



Writing Great OKRs: An Interactive Team Workshop

How To Write Objectives and
Key Results for a Team in 5 Steps



This interactive team exercise will provide step-by-step instruction, with relevant examples, so you and your team can feel confident about writing great OKRs.

Objectives and key results (OKRs) are being used by some of the world's most innovative companies including Microsoft, Intel, Google, and Amazon. Recently, they have gained renewed attention as businesses look for new ways to adopt greater focus, alignment, and transparency across teams – to become more agile and operate with higher strategic execution.

While many organizations and senior leadership teams are familiar with popular methods of goal-setting such as KPIs, S.M.A.R.T goals, and MBO, they struggle to adopt OKR best-practices and write truly great objectives and key results.

This exercise is meant to help alleviate common challenges and missteps when writing OKRs by providing step-by-step direction on how to develop meaningful and impactful objectives and the key results that will contribute to the quantitative success of those objectives.



TIP: Setting OKRs requires a bi-directional approach that starts with high-level company objectives, then cascades down to the rest of the organization.

From there, each employee works with their manager, providing input on how to best define their individual OKRs.

WHAT YOU WILL NEED



3+ People



Prep Time:
25 Minutes



Workshop:
2 hours

PRE-WORK CHECKLIST

Top-Down:

Objectives are discussed, refined and set by senior leadership. They are then communicated to the rest of the company.

Bottom-Up:

Managers work with direct reports on developing team-based and individual OKRs. Employees are given creative freedom to provide input on how to best contribute to the company and team goals.

Identify OKR Champion:

Much like a scrum master and owner, it's crucial to identify who will be responsible for leading the initiative in your organization. This person will mentor and coach teams, ensuring everyone is engaged and participates. This person will also be responsible for making sure there is a system in place to track and measure the company's OKRs.

Before beginning the workshop, ask your team to come prepared to share ideas on which objectives and supporting key results they feel the team should focus on in the upcoming months. If company OKRs have been communicated, the team should use those as a baseline for priority.



ACTION ITEM: BRIEF OVERVIEW

(30 Minutes)

Spend the first 30 minutes of the meeting introducing your team to the basic concepts of OKRs. Each person must understand the rhythm, formula, and basic terminology, as well as what OKRs aren't and how they should plan to score them at the end of the period. Defining this information up front will help set proper expectations of what the team can anticipate during this exercise.

UNDERSTANDING THE OKR FORMULA

Defined as “Objectives and Key Results,” OKRs are designed to help you answer two distinct questions:

1. Where do I want to go?
2. How will I know I’m getting there?

There is a standard formula for goal setting through OKRs:

I will _____ as measured by _____

OBJECTIVES KEY RESULTS

OBJECTIVES

Qualitative, aspirational goal an individual, team, or company wants to achieve. It is the final result or outcome.

KEY RESULTS

Measurable, quantitative metrics that contribute to the achievement of an objective. These results show the progress of how close an individual or team is to achieving an objective.

REMEMBER WHAT OKRs AREN'T

A few things to remember:

- OKRs aren’t unrealistic or ambiguous goals. They should be ambitious, achievable, and well defined, but still, push you and your team.
- OKRs aren’t to-do lists. They should serve a broader purpose that connects monthly and quarterly performance to the overarching business goals and strategy. They should also be shareable across the organization to inspire collaboration, transparency, alignment, and focus.

HOW OKR SCORING WORKS

There are two types of goals: committed and aspirational.

Committed:

A goal that will be achieved. Resources and schedules should be adjusted to make sure they get done. When graded, the score for a committed OKR is 0 or 1.0. You either achieved it or you didn’t.

