

# YOUR OKRS FOR ALL ACTION PLAN AND WORKBOOK

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Here is the step-by-step process for getting started with OKRs in your organization based on what you'll find in *OKRs for All*.

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# GETTING STARTED WITH OKRS

OKR (Objective and key results) is a proven goal-setting framework for creating alignment and focus and building a highly productive and engaged work culture to drive your business outcomes.

OKRs align your entire organization to strategy, shifting focus from output—the everyday work of your team—to outcomes, which are the impact of that work. This mindset shift keeps your team highly engaged with a clear sense of purpose and understanding of how everyone is contributing to forward momentum.

## OKRs sit at the intersection between purpose and strategy and execution.

You can think about objectives, key results, and key initiatives in the following way:



### **Objectives: what you want to accomplish**

Objectives are clear, inspiring goals. To sharpen focus, limit yourself to five objectives.



### **Key Results: how you will measure success**

Key results are your measurable outcomes. They should be ambitious but achievable, and quantifiable enough to lead to objective grading. You should have three to five key results.



### **Key Initiatives: projects and activities which will help achieve outcomes**

Key initiatives are the core activities that will drive success of the outcomes defined in your key results.

And they cascade through levels of the organization to bring each department and team focused on contributing to the most important business priorities.

Think about some of the OKRs that you would set for your company, your team or your self.

## Exercise #1: Write an OKR using the Objectives and Key Result framework.

**Objective 1**

**Key Result**

**Key Result**

**Key Result**

BEGINNING	PILOTING	ADOPTING	SCALING	CENTERING
<p><b>Starting your OKR journey</b></p> <ul style="list-style-type: none"> <li>✓ No usage of OKR methodology</li> <li>✓ No structured business rhythm</li> <li>✓ Limited alignment of goals between levels</li> </ul>	<p><b>Validating OKRs in your organization</b></p> <ul style="list-style-type: none"> <li>✓ Organizational experimentation with OKR methodology via pilot group</li> <li>✓ Small group learning OKR concept and building into business rhythm</li> <li>✓ Small group trying to understand how OKRs will work for them at scale</li> </ul>	<p><b>Committing to the OKR practice</b></p> <ul style="list-style-type: none"> <li>✓ Executive Sponsorship</li> <li>✓ Top levels of the organization are developing the OKR muscle and habit</li> <li>✓ OKRs are expanding more widely into business rhythms</li> <li>✓ OKR tool selection begins</li> </ul>	<p><b>Rolling out OKRs broadly</b></p> <ul style="list-style-type: none"> <li>✓ Executive Sponsorship</li> <li>✓ OKRs are rolled out to the rest of the company and baked into large, organization-wide initiatives</li> <li>✓ OKRs are firmly embedded in business rhythms throughout the organization, from top to bottom</li> <li>✓ OKR tool is selected and used across the organization</li> </ul>	<p><b>Unlocking cultural buy-in for OKRs</b></p> <ul style="list-style-type: none"> <li>✓ Executive Sponsorship</li> <li>✓ Team members reference OKRs in every decision, big and small</li> <li>✓ OKRs are firmly entrenched in business rhythms, becoming a global mindset of focus and alignment</li> <li>✓ Employees feel there is purpose at the center of everything they do</li> </ul>

# 1

## GET TO KNOW THE OKR MATURITY MODEL

The OKR (Objectives and Key Results) Maturity Model is based on thousands of OKR users. It can help you identify where your organization is today in OKR maturity and how you can progress to the next stage of maturity as an organization.

Let's break down the OKR maturity model a bit more granularly for you.



## Stage 1 is the beginning of your organization's OKR journey.

If your organization is in this stage, you're not actively using the OKR methodology today. You may have an existing task

management and/or goal-setting system in place at either the organization-wide or team level, but no structure, organization-wide process that's working for everybody.

You may have read a blog post on OKRs and are familiar with the OKR concept, but have little to no experience implementing the framework. You define goals based on a planning cycle of a year or longer. You may struggle with departments sharing goals, progress, and results with one another with a defined cadence. Employees cannot track how their work contributes to specific goals at the department or organization-wide levels.

### What to do now:

- Designate an OKR program owner responsible for the success of OKRs in a pilot group.
- Select an executive sponsor for pilot group.
- Ask your leaders and team managers to read *OKRs for All*.

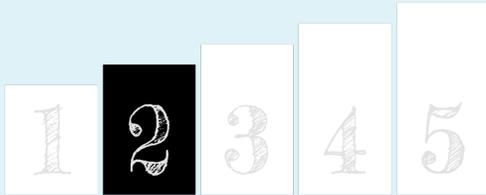
## Exercise #2: Identify owners and sponsors.

**Think about which people in your organization would be the right people to drive the pilot group and be an executive sponsor.**

**Who might be the right people to drive this?**

**Program owner for pilot:**

**Executive Sponsor:**



## Stage 2 is the piloting stage.

In this stage, you are validating OKRs in your organization. You are rolling out a pilot group (more on that in the next step in this section) to iron out the kinks before you roll out to the rest of your organization.

This may be at the leadership level, department level, or team level. You are using this time to understand how OKRs will work for you at scale and nail down your rhythms so you can expand to the rest of the organization.

### What to do now:

- Put together a project plan and timeline, including public milestones and training.
- Identify your department-level OKR Champions.
- Select and onboard the team(s) you will pilot OKRs with.
- Get pilot team(s) up and running in your selected OKR tool.
- Share updates and lessons from the pilot outside of the pilot group on a regular basis to let team members know that stronger goal-setting and achievement is on the horizon for them, too.

