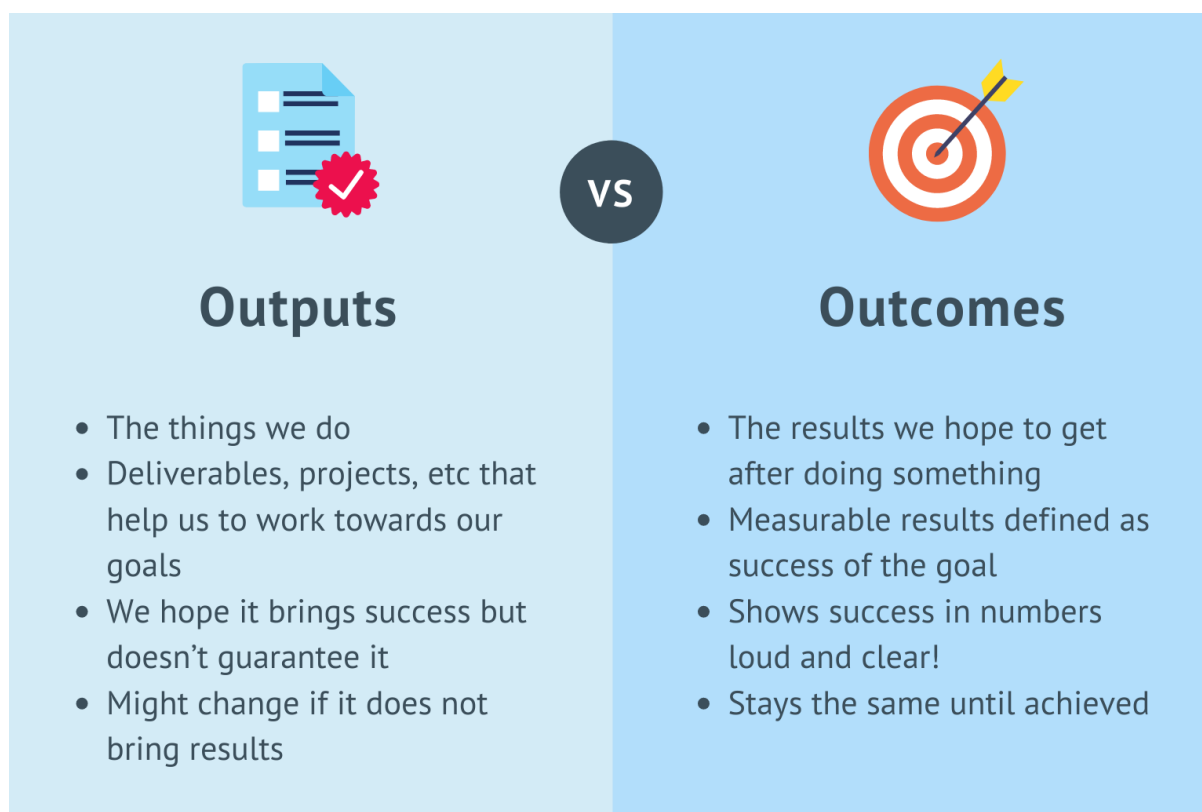
Output is just one term that can be used to describe activities. You can also call them initiatives, plans, projects, deliverables, milestones, tactics, etc. There is a slight difference in those terms, but within OKR methodology they mean the same.

Output is an action that you take towards your goals. One thing is for sure, they are not measurable outcomes! Writing and delivering a new marketing plan doesn't mean that the new plan is good and that it will bring lots of new customers.

Outcomes are the measurable results that you hope to see after you have completed your outputs. Outcomes are not about doing, they are about delivering real, valuable business results. If the marketing plan is our output then the desired outcome of it might be that executing the new marketing plan increases incoming leads from 4000 to 5500 per quarter.



Everything has its place, and so do outputs. They are still important to achieve your goals but it's not where your focus should be, and it's not a way to measure success. **You need to keep your eye on measurable results that deliver business value.** If something doesn't deliver that success - then stop doing it!



Why do Outputs vs Outcomes even matter?

Writing a list of outputs instead of thinking about real business outcomes is one of the main reasons why companies fail with OKRs.

The core point and value of OKR methodology is in setting measurable business outcomes. OKRs are about focusing on results that bring real business value instead of just doing different activities. If you are not setting any measurable outcomes, then it's impossible to see the real benefits of this methodology.

A lot of companies say that "this is the way we do OKRs". Why do you put people through all the trouble of changing their workflow and adapting the new OKR method if at the end of the day you still keep doing the same projects and delivering outputs that aren't driving the results you need?

Focusing on outputs is yesterday's practice.

Focusing on outputs is what a lot of companies are used to. The management sets its long-term or annual strategic goals and decides on how those will be approached.

Meaning they set the high-level outputs, KPIs or metrics targets. And as we learned earlier, KPIs and metrics are not the same as OKRs!

After setting outputs, they are cascaded down and teams are asked to deliver those different projects on certain due dates. No one even asks why they are working on this, or even consider if something has changed in the business landscape they need to adapt to. The outputs get delivered and the team gets their praise because they are on time. But did everything work out and did these activities bring any business value? Was it even the right thing to do?

Cascading outputs from management to teams has many other downsides, which eventually means that the company achieves less than it's actually capable of. The cascaded outputs tend to be complex long term plans which can confuse the individuals they are assigned to.

The most common downsides of cascading outputs

Lack of clarity brings low business value

Cascading outputs mean that people just know what they need to work on but they are missing the why. It's hard to deliver something good if you don't even understand why you are doing it.

For example, you have to write a new marketing plan. But if you don't know why then how do you know what areas the marketing should be improved? You might decide to focus on cooler ad designs but what the company actually needs might be more high-quality leads. Cooler ads are just cool and attract even more unneeded leads. So no real clarity equals low business value and you have just wasted a lot of your valuable time.

Downsides of Cascading Outputs



LACK OF CLARITY BRINGS LOW BUSINESS VALUE

Setting Outputs is about agreeing on next projects and plans to work on. They describe the action but not why something is important and what value it should bring to the business.



UNMOTIVATED EMPLOYEES

Self-realisation and being valued as an employee is something that almost everyone wants. If you are just cascading Outputs you are not listening to their actually very valuable opinions. Employees might not know why they are working on something and it's hard to deliver any results.



WRONG DECISIONS ARE MADE

Management is good at running company but that doesn't mean they understand each function in depth. Sales team is best at making the decisions about sales team improvements or at least giving the input. If the management makes the decisions for them, they might not focus on the right areas.



OUTPUTS MIGHT SIMPLY NOT WORK

You might think that you have chosen to work on something that will bring the company a great benefit but what if you were wrong? Because your focus is on just doing and not measuring the results then you might not even know if you have failed to achieve any actual Outcomes.



Unmotivated employees

If employees feel that their opinion is not valued in making decisions about the right things to improve, even though they are the experts in some areas in the company, it can cause low motivation and productivity. If you know more about motivational theories, you would know that self-realization and feeling valued plays an important role in employees' work motivation.

Also, low clarity and not delivering business value might mean that management is unhappy because things are not actually improving. That dissatisfaction is passed down to the employees who feel that they are just constantly doing something but things are not progressing for the better. Think for a second, how long would you be motivated if you feel that you put in a lot of energy but it just doesn't work out? Probably not for very long.

Without any input from teams, management can make the wrong decisions

Even though management is a group of people who are leading the company, it doesn't mean that valuable input and information can't come from other employees. People who work in certain job positions, like sales, marketing, etc. daily are probably the best people to tell you what seems to be working and what needs improvement in those areas. Management should collect this information and help teams set and align their goals.

For example, management might see that revenue isn't coming in as it should and sets a goal for Sales to get more customers. But just reiterating targets doesn't make targets happen. People in sales, on the other hand, know that they could upsell a lot of current customers and could focus on that to increase revenue. Bringing in more customers is harder and keeping old ones adds more long-term value.

Outputs might simply not work

Upper-level management might think that they have chosen to work on something that will bring the company a large benefit but what if they are wrong? If you are focusing on the action and not the results that you are hoping for then how do you know when you

are off track? Time is valuable, so why would you spend your time on just doing things if focusing on results could help you choose the right things to work on.

If you want to be the next Google you need to be ready to adapt OKRs as they are. Not just calling what you're doing OKRs without really putting in any effort.

What are outcomes and how to set correct Key Results?

Outcomes are the measurable Key Results and the success indicators of your Objective. When the Objective defines the direction and the focus then the Key Results help you to understand what you are looking to achieve. Key Results measure the success to know when you have achieved your Objective.

Let's continue with the new marketing plan example. Your company realized that you need more leads to increase sales. Marketing wants to write a new marketing plan to try to increase leads. In that case, your Marketing team Objective might be "**Increase our brand awareness to bring in new leads**". The new plan is just a way to approach this. From this Objective we can see that we need to define Key Results in at least two areas:

1) **What measurements will show that we have done a good job sharing our brand?**

and

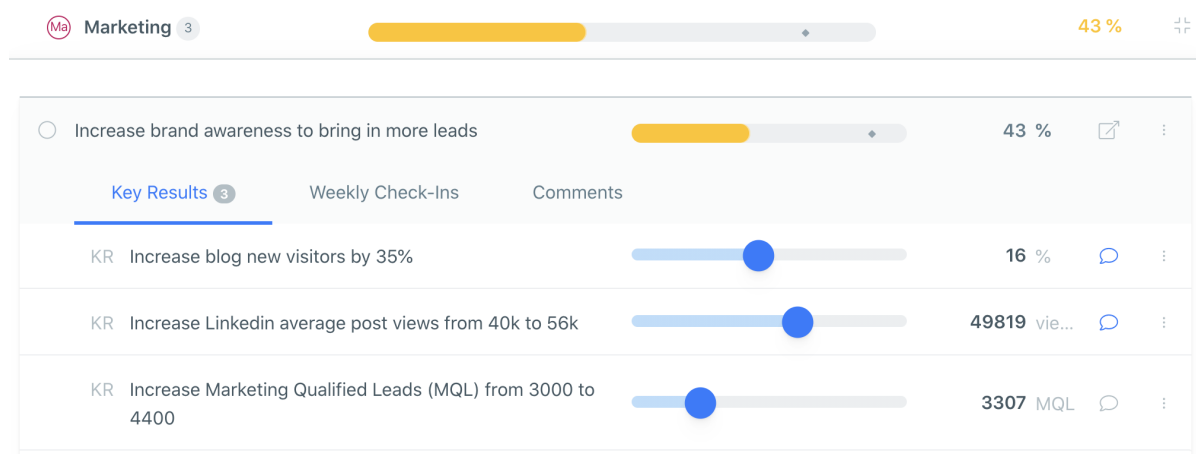
2) **How many new leads are we hoping to get?**

Depending on what works best for your company, there are many ways to measure if you have made your brand visible to new audiences. If you have a blog you could set a KR saying "Increase blog new visitors by **35%**". And you could try to be more visible in social networks as well by setting a KR "Increase LinkedIn average post views from **40k to 56k**".

Your first thought may be that we will set a Key Result to publish one new post per week. This is an output, not an outcome! Maybe the article is bad and no one shares it. Or it doesn't start ranking in search engines and doesn't reach many people. In that case, we can't say that we have increased our brand awareness. Focus on the outcomes! If the article did not bring the results then let's analyze why and not keep writing more useless articles.

When it comes to getting more leads, think about what you actually want. Do you want just more leads or you want leads that actually convert to customers as well? Probably the latter. That means if you do not know yet which kind of leads have the highest chance of ending up as customers, then it's time to look into it. You should start by defining the requirements for Marketing Qualified Leads (MQL). Based on that we can set a new Key Result saying "Increase Marketing Qualified Leads (MQL) from 3000 to 4400". Again, any lead doesn't count, only the ones that match the MQL criteria.

And we have our Objective with proper, measurable, outcome-based Key Results:



Keep asking "Why"

As you can see from the example above, setting Key Results is like being a curious 5-year-old who is continuously asking "WHY?". The why questions are a good way to take you from the first ideas (which are usually outputs), to a deeper understanding of the actual needs. The "why" is the outcome we need for the business.

If you are stuck with setting outcome-based Key Results, ask someone to keep asking you "why" and continue the dialogue until you are happy with what you are hearing. Let's go through more examples.

Sales example:

(Bad) **KR:** Implement new sales process

Why?: "Because our results are too low right now."

Why?: "Because our sales take too long and we can't sell enough in one month."

Our outcome isn't that we have the new process, this is our output. The real outcome that we are looking for is that we could close sales faster. We just need to define how fast is enough.

Our KR could be something like:

KR: Reduce lead to closed sale average time from 14 to 10 days.

If the new process doesn't bring immediate results, we need to keep improving it until we have reduced the average close time. We keep the focus on the measurable outcome!

Product Team example:

(Bad) **KR:** Update our in-product onboarding tips

Why?: "Because customers do not follow them."

Why?: "There seems to be too many and they get tired of them."

What we actually want is to have less but useful onboarding tips so customers would complete all of them. We could set two good Key Results from that. One focusing on making onboarding shorter:

KR: Reduce onboarding steps from 15 to 7.

And another making sure that now customers are really completing them:

KR: Increase onboarding steps completion rate from 20% to 56%.

If you focus on just updating the tips, it may not make any difference. You need to understand why you are doing this and if it really helps.

Outcomes drive the business forward, not outputs

Remember, that output is an action or a delivered project, document, etc. It just shows that something is done! Outcome is a measurable result that helps you see if something you did brought any business value. You need to start focusing on outcomes because this is what drives the business forward, motivates people, and brings in more clarity for the people in your company. Outcomes also help you to define which projects are important to work on now. When you clearly see results projects bring, you can stop

wasting your valuable time on something that isn't worth the trouble.

Here is a quick tip on seeing if your Key Results are outcomes. Does your Key Result have a number in it? If not, then most probably you have an output instead of outcome. And if there is a number, make sure that you aren't just measuring the number of tasks but the desired outcome of those tasks. Remember, keep asking "why"!

How OKRs and KPIs can coexist

While KPIs are business metrics that reflect performance, OKR is a goal-setting method that helps you improve performance and drive change. So KPIs let you know what you need to analyze to determine the basis for your OKRs.

There are two specific instances when a KPI number suggests that an OKR is needed to address a particular issue:

- If you're falling behind on your KPI target, you need an OKR to put everything back on track.
- If you want to achieve a more ambitious KPI target (like a big revenue number), you need OKRs that will guide you there.



OKRs are the bridges between where you are and where you want to be. The purpose of the OKR methodology is to single out improvement areas for the quarter and focus your teams' attention on delivering valuable business results.

If you have discovered that you're falling behind on your KPI targets, how do you identify the problem? How do you know what's causing you trouble?

To understand why the team is falling behind, you need to analyse cause-effect relationships in your business environment and understand what's changed. Sometimes the change you're seeing is a by-product of a different issue that you need to solve first.

As we stated in the previous chapter, to get to the root cause of the problem, you should continuously ask "why" something is happening. So if your Sales team KPI target is to close 50 new paying customers per month, and now they are only bringing 30, here's how you start digging:



If you have discovered that the issue is indeed customers choosing another offering, ask your teams to suggest their OKRs to **increase the competitive strength of your product** by setting this as a Company Objective.

The focus area for different teams could be on

- improving certain aspects of your product/service,
- marketing activities that could attract more potential buyers,

- sales process,
- communication channels or something else.

Deciding on what matters most is the foundation for writing Objectives and Key Results.

Here's an example of what Team OKRs might look like.

COMPANY LEVEL QUARTERLY OBJECTIVE: INCREASE THE COMPETITIVE STRENGTH OF OUR PRODUCT

Marketing Team OKR

Leverage "social proof" to increase credibility



- Get at least 15,000 views on our testimonials page
- Reach an average CTR of 20% in the communication campaign
- Increase the number of shares on LinkedIn from 30 to 1000
- Reduce an average acquisition cost per customer from \$100 to 20\$

Weekly Check-ins     
 Plan 1 Plan 2 Plan ...

Product Team OKR

Increase engagement in our product





- Increase average session duration from 10 min to 25 min
- Analyse competitor's offering and implement top 3 improvement ideas
- Increase average daily activity per user by 12%

Weekly Check-ins     
 Plan 1 Plan 2 Plan ...

Sales Team OKR

Personalize sales approach to nurture potential customers

- Increase the number of touchpoints with a new lead from 3 to 6
- Increase follow up email open rate from 14% to 45%
- Reach 8/10 average score on customer satisfaction survey with at least 100 responses

Weekly Check-ins     
 Plan 1 Plan 2 Plan ...

Product Team Objective:

O: Increase engagement in our product

KR1: Increase average session duration from 10 min to 25 min

KR2: Analyse competitor's offering and implement top 3 improvement ideas.

KR3: Increase average daily activity per user by 12%.

Action plans:

1. Make a list to compare our product with the competitor and brainstorm ideas for improvement.

2. Reach out to loyal customers and ask for feedback.
3. Design and launch a “wow” feature to ignite discussions and trigger customer engagement.

Marketing Team Objective:

O: Leverage “social proof” to increase credibility and improve reputation

KR1: Get at least 15,000 views on our testimonials page.

KR2: Reach an average click-through rate of 20% in the communication campaign.

KR3: Increase the number of shares on LinkedIn from 30 to 1000.

KR4: Reduce an average acquisition cost per customer from \$100 to \$20.

Action plans:

1. Partner up with thought leaders to promote our testimonials page.
2. Reach out to power users and ask to share their success stories in video format.
3. Brainstorm ideas for LinkedIn marketing.

Sales Team Objective:

O: Personalize sales approach and nurture new potential customers better

KR1: Increase the number of touchpoints with a new lead from 3 to 6

KR2: Increase follow up email open rate from 14% to 45%

KR3: Reach 8/10 average score on customer satisfaction survey with at least 100 responses

Action plans:

1. Update the customer journey map to improve the nurturing process.
2. Take a course on best practice email approaches and consult with the Marketing team.
3. Create different offers for different use cases, review the sales pitch.

Key Results are not the same as KPIs

Both Key Results and Key Performance Indicators are measurable and both reflect a team's performance. What's different, however, is what exactly you measure and how you come up with those measurements.