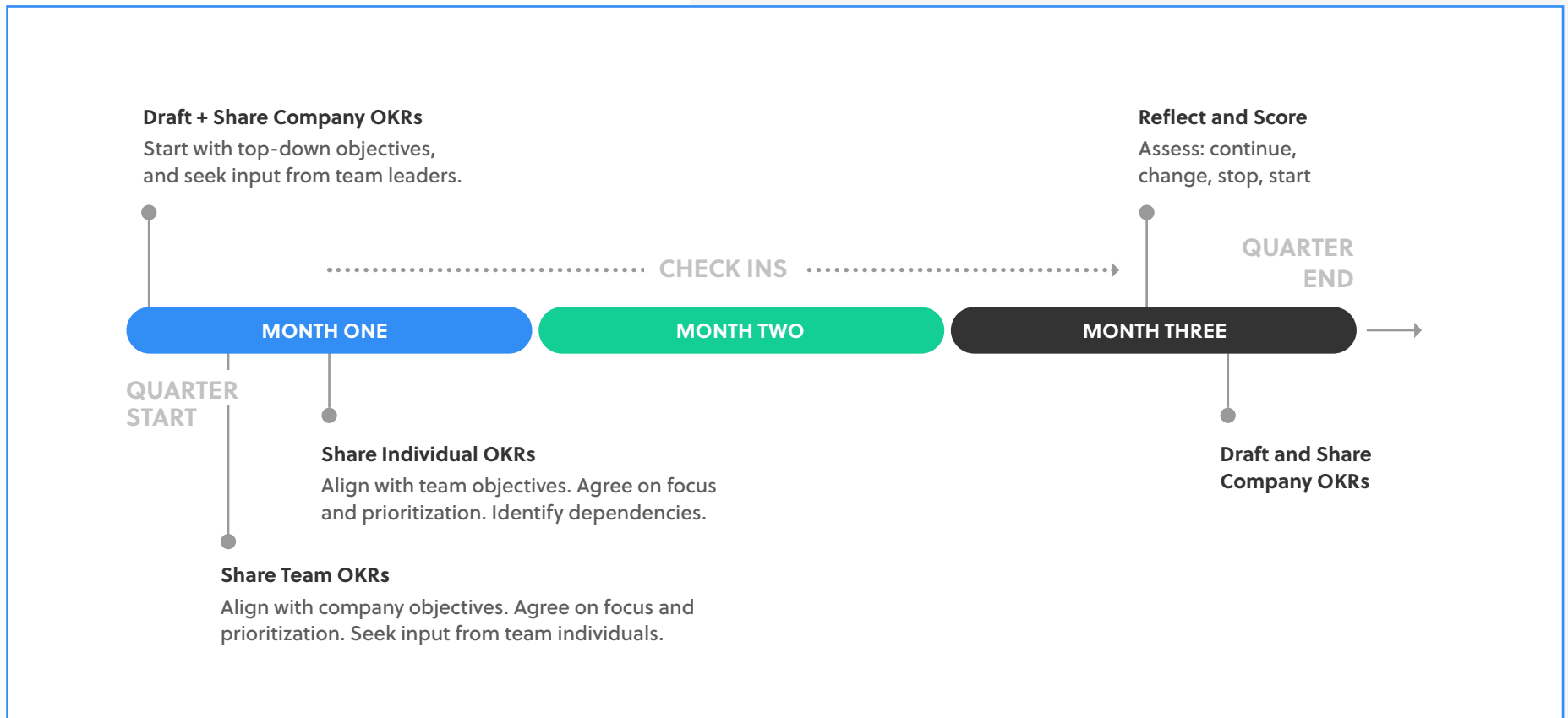
Aspirational:

Ambitious goals with no clear path to get there. They may roll over from quarter to quarter, or year to year, and sometimes even be reassigned to different teams. When graded, the average score of an aspirational OKR is 0.7, but with a lot of room for variance.

- **Red:** Failed to make real progress (Achieved 0%-40% of goal)
- **Orange:** Made progress but fell short (Achieved 50%-60% of goal)
- **Green:** Delivered on the goal (Achieved 70%-100% of goal)

UNDERSTANDING THE OKR RHYTHM

OKRs should be conducted quarterly, with a rhythm of check-ins, reviews, and scoring goals, as seen below.