## Exercise #3: Put together your pilot plan.

**Outline your project plan and timeline – what major milestones do you want to hit?  
What training is required?**

## Exercise #3: Put together your pilot plan.

**Who are your department-level or team-level OKR champs?**



## Stage 3 is all about adopting OKRs, committing to the OKR practice, and broadening your approach.

In this stage, top levels of your organization are developing the OKR muscle and habit, pre-seeding the ideas and philosophies of OKRs with their teams, and beginning to work OKRs into business rhythms like team meetings and collaboratively building company-wide OKRs. This is typically when OKR tool selection is finalized (necessary for the next stage of scaling).

### What to do now

- Pilot team(s) share their experience and lessons from the pilot.
- Work with leadership to operationalize OKRs and grow executive sponsorship.
- Leaders share the presentation dashboard at team and organization-wide meetings.
- Timeline for broader rollout is shared.
- OKR tool access is secured for broader organization.

## Exercise #4: Adopting and expanding your OKR practice.

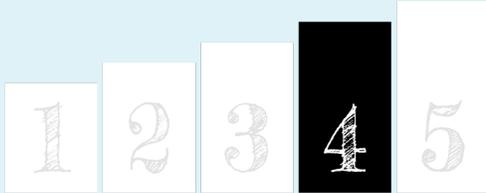
**Reflect upon the pilot program. What were the lessons learned and best practices?  
How these learnings be used to evolve and grow your OKR practice?**

## Exercise #4: Adopting and expanding your OKR practice.

**Plan for rolling out the broader roll-out. What is needed to operationalize the OKR practice? What sponsorship is needed?**

## Exercise #4: Adopting and expanding your OKR practice.

**Build your broader organizational timeline and roll-out plan. What milestones need to be included?**



## Stage 4 is scaling.

In this stage, you are rolling out OKRs to your entire organization, embedding in current rituals and creating new ones. You are training up your teams and your OKR tool has been selected.

### What to do now

- Build formalized communications strategy.
- Set timeline and meeting invites for creating and approving OKRs, as well as closing and retroing at the end of the designated time period.
- Add OKR progress to the agenda of existing team meetings.
- Roll out organization-wide OKR and tool training using self-serve resources or by leveraging a partner.

## Exercise #5: Scale your program.

**Plan your communications strategy. How often do you communicate with OKR champs? With your team members? With executive leadership?**



## Stage 5, your ideal stage, is OKR centering. Unlocking cultural buy-in for OKRs.

This is where leadership doesn't have to be in the room for the decisions that reflect your organization's mission, values, strategy,

and OKRs to be made. Every employee feels comfortable asking questions like "Which objective does that roll up to?" "Which initiative should I deprioritize to accommodate this new one?" and "What are we hoping our key result will be here?"

In other words, everyone in your organization is so clear on their focus, the specified outcomes of their work and how these align to the teams that surround them, that OKRs have become an organic part of the fabric of the business. Employees feel there is purpose in the work they do and understand the definition of success.

## So how should you use the OKR model to get started with OKRs?

- **Using the descriptors above as a guide, identify where your organization sits today.** Before you can get going, you have to be realistic and clear about where you are today.
- **Commit to milestones for getting to each stage in the OKR maturity model.** User increments of months, quarters, half-years, or even years. Remember that OKR implementation is a long game, taking effort to get it right for your organization and reaping major rewards when you do.
- **Use the maturity model as a framework for initiating and continuing the conversation around OKRs as you roll them out in your organization.** This will help frame up conversations about your organization's current status when it comes to goal-setting, what comes next, and what the ideal state looks like. What does your organization have to do to get from OKR piloting to OKR adopting, for instance?

Now that you know where you are, where you want to go, and your broad timeline, it's time to choose your OKR rollout strategy.