KPIs reflect performance but don't tell you what needs to change or improve to drive growth of those numbers. They are high level business metrics that you analyze with precise frequency (yearly, quarterly, monthly, weekly, etc.).

When you see the numbers dropping below target, you should go deep into analysis, identify bottlenecks and constraints, determine what needs to be changed, fixed or improved.

And once you've decided on which area needs improvement, you write an Objective focused on that area and Key Results to measure how close you're getting to this Objective. So Key Results are specific to a particular focus area represented by an Objective.

There are always a million things a team could do to improve a KPI number, and that is why the Objective of your Team OKR has to be specifically focused on a valuable improvement area.

If everything is a priority, nothing is. So choose wisely and direct your team's attention towards specific outcomes.

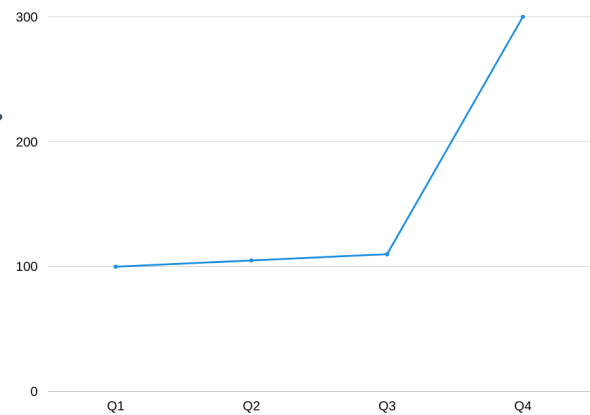
Customer Success example

Let's say company A's Customer Success team has a KPI target of 100 meetings per quarter. They realize that to onboard more customers and increase customer lifetime value, they need to have more meetings. So they decide to pursue a much higher KPI target of 300 meetings per quarter. This is an explosive KPI growth target.

1 Clarify the KPI target.

The regular KPI target is **100 meetings** per quarter.

The new target is to achieve **300 meetings** in the next 3 months.



What exactly do they need to focus on to deliver on this KPI target?

- Will they focus on new customers or the ones who subscribed in the past 6 months?
- When are the customers more likely to book a meeting? What has to be true for them to have interest?
- How will the team approach this: through email communication, in-product notifications or a landing page?
- Where in the sales funnel should the changes happen: early on when potential customers are still learning about the service or somewhere in the middle when they discover its value hands-on?
- Would it be more impactful to focus on long-term customers and engage them more often?
- How many meetings per customer is enough to make sure continuous usage and engagement?
- If customers are not booking follow ups, is it because of the bad first impression? Should the team consider improving the sales pitch and demo approach?

So... what does it mean exactly “to increase the number of meetings” and why is that important?

In the reasoning process and in team discussions, it will become clear that some areas are more impactful than others, and you have more faith and confidence in some ideas for delivering actual change.

Place your bid on the highest impact idea and define how you will measure success of achieving this Objective. These measurable outcomes will be your Key Results.

We've established that Key Results should be narrowly focused to pinpoint what outcomes you need to achieve to reach the Objective.

To continue with our example, let's imagine that the Customer Success team decided to focus on the customers who subscribed in the past 3 months and increase their engagement. The team will apply different tactics to deliver on the desirable outcomes. But which outcomes are desirable here?

Usually companies think that the KPI should be one of the Key Results under the Objective, but this isn't the best practice.

Instead of writing "increase the number of meetings from 100 to 300" (which is just reiterating the KPI target), try to identify an outcome that the team can influence on an ongoing basis. Something that they can track every week and take action when the progress is at risk, for example: "increase the number of follow-up meetings booked [a specific type of a meeting] from 7 to 21 per week [measurable on a weekly basis]".

Remember, you should have at least 2-3 and no more than 5 Key Results per Objective. What other outcomes will the team try to deliver?

Customer Success Team Objective:

O: Increase engagement with new paying customers

KR1: Increase open rate of our in-product communication from 4% to 15%

KR2: Increase the number of follow-up meetings booked from 7 to 21 per week

KR3: Achieve service quality rating 9 out of 10 based on the post-meeting anonymous poll

KR4: Reduce average response time from 5h to 1h

Now, when the team has drafted the Key Results, look at them and ask yourself: do you know what the team will do next? Is there an action plan that will move the needle on these Key Results? Numbers won't change without an action plan.

Action plan:

- Analyse open rates from the previous quarter and draft new copies for in-app messages.
- Personalize outgoing communications.
- Create a high quality FAQ section and stock answers to speed up responses.
- Survey our high engagement customers to ask what they like in our services.

So, for OKRs to work, you need to define the Objective so clearly that it would shape the thought process and prioritisation framework for the entire quarter. Knowing the actual outcomes helps the team to choose the right tasks to work on, and not to waste their time on pursuing everything that comes to mind. Everyone should stay focused.

Marketing example

If your Marketing team KPI is to bring 2000 qualified leads to your website per month, and now they are falling behind on this number, your first impulse might be to create an Objective: **Increase the number of high quality leads**, with the first Key Result being: *increase the number of qualified leads from 1500 to 2000*.

Reiterating your KPI targets in your Key Results will not help you achieve them. So consider a closer look into the reasons behind the KPI changes and maybe there's a different approach or a better path you could take.

A KPI simply lets you know that there is an issue, but Key Results should be measuring success or failure of your Objective. So if the Objective is really to **increase the number of qualified leads**, what outcomes would you like to deliver and what Key Results should you consider?

Perhaps 50% of the new leads were coming from a free ebook. However, this ebook is now 5 years old and over the years the percentage of leads has been going down regularly.

You may want to write a Key Result to focus on updating the ebook and generating downloads of the new edition.

Other Key Results may be about diversifying your communication channels and nurturing leads for them to reach your qualification criteria.

Marketing Team Objective

O: Increase the number of high quality leads

KR1: Reach 3000 downloads of the updated version of the free ebook.

KR2: Increase traffic from software review platforms from 500 to >2000 leads.

KR3: Reach >2000 reads per article on our new blog content.

Don't confuse OKRs and KPIs

There shouldn't really be the word "versus" between OKR and KPI since they do not compete for your preference. They coexist very well and you should use both frameworks in your business but for completely different purposes. Use OKRs for goal-setting and improving your business and KPIs for monitoring general business performance.

Most companies choose to track their KPI targets in a spreadsheet where you can be as detailed as needed: Company KPIs -> Department KPIs -> Team KPIs -> Individual KPIs, and track those per year, quarter, month, week, day or even per hour.

For improvement-oriented and focused goal-setting, you should definitely use OKRs. The OKR methodology offers great benefits for organizations. The best way to achieve success with the methodology is by using dedicated software like [Weekdone](#) that allows company-wide transparency, effective communication of priorities, and, most importantly, alignment of Objectives.

Committed and Aspirational OKRs

As we mentioned in the beginning of this book, when it comes to OKR methodology there are two types of goals one can set – committed or aspirational OKRs. Committed OKRs are ones that your organization or team has agreed to execute and might have a clear action plan for achieving. Aspirational OKRs are more visionary and likely won't get completed 100%, but they are important for moving towards the future.

While just defining these types of goals is easy enough, it doesn't give you a real picture of the difference between the two. You need to think about when you should choose one type of OKR over another. In many cases, you will even combine them together. Let's go over the differences between committed and aspirational OKRs and provide examples of each. Hopefully it will give you some insight into which will work best for you and your team.

Committed OKRs

A committed OKR should be achieved by 100%. The success of a committed Objective is critical to the success of the company or team. The outcomes of these Objectives should push you to be better, but they should still be achievable. Committed Objectives describe business-as-usual and the Key Results should be reflective of expected measurable outcomes. Committed Key Results are often considered roof shot goals where 100% progress is expected.

It's important to remember that even though committed OKRs are more like business-as-usual, they still are still goals! This means a committed Objective isn't a target like the number of client meetings or calls month-to-month. A target is usually the expected level of performance that is needed to keep the company going. OKRs are all about growth, going through some needed changes, innovation, etc. They are pushing the company to have better results.

Committed Key Results

Even though KPI or metric targets and OKRs aren't the same things, your KPIs can become your OKRs in *some* situations. First, if your KPI hasn't been met and it's starting to cause a problem. You probably need to have some improvements to restore its

historical level. The second situation might be that you have decided that you just need to improve some KPIs to achieve some of your Objectives.

For example, one of the KPIs in your company is Net Promoter Score (NPS) and it has a target of 50. Now, this is something that you should keep an eye on, but you can expect to hit the target by just doing your day-to-day job well. It shows you the health of the company and if it's good, it doesn't require any extra action.

Now let's say you are starting to see a drop below your usual target. You might have a problem and you want to improve the situation. To solve this you might set an Objective to improve the NPS. NPS will now be your team's central focus. Once you have set an OKR you will also want to set plans that help you to drive the NPS back above 50. Once you achieve your Objective and get your score back to 50, it will become just another KPI to keep an eye on again. From there it's time to improve or change something else in the company. You might have many different KPIs or metrics that show you how your company is doing but you should choose only a few and the most important OKRs to work on and drive the focus to for the quarter.

Committed OKR Example

Having an Objective means that your team needs to put your heads together and think of various ways to achieve it. If later the Objective is achieved by doing what you usually do, then the Objective lacks drive. You should rethink it by testing new ideas or doing changes to the work culture.

Committed OKRs may also focus on making necessary changes in the company as well. For example, you have internal communication processes in place but the information still goes missing or moves too slowly, which has led people to feel frustrated. That's a sign that you need to rethink your internal communication process and you need to get it working well. You could set an OKR like this:

O: Improve internal communication process

KR1: 80% of employees have answered the communication survey

KR2: Analyze results and choose 5 improvement areas to execute

KR3: Interview 40 employees; 35 of them should confirm that they have seen an improvement

Once committed Objectives are achieved within the quarter then usually new ones are set for the next quarter. If you keep having the same OKR quarter after a quarter then you may just be measuring KPIs and not setting Objectives.

Aspirational Objectives

If a committed OKR was realistic and needs to be achieved around 100% then aspirational OKRs are the lofty and ambitious Objectives where 100% completion is likely impossible. Aspirational Objectives should be set with very high bars. Achieving these OKRs brings huge success, but the risk of failing is high as well. Usually, 65-70% progress achievement can already be called a success. But you have to be careful. While these goals should be just out of reach, it's important that people still take them seriously and aim for the highest possible result. If 66% becomes the new 100% in people's minds, nobody will push hard enough.

Aspirational OKR example

Aspirational OKRs are also called moonshots. Like the term implies, it's about aiming high. What you measure with the Key Results can be the same for committed or aspirational OKRs, but how big the stretch is will define which type of goal it is.

For example, a Sales team committed OKR might be:

O: Expand to the German market

KR1: Close first 5 enterprise customers

KR2: Achieve sales cycle average (from lead to closed) of 27 days

KR3: 15% increase of Q1 revenue for the German Market

To make it aspirational we could make it look like this:

O: Expand to the German market and start taking over the market

KR1: Get 10 enterprise customers to switch to our product

KR2: Achieve sales circle average (from leads to closed) of 15 days

KR3: 20% increase of Q1 revenue for the German Market

Both examples cover expanding the company and entering into the German market. The difference between the two examples is that the committed one is more realistic and completion of all the Key Results is necessary to call the venture a success. The aspiring example is aiming high. Their goal is not just to successfully enter the market but also to start taking over the market. That one is a lot harder, almost even impossible to achieve in such a short time frame.

As succeeding with aspirational OKRs might be very challenging, team or company-wide readiness is very important. The company has to be open to testing new ideas, failing, trying again, and learning from the process. Also, before setting aspirational OKRs, your resources should be evaluated. There's no point in setting high OKRs if you don't have the time or manpower to work on them weekly. With any type of OKRs, you should consider and record your weekly initiatives towards them.

Aspirational OKR example

You are a Software as a Service (SaaS) company and you have different features in your product. Feature X isn't performing as you would like and you can see that it is harmful for the overall reputation of the product. Only 10% of the users use the feature and you get many complaints about it. You have tried to do some small changes, but the maximum use case has been 12%. You want to improve the feature to avoid negative responses and you also know its value but it's not comprehensive right now. If potential customers could see the value it could actually bring in more revenue.

From there, your Product team sets an Objective "Improve feature X" and one of the aspirational Key Results is feature usage increased from 10% to 35%. As mentioned before, 12% has been the highest before so 35% is a really high bar! The Product team doesn't even know if it's doable but they are ready to put in the effort and try to achieve it. Even getting the usage up to 15% would be a great success, but hitting the 35% could make the product a lot more valuable. This would have a noticeable effect on company revenue!

The balance between them

Committed Objectives are the best to use when you first start implementing the OKR methodology. By changing the way you are thinking about your existing goals, it makes it easier for people in the company to form a new habit. Becoming a result-driven company needs time, discipline, and changes in how people and management think. First, your focus should be on adapting the methodology and setting up the necessary process around it.

If you start with too many aspirational OKRs then people can easily feel overwhelmed. Everyone needs to adopt a new habit and on top of that, the goals are set really high. It's just too much to handle. Once your company is more used to the OKR methodology, you can start setting some aspirational OKRs or just some aspirational Key Results.

As mentioned above both the whole OKR or just one Key Result under each Objective can be aspirational. That means you either have a whole goal with all the results aiming high or you have a goal where some results are committed and easier to achieve and some are aiming higher. The exact number of the aspirational Objectives you should have depends on your company's resources but remember, the less you have the stronger the focus and chance of achieving success.

Personal OKRs

OKRs can be set on many levels but that doesn't mean they should be set on every level possible. One common misconception is that OKRs should be set on an individual level. It makes sense that people have their weekly plans and maybe also a list of individual KPIs. But OKRs are a bit different. They rarely produce any business value if they are set on individual levels. Of course, that doesn't mean that individuals do not work towards any goals. They do, they work collaboratively towards their team goals.

Let us explain why your company shouldn't ask people to set individual OKRs and should instead focus on Team OKRs.

Team level vs individual level goals

When we explain to customers that OKRs should be set on a team level, and personal level goals are not needed at all, they are at first resistant to this idea. They think that for success they need to tell each person to set goals and later keep a close watch on how each person is doing. Companies hope that individual OKRs add more responsibility and therefore people take more action. But what we see happens is that people feel frustrated and don't understand why they have to do it. They set easy and rather task-based goals which actually doesn't bring any value to the bigger picture. Instead of collaborating and creating brilliant ideas together, they struggle alone with small tweaks. Eventually, forcing individual OKRs might just kill any motivation to do OKRs at all.

Don't get us wrong, we are not saying people never need goals. Individual goals are important, but their focus should be on personal development. There is a huge difference between setting team goals that drive the company forward versus people developing themselves to have a better career and happier life.

Team OKRs don't mean people are any way left out of the process. The purpose of Team OKRs is to actually focus people to work towards them every day.

To prove our point, let's walk you through one example. This kind of scenario is something that happens to many companies.

Company Blue implements OKRs to drive improvements

Company Blue is a software company that offers productivity and tracking tools for businesses. They have been on the market for a couple of years and are still figuring out some things. For the last half of the year, they have been having problems with revenue. It's clear that they need straightforward goal-setting to drive improvements and focus on measurable results. They decide to set OKRs and start the necessary learning process and discussions.

Management starts by thinking about what the overall focus should be for the company. After discussing with the team managers they realize that their approaches and processes need to be improved. There are not enough leads, Sales take too much time or fail completely, and the product has problems with on-time and bug-free releases. Management decides that the company's overarching Objective will be to **improve our processes to drive revenue back to positive**.

Now, it is time for the teams to set their goals.

Here are two ways how this company can approach OKR settings: first is by focusing on Personal OKRs and the second is by focusing on Team OKRs.

Wrong approach – focusing on personal goals

After the management discussion, the Sales Team Manager goes back to his team and announces that the results are low and everyone needs to set goals for themselves to have better results.

Team members are struggling with setting the goals and it takes a month before everyone has decided on their "OKRs". People end up writing down how many meetings they need to have, what kind of email templates they need or what sales books to read. Instead of measuring [outcomes](#) they mostly end up counting how many things they plan to do. Everyone is thinking about their own results but not what Sales as a function should improve. Personal goals become more important than having better results as a team.

At the end of the quarter some results might come in, but the problem is that people have been pushing hard to get the results for their personal goals, which have been tiring and they are losing motivation. Personal goals were just micromanagement and

took focus away from the bigger picture. Even the ones that were written well didn't actually help move the *team* forward. The team members might be smarter in some ways but if they decide to leave the team, so goes the new knowledge.

If each person has their own goals to achieve, then other team members' problems are mostly their own issues. I have my own efforts to make, why should I put my energy into yours? Instead of working together as a team, people might end up competing with each other to have better results on their personal goals. Also, because the team never focused on setting actual measurable and business value-oriented Key Results on a team level, they don't know how much or if anything was improved. Or even what or exactly how they were supposed to improve.

This isn't what a team should be doing and it doesn't move the team forward. As Henry Ford said, "If everyone is moving together, then success takes care of itself". We think time has proved that he definitely knew the secrets to a successful business!

Let's take a step back to the beginning of the story. Now, instead of asking people to set their personal goals, teams will set their OKRs together.

The right approach – focus on team improvements

The company shares its overarching Objective "Improve our processes to drive revenue back to positive". Now it's time for the teams to set their contributing goals.

The Sales team knows that current approaches do not work and they need to change something to start selling more. After discussing together with the team, they have concluded that something is up with their sales process. It takes too much time to close deals. Many potential customers seem to get tired in the process so they go to competitors. The Sales team chooses to set a quarterly Objective "Speed up our sales cycle". It contributes to the Company Objective and should eventually help to increase revenue.

After setting the Objective, the team also sets Key Results. For example, good Key Results would be:

KR1: Reduce lead to sales time from 60 days to 31 days on average

KR2: Increase SQL to trial conversion rate from 30% to 60%

Once the OKR is agreed upon, the team starts working on achieving it. Now, even though it's a team goal, each person has his or her own role and responsibilities.

Each week team members set new plans to execute and the week after they check how much was done. They share lessons learned to improve their collective knowledge. Together they measure the progress of Key Results and discuss any occurring challenges.