**Now That We've
Reviewed the Important
Tips, Let's Get Started!**

STEP TWO

Choose How Your OKRs Will Cascade

It's time to start developing high-level objectives for your team. However, remember there are two ways you can cascade OKRs across your company. Let's first start by looking at an example of the duality model.



ACTION ITEM: REVIEW THIS OKR EXAMPLE

(10 Minutes)

Duality Cascading Model



Company

Objective: Earn customer love and trust

Key Result: Increase retention rate to 99%

In this example, we will look at the company-level objective with one key result that is applicable to the customer success team.



Jane, VP of Customer Success

Objective: Achieve a phenomenal retention rate

Key Result: Implement customer improvement plan for 100% of at-risk customers

Key Result: Increase NPS score from 7 to 8.5

Key Result: Increase customer engagement from 1x a month to 2x a month

Jane starts by inheriting the key result from the company objective. Her objective has 2 key results she will use to measure the success of this objective. Because this objective will require the support of other team members, this objective will cascade to other team members – becoming one of their objectives.

“Implement customer improvement plan for 100% of at risk customers” will now become one of the quarterly objectives for Nick, the Director of Customer Success. Nick will identify 3-5 key results that will help him measure whether or not he reached his goal.



Nick, Director of Customer Success

Objective: Implement customer improvement plan for 100% of all at-risk customers

Key Result: Reduce customer response time from 72 hours to <24 hours

Key Result: Increase total amount of completed QBRs from 88% to 100%

Key Result: Develop an action plan with 3 improvements and implement this quarter

From here, the OKR can continue to cascade until it reaches the bottom level of the company.

STEP TWO

Choose How Your OKRs Will Cascade (cont.)



TIP: Remember, OKRs are means to align the work every team and individual is doing across the company. They are the outcomes the company, team, department and individual wants to achieve in a set period of time.

Flexible Cascading Model



Company

Objective: Earn customer love and trust

Key Result: Maintain >8 NPS score

In this example, we will look at the company-level objective with one key result and see how a team and their direct report can take a more flexible approach to writing their OKRs.



Jane, VP of Customer Success

Objective: Improve customer satisfaction

Key Result: Identify top 3 drivers causing friction and implement corrective action

Key Result: Reduce customer response time to <24 hours

Key Result: Resolve 90% open cases

Jane understands the company plans to measure the success of their objective through NPS scores. Choosing to focus on improving customer satisfaction is a great objective that will contribute and impact the company's goal.

Much like Jane, Nick must create an OKR that is both relevant and will impact the company's focus on earning customer love and trust. For him, he finds an opportunity to increase the company's CSAT score.



Nick, Director of Customer Success

Objective: >4.5 CSAT score on implementations

Key Result: Deploy new onboarding and implementation process to 100% of new customers

Key Result: Implement new customer community with 65% engagement rate

Key Result: Make customer office hour training sessions available 4x week

In this example, both Jane and Nick create relevant and measurable key results they can use to discern whether they achieved their goals or not.



TIP: Remember to identify which type of objective you are creating, either committed or aspirational. Committed are binary and are graded as either achieved or not, where aspirational encourage individuals and teams to stretch their goal, pushing boundaries. You should never hit 100% of an aspirational goal, but instead be around 70-80%.

Objective 1

Objective 2

Objective 3

Objective 4

Objective 5

For this exercise, start by defining 3-5 objectives.

Use this formula:

Verb + what you want to do + in order to/for/so that (what you hope to achieve)

For example:

"Drive better attendance at our conference to improve the customers' networking experience"

Now start by defining 3-5 sample objective you would like to focus on for the upcoming quarter. Remember they should be qualitative, actionable and ambitious.



TIP: Make sure to limit your objectives to no more than 5 to ensure you have the appropriate time and resources to reach your OKRs.

STEP THREE

Writing Your Key Results

Remember, key results **must be measurable and time bound, and will be the measure by which you know if the objective was achieved or not.** Don't include more than 5 key results per objective to ensure your goals are achievable.