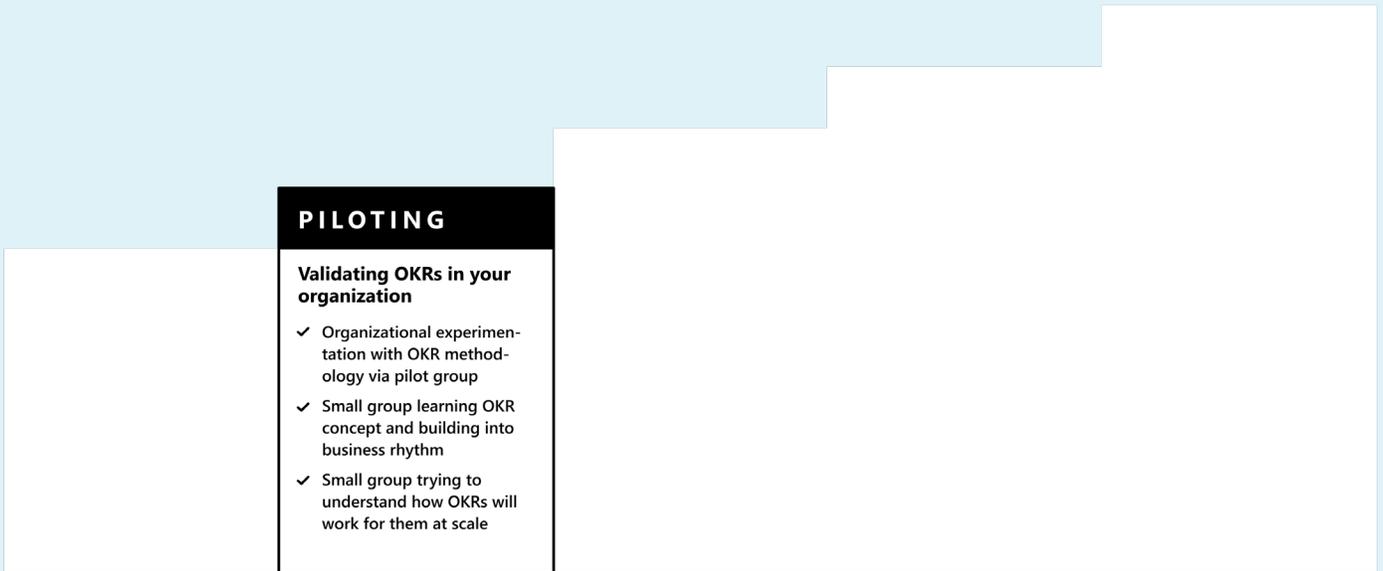
  
  


## PLAN YOUR OKR ROLLOUT STRATEGY

For OKRs to be a successful driving force for your strategy, they need to be baked into your business rhythm. That starts with understanding the necessary phases of a successful rollout.

Give yourself enough time to get it right. Most companies say it takes at least two to three quarters to get their OKR process right, and even then, it's iterative.

When it comes to setting good OKRs, Amanda Nicholson of Formstack says expecting perfection at first is just not realistic. "You have to teach the skill, allow people to set really crappy OKRs, and learn from that experience."

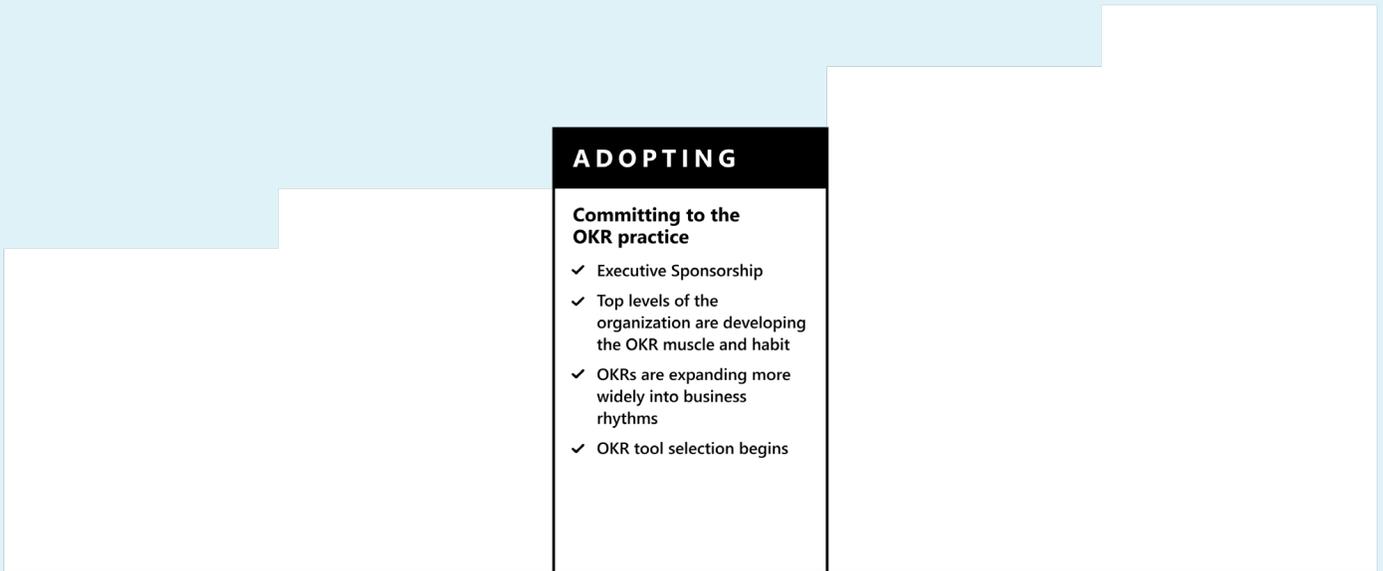


## Phase 2: Leadership-Only Pilot

I recommend rolling out your OKR program systematically from the top down, starting with a pilot program. The benefit of this method is that employees see that senior leadership is fully behind the program, serving as a model example for the program's importance, and any issues can be worked out before expanding the program to the entire company.

In the first quarter of launch, OKRs are set by the executive team and the entire organization has access to view long-term strategic goals even without team and department OKRs. Throughout the quarter, a weekly cadence for check-ins is set as an example, and meeting agendas are structured around measurement against these goals.

Last, after another one or two quarters, team managers expand their key results another level down to individual team members.