Because they are working together as a team, they can make decisions that have a bigger impact and change how Sales operate. Everyone can test new ways and collect feedback. Which is later shared and conclusions are made based on the experience of the whole team, not just one person.

At the end of the quarter, the Objective is achieved with really satisfying progress of 82%! Sales take less time, fewer customers drop off in the process which means it also helps with increasing revenue. The Sales team has been improved and is ready to take on another challenge.

When the Team Objective is accomplished, the positive change is rather long-lasting or even permanent in some cases. It doesn't matter if someone is on sick leave or leaves the company permanently, the Objective has improved the Sales process and new ways can be applied by anyone. Instead of just working harder, people work smarter. Which means they are more motivated and bring more to the table.

What can we learn from this example?

1. Personal OKRs are not valuable to the business, they are for personal growth. Even though personal growth is also important, teams need to focus on their collaborative growth as well. For that, teams should focus on team-level goals. Individuals can always set their own goals as well if they want to but it's not something the company/team needs to think about. Or, more importantly, it is not something that should be demanded from people.
2. Personal OKRs set limits and end up driving small tweaks and quick fixes that are in many cases dependent on more effort. Personal OKRs do not drive actual positive change on a team level. Rationally speaking, one person in a team of 5 can't change the

whole sales process. But when the team works on it together, they are more likely to succeed in changing the sales process as a whole.

3. Personal OKRs drive people to be competitive and divide the team while Team OKRs encourage collaboration and exchange of great ideas. With Team OKRs, people are not struggling alone with the challenges. Those become team challenges that will be solved a lot quicker because many heads are put together.

4. Personal OKRs make the company dependent on certain persons while Team OKRs improve the team as a whole. It reduces the risk for the company. The positive changes made while executing Team OKRs are long-lasting vs having small personal changes that are always dependent on a certain person's effort. Teams should not lose their capability to function and deliver good results if people leave the company. Of course, if new people join the team, it takes time to adapt but if the team has everything in place then the results follow fast.

5. Team OKRs are a lot more motivating. Team members can work together on things, encourage each other and help each other out with the challenges. Results should be celebrated together! It's much better than constantly worrying if I can achieve enough on my personal goals, and what should I even do.

6. Personal OKRs slow down the company. Imagine if everyone needs to set their own OKRs... which is pretty hard because OKR principles are hard to follow on an individual level. Then the managers need to make sure that this somehow aligns with what the team or company wants to do. That is a lot of back and forth reviewing and agreeing. Eventually, you will have tons of tasks listed as Key Results and focus from business-valuable outcomes is shifted to just doing things. Believe us, people will be tired and they won't see value in that.

As a summary: Personal OKRs is a bad idea

Google tried Personal OKRs, it didn't work. [Spotify tried Personal OKRs, it didn't work.](#) We in [Weekdone](#) tried it, it didn't work as well. So this is a friendly recommendation from many companies that learned this lesson the hard way – focus on Team OKRs and do not force your people to set their own Personal OKRs!

To motivate you even more to throw out the idea of Personal OKRs and focus on the Team OKRs instead, here's another saying from a man who definitely knows what he is talking about:

“Great things in business are never done by one person; they're done by a team of people.”

-Steve Jobs

How to Write Actionable OKRs

A goal without a timeline is just a dream. People believe in this idea, and yet they still approach the goal-setting process superficially. Bad goal setting in business means your team may never get around to achieving much. If you want to set powerful and actionable goals that have an impact, you need to learn how to set and write them properly from the start.

We will cover 4 practical tips that you can use to determine what matters to your business right now, so you can write relevant and actionable OKRs.

- Rule #1: [Identify the problem correctly.](#)
- Rule #2: [Keep asking why.](#)
- Rule #3: [Come prepared to brainstorming meetings.](#)
- Rule #4: [Focus on what matters.](#)
- [How actionable OKRs help you succeed](#)

Rule #1: Identify the problem correctly

To illustrate this point, let's borrow an example from [Teresa Torres](#), Product Discovery Coach, and tell you a story.

Imagine you own a business in the 16th century: transporting goods by sea from Europe to North America. Your biggest order is just about to be shipped off across the Atlantic, so you organize a meeting with the captain and senior members of the crew.

You ask them: "Is there any specific problem we should tackle before you leave".

And the captain is the first to answer: "We need to make sure everyone on the ship is healthy and able to work, and we're often struggling with lack of Vitamin C, the disease commonly known as scurvy. It's dangerous and can delay us significantly."

"How do we prevent or treat scurvy?"

"Citrus is rich in Vitamin C, so we should bring oranges with us," – says one of the most experienced members of the crew, and another one jumps in: "That's right! But oranges are hard to peel, can we bring grapefruits instead?"

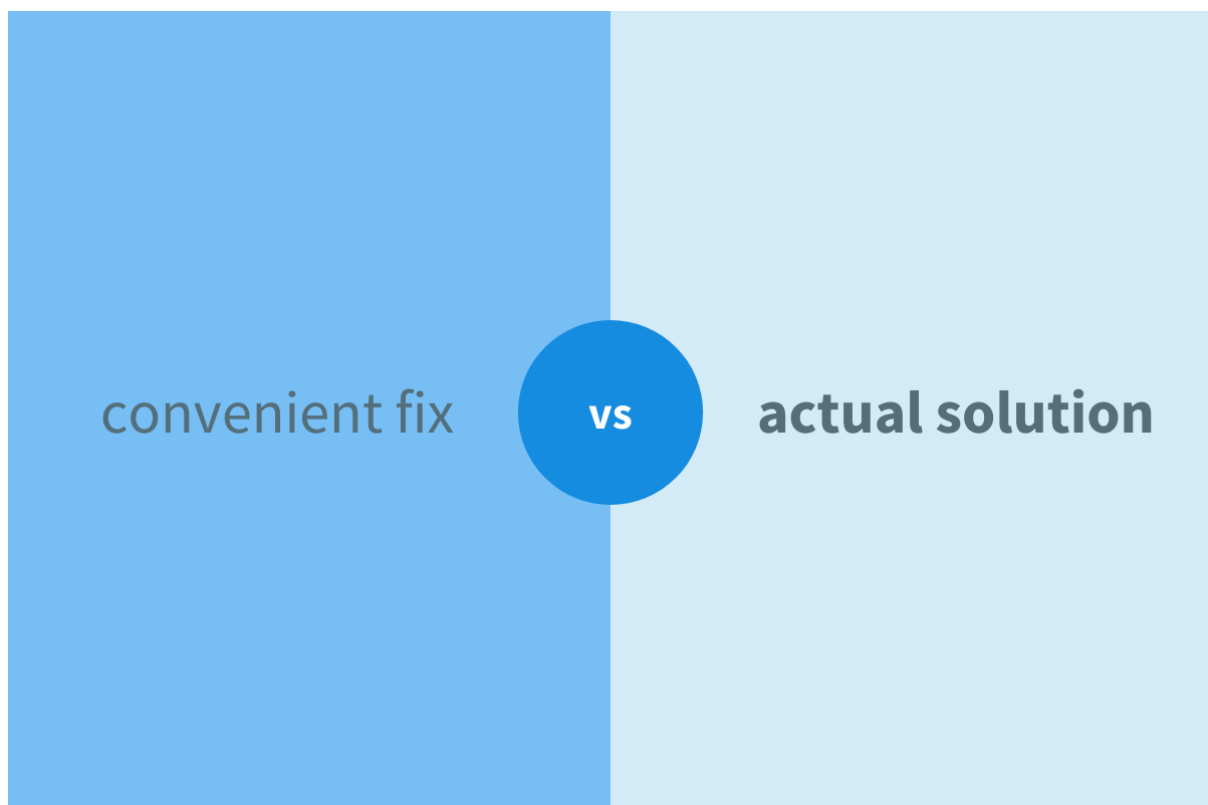
Another person reasonably points out: "Grapefruits would be too expensive and very hard to find at the moment, can we go with apples instead?"

And so it's settled, the crew is to bring apples on their journey.

Somewhere in the middle of this seemingly logical conversation, the crew forgot that the problem they were solving was not about feeding the team a type of fruit, but about treating scurvy. And severe Vitamin C deficiency cannot be prevented or treated with apples, so the solution does not solve the problem which means the crew will not reach the destination on time or at all.

What does this story tell you?

Obviously, you cannot come up with a solution without discussing the problem. But how do we stay on track and how can we tell a convenient fix (apples) from the actual solution (oranges)?



Let's imagine that (instead of crossing the Atlantic successfully) the leadership of the modern-day company set a quarterly Company Objective to **improve internal processes and encourage cross-team collaboration**. As a unified direction, the Company Objective

would lead the teams to think about their role in the company and how they can contribute to the overall success.

Each team should have a productive discussion and find the answers to the questions: What can we improve? What is slowing us down? What can be changed for us to have better results as a team?

Through this discussion, the Marketing team of the same company came to realize that they are not able to allocate time to participate in cross-team collaboration, and they need to reorganize their workflow. One of the team members suggests: "We don't have enough time to execute our ideas because our meetings are too long."

Their first impulse might be to cut the time spent in meetings and, eventually, cancel those meetings altogether. But without those meetings, the team members could become even more disengaged. Because when no one communicates their ongoing progress, things tend to get much worse.

It becomes clear that the problem wasn't solved because the most obvious solution was not the right one. So, one way to avoid false reasoning is not to jump to conclusions.

"Because our meetings are too long" clearly suggests a solution – to cut meetings short, so when you're identifying a problem ("we don't have enough time to execute our ideas"), don't suggest an immediate solution, it might not be the right one.

The issue in the Marketing team clearly was: "We spend too much time talking, and not enough time doing things" but the duration of the meetings was a symptom and not the root cause of the problem.

Now, how do we find out what's really behind this issue?

Rule #2: Keep asking why

Five Whys was developed by the Toyota Motor Corporation to improve their manufacturing process. The technique has been borrowed and implemented by thousands of companies around the world.

In Five Whys you keep asking yourself "why something is happening", with every following "why" being based on the answer to the previous one. This helps you get to the root cause of the problem.

The management team in the ABC company has found a problem to solve, they say: “We spend too much time in meetings.” Let’s find out what’s causing this issue.

	QUESTION	ANSWER
WHY	Why do we feel our meetings are too long?	We don’t have enough time and energy to complete our tasks after these meetings.
WHY	Why don’t we have enough time and energy after the meeting?	Every person takes around an hour to go over their reports.
WHY	Why does it take so long?	People get into detailed discussions over ideas, projects and ongoing issues.
WHY	Why are they going into so much detail?	Everything feels important, and people don’t know what can be left out.
WHY	Why don’t they know what to focus on?	There is no clear agenda and structure to prepare for the meeting.

So the meetings are long because people are not prepared and there is no clear agenda. Perhaps there’s no preparation whatsoever, and participants come to the meetings with everything they’ve got and go with the flow.

Now that we know the root cause of the problem, how do we write an OKR that can help us focus on solving this issue?

The Objective might be to **implement best practice weekly status reporting and improve teamwork**. But what does it mean and how will they measure the success of this Objective? This is the question you ask to write Key Results – measurable outcomes that the team wants to deliver.

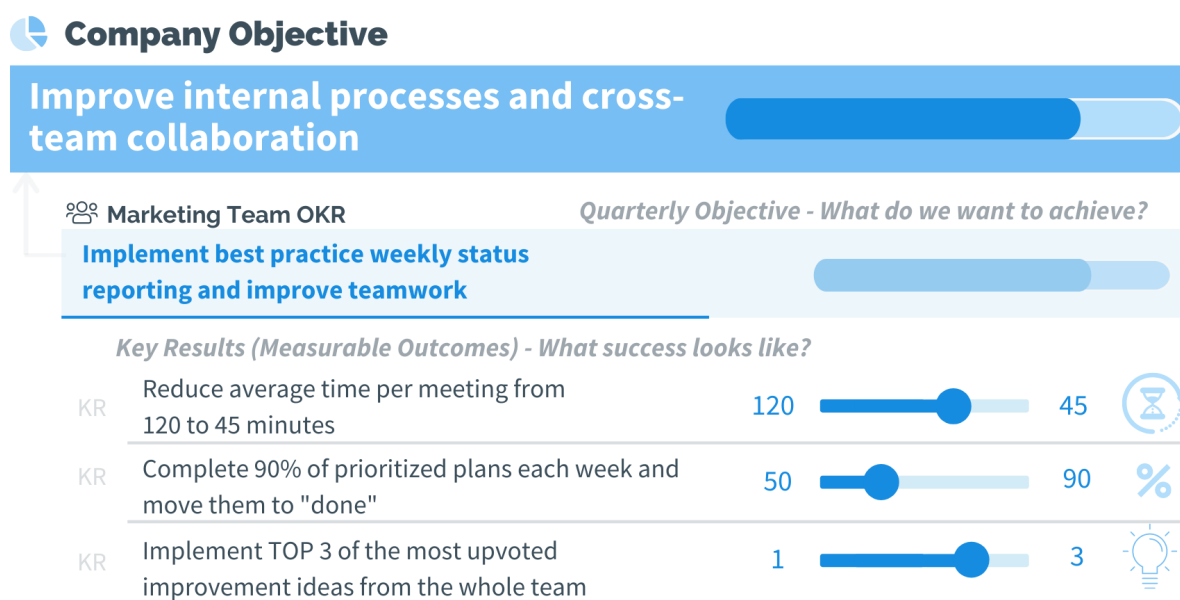
In this case, the first Key Result might focus on the time management issue that the team has identified from the very beginning: for example, reduce the average time per meeting from **120 to 45 minutes**. But it is not enough to cut the time spent in meetings –

what if it doesn't impact the productivity at all? How will the team know that they are managing their work better?

To make sure that improvement is on the way, the second Key Result might be to **complete 90%** of prioritized plans each week and move them to "done". Getting things done is the direct outcome of better time-management and effective communication.

To improve teamwork and accountability, the third Key Result could specify outcomes related to the implementation of the most valuable ideas that come from team members: for example, implement the **top 3** most upvoted improvement ideas from the team.

Here is what this OKR would look like.



With our expectations numerically defined and desired outcomes clearly communicated, we can actually get things done by completing prioritized plans on a weekly basis.

From the example, you might have noticed that Team Objectives and Key Results:

- address what matters to the business right now,
- will be executed by a team in collaboration,
- are set for a quarter,
- should be updated on a weekly basis.

With the Key Results being the numeric outcomes that you want to achieve, you still have the possibility of trying out different plans and activities to move those numbers. The team might start by organizing a clear agenda for the meetings, brainstorming improvement ideas, figuring out the best approach to prioritize plans, and evaluate their impact.

There are many things that the team will learn in the process, and it will definitely result in more trust and mutual understanding.

Rule #3: Come prepared to brainstorming meetings

Creativity thrives in the sweet spot between too much order and too much anarchy. The computer scientist, Christopher Langton, concluded a long time ago that innovative environments are borderline chaotic but not completely without discipline.

That brings us to the topic of organized brainstorming.

Brainstorming is often reduced to letting everyone speak their mind and exchange ideas with no restrictions. These are the meetings that last for hours, very often bringing no practical value in the end.

To tap into the collective intelligence of your group, you should introduce some restrictions to the ideation process. Creativity asks for restrictions because, evolutionary speaking, our brain works better when it's challenged with overcoming obstacles. Restrictions force us to think harder and think better.

So before scheduling a brainstorming meeting, structure your teams' thought process and ask them to answer these questions:

<ul style="list-style-type: none">• What could we change to have better results as a team?	<ul style="list-style-type: none">• What's stopping us?
<ul style="list-style-type: none">• What has been working for us so far that can we double down on?	<ul style="list-style-type: none">• What problems are we facing and how do we solve them?

The answers to these questions would present good ideas for your Objectives that could be further discussed and recorded in a shared document for later review and feedback.

[Download our free spreadsheet for recording and categorizing ideas.](#)

When the answers are thought through and added to the shared document, allow a week for reading each other's thoughts, give feedback and hold 1:1 discussions.

When the most shared concerns are clear and particular Objectives are upvoted by most of the team, you can finally schedule a brainstorming meeting with a clear purpose: to come up with an action plan for execution.

Rule #4: Focus on what matters

When you are building new software from scratch, you need to figure out “what happens if I click here” before you can even start optimizing around what color the buttons should be to generate more clicks.

That’s why roadmaps were invented. Because you can’t get from Paris to New York without crossing the ocean. And to reveal what’s hiding around the corner, you have to move your feet first and point your searchlight into the shadows.

Imagine that your company set out to go viral. When you try to come up with a viral idea, you have no way of predicting whether it would work or whether you'd need to

tackle other issues that come with virality (reputation management, website crashing due to traffic overload, etc.). But what you can do is try out different things and give people various reasons to talk about the product.

Whichever idea generates more buzz should be considered a winner and developed further. If your adorable cat video didn't go viral, you change the content and try something new until you move the needle on your Key Results (for example, Increase post engagement on Twitter to 20%; Increase website traffic by 50%, etc.).

Before you've figured out the way to go viral, you shouldn't set a goal to increase your server capacity to handle the overload of new traffic.

It might be nice to think that this may be a problem you'll need to solve in the future, but it is not the problem to solve right now.

If you decide to "prepare" ahead of time for when virality hits you, you might ask your IT team to work on the server and dedicate their valuable time to solving the issue that might or might not occur. While long-term planning and preparation in itself is a good thing, what might actually happen is that in a month your Marketing team finds a better way to get new users and abandons the original idea of going viral all together. At this point, your IT team would have lost time they could have spent fixing real issues. Wasting a team's time is demotivating and has a long lasting effect on morale. People deserve to feel that their work is valuable.

So focus your attention on figuring out your current business problems and opportunities and make sure to tackle them immediately.

Don't try to get ahead of yourself and solve problems that you might or might not have in the future.

We'd like you to remember that absentmindedly striving for growth will not make things happen. You need to define an area for improvement with your Objective, measure its progress with Key Results, try different things to drive change, compare results, and understand what makes a difference.

OKRs provide you with a framework to keep your focus in place while you're trying out different tactical approaches.