Develop 3-5 respective key results that will help you accomplish each objective you and your team have created.

When possible, use this formula:

Verb + **what you're going to measure** + from **x to y**

For example: "**Increase attendance** from **350 to 500** people"



TIP: There are two types of key results; **Metric:** (most common) track quantitative outcomes designed to gauge success on an objective, and **Milestone:** used to convert a binary outcome into a key result.

Objective 1

Key Results

Objective 2

Key Results

Objective 3

Key Results

Objective 4

Key Results

Objective 5

Key Results



**ACTION ITEM:
TEAM DISCUSSION**

Once the objectives and key results are defined, work with your team to refine based on the necessary and sufficient test.

Validate Your OKRs Through the Necessary and Sufficient Test

Look at your objective and its key results and ask:

“Are all these key results necessary?”

- ✓ If the answer is yes, then they pass the necessary test.
- ✗ If the answer is no, spend more time refining the OKRs to be more relevant and measurable.

Repeat the exercise, but this time ask:

“If I accomplish all my key results, would I have achieved my objective?”

- ✓ If the answer is yes, they they pass the sufficient test.
- ✗ If the answer is no, you need to spend more time defining stronger key results.

STEP FOUR

Schedule Regular OKR Review Sessions

One of the most important pillars of success when adopting OKRs is ensuring your organization sets a regular review cadence and OKR check-in intervals. The cadence will help drive performance and accountability, increase alignment across the organization and keep your teams focused and engaged.

Take 15 minutes and briefly outline your regular review cadence and check-in intervals in which your OKRs will be reviewed. Once this is defined, communicate the schedule to others to ensure everyone understands the right expectations and their role in the program.



TIP: We find best practice is to have owners update their OKRs before any regularly scheduled meetings. This allows for a better use of meeting time and focus on behind or at-risk OKRs.

Schedule Your OKR Review Cadence & Check-In

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STEP FIVE

Wrap Up and Next Steps

After you have completed your review schedule, spend a few minutes wrapping up with any open questions. Now is the best time to establish the next steps with your team and decide if a follow-up meeting should be scheduled to resolve any lingering questions, or include any additional team members who may impact the established goals.

Take this time to remind the team to update their key results before the first check-in meeting.

That's all there is to it!

Get ready for your first review meeting by measuring and tracking performance with regular OKR check ins.

Good luck!



Don't Have an Existing OKR Tool in Place?

Consider Ally.io for tracking and measuring your OKR performance. It only takes seconds to sign up for a 14-day free trial, and you can begin tracking OKRs in under 15 minutes.

Ally.io features:

- The solution provides seamless integrations to popular business tools like Slack, Jira, Salesforce, Asana, Smartsheet, and more.
- Its easy to use, intuitive UI requires minimal training to make getting started, and adopting OKRs simple.
- The software has built-in best practices, templates, and example OKRs that make adopting the OKR framework easy.
- Our migration templates provide a smooth way to import existing OKR data from shared spreadsheets.
- The depth of our onboarding and rollout support can turn your team into OKR experts and enable success.

Free Trial

Request Guided Tour

About Ally.io

Ally.io is a strategic goal-setting and business performance management solution that enables businesses to shift from traditional, disjointed planning and execution to a modern, OKR-based framework that drives strong alignment, agility, transparency, and empowers the workforce. Ally's solution makes it incredibly easy to adopt OKRs as a seamless part of the users' daily workflow. The platform has built-in OKR best practices and provides seamless integration to several enterprise systems, including Slack, Salesforce, Jira, Smartsheet, Asana, and ZenDesk. Ally's comprehensive professional services offer continuous support, dedicated training, and coaching to ensure best-practices for implementation and successful change management. Since its launch in 2018, Ally.io has been adopted by hundreds of leading organizations in more than 70 countries.

10400 4th St.
Bellevue, WA 98004
contact@ally.io
(800) 216-7507
ally.io