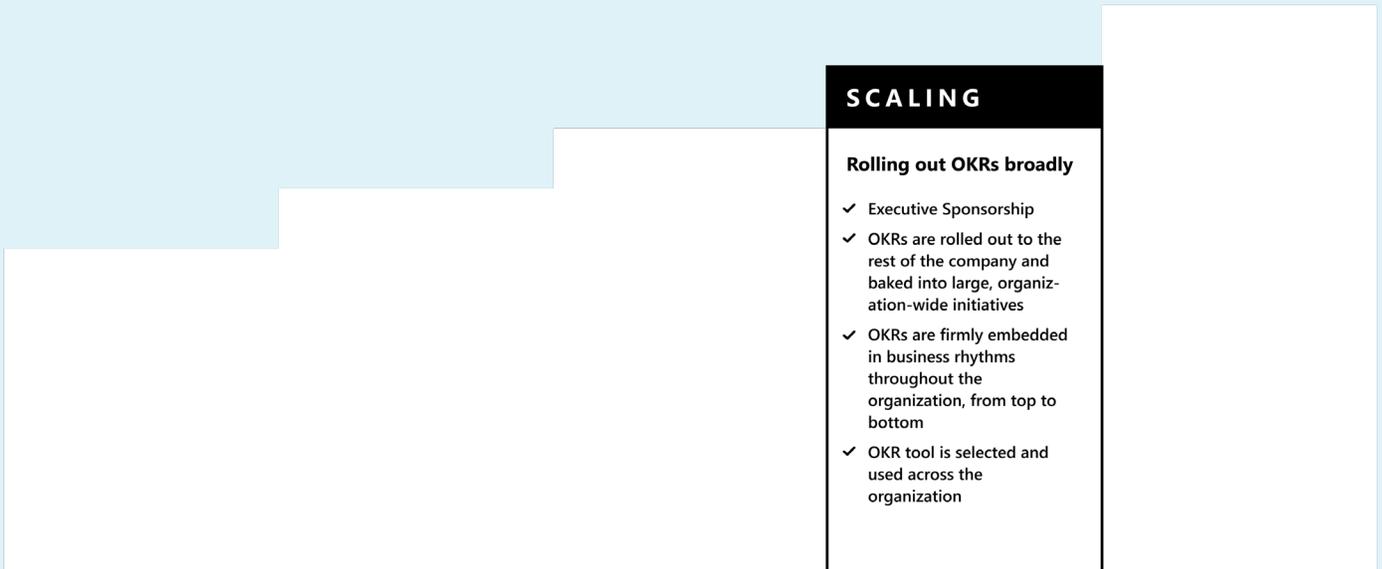


## Phase 3: Leadership and Departments

After a successful first quarter (or two), goals are cascaded one level down to departments. Those OKRs should be aligned with the senior leadership team. This is your adopting stage in the OKR maturity model.

This department adopts a weekly cadence for check-ins for one or two quarters, experimenting with what works and making changes as necessary. Along the way, department-level leaders report back to the executive sponsor and OKR champion regarding successes, challenges, and recommendations.

Once the executive team and department-level leaders are comfortable with how the program is working, a training plan is formulated to roll out OKRs at the team level.

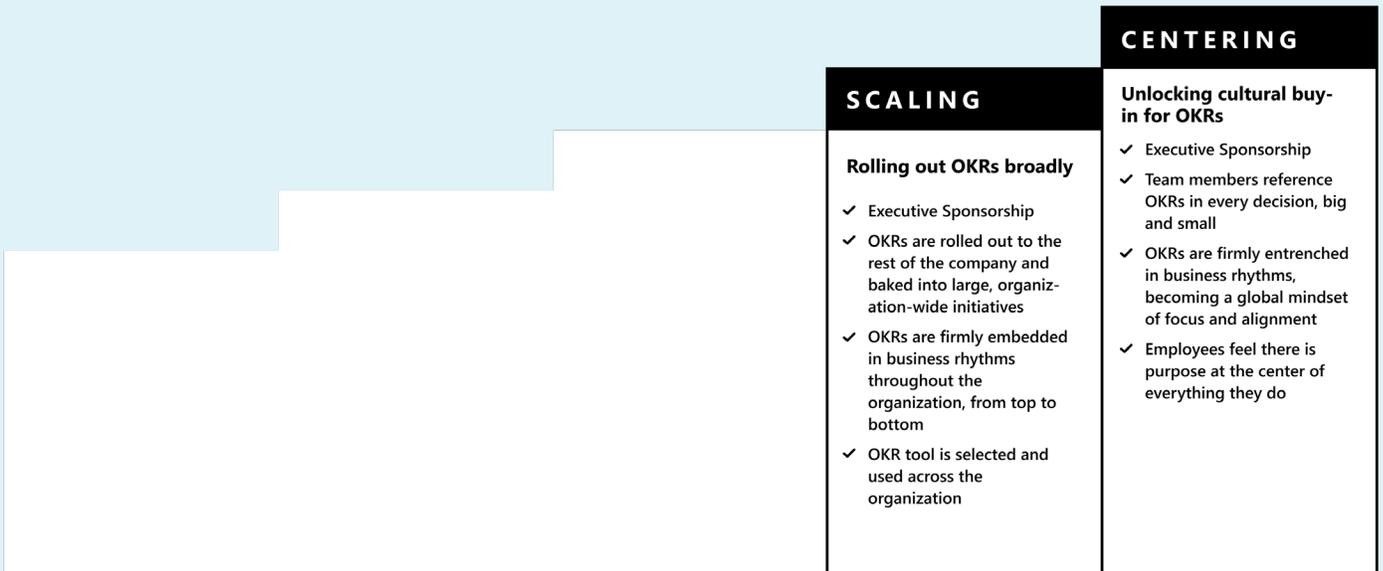


## Phase 4: Leadership, Departments, and Teams

Now that you have implemented OKRs at the leadership level and department level, it's time to roll out OKRs to individual teams. You are in the scaling stage of the OKR maturity model.