How actionable OKRs help you succeed

If we had to summarize this whole chapter into one sentence, we'd say: your OKRs should be focused exclusively on the things that could have the biggest impact right now, and everything else should wait. When you are chasing everything, you are catching nothing.

Objectives and Key Results help you see your main issues and improvement opportunities clearly, and not mix them up with day-to-day operations. Not everything you do for your business should be considered an OKR. OKRs should cover the areas you need to improve: from the ways you work (internal processes) to the ways you think about growth opportunities.

Whenever you feel like there are a billion improvements you absolutely have to implement, remember that in the beginner's mind there are many possibilities, but in the expert's mind there are few. So keep your eyes on the prize, and don't give in to distractions.

Weekly Plans: How to Make Progress on OKRs

The OKR framework helps to focus your team on the outcomes they need to deliver. You have heard repeatedly by now that Key Results are not plans, tasks, projects, or any kind of other activities. Key Results are the outcomes that you are hoping to achieve. That being said, planning is still important to drive OKRs forward. Just because plans aren't listed as part of the Key Results, doesn't mean that there is no planning. It is just important to distinguish what is what. Weekly planning drives the OKRs forward by focusing your attention on what you need to do.

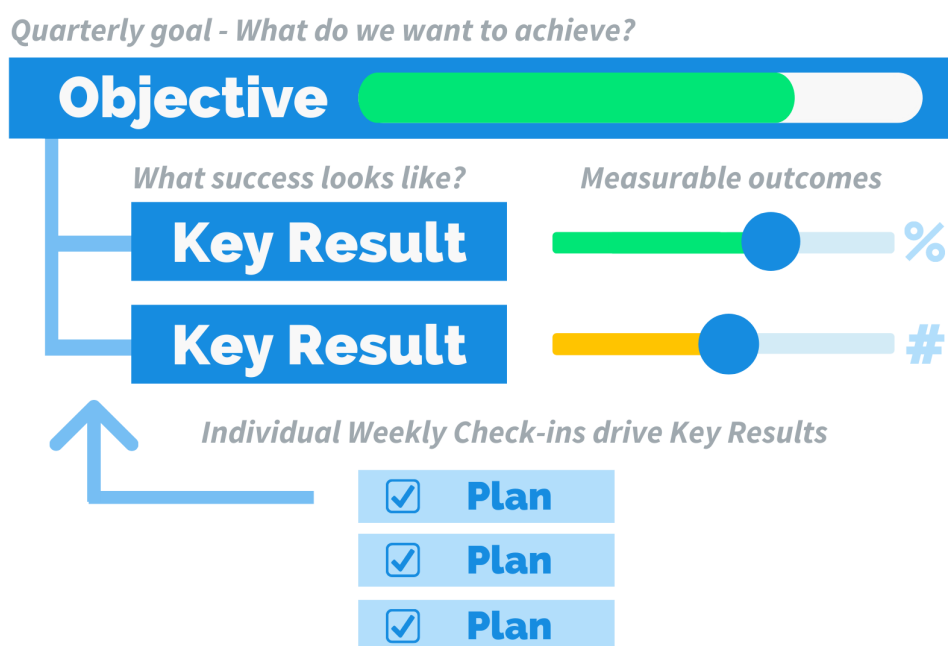
The OKRs set goals. Weekly plans remind you to achieve them!

Objectives and Key Results need to be [actionable](#). That doesn't mean that OKRs are just one-off actions. It means that if a team sets an OKR, they should also have some ideas or plans how to drive it forward. If we set a goal and we can't think of how to achieve it, then this goal is not actionable. It could even be total nonsense. While writing your OKRs, try to also discuss what could be done to drive the Key Results. This way you will see if this goal even makes sense.

For example, you are a production company and one of your goals is to increase the profit earned on each product. The team sets a Key Result to "reduce production time from 12h to 9h". Seems logical at first but then, once they start thinking about how to achieve it, no reasonable course of action comes up.

The speed of the production machines is already maximized, there's no money to replace any of the equipment or to add more, and the process can't be changed. There's not a single idea to start with to try to reach this goal. Even though it would be a nice Key Result to have, if we can't plan any actions to deliver it, it's quite a useless Key Result because it won't be achievable.

In addition to evaluating the achievability of an OKR at the beginning of the quarter, planning should take place on a weekly basis. While OKRs are set on the team level and all of the team members will work towards achieving these results, executing plans takes place on the individual level. This is how individuals contribute to the team goals: everybody is working on their plans, ultimately contributing to the progress of the whole team.



The planning aspect of OKR execution is often very underestimated. It's seen as unnecessary reporting or something that is just time-consuming but not needed. Let us explain why your team should really consider using the Weekly Check-ins feature in [Weekdone](#) properly.

Planning helps to manage time and prioritize

"We didn't have time for that" is one of the most common answers we hear during our coaching calls with customers when we discuss why some goals had almost no progress. It happens to us at [Weekdone](#) as well.

We always have more work than we are able to do. That means we need to plan our week and prioritize our plans so that important things are not abandoned or overlooked.

We all have repetitive tasks and business-as-usual things that, depending on our role in the company, take some or a lot of our time. On average, people can invest 20-40% of their time into improving the way they work or pursuing new ambitious goals. Both of these areas are the focus and main purpose of OKRs.

If we do not plan and prioritize, then day-to-day work just takes over and improvements to drive the team forward are not done. The team will never improve this way.

OKRs are there to make sure you know what you should focus on. Remember, there will always be a million things to do, and that doesn't mean that you should work on everything at the same time.

If we do not plan to work on it, how will it be done?

If people in your team do not plan their actions towards achieving the OKRs, would the results ever be delivered? It's hard to do something that you do not think through. The team needs to focus on planning so individuals can commit to what needs to be completed each week.

Transparency is for awareness, not for control

A lot of leaders comment that they want to use [Weekdone](#) only for OKRs and they do not want to read individual plans of their subordinates. It happens because they see weekly check-ins and reporting as something that is used for controlling people. They simply don't see the need to do that. However, visibility of the individual planning process is not for controlling and petty micromanagement.

Planning and progress sharing is not something people do for their manager, it's something they do for the team. Team members need to see what others are working on to offer timely feedback and keep up with the updates. Visibility of key plans and priorities is the first rule of nurturing a proactive attitude, maintaining teamwork and keeping healthy enthusiasm.

When seeing each other's plans, team members can offer help when it's needed, have a better overview of what's happening, and learn more from each other's experience. This is how you make sure that your team knows what they are doing to drive your team goals forward.

If we mark down our actions, we can check if they bring results

Who wants to keep putting their energy into something that actually doesn't make any difference? Nobody. It's frustrating not to see results improving if you are putting your energy into them. When everyone writes down their plans towards their goals and the team has weekly OKR checks-in together to discuss what brought results and what

didn't, you can quickly see what is worth your time and effort. If no one is aware of what is being done, it's impossible to know what brings the results, and how to improve them.

PPP's – the most common reporting framework

The most efficient and widely used status reporting framework is PPP which stands for Plans, Progress, and Problems. It's used by companies like Skype, eBay, and Facebook. We recommend you use PPP's and add any other additional categories to share extra information that might help the team. Now let's break down the PPP's. This way you will know how to introduce PPPs to your team members.

Plans

Under plans, people should list the 3-7 most important things they want to get done this week. This is not a list of every small task they are doing this week. Instead, ask your team to use it as a priority list of the most important things they want to focus on. Also, it's not a place to write down upcoming weeks' plans (read on and we will explain where to add those). In the Plans section, everyone should stick to this week's priorities.

Added plans might be connected to your team's quarterly Objectives or they could be other important items people are working on. By adding both, OKR-related and other, to the list of plans, people can manage their time better. If they are adding only OKR-related plans, it might be hard to understand what their priorities are for the week because they actually have other things that are important as well. Listing their non-OKR plans also allows them and you as a manager to see if they are allocating enough time to the OKRs and improvements needed.

When writing plans or reporting progress, remember that it's about being transparent with everybody on your team. It should be valuable information that is easy to understand. As an easy exercise, you can ask team members to imagine being in a team meeting and explaining to others what they are planning to achieve this week. They should write it down in a way that others would understand.

Bad examples	Good examples
<ul style="list-style-type: none"> ✗ Send an email ✗ Talk to Kate about our customers ✗ Clean my desk ✗ Fix a bug #23466 ✗ Answer all my daily support tickets ✗ Clear all my tasks ✗ Make a report <p>These examples are bad because they do not provide any value for the coworkers reading them!</p>	<ul style="list-style-type: none"> ✓ Prepare the presentation for the monthly OKR review meeting with the team ✓ Design our new feature and send it to the Product team for overview ✓ Agree on job tasks, responsibilities and requirements and finish the job ad for the new developer position

Progress (what is done)

Progress is the “done” section. It is what your team has completed during the week. The ideal situation is that all of those items they put into Plans can be moved to Progress by the end of the week. If they worked on something that wasn’t planned but it’s important enough to share, they can add it straight to the Progress section.

Problems

There are two ways you can use the Problems category.

The first way is to move a task from Plans to Problems when there are obstacles with execution. The task will stay under problems until it gets resolved. It will either be

moved to Plans if the person needs to continue working on the task or put directly to Progress if the task is finished.

The second way is to use Problems to list all of the other issues or challenges that people have faced during the week. Those should be important enough to share with others. In this case, the Problems can be issues directly disturbing employees' work or challenges they encountered that others in your team should know about.

Also, if the term "problems" seems too negative you can change it to be "challenges" or "obstacles". It's up to you how your team wants to approach it exactly. The main point is that it should be about reporting things that stop us or make our work harder.

Additional categories

For the main categories of your weekly reporting, it is best to stick to the concepts of Plans, Progress, Problems but you can change the names of these categories to represent the same meaning. For example, you can use longer headlines like "Key things to get done this week" (plans), "This week achievements" (progress), and "I am struggling with" (problems). It's important that people understand what the categories are about and can easily add items to it.

As we mentioned in the beginning, we recommend adding additional categories to maximize the benefit of the weekly planning and reporting. To add additional categories, think about what kind of information would be interesting and beneficial for your team. If plans and progress are required fields, then problems and custom categories are used when there is something extra to share. If there's nothing to share, those will be left just empty.

For example, you might add a category called "Lessons learned" where team members could share their weekly insights that others might find useful. In this category, people can share something interesting they read, something they learned about the team or company, or even some useful customer feedback.

Some other ideas that you might want to add are: Team improvement ideas; What could I do better next week; or a category for Future ideas to keep any ideas, plans, or projects you want to work on in the coming weeks. Future ideas category is especially useful to keep your Plans category focused on the current week, and not to distract yourself with activities planned for later.

Examples on how to use weekly plans and reporting to drive OKRs

OKRs are set on a team ([not on the individual](#)) level. Individuals contribute to the OKRs by setting plans that should drive the Key Results forward.

For example, the Sales team of a software company has decided that to drive revenue up they need to focus more on large, enterprise customers because they bring more money in. For that they set an Objective to **drive an increase of new enterprise customers**.

The success of this Objective will be measured by:

KR1: Identify the **6 main benefits** for customers from (at least 60) lost and retained customers

The purpose of this KR is to understand what kind of value customers see in the product so the Sales team would have more knowledge on what they should focus on while trying to close enterprise deals. For the feedback to be reliable, they have set the bar to have at least 60 responses. The final outcome and the measurement of this Key Result is that they have agreed on 6 value propositions to strategically present to potential buyers.

KR2: Increase the percentage of companies with 4+ decision-makers who had meetings with us from **10% to 40%**

Driving up the number of people in the buying decision team increases the likelihood of closing the deal or understanding this isn't the deal for us early on. Making sure we focus the Sales team on the depth of contact needed, and learning how to pitch and overcome objections from the different players in the team will make us a better sales team and increase the number of closes.

KR3: Increase Enterprise Opportunities to Win conversion rate from **6% to 15%**

As you can see, instead of just focusing on money numbers the Sales team is focusing on achieving a state where they are able to get more customers than before. Focusing just on revenue might mean that it was luck and the process itself didn't improve.

To achieve these Key Results and Objective altogether, something has to be done. Those results won't just happen.

For example, to get those 6 main value propositions to sell, employee A will need to put the survey together. Then the salesmen C, D, and G need to figure out how to get responses. For that, person C might start calling the customers while D and G try to get answers through email. Last but not least, the answers need to be analyzed and conclusions summarized, and this process is led by the team manager. At the same time, the same people are also working on other Key Results by executing different plans that might drive the OKR forward.



If no one takes care of those plans, the Key Results will not be achieved. The same goes for other Key Results. Most probably all of the Key Results will be worked on at the same time. By planning who does what and linking it to your team's OKRs, you as a manager will have a good understanding if things are being worked on or not. It also helps to see what actions are actually driving the results forward and which plans didn't change anything.

OKR Alignment: Using OKRs to Get Teams on the Same Page

One of the biggest benefits of OKR methodology is that it provides strategic goal alignment across your company; it can align executives all the way down to individual teams. Many companies choose to implement OKRs because they want different teams in the company to be more aligned with the overall company direction.

Still, alignment can easily go wrong if people are not aware of how it should work and what the process looks like. It's not just about having goals somehow linked to each other. OKR alignment is deeply rooted in the goal-setting process and requires a mindset for creating good OKRs.

Before you can start to align OKRs throughout the organization, you need to take the time to get everyone onboarded with the new methodology.

If you are in your first quarter of setting OKRs, **start with just one OKR per team and forget about alignment for now**. Let your employees practice and implement the new workflow. After the first quarter, you can focus on the alignment process.

How to align OKRs successfully

The successful implementation of OKRs and, consequently, improving your business starts from the right process and approach! There are two alignment methods you often read about. Those are the bottom-up approach and the top-down approach.

To keep it simple, we will introduce you to **the best and the most successful way to align goals**. It is a combination of the two approaches.

BEST PRACTICE ALIGNMENT PROCESS FOR QUARTERLY OKRs



- 1** Company sets overarching Quarterly Objectives which focus on areas to improve or problems to solve.
- 2** Objectives are shared with the rest of the company and their importance is explained. Objectives should be discussed until everyone agrees.
- 3** Teams brainstorm and set their OKRs which contribute to what the company is trying to achieve.
- 4** Teams share their OKRs and get approval from management. Approved OKRs should then be linked up to Company Objectives.

Step 1: Set overarching Company Objectives

When you are looking for alignment, **you should always start by setting the overarching Objectives on the company level.** It's nearly impossible to have any company alignment if you do not have a central focus.

Let's learn how to align your company through an example story:

Let's say you have a software as a service (SaaS) company that has been struggling with achieving your revenue targets. After management examined the problem more closely, you have reached a conclusion that the revenue is low because of high customer churn. You are happy with the new customers coming in but churn is too high and customers stop using your service too quickly. It indicates that there's some kind of a problem you need to solve. Your customers are not satisfied enough to stay. So management **does the first step and sets the Objective for the company** – "Improve customer retention to drive up the revenue".

Step 2: Communicate the Quarterly Objectives with the teams

After the Company Objective is set, it should be shared and communicated to start aligning teams. A Company Objective is enough because all the main work will be done on the team level.

Besides sharing the Objective itself, management should also **take time to explain why this is important and where the need to work on that comes from.** Do not underestimate this step because when people do not understand or do not agree with the overarching Objectives, it's actually pretty hard to get teams and individuals aligned and working together.

Leave room for discussion and feedback. Team managers might see the situation from a different angle. If they do not agree with the focus area, take time to understand why: maybe there is a really good reason. Do not move forward before everyone has agreed to pursue those Objectives.

Step 3: Teams set their contributing OKRs

After all of the teams and management have agreed on the Company Objectives, it's time for teams to set theirs.

Team leaders need to think how they could contribute to what the company is trying to achieve. Setting the Team OKRs should mean that the whole team is participating in the process, it shouldn't be just the manager setting the goals without any input or feedback from the team members.

Teams should take time to organize OKR discussion sessions where everybody can brainstorm and evaluate the ideas. First, focus on putting a lot of ideas on the table, and then move on to choosing the important ones that make the most sense right now.

Let's return to our example. The Company Objective was to **improve customer retention to drive up revenue**. The Product team is aware that the goal is to improve customer retention and they are starting to brainstorm on how they could contribute to that.

As a result of the brainstorming sessions, they understand that the software onboarding feature is not good enough. Data shows that only 13% of customers are completing the onboarding steps. A high amount of support tickets asking about the product features also indicates that people need more product guidance. If a product is confusing to use, it can easily push people to change the software. So having a better onboarding process would help with retention. That being decided, the team sets its own Objective and defines measurable [outcome-based Key Results](#) to know when they have achieved the Objective.

Objective: Improve our in-product onboarding.

KR1: Reduce the number of product-related support tickets from 220 to 120

KR2: Increase onboarding completed rate from 13% to 45%

KR3: Improve first 30 days product usage activity average from 40% to 70%

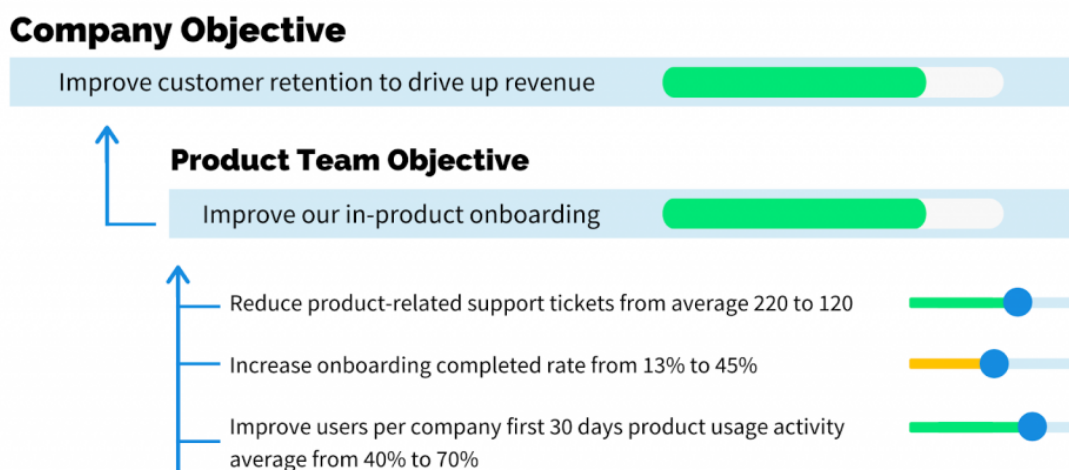
Step 4: Share, agree and align

If everything goes smoothly, then the next step is simply sharing the Team OKRs with everyone else and linking them to the Company Objectives.