It is vital that you equip team managers and teams at this point with the OKR training they need to understand how to write, track, and measure OKRs.

Remember that the first step within this phase is to have team managers build team-level OKRs collaboratively with their team members. Once this process is going smoothly and widely understood by team members, it's time to move on to the next and final phase of OKR rollout: bringing in individual OKRs.



## Phase 5: Leadership, Departments, Teams, and Individuals

This final phase sits somewhere between scaling and centering on the OKR maturity model, with centering being the ideal end state of this phase.

In this phase, you roll out OKRs to individuals on the level of the key initiatives and projects they are working on, so that they have a full understanding of how their daily work is contributing to their team-wide OKRs, department-level OKRs, and company-level OKRs.

Because individual team members should already be familiar with the OKR process from collaborating on writing their team-level OKRs and the previous OKR evangelization from executive leadership and department-level leaders, this final phase should feel natural.

**To support individual team members in this phase, do the following:**

- Widely communicate what company-level, department-level, and team-level OKRs are so that individual team members understand how to connect their OKRs to the big picture.
- Schedule specific trainings/coaching sessions for coming up with individual OKRs.
- As a team manager, check in regularly with team members in 1:1s to find out how the OKR writing process is going.
- Use your OKR software tool to keep tabs on OKR progress and roadblocks throughout the quarter.

One final note here: if your organization does not want to roll out OKRs from leadership down, you can adopt a pilot program model instead for initial rollout.

In this model, individual departments (for example, the marketing or IT department, or a product engineering team) do a top-to-bottom rollout involving team managers and individual employees. Here's how it goes:

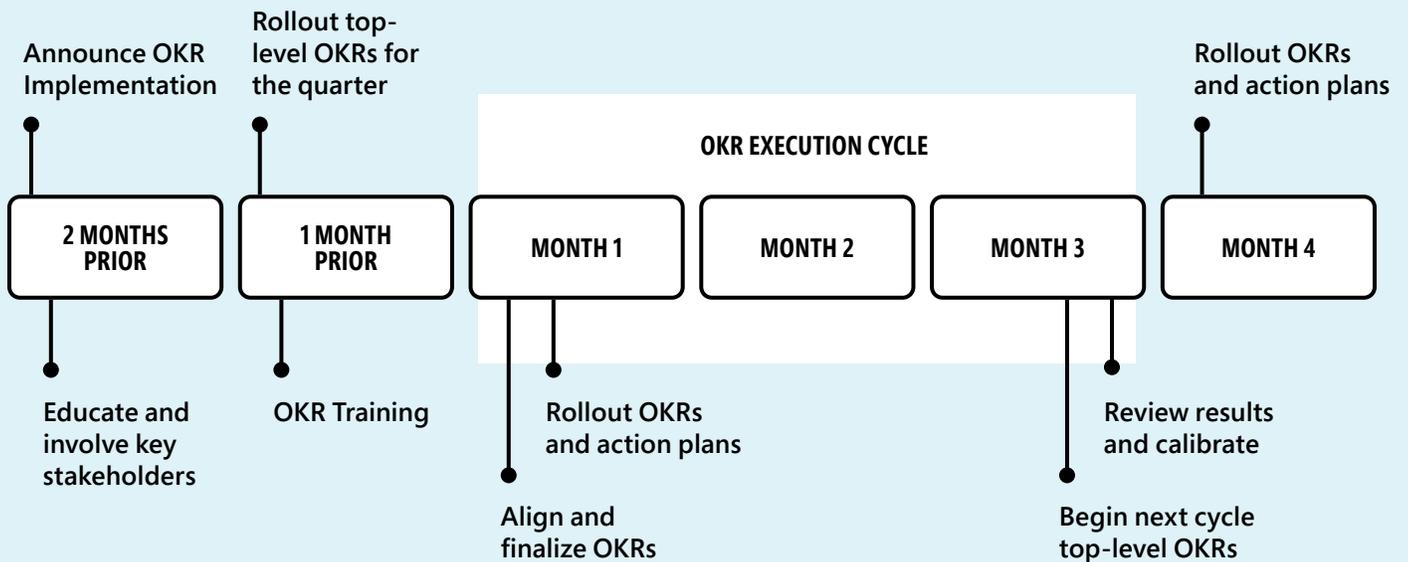
1. With support of upper management, the group adopts a weekly cadence for check-ins for one to two quarters, experimenting with what works and making agile changes. Along the way, team managers report back to management regarding successes, challenges, and recommendations.
2. Once the individual department and management are comfortably in a rhythm, a training plan is formulated to roll out OKRs to the rest of the organization.

No matter which type of pilot program you choose, it's important to find out what works best for your organization. Be patient, as it usually takes a few quarters to get comfortable with change. Soon, though, you will get into a solid rhythm and your OKR program will grow and mature naturally alongside your organization.

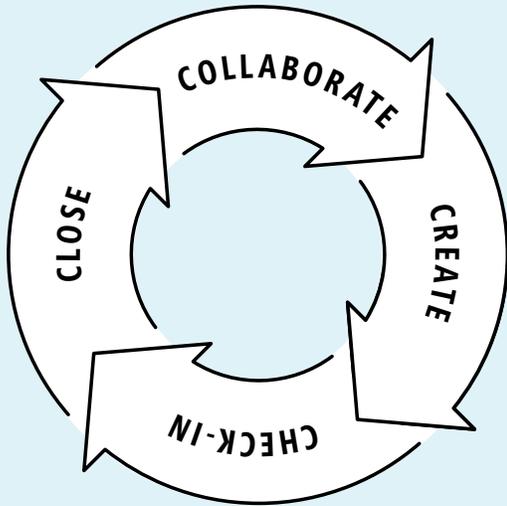
# 3

## PUT TOGETHER YOUR PROJECT PLAN AND COMMUNICATION PLAN

While it's common for OKR programs to vary from company to company, once your phased rollout of OKRs is complete, a typical OKR cycle looks like this:



The Typical OKR Cycle



Here are the project milestones you should hit to ensure that everyone in your organization is aware of what's happening and what is expected of them.

## Milestone 1: Kickoff Meeting to Announce OKR Implementation

The first milestone of implementation is the same as it would be for any major initiative: you host a kickoff meeting. This meeting is generally set at the leadership level but includes your OKR champion and department-level heads as well.

The goal of this meeting is to define the parameters of the initial launch and create an action plan among the key stakeholders involved.

I generally recommend people use a responsibility matrix like RACI (responsible, accountable, consulted, informed) or RAPID (recommend, agree, perform, input, decide) when building this plan. Your OKR program is about establishing accountability, and that is hard to do without creating accountability from the start.

There will be three items to focus on in this meeting:

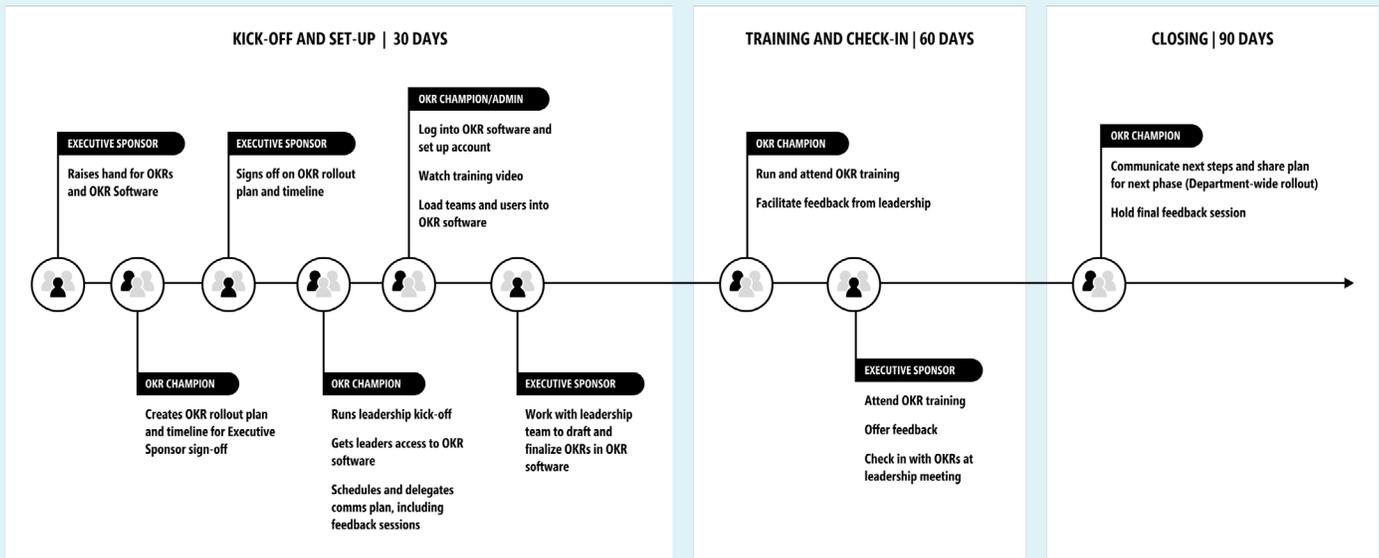
- 1. Assemble the team and clarify role expectations** based on the key roles we outlined earlier in this chapter.
- 2. Define OKR rollout milestones and next steps.** Here is a sample of what a milestone timeline might look like for the leadership team phase.
- 3. Set expectations.** No matter which phase you're in—leadership team rollout, department rollout, team rollout, or individual rollout—make sure the following is clear:
  - What is expected of each role
  - Due dates for all members of the participating team
  - When and how feedback will be requested and incorporated

## Milestone 2: Define Your Company-Level OKR Strategy and Communications Plan

Your company-level OKRs are developed top-down, defined at the executive level, and must be an integral part of the company culture, championed throughout the year.

### PHASE 1: LEADERSHIP TEAM 30-60-90 OKR ROLLOUT

End-to-end view of the Leadership team OKR rollout



Once you have completed your leadership team rollout, it is time to take the lessons you have learned and define your communications plan for department-wide and team-wide rollout.

Even if you don't have the goals set down to the specific metrics, at least being very transparent and clear about the direction the organization is taking is very important and that is a tremendous value OKRs bring. These company objectives will set the tone for the OKRs created and work done throughout the company.

## Milestone 3: Roll Out Top-Level OKRs for the Quarter

Once the high-level strategy is set, it's time to bring the rest of the organization into the conversation for feedback, and to begin the next level of planning.

Don't be surprised if this is iterative. You'll learn about dependencies, risks, and opportunities that the original planning sessions may not have surfaced.