Of course, there might be occasions where Team OKRs need some discussions and explanations for the management as well. It's a two-way street.

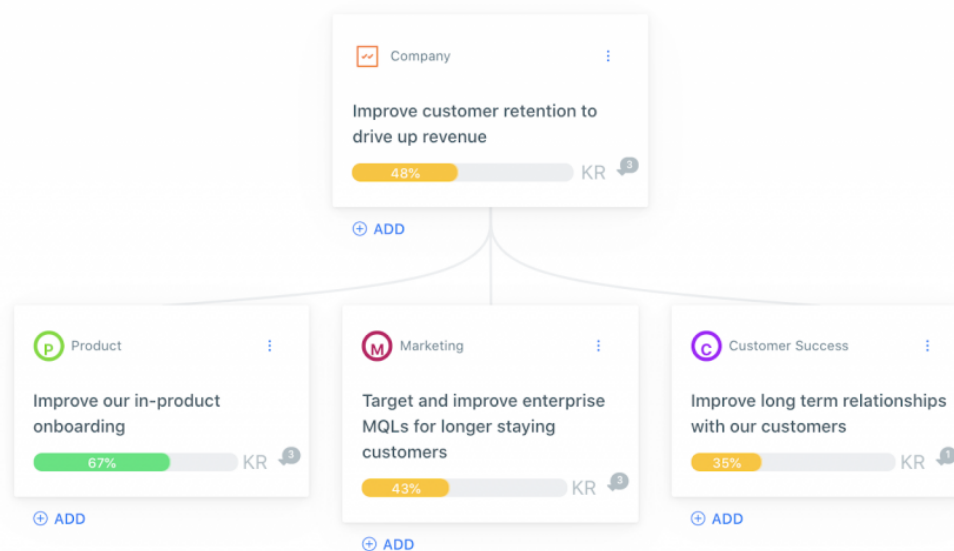
Management should have an overview of all of the OKRs set. Even though it's crucial that teams should decide their goals, it's also important that different Team OKRs work in parallel and not against each other.

Continuing with our example, alignment between Company and Product team OKRs would look like this:



Following the same flow, teams who can contribute to that Company Objective should set, agree, add and link their goals. The Company Objectives will progress when teams update the progress on their Key Results. This means, when the teams achieve success, the company does as well. Once alignment and linking is complete, everybody can start working on their goals!

Let's say the Marketing and Customer Success teams have also set their OKRs to contribute to the Company Objective. Marketing works on improving the MQL numbers and Customer Success focuses on long-term relationships with customers. If the teams succeed with their Key Results, it would move the progress of their respective Objectives. And as you can see on the picture below, if Team Objectives progress, it all feeds up to the Company Objective which moves forward as well.



If you have more than company and team level OKRs to set

It doesn't actually matter how many levels you have in your organization's structure, alignment logic says the same. **The actual work is done by teams, and higher level Objectives are there to make sure that there is a unified focus area!**

Also, having too many levels of goals might easily overcomplicate the whole process and it might mean lower chances of success. So think it through: do you really need this much complexity or not? Especially, when you are just starting with OKRs, we would strongly recommend to keep it as simple as possible.

If you need to set department level goals (in order to be more specific about the focus area for several teams), then you should do this after setting and communicating company goals (step 1 & 2). Once the department agrees on their top priority for the quarter (we recommend to set Objectives only), the teams can continue with setting their OKRs and align them with the department level (step 3 & 4). You should be careful with setting Key Results on department level because there's a high chance of them ending up being actually KPIs or metrics targets.

OKRs never cascade, they align:

3 BIGGEST OKR ALIGNMENT MISTAKES

1

OKRs are cascaded down from the management to the teams without acknowledging their expertise

2

Teams are not taking the responsibility for their results or they are not trusted to do so

3

Companies skip setting the Company Objectives or fail to set ones that are understandable and focused

Let's start with the biggest mistake that many companies make: they cascade the OKRs from management to the teams. This is a red flag for many reasons.

First, when something is cascaded down from management, it's probably a KPI target or some kind of a project and not an actual OKR. If you do not know the difference, then we would recommend to read the following sections first: [Outputs vs Outcomes](#) and [OKRs vs KPIs](#). It's hard to achieve OKR alignment if you are not setting proper OKRs.

You should not cascade goals or even projects. Let the teams, as the experts in their function, define the areas they need to improve and work on, in order to help to achieve Company Objectives. This is the way (maybe even the only way) how teams can achieve the best overall results.

That brings us to the **second biggest mistake: management doesn't trust the teams to set their OKRs and teams do not take responsibility**. Teams know best when it comes to defining what is wrong or what they could do better in their area. They do their jobs daily and definitely have the best overview of the team situation. They should be the ones setting the Team OKRs.

If OKRs are cascaded, you are taking away their chance to put their heads together to understand what this team really needs and could bring to the table. When you cascade, you might be totally wrong about what's important. It might also mean that teams are getting too comfortable not setting their OKRs and not taking the responsibility of their own results.

Management still plays a big role in the goal-setting process, just not by doing the team's job. Management needs to define the focus area for all of the teams and make sure that everyone is setting their OKRs based on what the company wants to achieve. Also, management is responsible for running the process and supporting the teams with timely feedback.

The third biggest mistake when it comes to goal alignment is that companies skip setting Company Objectives or do not set good ones. How can teams align if there's no common direction in the first place? If each team sets their OKRs separately, they might even end up working against each other. OKRs work best if there's alignment and unity in what the teams do.

OKR Examples

OKRs may seem simple, but you should see by now that writing good OKRs isn't easy. Which is why we put together useful examples for how different teams came about their OKRs. Hopefully it will inspire you to write your own OKRs.

Our sister site has a list of [OKR examples](#) for even more teams, however it doesn't show the step by step process of how the teams came about these OKRs as these examples below do.

Financial Team OKR example – how to align with the Company OKR

Finance Teams are usually focused on business-as-usual regular operations, and they might struggle with writing improvement-focused Objectives and measurable Key Results. Let's look at how to write OKRs for a Finance Team with this step-by-step example.

Company A has an overarching Objective to improve cross-team collaboration. Let's explore an example for the Finance team that is writing an OKR to align with the company goal.

- Step 1: Team discussion
- Step 2: Writing an Objective
- Step 3: Writing Key Results
- Step 4: Alignment & linking

Step 1: Team discussion

What should the finance department focus on to help move the company forward? In order to determine the answer to that question, the team has to put their heads together and have a discussion that could go like this:

Question: What problems are we facing?

Answer: We have a lot of overdue payments (causing contractual penalties) and late financial reports although we are always busy and always in a rush.

Q: Why is this happening?

A1: Team managers are not sending primary documentation (receipts, bills, invoices) to us on time and submit their payment requests too close to the payment deadline causing issues with unexpected fines and going over the planned budget.

A2: Also, it takes a very long time for us to determine a type of expense to enter it correctly into the ERP system. The reason is a non-descriptive expense name in the invoices. If team managers specify what the payment is actually for, it will save a lot of time for us in preparing reports.

A3: According to feedback from team managers, the payment request application is too complicated, as there are too many people who need to confirm the application before it comes to the Finance department.

Q: How can we change this?

A1: We need to explain how financial reporting should work to reduce overhead for the team managers and make sure that we can process all documents on time.

A2: We should create a straightforward manual to categorize all invoices by the type of expenses they represent. This way, when team managers submit payment requests, they can specify the expense type for us, and we wouldn't need to spend extra time researching the background of every single document.

A3: We should organize a payment confirmation process that requires no more than 3 parties involved.

Step 2: Writing the Objective

In the team discussion, it became obvious that team managers are struggling when submitting payment requests to the financial department, and it's not clear to them how invoices and receipts should be handled.

This is causing issues with outstanding payments being delayed, and one way to change the situation is to improve the procedure that team managers are following to submit their payment requests.

Based on this step-by-step analysis and the answers that the team has discovered, they can write an Objective that would solve the problem.

For example, **simplify internal procedures and make financial reporting more transparent.**

This Objective directly contributes to the overarching company goal (**Improve cross-team collaboration**) because achieving it should mean a huge improvement in the internal processes and mutual understanding.

But how will the team know if the Objective is achieved? In other words, what needs to change specifically so that everyone would agree that the internal procedures are simplified and financial reporting is finally more transparent?

With these 2 questions, the team should approach writing the Key Results for their Objective.

Step 3: Writing Key Results

Key Result 1

First of all, the team has discovered that it takes a very long time for them to determine a type of expense to enter it correctly into the system. Often they need to check if the contractor is already in the system, and reach out to the team managers to ask what kind of service the third party has provided. This is why they are always swamped with tons of documents to process. All due to a non-descriptive expense name in the invoices. If team managers specify what the payment is for and if there was a prior purchase from this contractor, it would save a lot of time for the financial department.

The go-to solution would be to categorize expenses in the payment request so that team managers could provide all of the necessary information from the beginning. So the first Key Result must indicate the change in categorizing expenses as a part of the new payment request procedure:

KR1: >80% of invoices are categorized by expense type before they come to the finance department

This would mean that the Finance department needs to create a list of expense types, categorize them, and explain the new payment request form to the team managers. And only if the team managers understand and adopt the new process, this Key Result could be achieved.

Simplify internal procedures and make financial reporting more transparent.

1

If Team Managers specify what each payment is for, it will save a lot of time for the financial department.

Key Result 1

>80% of invoices are categorized by expense type before they come to finance department

0%  80%

Action Plans

- Create a straightforward description of different expense types and add the selection to the payment request form.

Key Result 2

Secondly, the Finance team needs to make sure that team managers are capable of delivering primary documentation on time. Here's how to measure this change:

KR2: Reduce the number of primary documentation reported late to the financial department by 20%

To move the needle on this Key Result, the team might create a presentation about handling receipts, bills, invoices, and similar forms of primary documentation, to make sure that everyone else understands the process.

Only if everyone understands the process, the team would consider that they have achieved a new level of transparency in the organization. It could be even a good idea to create a leaderboard for team managers who bring documents on time!

Key Result 3

Third of all, the finance team would want to focus on making the payment confirmation process easier so that applications can reach the Finance department faster from the moment when team managers submit them.

But making the process easier might not be the only issue that needs to be solved to improve the processing time. Even if you are confident in the solution, don't assume that it's the best one. There might be better ways to solve the problem or there might be other factors you haven't considered.

What if the procedure is simplified but the processing time hasn't changed? Treat your solution as a hypothesis, and keep in mind that it's absolutely important to determine the real change the team wants to see in the future, and not just the first good hypothesis that comes to mind.

You should never forget the problem you are trying to solve.

In our current example, the problem is that the payment confirmation process needs to go faster (from making a request to making the transaction). Making the payment confirmation process easier is one possible solution. But if fixing the application procedure does not solve the problem, the team will have to keep thinking about other solutions.

Focusing on outcomes (as opposed to to-do lists) is a productivity lifehack and the greatest advantage of the OKR methodology.

So here is a measurable outcome the finance team would need to deliver:

KR3: Speed up payment processing time from "application" to "paid" from 16h to 8h

3 According to feedback from team managers, the payment request application is too complicated and requires too many people to confirm the document before it comes to the finance department.

Key Result 3

Speed up payment processing time from "application" to "paid" from 16h to 8h

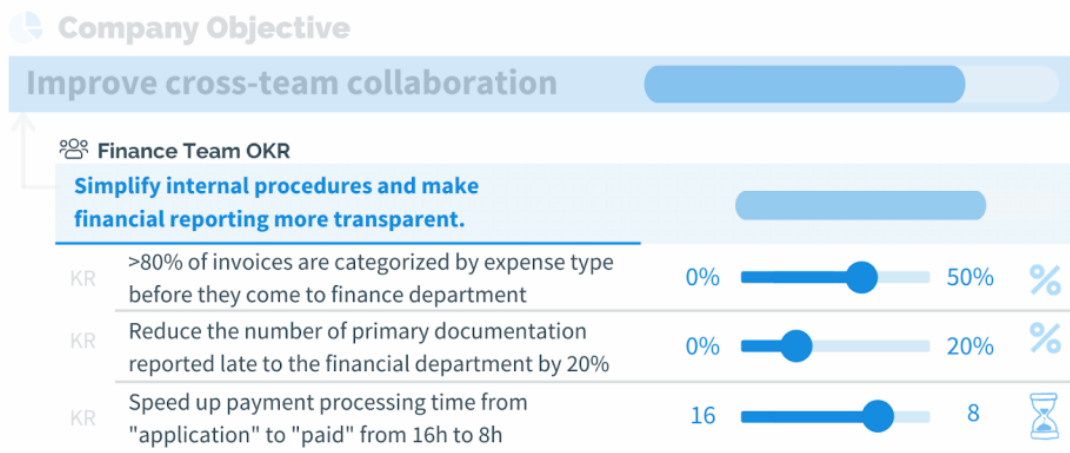


Action Plans

- Develop and present a new weekly budget request procedure.
- Organize a payment confirmation process that requires no more than 3 parties involved.

Alignment and linking

When the Team OKR is agreed upon, drafted, and aligned with the Company Objective, here is what it looks like:



For the Finance department to reach their Objective, they will have to develop better internal procedures for team managers to understand and adopt. Delivering results on this OKR will definitely create stronger ties between departments and better

collaboration in the company. Thus, directly impacting the company level overarching goal.

With OKRs acting as your teams' North Star, you can say no to low-priority and low-value plans, or think about outsourcing and automating them.

OKR example – alignment with the Company OKRs

The first step of the OKR goal-setting process is to determine an overarching goal for the company. Based on this goal, different teams should write their OKRs to move the company forward. Check the example to learn how to set an Objective on a company level and lead the teams in a unified direction.

According to best practices in implementing OKRs, the goal-setting process should begin at the company level. Top management decides on the strategic direction and an overarching goal for three months. This focus area is a specific problem to be solved or an opportunity to pursue.

What kind of problems could you identify in your current situation? By looking at your health metrics (KPI numbers), you should be able to spot specific areas that you could work on in a given quarter.

For example, if your Sales team's KPI target is to close 50 new paying customers per month, and now they are only bringing 30. To get to the root cause of the problem, you should continuously ask "why" something is happening:

- Why are we not getting enough new paying customers?
- Because we are not closing enough deals.
- Why aren't we closing enough deals?
- Because we have a competitor who is taking all our customers.
- Why are the customers choosing our competitor and what can we do to improve our product/service?

If you have discovered that the issue is indeed in customers choosing another offering, this is not only the sales team's issue, and it has to be approached from different angles by different teams. In this case, you should ask your teams to suggest their OKRs to **increase the competitive strength of your product** (Company Objective).

The focus area for different teams could be on 1) improving certain aspects of your product/service, 2) marketing activities that could attract more potential buyers, 3) sales process, 4) communication channels or something else.

Teams write Objectives and Key Results based on their knowledge and expertise and align their OKRs with the overarching company goal. How can the team contribute to the overarching Company Objective? This is the starting point of a meaningful conversation.

Team Objectives should be ambitious, inspiring, qualitative and quarterly based.

Under each Objective, the team defines 3-5 Key Results – measurable outcomes that indicate success or failure of an Objective. Key Results should be clear, quantifiable, and hypothetically achievable. But keep in mind that Key Results are about pushing to be better and should not be easy.

Here's an example of what Team OKRs might look like.

Product Team Objective:

Objective: Increase engagement in our product

KR1: Increase average session duration from 10 min to 25 min.

KR2: Analyse competitor's offering and implement top 3 improvement ideas.

KR3: Increase average daily activity per user by 12%.

Action Plans

- Compare our product with the competitor and brainstorm ideas for improvement.
- Reach out to loyal customers and ask for feedback.
- Design and launch a "wow" feature to ignite discussions and trigger customer engagement.

Marketing Team Objective:

O: Leverage "social proof" to increase credibility and improve the reputation

KR1: Get at least 15,000 views on our testimonials page.

KR2: Reach an average click-through rate of 20%.

KR3: Increase the number of shares on LinkedIn from 30 to 1000.

Action Plans

- Partner up with thought leaders to promote our product.
- Reach out to power users and ask them to share their success stories in video format.
- Brainstorm ideas for LinkedIn marketing.

Sales Team Objective:

O: Personalize sales approach and nurture new potential customers better

KR1: Improve conversion % from “trial” to “paid” from 20% to 35%.

KR2: Increase follow up email open rate from 14% to 45%.

KR3: Reach 8/10 average score on customer satisfaction survey with at least 100 responses.

Action Plans

- Update the customer journey map to improve the nurturing process.
- Take a course on best practice email approaches and consult with the Marketing team.
- Create different offers for different use cases, review the sales pitch.

Writing OKRs is deciding what exactly you need to improve in your business and, based on that, how you will spend your time and resources in the next 3 months.

Success is not a single leap from zero to hero. It's a process of fixing weaknesses and strengthening your best features. So if this quarter's OKR didn't impact your business the way you wanted it to, you can analyze what worked and what didn't, and come up with a better approach, and a better Team OKR for the next quarter.

OKR is a learning path, and it takes a few quarters to learn how to leverage your strengths and find your weaknesses. By analyzing your OKR progress in retrospect (in

[OKR review meetings](#), which we will cover in a future chapter), you are figuring out and documenting exactly HOW you are most likely to improve your business and achieve your ambitious KPI targets.

The OKR Process

1-2 Weeks before starting with OKRs

First, start by defining your quarterly Company Objectives. You may also want to have longer term annual Objectives that connect to the quarterly ones. However, this is optional.

Another thing to note is to keep annual Objectives at the company level. Annual Objectives shouldn't be used by lower levels or you lose the agility factor of using OKRs.

When starting out with OKRs, it's important to remember that you should only focus on a few high level Objectives. In this case, we would suggest setting 1-3 and discussing them with managers, team leads, and whoever else is involved in the change to OKRs so everyone agrees on the most important goals for the company.