"For the overall company or organization, start with the annual and then develop the quarterly OKRs," says Intel Alumni Association president Howard Jacob. "Group and team OKRs derive from these quarterly OKRs, and most of the individual OKRs derive from the group/team OKRs. Individuals may also create career/personal development OKRs for the year, which then get implemented quarterly."

"For example, completing external training or education goals to prepare them for their next promotion or project, or becoming an internal trainer/mentor/coach to help develop both their skills and those of their peers, could be appropriate individual OKRs."

There are three activities that happen within the context of this milestone:

1. Assign key results for corporate objectives to the appropriate teams.
2. Teams respond to assigned corporate key results by drafting their OKRs with senior leadership support.
3. Collaborate with team leaders and stakeholders for feedback.

## Milestone 4: OKR Training and Enablement (Champion Team OKR Launch)

As you get closer to organization-wide implementation, training and enablement are critical.

This is where the OKR champion takes the reins and makes sure everyone knows their role and is armed with the proper context, framework, and even excitement about what's to come. The champion will facilitate OKR training for all levels of employees, identifying stakeholders and specific needs.

It's helpful to break training sessions into groups, as the information needed and level of involvement will differ:

- Company leadership and OKR champions
- Managers and department leads
- All employees/individuals
- Geographical and logistical grouping (if applicable)

With these groups, you'll need to address three things:

1. Discuss existing goal-setting methods and how the OKR framework differs.
2. Develop coaching and training plan for those involved.
3. Set coaching and training schedule.

## Milestone 5: Align and Finalize OKRs (All-Employee OKR Launch)

The fifth milestone is to have the entire company align and finalize their OKRs. This is a critical step because if it's approached with half-measures, OKRs will be seen as "another thing we have to do" by the broader team. There will always be a contingent of detractors who just don't "get it" so be prepared for that, and be brutally honest with yourself about how people will respond, but also set yourself up for success by creating the right structure to add value to every employee.

This milestone is marked by cascading objectives to individuals in a process that loosely goes like this (add deadlines, meetings, and process as you see fit).

- High-level OKRs flow downward to business units, team leads, managers, and eventually individuals.
- Team members digest and respond with individual OKRs.
- Managers review and iterate OKRs with team members.
- OKRs are reviewed and finalized to ensure organizational alignment.

From here, cross-company collaboration between team leaders and stakeholders for feedback will be necessary in order to iterate, refine, and finalize company-level OKRs.

## Milestone 6: Roll Out OKRs and Action Plan

Milestone 6 marks the operationalization of an OKR program, including a definition of the ongoing rhythm.

- Define and schedule company-wide review cadence.
- Clearly communication cadence and set expectations.
- OKR execution begins.

As you move through your OKR rollout, be sure to build in plenty of touchpoints, including meetings and anonymous forms, to get feedback from everyone involved in the process. Reflect regularly on what you're learning and how you are going to incorporate feedback so that participants understand that this is an iterative process and they are key contributors, whether they are members of leadership, team managers, or individual contributors.


# COACH YOUR GROUP ON DEVELOPING GREAT OKRS

Learn more about writing great OKRs [here](#).



# 5

## INTEGRATE OKRS INTO YOUR BUSINESS RHYTHMS

One of the most common pitfalls that companies face when adopting an OKR program is setting OKRs but failing to establish a rhythm for checking in with them and embedding them into the DNA of the organization. Just as an orchestra needs a conductor to guide them through their performance, so too does a business need a rhythm to guide them through their goal setting.

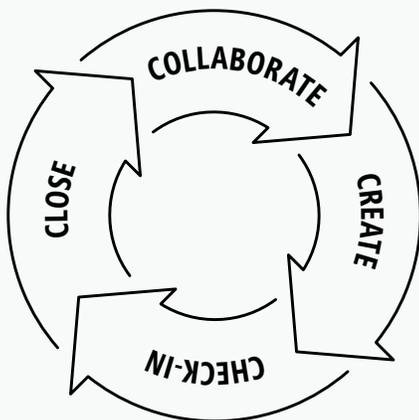
Without this rhythm in place, it can be difficult to make OKRs stick. And if OKRs don't stick, then you won't reap the rewards of the OKR methodology, and you'll be less likely to achieve your goals.

If you want your OKR program to be successful, then it's time to start thinking about how you will keep your organization on track throughout the planning cycle. From daily check-ins to quarterly reviews to end-of-cycle reflection and scoring, these milestones will become your OKR rhythm. When fully incorporated into your OKR program, these elements will inform and drive the execution and adoption of the OKR methodology.

For those on a quarterly cadence (again, that’s the case for most organizations), your timeline will look like this:

MONTH ONE				MONTH TWO				MONTH THREE				M 4
W 1	W 2	W 3	W 4	W 5	W 6	W 7	W 8	W 9	W 10	W 11	W 12	W 1
COLLABORATE												
CREATE												
	CHECK-IN											
										CLOSE		

Notice that the 4 Cs are clearly present in this rhythm. Next, I break them down one by one so you can execute this rhythm at your organization.



### Phase 1: Collaborate

Team members collaborate with each other to align on strategy, develop shared OKRs, and understand how overall objectives from senior leadership cascade to the team level.

## Phase 2: Create

Before and during Week 1 of the quarter, you'll be creating your OKRs. Here are your key milestones during this phase.