Example: You have an annual Objective to **increase company growth**. So, for the first quarter, your focus regarding this goal will be to **understand and analyze our customers better** or **create a better workplace for our employees**. These quarterly Objectives help you realize your annual Objectives by looking for the positive outcomes of better aiding customers or staff.

You can then repeat this process at the team level. At the team level, team leads should consult their team members to decide on important team goals while team leads should make sure that these goals align with the Company Objectives.

The final step before finalizing OKRs is a last round of feedback where Objectives and Key Results can be added, deleted, or changed.

Weekly Check-Ins

It is incredibly important that an OKR check-in process is implemented and followed. That means teams should have weekly check-ins to see how their goals (Objectives) are progressing.

An OKR check-in is a quick 15-20 minute meeting where you and your team reflect on the progress of Team OKRs and set new priorities for the upcoming week. The purpose of the OKR check-in is to guarantee that OKRs progress.

This is done by looking at accomplished plans, the results of these plans, and the lessons learned when moving forward. This turns Objectives and Key Results into a weekly flow. Make sure to keep check-in meetings short and focused. 15-20 minutes should be enough to go over everything.

The next chapter is all about [how to run a successful OKR Weekly Check-in](#) for tips on running one successfully.

Once a month

Make sure to have a meeting outside of the weekly check-ins as well. This meeting should be between managers and team leads with the purpose of identifying problems and brainstorming ways to fix them.

1-2 weeks before the end of the quarter

At this point, the entire company should review the Company Objectives to see the progress that has been made towards them at every level. It's definitely a good idea to gather some input on this quarter's OKRs and ideas for the following quarter.

Good questions to ask as a team:

- How did your team perform?
- How big was the contribution of the Team Objectives to the overarching Company Objective?
- Were the OKRs set a good choice for the team?
- Did they help the team make improvements for the team as well as the company?
- If the OKRs failed, then why?
- What were the challenges this quarter?
- What can be done better next time?
- What are some ideas for the upcoming quarter?
- Were the KR outcomes driving the Objective forward?
- Could we have better KRs next quarter?

Good questions for company review

- How did the company move forward in achieving company goals?
- Were the results satisfactory?
- Which teams performed the best?
- How do you support teams that did not succeed?
- Did teams feel motivated working with their OKRs?
- Was the focus clear to everybody?
- What are the main learnings from this quarter?
- What can the company improve in their OKR setting and process?

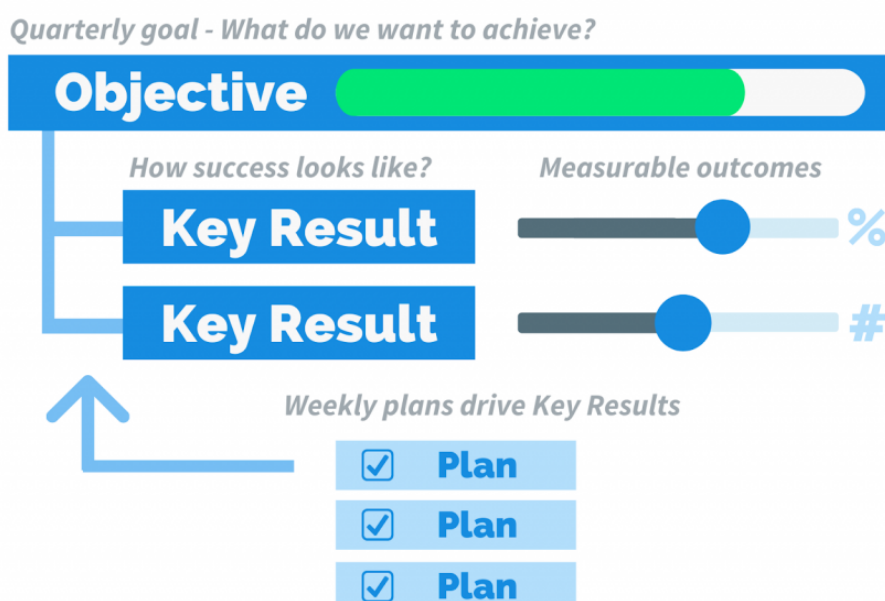
We will go into more detail in [how to run a successful OKR quarterly review](#) in a future chapter.

The OKR Weekly Check In: What It Is and How to Run One

To be successful with the goal-setting methodology of OKRs, you need to continuously work on them, discuss them, check the progress and plan what ideas your team could execute. The best way to do all that is to have a weekly team OKR check-in.

An OKR check-in is a quick 15-20 minute meeting where you and your team reflect on the progress of Team OKRs and set new priorities for the upcoming week. The purpose of the OKR check-in is to facilitate OKR progress. Teams make sure that progress is happening by looking at accomplished plans, the results of these plans, and the lessons learned when moving forward. This turns your work towards achieving Objectives and Key Results into a weekly flow.

Weekly Team OKR check-ins are crucial for a successful OKR cycle. Even if it seems obvious that goals won't be achieved when there's no one taking action, weekly check-ins are still incredibly important to keep everyone focused. Alignment, transparency, and progress aren't just important when it comes to OKRs. They are also crucial when it comes to taking action towards goals. You can run weekly OKR check-ins as a part of your general weekly or bi-weekly team meetings.



Make sure to keep check-in meetings short and focused. 15-20 minutes is enough to go over everything. Smaller groups can continue with more specific follow-up discussions after the check-in. However, these follow-up meetings should also have a clear agenda and only include the parties involved in the topic.

Being prepared gives you the opportunity to make sure that time is used efficiently and that all of the most important topics are addressed. You, as a manager, are responsible for keeping the meeting on track. That doesn't mean you do all the talking. Instead, your role is to moderate meetings so talking points don't derail.

Preparing for an OKR weekly check-in

Before going into the meeting, take time to look through the Team Objectives and update any progress made on KR's. This is also the ideal time to note any additional insights. Are you satisfied with the results of your OKRs? What were your biggest priority plans from the previous week? Do you know how to progress from here? Are there any problems that you noticed and want to bring up? Do you have any suggestions you want to share with the team?

Preparing for Weekly Check-ins



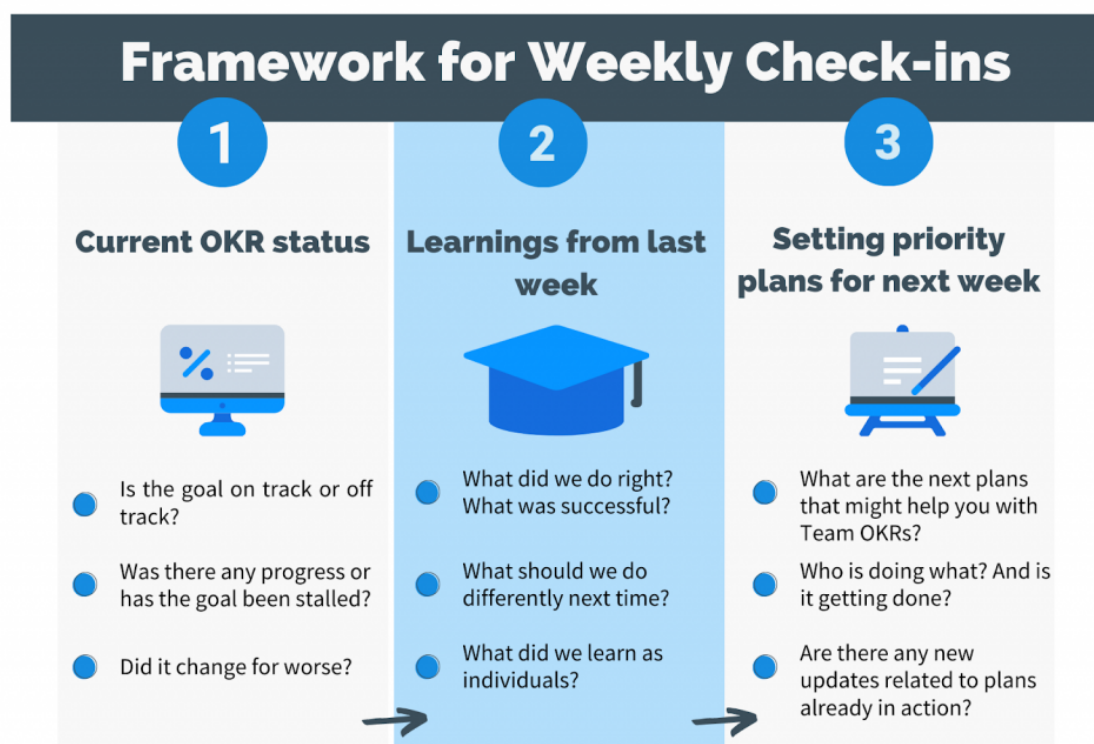
- **Look through Team Objectives**
- **Are you satisfied with the results?**
- **Are there any problems to address?**
- **Make notes of your thoughts!**

It's good to take written notes or leave comments under the specific OKR so you can see what's been happening over time. Because a KR's progress meter can move back and forth, it's also a good idea to document where progress stalls and not just which KR's advance. If you have any important ideas or questions about your team's OKRs, it's good

to write them down in the comments as well so everyone can familiarize themselves with your concerns.

It's important that your weekly OKR check-ins have the same framework each week so people can get used to the workflow and know what to expect. However, the specific questions in the meeting agenda will differ depending on how well everyone's doing and which goals you need to focus on.

Best Practice Framework for OKR weekly check-ins:



- Current OKR status
 - Is the goal on track or off track?
 - Was there any progress or has the goal been stalled?
 - Did it change for the worse?
- What did we learn from last week?
 - What did we do right? What was successful?
 - What should we do differently next time?
 - What did we learn as individuals?
- Set new priority plans for next week
 - What are the next plans that might help you with Team OKRs?
 - Who is doing what? And is it getting done?

- Are there any new directions or updates related to plans already in action?

Running weekly check-ins

Make sure that everyone is aware of the framework you're using.

- Keep track of time so meetings don't derail or go on too long.
- Moderate the meeting. When some discussions start to go off track or delve into too many specifics for the whole team, then ask the parties involved to schedule their own meeting to continue the discussion later.
- Make quick notes. Use these to write a summary after the meeting and make sure that any good ideas or lessons learned will not be immediately forgotten.
- Don't do all the talking! Make sure that all the parties involved get to share their thoughts or ideas. They see things from a different angle and it can be very useful for planning ahead to make use of everyone's varied experience.
- When setting new priorities for the upcoming week, encourage your team members to be creative and try new things.
- Pay attention if there are people in the team who seem to not be engaging with the OKRs even if they should be. Likewise, look out for people who may be struggling. If someone is having a hard time, have a friendly discussion with them afterwards to figure out what the cause may be.

After the meeting

Don't run the OKR check-in meeting just for the sake of having a meeting. There should always be an outcome for every meeting you have. It's also important to remember what was discussed. Choose how you want to share and document the lessons learned and any new ideas that came up.

If you are using [Weekdone](#) to track your OKRs, you can, for example, add lessons learned or new ideas to the OKR comments or share them as a message on the team Newsfeed. New priorities set for the next week(s) should be added to the Plans of the responsible party. This way, these plans are not forgotten and everybody can keep track of the situation. During your next meeting, you should briefly go over this set of priorities. Make sure to discuss progress and the effect the completed plans had on your Objectives.

(If you aren't using [Weekdone](#) yet, you use all the features for 3 people completely free. If you have a larger team you want to test it out, you get a 15 day trial.)

OKR weekly check-in FAQ

Why do I need to have a meeting when I have told my team that they need to work on their OKRs?

Implementing OKRs requires a change in thinking and in management. It's basically a new habit for the whole team or company. If a manager doesn't show initiative and support, then employees will find it overwhelming and will stop using them. If a team manager doesn't think it's worth the effort, then why should the team? OKRs are all about execution. It's an ongoing circle of setting plans, completing them to reach desired outcomes, reflecting and analyzing their impact, learning from mistakes or success and setting new plans again. OKRs are a team effort. Therefore, they cannot succeed without a fixed process and ongoing discussions.

With weekly check-ins, you can also increase team motivation and engagement. The whole team gets a better overview of what everybody is doing, which helps everyone move in a unified direction.

We are having a good discussion over one idea/problem. Can we run the meeting longer?

It's simple. If this conversation affects everybody in the team and it is valuable information, then yes. This is under the assumption that no one else has anywhere to be as well. But you still have to be careful not to derail the conversation. There should be an outcome for every meeting you have. Repeating or arguing over things that everybody already knows doesn't help anyone besides those that want to hear their own voice. Also, most things can't be solved by just discussing them. You need to try and gather feedback to see what works and what doesn't.

If the conversation affects a part of the team, then they should continue the topic after the meeting. There's no point of holding up other people who don't need to be in that discussion. The more the meetings go over time, the more people start to feel that check-ins are not valuable. They are, but they need to be moderated carefully.

I'm a manager and I should know what to do and how to do it. Why can't I run the whole check-in process alone and just assign the plans/responsibilities myself?

As a manager, you need to have the big picture of everything going on. However, your team members might know important details that you are not aware of as it is specific to their work or expertise. OKRs are all about little details that impact what works and what doesn't. You need to hear different points of view and different experiences to make the system work and increase engagement and flow. Also, just cascading plans without any discussion can demotivate the team and that is definitely not what you would want.

Can we have just one OKR check-in per month or quarter?

To have great success and achieve ambitious goals – definitely not. As mentioned before, OKR check-ins are meant to reflect on what's working and what's not so you can set new plans to accomplish goals. If you have only one (or even three) meetings per quarter to do it, then you likely won't have time to test how projects are going or check if people are working on the right things.

We are continuously failing on driving one of our Key Results or the whole Objective. Now what?

If the KR is not progressing, don't immediately panic. The stagnant KR might not be the most important aspect of it. There are two questions you need to ask. First: did you learn something new? Second: was that information valuable? If you can answer 'yes' to these questions then the KR might have served its purpose without making any measurable progress. Maybe you picked a KR that is very hard to measure or maybe your KR doesn't reflect the success of the Objective itself. Unless you didn't learn any valuable lessons, you actually succeeded at something. As Thomas Edison said "I have not failed. I've just found 10,000 ways that won't work."

The OKR check-in is a critical part of implementing the Objectives and Key Results methodology. It is important to have a structured way to run your check-ins and OKRs. The best way to do that is with [Weekdone](#). It puts the idea of weekly check-ins at its core and builds a culture around weekly updates and OKR tracking. And with unlimited OKR coaching included in all paid packaging, it is the best way to successfully implement OKRs in your team.

The OKR Quarterly Review

When you start setting goals using OKR methodology, you should see improvement and progress as a company or a team. But succeeding with OKRs doesn't equate with the achieved percentage of the Objective. Even if you achieved 100% of your Objectives it might still mean it was quite random, the bar was too low or you just got lucky.

Without understanding what brings success and what brings chaos, it's hard to actually improve. OKR success is also about gaining knowledge, having innovation and making discoveries. Sometimes the OKR with only 20% of progress might be your best one ever.

So how do you conduct a company-wide review and evaluate the OKR process to gain knowledge? We will look at the process for a company wide quarterly review, as well as what mindset your company needs and the best questions to ask.

“The ability to learn faster than your competitors may be the only sustainable competitive advantage.”

- Arie De Geus

The process of a company-wide review

The end of the quarter review should also happen in the correct order. It even seems impossible to share findings on a company level if the teams haven't analyzed what to share yet. For teams, the process of a monthly review or preparing for a company-wide review is the same. The process itself is rather simple, just remember to

1) have an open and honest but respectful culture, 2) share constructive feedback, 3) ask the right questions, and 4) have valuable discussions to complement the answers.

Conducting team OKR reviews

The company-wide review should always start with teams reviewing and analyzing their OKRs and work done. If you are just conducting a review on the team level, you can still follow the same process. Teams can use the questions below to understand what were the most valuable lessons learned.

To give everyone time to think and analyze it would be best if people get the questions beforehand and come to the review meeting already prepared.

The review meeting should have two outputs: 1) a longer report of team learnings, ideas, etc, and 2) a shorter overview to present to others in the company. The first would be for the team, more detailed information about their learnings and second for a company-wide review as there's no time and need to share all the details with other teams.

If the next step will be a company-wide (or department) review, then teams should keep in mind that everything presented should be understandable for other teams. That means, if you are talking about some kind of action that helped to achieve a lot of progress on your Key Results, be ready to explain and offer more context in order for others to understand.

It may not be so easy for Marketing to understand how Sales works and what different terms mean, etc. If people do not understand the context, it's hard to make sure that they will learn anything from your experience.

Think about the presentation as telling a story – before getting to the main point there's an introduction to give enough background which makes understanding the main point possible.

Before sharing the lessons learned, the team should also make an overview of their progress made and most important steps taken to achieve those results.

In summary, each team should be ready to talk about 3 main points during the company-wide review:



1. How did the team do? How much progress did the team achieve on their Objectives and Key Results? Were those the right ones to pick? Besides telling how much was achieved percentage-wise, also explain if the team is satisfied with the results.
2. What were the main actions/initiatives taken to achieve the outcomes? Introduce a couple of the most relevant ones. Those can be the ones that worked best or completely failed.
3. What are the key learnings from this quarter's OKRs? Share 3-6 main takeaways. Did you learn something about the OKR process itself? What should the team stop/start/continue doing?

After teams have finished with their summaries, it's time to organize a company-wide event where each team can present what they have prepared. Leave time for other teams to ask questions and share their ideas/feedback as well.

After the presentations discuss together how everyone felt about the Company Objectives. Was this focus right? Did teams see company-wide improvements?

At the end of the review session, it would be good for the CEO or management to have a little summary speech. It should be about acknowledging the hard work done by the

teams and repeating the most important lessons learned which caught their attention the most.

If management already has ideas for next quarter's Company Objectives then it would be a good time to share them as well.

Bigger companies with many teams or departments

If your company also has departments and it would be a very long day to hear each team present their reports, then organizing a department review would be relevant.

The goal of the department review would be to hear each team presentation, have a discussion, and make an overview which can be presented during the company-wide review. The points presented are similar to what the teams did, it would be just a summary of teams presentations:

1. What did the department do? How much progress in general did teams have with their OKRs? Were they satisfied with the OKRs set? Give a brief overview of the teams in general.
2. What were the main actions/initiatives taken to achieve the outcomes? Introduce the most impactful and biggest ones, and the ones that failed but helped you learn a lot.
3. What are the key learnings from the OKRs? Share up to 10 main takeaways from different teams.

Going through the process of the OKR quarterly review is the first step. However, there are some other aspects you must keep in mind to make sure your quarterly review is successful.

Learning starts from the right mindset

You learn only if you are ready to learn. That means there has to be an open and learning-oriented culture in the team and in the company general. People have to be able to admit their failures without being afraid of being strongly criticized.

There's a huge difference between criticism and constructive feedback. Criticism is just looking back and pointing the finger, repeating that the person has failed and just making them feel bad about it. Constructive feedback or even constructive criticism is about looking into the future, what do you see that the person could do better next time

and how? What ideas and support could you share to help that person to achieve it? What would you do differently and why? What you need is not blaming someone but figuring out how the next step in the company or team development process can be reached most effectively.

Plain criticism is not welcomed but **constructive feedback needs to be given and it needs to be accepted by the receivers**. It's not about *who's* idea is best but *which* idea is the best for the company or team's progress.

People have to be able to admit that "well, I thought this would work but it didn't". That's fine! You just need to try something else and it's important to stop when something isn't working. And as T. Edison said "I've not failed. I've just found 10,000 ways that do not work".

Finding things that do not work for your company is also progress if you understand why they didn't. It's gained knowledge!

Opinion or feedback doesn't follow the power hierarchy. Opinion is a point of view which is generated based on the role we are in which defines the angle we see it from and what kind of past experiences and knowledge we have to analyze the situation. The power hierarchy just changes from which angle the situation is experienced but not the value of the opinion. Same goes with feedback.

Feedback and opinion is valuable if it's backed up with facts and can be explained. People need to feel safe to share their opinions and honest feedback. That means their answer can't be later rejected based just on their position or even worse their job can't be threatened if they say honest things that maybe managers do not want to hear. To learn, we need to be ready to accept the feedback no matter where it is coming from.

To get valuable answers you need to ask right questions

It's hard to evaluate anything if you do not know what you are supposed to look for. **If you ask the right questions**, that direct people's thinking in the right direction, **you might learn many interesting things**. We will give you some questions for different purposes, you can find them below. You do not need to answer them all, choose what is relevant for you and what clicks in your people's minds.

Keep in mind that **answers need to be discussed!** When we say it out loud, it requires us to think our sentences through and formulate the answer that we are planning to

give. Already in this process we actually evaluate and analyse a lot more than when it happens just in our head.

Discussion is important because we all evaluate the same situation from different angles based on the knowledge and experience that each individual has. More opinions means that we are able to get a deeper and fuller understanding. By discussing our points of view we can connect the dots between different things and make conclusions why something has happened or what might influence it.

Remember, it's constructive feedback and not just judging people's opinions. In the end of the discussion the group should agree on common learning points.

Questions about the OKRs set and the process

- How did the team generally perform? What did we achieve?
- How was the quality of the OKRs that were set? Did they help the team make some improvements?
- Did we prioritize the OKRs enough? Were people working on them?
- Were people aware of the roles and responsibilities they had? Did they feel that they knew what to do?
- How often did we discuss the progress? Did we have enough regularity and consistency?
- How can we be better with setting OKRs next quarter? What do we have to keep in mind?

Questions about success

- Why were we successful with achieving the Objectives?
- Was it intentional or did it just happen?
- What kind of actions brought the highest results?
- Are there things that we can improve even more?
- Can we use what helped us succeed in some other areas as well?
- What are the key takeaways from our success that we can share with others?

Questions about failures and challenges

- If we failed, then why? What did we try and why do we think it didn't work?
- Most likely something did fail. If it wasn't a Key Result, it was some kind of action that didn't bring results. So, what doesn't work for our team/company?

- What were the major challenges?
- Why did those major challenges appear? Can we prevent them in the future? How?
- What kind of knowledge or experience might we be missing? How can we gain it or did we already?

Questions about the future

- What are the key things we learned and have to keep in mind while making decisions in the future?
- What kind of new opportunities have we noticed?
- What should we as a company or a team start doing? Or what should we continue doing?
- What should we stop doing?

You can access these [questions as separate pages](#) in our Resources section.

As a summary, remember to have an open and honest but respectful culture, share constructive feedback, ask the right questions, and have valuable discussions to complement the answers.

The Secret Behind Successfully Implementing OKRs

Are you ready as an organization to implement OKRs? Many organizations want the benefits of OKRs (teaching teams to be result-oriented and having your whole company aligned and moving in the same direction) but as you realize by now, OKRs are not a plug and play solution. There are 4 pillars that are needed in order to successfully implement OKRs throughout a company.



Knowledge

First of all, OKR knowledge is a must to be able to successfully implement OKRs. Do you understand what the purpose of OKRs is and how to write good OKRs? Do you understand the weekly, monthly and quarterly process of OKRs? Can you explain to everyone in the organization their roles in the OKR process? You need to be able to answer these questions to successfully implement OKRs and get everyone engaged.

A good level of knowledge is needed because OKRs tend to be a bit different from the other methods that companies follow. That means, without knowledge, it is easy to fall for different misconceptions and end up not setting any real OKRs at all. For example, OKRs are really often confused with high-level project management, and instead of defining measurable outcomes, companies are setting action-based outputs as their Key

Results. It just defies the whole point of OKRs. Reading just one article is not enough, you need to dig deeper.

Having a process in place is also important. It is very easy to set your OKRs for the quarter and then completely forget about them if you don't have processes in place. This is why weekly check-ins and quarterly reviews are so important to successfully implementing OKRs.

Reading this ebook is a good first step in gaining the knowledge you need to successfully implement OKRs.

Motivation

Why are you using OKRs? Are we motivated enough to stick to implementing OKRs and the changes needed to make the OKR methodology successful in our organization?

OKRs take an element of drive and commitment to keep them moving when first implementing them. If you have read Measure What Matters, you know it took Google 3-4 quarters to become good at writing OKRs. It takes time, it is a journey. Don't expect to implement OKRs and in two weeks everything is running perfectly.

You need to have the motivation and the will to train and coach people through this process and manage the overall change that OKRs will bring. The idea of OKRs, they should change the way the organization thinks and the way it works. And that means managing that change over time.

Culture

When we look at culture in an organization, there are a few elements that are needed when implementing OKRs.

OKRs are supposed to be open and transparent. If your company doesn't really have that openness and transparency naturally, you have to work towards creating it. The whole purpose of people setting OKRs is to create alignment, which is why OKRs must be visible to everyone. If openness and transparency is new, it will need to be driven and encouraged.

When it comes to OKRs, failing and learning is OK. Every OKR you set won't be equally successful. Some OKRs might fail. Having that mentality that it is ok to fail and to learn

from your failures is important. Even if an OKR doesn't work out every once in a while, the new knowledge these "failed" OKRs bring can help for future success.

OKRs are measurement driven. So you must have some form of measures in the company. And be prepared for the mind shift from focusing on actions (which is what companies usually do) to focusing on results. People must be ready to trust the outcome and let go of projects that don't bring measurable results.

Lastly, you need to have trust. As managers, we need to trust teams to develop their OKRs. In the beginning you will coach them on whether they are a fit in the direction we want to go. The aim is to have the teams set good OKRs because they have the skills and expertise in their field to know the best actions the teams can take to help move the Company Objective forward. Management's role is to make sure everyone goes towards the agreed direction and that Team OKRs won't hurt any other goals or principles that the company has. And as you go on quarter after quarter, it becomes more and more important to give teams that independence to set their OKRs and commit to them.

OKR Tool

A tool on its own won't miraculously help you successfully implement OKRs. You need to also have knowledge, motivation and the right culture in place.

But the right tool can make a difference in these areas. For example, a lot of companies initially start with spreadsheets for measuring OKRs. However, spreadsheets can be really cumbersome, and can quickly deplete motivation to keep OKRs going when you have to force your teams to continuously update spreadsheets.

Spreadsheets also don't foster the idea of transparency naturally. Sure, you can have a spreadsheet that everyone has access too, but will everyone look at it? And how do you know what plans are driving Team OKRs forward?

[Weekdone](#) is more than just OKR software. We provide coaching to all paid clients so that you can get the knowledge needed to successfully implement OKRs for the long term, with individual and team training, and regular OKR quarterly reviews.

Our software allows teams to create habits around their OKRs with the weekly check-in process. Each week, teams come up with ways to drive their OKRs forward and enter those plans into [Weekdone](#) – plans that are visible to everyone on the platform. If

people have issues, or things aren't moving forward as they should, it is easy for team members to update their plans while keeping everyone in the loop.

OKR Implementation Guide

Now that you've learned the basics of the OKR methodology and what it takes to implement OKRs, the next step is to start implementing it! When implementing OKRs, it's important to do so in advance, starting a few weeks before the coming quarter to make the most out of the methodology. Here we will provide an overview of implementation practices.

The first thing to do is to make decisions about which teams will use OKRs

Some common structures include:

Pilot team

By only focusing on one team, you can work out any kinks in your cycle before introducing it to everyone. Likewise, you'll get a mini version of what your OKR levels will look like, so you can predict how OKRs will work for the rest of your company.

Team leaders only

By starting OKRs with team leaders only, you can work out alignment issues and how Team OKRs connect to overarching Company Objectives.

The benefit of this approach is that this mindset shift (managing by [outcomes vs outputs](#)) is a huge change for organizations, and if you onboard the team leads properly, then everyone else will see that this framework works and should be taken seriously.

Everyone

Starting everyone out using OKRs at once can be incredibly daunting, but is suitable for SMEs or companies with flat hierarchies. It takes 2-3 quarters to fully see the value of OKRs, so getting everyone started means seeing results sooner.

Getting an OKR Coach

When you want to start getting organic traffic, you would hire an SEO expert. You would not ask a guy from Sales who has read 2 articles on SEO to optimize your website. This same logic applies to implementing OKRs within your company. Reading a couple of books or articles is a good start, but at the end of the day it doesn't mean you know how everything works in practice. It doesn't make you an OKR expert, yet. Understanding the main principles is still far off from knowing how to make the changes needed in the company to actually happen.

While OKRs themselves are fairly simple, having your entire company understand OKRs and use best practices isn't easy. Having an expert guide you on best practices, train your teams and help your entire company implement OKRs in a way that fits your needs will make your OKR experience more likely to succeed and much easier. So let's take a look at why you will want an OKR coach when you start using OKRs in your business.

OKR coaches save you time (and therefore money)

There are many "roles" and stakeholders in the OKR process, and everyone needs their own type of guidance. If you are a leader, you want everyone to be immediately more aligned and connected to the strategic priorities. If you are an OKR champion, you want everyone to follow the process you put in place, and get support from the team. Different roles have their own challenges and best practice solutions. OKR coaches know the implementation process from different perspectives, and their tips can save you time and effort substantially.

Everyone has their own expectations and needs. An OKR coach can also help you find a healthy balance between what everyone wants and in which order those needs should be fulfilled.

When you are implementing OKRs, you are pursuing ambitious results for your business, and spending time on getting everyone onboard with your OKR thinking might not be the first thing on your list. Unfortunately, OKRs don't work if people don't know how to set them or what kind of process helps execute them. That makes managing expectations and organizing workflow crucial if you want to succeed with your OKR implementation. But you don't have to do it alone.

The job and the purpose of an OKR coach is to guide your team to be more aligned and productive, not just to structure your goals in a new way. The value of this guidance is in the step-by-step approach, which is far less overwhelming than trying to absorb everything in a single day. An OKR coach knows the best practices and helps you set up a process that increases the chance of successful implementation drastically. The goal-setting skill has to be exercised and improved over time, and it helps if you know what every next step should be in this process.

Coaches know how to adapt OKRs the right way to fit your needs AND still see the success

The OKR methodology has been around for 50 years, and hundreds of organizations have succeeded and failed continuously over the years. Why take the long road and go through the same mistakes someone has committed already if you can learn from their experience and fast-forward to success?

Good OKR coaches go through at least 6 months of hands-on training with a mentor. Established OKR coaches have years of seeing what works and what doesn't when it comes to implementing OKRs in all types of industries. They know the main challenges companies face with OKRs. They can help prevent or overcome challenges smoothly and without people losing motivation.

Yes, you could technically learn these same mistakes on your own, but wouldn't you rather run a successful company than take the trial and error approach to implementing OKRs?

Most companies who take the longer road just give up in the process because hitting every challenge possible is not motivating. Many companies give up saying "OKRs didn't work for us" but the actual issue is they never managed to set any real OKRs - because they didn't have an expert there to guide them.

Coaches see blind spots you won't be able to see yourself

We all have blind spots. Areas that need improvement in OKR usage that we don't realize need improvement. And it is hard to see these without an OKR coach.

For example, reading a book on how to run fast doesn't mean that the person who reads it will be competing in the Olympics the next day. They still need to practice and

train. And they also need a coach who helps them with their technique or where they need improvement.

It is common for leaders to read a book or two on OKRs, and then implement OKRs. They, of course, are implementing OKRs in the way that they know best. Otherwise they wouldn't do it that way. But if they don't know the difference between [OKRs and KPIs](#), for example, they won't even realize that having a KPI as a Key Result isn't ideal. Or if they don't understand the difference between [outputs and outcomes](#), they will teach teams to set Key Results that are just plans and projects - which may or may not drive business value. It goes against the whole purpose of OKRs. But if you don't know that this is not how you should do things, how can you improve?

As humans, we simply don't know what we don't know. And it's okay. That's why people hire experts. Without a coach, you won't be able to learn the things you are doing wrong because you won't be able to see them.

Easier for people to get coaching from an outside source

When people in the company have access to a coach, suddenly they are a lot more open to actual coaching. They are aware that coaches are OKR experts who live and breathe OKRs every day. It makes more sense to listen to them than to an employee who has some experience with OKRs.

When people are open to coaching, they are more likely to actually hear the advice given and take action on that advice. After all, if this wasn't the case why would they speak to the coach in the first place?

Why does Weekdone offer unlimited coaching?

We understand that implementing OKRs and making them feel a part of the regular process of work takes time. Usually 2-3 quarters, even with an OKR coach.

3rd party coaching can be really expensive, and small or medium-sized businesses generally don't have the extra budget for an outside [OKR consultant](#).

There are always the options of training an employee to become an OKR coach, but this takes time. So many work hours are used up, not only for training, but for actually coaching teams. And the real question is, will the teams even listen? We've seen team leads completely ignore the advice of an in-house OKR coach because it didn't fit their

narrative - and how much experience can an in-house OKR coach have after 2 days of training?

Weekdone is more than [OKR software](#). Yes, we want companies to use our software to easily measure the progress of their OKRs. But if you don't see the value that OKR methodology brings, you won't stick around long. We know that we can provide the quickest learning curve and help companies implement OKR best practices so they can reap all the benefits OKRs have to offer.

OKR Best Practices and Tips

While the OKR structure is fairly simple, as you have read, it doesn't mean they are easy to implement. It usually takes 2-4 quarters for companies to start using OKRs the right way. We went over a lot of these best practices throughout this book. Here is a short reminder of what you need to do to start to successfully implement OKRs in your company. You can also use our [OKR implementation checklist](#) found in the [resources section](#) of this book.

Set good OKRs from the start

Start setting your OKRs before the quarter starts!

This is especially important for Company Objectives. OKRs can take a lot of time, planning, and agreement (especially if it is your first time setting them. It is best to start planning the 2-4 weeks ahead of the start of the quarter. That way you are ready to go when it starts.

Communication

Communicate the Objectives with the rest of the company and discuss why they are important. Leaders should get together and discuss their Team OKRs. From there department/team managers should introduce their teams to the OKRs and get their feedback and ideas.

Align Team OKRs with Company Objectives

Often people get excited coming up with new ideas when it comes to OKRs. But it is important not to forget why you are setting them in the first place: Alignment! Make sure that the majority of OKRs at the team level connect to the company ones. This way everyone moves in a unified direction. A software with an OKR hierarchy view (like [Weekdone](#)) lets you see all your goals and how they connect in an easy-to-view format.

Read more about this in the [OKR Alignment chapter](#).

Use OKR examples

There are a lot of wrong ways to write OKRs. When you are first learning OKRs, it can be good to have some examples to reference. We recommend [OKRexamples.co](https://okrexamples.co) because it has hundreds of examples of OKRs for different teams. If you are using [Weekdone](https://weekdone.com) to track your OKRs and weekly check-ins, you can see example OKRs when adding OKRs with the OKR Wizard.

Execute your OKRs

Implement a weekly process

It is important to align your weekly activities to your Objectives. This helps employees engage with OKRs as they work, and makes sure their activities help move the company forward. You can read more on this in the [Weekly Plans](#) chapter.

Hold a weekly team OKR Check-in

It is important to set new weekly items as well as update the Team KR's. Review every team member's weekly items and make sure their plans are being completed. Here you can also agree on what you need to do to accomplish next week to move your OKRs forward. Read more in our chapter about [The OKR Weekly Check-in](#).

Review your OKRs with your company

Monthly OKR reviews for teams

Teams should review their OKRs from the big picture perspective and write down any lessons learned. Team managers should synthesize this information and share them at the company-wide review.

Hold company-wide reviews at the end of the quarter

It is important to make sure everyone takes part in the review process. That way everyone can see how far the team has come. It may also be helpful to work with an OKR coach to see how it went and what you can do better when setting OKRs again next. When you use [Weekdone](https://weekdone.com) for your OKR tracking and weekly check-ins, unlimited OKR coaching is included for paid accounts.

Start setting next quarter's OKRs

As mentioned above, you already need to start planning your next quarter's OKRs 2-4 weeks before it starts. As you start planning, think about how your previous OKRs went so that you can use OKRs more effectively in the coming quarter.

OKR Case Studies

Heureka

This case study was written by [Heureka Group](#)

Heureka Group is Europe's largest price comparison website and online shopping advisor. We simplify and facilitate online shopping for millions of customers every day.