### **Milestone 1 (Seven Days before Week 1): Draft and Share Company OKRs**

Seven days before a new quarter begins, you and your leadership team will meet to draft OKRs, reflect, and prioritize. Ask these questions to help narrow your list of potential objectives down to just three to five:

- **What went well last quarter?** Why?
- **Where do we have room for improvement?** How?
- **What should be our focus going forward?** Why?
- **Will focusing here get us closer to our vision?** Is it in line with our mission and values?

### **Milestone 2 (Five Days before Week 1): OKR Drafting and Editing Sessions for Teams and Departments**

Once company-wide OKRs are set, share them with department heads and team leaders. Remember, OKRs are meant to cascade down from the highest level of your organization in order to build alignment. Thus, it is critical to share company-wide OKRs transparently to everyone within your organization.

### **Milestone 3 (Week 1): Finalize and Load OKRs into Your OKR Tool**

By the end of week 1, your leaders and teams should all have finalized and loaded their OKRs into your OKR tool.

Now let's move to the check-in phase.

## Phase 3: Check in

### **Milestone 1: Weave Frequent Check-Ins into Existing Rhythms**

Frequent check-ins help leaders keep a pulse on the health of their goals. Are they still tracking to reach them on time? Is there a roadblock or an unanticipated factor that will require the plan to change? Consider providing some of these discussion questions to leaders to guide their thinking for their first meeting and encourage them to use their dashboards to conduct meetings.

Review sessions increase focus, accountability, autonomy, and transparency throughout the organization. Without these sessions, you risk losing sight of your goals and working in silos, disconnected from the big picture.

But with a close eye on progress and a dedicated process for learning and improvement, review sessions will result in increased alignment, a stronger organizational culture, and greater performance in the future.

OKR reviews come in all shapes and sizes—from morning check-ins to weekly team meetings to quarterly business reviews.

I recommend weaving OKR reviews and check-ins into the meetings you already have on the books to avoid increased meeting load but maintain a close eye on how you are tracking with OKRs.

Here are four specific meetings you can incorporate OKRs into, and one new meeting I recommend:

### **1. Weekly internal leadership meetings** (executive, department, and team manager levels)

Weave OKR check-ins and reminders into weekly leadership meetings for executives, department heads, and team managers, respectively.

Connecting every department with OKRs reinforces that OKRs should be top of mind and drive the work being done to help your organization reach its goals.

Including OKRs in meetings for team managers helps eliminate silos; if there are issues, they can be addressed more efficiently.

At the end of the quarter, use this meeting as an opportunity to go over what went wrong, what went right, and what the plan is for the future quarter.

### **2. Company-wide meetings**

Company leaders should incorporate OKRs into their regular company-wide meetings and town halls as a part of the discussion around important updates or issues the company is having. The state of the company should be driven by where OKR progress stands. This is also a great opportunity for employees to participate by asking questions and making suggestions.

### **3. Team-level meetings**

OKRs should be a part of every team-level meeting that a team manager holds. They should be baked into the structure of team meetings in the following ways:

- As a collaborative ideation session prior to the new quarter to ensure team engagement and buy-in.
- As part of the regular structure of round robin updates.
- As a formalized check-in at the beginning, midway, and end of a quarter.

#### 4. 1:1s

OKRs should make a regular appearance at 1:1s between team managers and team members, using your OKR software as a facilitating mechanism. OKRs should be baked into these 1:1s in the following ways:

- Checking in on individual progress.
- Identifying roadblocks and gaps, helping to clear them as a manager.
- Sharing context about how company-wide OKRs are influencing team priorities and individual priorities.

#### 5. Quarterly cross-functional OKR meetings (New)

There is one new meeting that I recommend, and it's a cross-functional one. This meeting is necessary because it is directly related to the core value of OKRs: ensuring cross-functional visibility and alignment.

Once a quarter, plan a cross-functional meeting with stakeholders who own a piece of each OKR. For example, if you have an objective around 10x revenue growth, you could hold a quarterly meeting with sales, customer service, marketing, and product stakeholders who have cascaded OKRs supporting that topic.

This meeting will help you identify wins, flaws, and lessons for the future in both the OKRs you come up with and the OKR process itself.

## Phase 4: Close and Score

Now it's time to see how you performed!

### Milestone 1: Score and Close

Before the quarter ends, ask your OKR solution to send out automatic reminders to ensure that all participating departments and teams complete final check-ins, then close and score their OKRs.

Remind	EXECUTIVES	begin closing out OKRs	2 WEEKS	before quarter-end
Remind	DEPARTMENT HEADS	begin closing out OKRs	1 WEEK	before quarter-end
Remind	TEAM MANAGERS	begin closing out OKRs	2 DAYS	before quarter-end

### Milestone 2: Review and Move Forward

During the last week of the quarter, you'll be doing two things simultaneously: closing out the current quarter's OKRs and finalizing the OKRs for the upcoming quarter.

The good news is, one thing informs the other. Spend the first half of your OKR meeting in the last week reflecting on what went well and what didn't go well.

Take time to consider whether or not you are going to carry forward any unfinished OKRs into the next quarter. Next, spend the second half of the meeting using the lessons learned to inform your priorities for the upcoming quarter. Update any carry-forward OKRs to reflect these learnings so you can learn, iterate, and achieve your goal next time around.

To learn more about *OKRs for All*, [buy the book here](#) or visit [okrsforall.com](https://okrsforall.com).