Three years ago, the company was overloaded by various initiatives, lacked focus, and wasn't moving forward with the product. But we had a vision: in product and development, we wanted to eliminate complex roadmaps and the long-winded and ineffective defining of concrete projects and deadlines. We wanted a goal-setting process that would give specific teams the possibility to decide what is necessary to do and when.

We were looking for a framework to help us indicate a clear and common goal to be in line with it and got the idea of OKR and inspiration to implement it from tech companies such as Spotify and Netflix. It's important to say that Heureka Group has a very open company culture where autonomy and agility play a significant role. This was a perfect starting point.

Start of the journey

We started out with small teams in product and development two years ago. We tested it and discovered that OKRs supported and developed team responsibility and autonomous decision-making. The new process gave us significantly better business results, and it was easier to obtain management support once we had a track record to rely on. Then, we started rolling it out to the whole group.

We decided to start gradually getting buy-in from the colleagues in sales, customer support, marketing, and reception in all the countries in which we operate (offices in the Czech Republic, Hungary, and Slovenia). As an OKR pilot team of seven people, we prepared a multi-day online workshop for 60 leaders from the entire Heureka Group and shared the necessary know-how with them so they could pass it on to their teams. Thus, we helped our leaders to become teachers of OKR methodology.

Challenges of implementing OKR methodology

The OKRs should guide you to improve, and, therefore, intuitively make perfect sense for any organization. It sounds great, but no team in a company can dedicate itself to improvement 100%.

When you consider what already makes money for your company, you will, no doubt, discover that something is working very well and you want the teams to maintain their good practices and results. The key concept here is to "maintain" which means no sweeping changes.

This is where everyone should be reminded about the purpose and value of monitoring regular KPIs. These are suitable for dealing with current needs and challenges in processes we call 'business-as-usual' – standard company operations. Any team will always be at least partially responsible for some work that falls into the category of regular operations, and these operations should be monitored by performance against KPI targets.

So we are using both KPIs and OKRs but for completely different purposes (KPI for business-as-usual and OKR for improvement), allowing them to coexist, and ensuring they reinforce each other.

We also discovered that OKR and autonomy are not for everyone. Even though it was only a handful of cases, our corporate culture has already cost us a few employees.

Another thing to keep in mind is that the OKR process does not end with defining OKR at the beginning of the quarter. You need to regularly return to them and see what progress has been made and whether as a company you are getting closer to your objective.

Benefits of the OKRs

The main benefit is that OKRs unite and align different teams. The magic that makes OKRs work so well is actually in the mindset. Specifically, it's a state of mind that allows people to search for opportunities and possibilities instead of getting discouraged by challenges.

It's necessary to trust your people's skills and expertise. By using the combination of OKR and KPI we are able to manage expectations. The people are bringing improvements and taking care of the business-as-usual at the same time.

We now know that in the beginning we really had no idea whether we could successfully manage our improvement process and decision-making through OKR. We have been figuring out the proper process gradually, step-by-step, and we had to mature and unite as an organization.

From our experience as a company with some remote teams, we realized that the OKRs helped us coordinate our activities more transparently. They contribute to the teams' autonomy. Yet it is necessary for the company to have defined boundaries of autonomy and individual responsibility. It is not necessarily obvious to everyone that decision-making freedom also brings responsibility – not only for success but also for when things don't work out. Taking responsibility for failure doesn't mean pointing fingers and blaming each other. It means finding lessons and documenting learnings to ensure the same situation wouldn't occur again. Learning and communicating this information is one of the greatest benefits of the OKR process.

OKR software

We discussed various tools, Excel included. At some point, we decided to use [Weekdone](#) as we needed to synchronize activities and initiatives of more than 50 teams across 3 countries on a quarterly basis.

[Weekdone](#) is helping us track, build structure, and see transparently what other teams are working on. Nevertheless, when using such a tool, it is necessary to keep onboarding the newcomers and reminding the teams to update [Weekdone](#) regularly. It is a continuous process.

In our case, once in a quarter, the whole company gathers and each team presents its OKRs. The company objectives are being presented by the CEO as well.

Aha! moments when introducing OKRs

This section was originally published in Czech on October 10th, 2020, on [HeurekaDevs blog](#) with the headline: "Our 'Aha! moments' when introducing OKR in 50 teams throughout Heureka Group"

#1 Every goal must make sense

- The objective must have a clearly and simply described meaning. Sometimes this is very difficult, yet the better you describe it, the greater sense your work has. It also means you sometimes discover something that doesn't make sense.

#2 Management support is key

- It is difficult to introduce OKR if you don't have management with an OKR mindset. OKR is a lot about focus – and teams won't obtain it if management doesn't respect quarterly OKR and assigns teams tasks 'on the side'.
- It's difficult to give up the 'project management mindset' – determining exactly what should be done and when it will be started – and, instead, start saying what the objective is and leaving it to the people to decide how to achieve it.
- Create a safe-to-fail environment – the success of objectives is never guaranteed, particularly with an ambitious approach.
- You also need to convince your investors that OKR is useful – preferably through results, which takes a long time – in our case almost a year.

#3 Mindset and culture must be ready for OKR

- OKR encourages autonomy – yet not everyone wants that responsibility.
- Teams must have continuous responsibility for specific product areas, otherwise, it doesn't work.
- OKR is about ambition, yet ensures you have a safe-to-fail environment.
- Give priority to an outcome (versus output) mindset.
- OKR doesn't necessarily suit every environment. Bear that in mind. Even when companies are ready for OKR, some don't introduce it.

#4 Introduce OKR gradually

- We can't imagine introducing OKR with a 'big bang' throughout a company.
- We started in the teams with the greatest inclination towards this – in our case, this was product/development – and gradually added other teams and departments – again, with us this meant marketing and sales. Then extended OKR to the rest of the organization in the following phases.

- This approach might be key for convincing both management and everyone else in the company. It is okay to start at the team level, and then arrange OKR at the company-wide level.

#5 It's important to explain the company's vision

- Everyone must know where you are going, to ensure they can see the purpose.
- Be careful – you might think that everyone knows the purpose, but you might have actually communicated it poorly or insufficiently.

#6 OKR and KPI, improvement versus BAU

- When we gradually introduced OKR to the company, we encountered situations when some teams said that OKR is not suitable for them. These were mainly 'support' teams that deal with a lot of operational matters. All teams deal with some types of operations to a greater or lesser extent. We call this 'business as usual' (BAU). OKR is something else, mainly about innovation and moving things forward. Every team must address innovation. We call this improvement.
- The point is that OKR is here to help you manage improvement, while KPIs are here so you know everything else is working as it should. We need both, although the proportion of work on OKR and KPIs can vary in each team.

#7 The best way to learn something is to teach it to someone

- We tried this when introducing OKR. We prepared a multi-day online workshop for 60 leaders from throughout the Heureka Group and shared the necessary know-how with them so they could pass it on to their teams. We helped leaders to become teachers of the OKR methodology. We learned a lot from this experience too.

#8 Sometimes it's difficult to write measurable Key Results, but it pays off

- We have been struggling with how to set key results correctly so that they are measurable.
- People have a tendency to create done/not done tasks as key results. We encourage them to use some sort of an outcome-focused metric instead – has something improved?

- It's difficult to find the correct measurement, and sometimes also difficult to measure qualitative changes – when there is no bottom line data or you don't have tools to do it.

BMAT

BMAT is a music monitoring company who are driven by a desire to make sure every artist in the world gets the recognition they deserve. BMAT monitors and reports music across televisions, radios, clubs and digital services globally.



They have been incredibly successful in their endeavor and have been rapidly expanding since 2015. BMAT's central office is located in Barcelona, but they have offices in 12 countries all over the globe. As they grew in size they began to feel they were beginning to lose focus on their goals, so they began to look for a better way to manage their quarterly goals and align their weekly activities.

Brais Suarez is responsible for BMAT's communications and PR. We went over how OKRs have helped their company and the importance of having company-wide goals.

Why BMAT started using OKRs

According to BMAT COO – Jaume Vintro, by 2015 they had already experienced massive growth. Not just in terms of people but in hierarchical structure dispersion as well. "We've always had weekly meetings to synchronize everybody's Objectives, but we reached a point in scaling where we couldn't keep up with everybody. We didn't want to lose our focus on long-term Objectives" said Jaume.

Before they kept track of their Objectives by providing updates during meetings and writing out manual reports. This only left a few people in the know about what Objectives were being worked on. It had always been a core value for company goals to be transparent, so that everybody could get involved in the general strategy of the company.

As each new quarter started, BMAT felt there was a growing disconnect between the company goals and everyone's activities. It became easy for people to deviate from their original Objectives. Sometimes people would take tasks outside the range of their core goals. To avoid this, they began to look for a tool to keep their Objectives and their progress at the forefront of everyone's work.

Embracing the process of setting OKRs

It took some time to get used to it. Brais emphasized the importance of putting effort into learning the OKR methodology and OKR software. Brais said that "You should adapt to the tool not the other way around".

How BMAT sets OKRs and makes sure they are aligned

BMAT first sets a series of big annual goals then later they divide these Objectives between each quarter. They begin by defining their priorities and then start to assign the main responsibilities between different teams. BMAT makes sure that every team and employee knows what they must do to work towards the general company Objectives. As they set their Objectives, they make sure to ask for employee input.

Setting OKRs in Weekdone

When Brais started with OKRs he quickly realized an OKR software was necessary. "I liked [Weekdone](#), because of the vision it provides you of the whole company. Also, you can synchronize your work with other teams and share your work via an automated platform." said Brais. Once the quarterly goals are set, they work in weekly cycles, where every Monday Brais and his team hold a weekly check-in to plan out the next week. "It is the only tool we found that works well with quarterly OKRs. It reflects the progress of the whole company and everything is visible to everyone" said Brais.

Brais and BMAT in general make sure to link weekly tasks to team and Company Objectives. This way when their personal progress is achieved the company's overall

progress moves forward along with it. Brais notes that some people prefer to mark their progress continuously, he personally prefers to do it at the end of the week.

BMAT has now incorporated introductions to OKR and [Weekdone](#) into the training of new hires. “Now, when somebody new joins, he or she is given guidelines by the operational team and they are taught how to use OKRs.”

Humanitec

Humanitec helps NGOs by building software tools which collect data, analyze it intuitively, and report it efficiently. They implemented OKR methodology as a means to move their company forward as a larger whole. Now, OKR training has become a standard cycle with their onboarding process.



Kaspar von Grünberg, the CEO of Humanitec, values the contribution of each individual. They have teams in 4 different locations around the world, and for him keeping everybody aligned was his main challenge.

Humanitec needed a framework that enables alignment

Humanitec’s workforce is quite diverse, “We have 15 nations who all have different approaches to their work” said Kaspar. Keeping the company innovative while valuing individual contribution is quite a challenge. In his words: “In our current phase of the company, planning and giving everybody a clear idea how their work contributes to the overall picture is maybe the most important thing to focus on at the moment”.

In order to do that, Kaspar turned to the Objectives and Key Results framework. He knew OKRs, because Google started using it in their early days. “I was really impressed how they went from a small company to a huge organization using OKRs,” said Kaspar.

Kaspar first tried OKRs on his own before rolling it out to his team. Then, he started testing different solutions and finally settled on [Weekdone](#). He chose [Weekdone](#) because it was the most advanced and had the best user experience. “It is sometimes difficult to convince people to use OKRs, so you want a solution that is extremely simple, intuitive and excellent to understand,” said Kaspar. Otherwise people feel overwhelmed and face the daunting task of using yet another software.

Implementing a new goal-setting framework

According to Kaspar, it was pretty hard to get people using OKRs at first. “It is a little bit difficult to convince people to do something now when they can only see the benefits later on,” said Kaspar. The first OKRs they planned were not particularly good. There was a lot of misplanning and many of the people didn't understand the ins and outs of the OKR framework.

In order to educate people, Kaspar presented the theory of OKRs and trained his co-workers on how to make the most out of the framework. Now, OKR training has become a standard cycle in their onboarding process.

After the 2nd quarter Humanitec started seeing significant improvement with their OKR process. “People went out of the OKR review meeting and said that the process really helped them to understand where the company is going, and how their work is contributing to the larger whole and therefore actually feel more valued,” said Kaspar.

Kaspar later found the need for an OKR software for his team. “The clear benefit of [Weekdone](#) is that we are more aligned, structured and people feel more connected”

According to Kaspar, they have less meetings and more importantly the meetings they do have are more constructive. “End of the quarter, we all sit together and open up [Weekdone](#) and every team explains where they are at and what has happened during the quarter. It is really nice because it structures the meeting and has the effect of accountability.”

Conclusion

Adopting OKR methodology requires a change of internal culture and process. It will be easier for some than for others, but don't let that discourage you if you are having some growing pains while getting started. It is an individual process that requires a balancing of the best practices and what works for you. It requires both some give and take in re-evaluating your current structures and internal processes. But if you maintain a critical eye both to your own organization as well as toward the methodology itself, there is a lot you can take away.

So there it is, you are an OKR Master and can now flawlessly implement Objectives and Key Results. Well, not really, there is still a lot to learn, and the biggest learning process will be working through the road bumps as you begin to implement OKRs with your team or company. But, you are on your way, and hopefully have a better understanding of both the methodologies and methods involved in the process.

And now for our shameless plug:

For small and medium size companies of up to 500, [Weekdone](#) is the best choice for helping you implement OKRs. Our OKR software comes with Weekly Check-ins, to help facilitate the habit of connecting weekly plans with Team OKRs. You can easily see the alignment between Company Objectives and Team OKRs, and our dashboards and OKR progress reports help you quickly see if your OKRs are progressing as they should.

The best part of it all is that you have access to unlimited coaching. We are committed to making sure your company gets the most out of the OKR methodology. And you will do that by using OKR best practices presented throughout this book.

Remember, it takes 2-3 quarters to get the OKR process working properly. You don't have to do it alone when you use [Weekdone](#).

Sign up and try all features for free with 3 users. When you are ready to add everyone, you will get a 15 day trial.

Resources

Here are quick links to the list of resources we mentioned in this book. Some resources can be found at the end of this book for you to print out.

[Spreadsheet template for categorizing ideas for actionable OKRs](#) (page 63)

[Questions for an OKR Review](#) (page 106)

[OKR implementation checklist](#) (page 113)

Questions for OKR reviews

Questions about OKRs set and the process

- How did the team generally perform? What did we achieve?
- How was the quality of the OKRs set? Did they help the team to make some improvements?
- Did we prioritize the OKRs enough? Were people working on them?
- Were people aware of the roles and responsibilities they had? Did they feel that they know what to do?
- How often did we discuss the progress? Did we have enough regularity and consistency?
- How can we be better with setting OKRs next quarter? What do we have to keep in mind?

Questions about success

- Why were we successful with achieving the Objectives?
- Was it intentional or it just happened?
- What kind of actions brought the highest results?
- Are there things that we can improve even more?
- Can we use what helped us succeed in some other areas as well?
- What are the key takeaways from our success that we can share with others?

Questions about failures and challenges

- If we failed then why? What did we try and why do we think it didn't work?
- Most probably something failed for sure, if it wasn't a Key Result, it was some kind of action that didn't bring results. So, what doesn't work for our Team/Company?
- What were the major challenges?
- Why did those major challenges appear? Can we prevent them in the future? How?
- What kind of knowledge or experience might we be missing? How can we gain it or did we already?

Questions about the future

- What are the key things we learned and have to keep in mind while making decisions in the future?
- What kind of new opportunities have we noticed?
- What we as a Company or a Team should start doing? Or what should we continue doing?
- What should we stop doing?

OKR Implementation Check-list

Company name:

This OKR implementation check-list has been developed based on years of experience with hundreds of companies. We have analyzed why some fail and some succeed. The steps listed here will help you succeed.

LEARN THE PROCESS	DATE	DONE
Learn the best-practice OKR goal-setting process and test your knowledge		
Browse OKR examples for different teams		
Level up your OKR writing skills with this practical exercise		
Decide on the levels you need for your OKRs		

Use two primary levels:

- the Company level for overarching Objectives (strategic directions, no need for KR)s
- the Team level to write shared OKRs for an entire functional team to work towards; the progress of a Team OKR would move the overarching Company Objective forward

NOTE: Personal OKRs are not recommended (exception: personal development goals)

DRAFTING OBJECTIVES & OKRS	DATE	DONE
Leaders draft and discuss Company Objectives create a shared document to discuss the most important priorities and brainstorm ideas for the most impactful directions. How to write Objectives		
Teams draft and align OKRs use the template for OKR ideas ; allow a week for comments and have both internal and cross-team discussions		
Organize a company-wide alignment session each team manager presents their Team OKRs, answers cross-team Q&A, and adds OKRs to Weekdone		

GETTING THINGS DONE: EXECUTION PROCESS	DATE	DONE
Set up the best practice OKR check-in process Learn more		
Teams agree on a specific day and time for internal weekly OKR check-ins (15-minute meeting)		
Teams schedule a monthly OKR retrospective review to sync, align and summarize learnings		
Schedule a company-wide quarter-end OKR review		

See the next page for a nice, printable version of this checklist.

OKR IMPLEMENTATION CHECK-LIST



COMPANY NAME:

.....

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.....

LEARN THE PROCESS	DATE	DONE
<ul style="list-style-type: none">• Learn the best-practice OKR goal-setting process and <i>test your knowledge</i> [↗]	<input type="checkbox"/>
<ul style="list-style-type: none">• Browse OKR examples [↗] for different teams	<input type="checkbox"/>
<ul style="list-style-type: none">• Level up your OKR writing skills with this <i>practical exercise</i> [↗]	<input type="checkbox"/>
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<ul style="list-style-type: none">• Teams draft and align OKRs use the <i>template for OKR ideas</i> [↗]; allow a week for comments and have both internal and cross-team discussions	<input type="checkbox"/>
<ul style="list-style-type: none">• Organize a company-wide alignment session each team manager presents their Team OKRs, answers cross-team Q&A, and adds OKRs to Weekdone	<input type="checkbox"/>

GET THINGS DONE: EXECUTION PROCESS	DATE	DONE
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