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The 2023 OKR Guide

Best Practices for Adopting
Objectives and Key Results

Contents

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Introduction to OKRs

When implemented correctly, OKRs establish broad alignment and accountability throughout your organization and help teams see how their work contributes to your company's objectives.

For your company to be successful with OKRs, you want to make sure OKRs are implemented with intent at every step. In our experience, groups with the most success have taken time to:

> Prepare and follow a detailed strategy
> Educate and empower their organization
> Build a rollout plan while following change management best practices
> Define OKRs in the correct sequence
> Manage and track OKR progress

With that being said, you may be reluctant to implement OKRs because of uncertainty. We understand and empathize with this uncertainty, but reading this guide is your first step in conquering it. Let's start with the basics of OKRs.

The OKR basics

If you've made it to the point of checking out our guide, you may already have an idea of what OKRs can do for your organization.

However, establishing an understanding of OKRs is the preliminary step in adopting and implementing them. After all, if your teams don't understand the methodology, can it really be successful?

What are OKRs?

OKRs are a framework for goal setting and management, created by Intel's Andy Grove. Venture capitalist John Doerr popularized the methodology in his New York Times best-seller *Measure What Matters*.

From tech giants like Google and Adobe to worldwide enterprises, OKRs continue accelerating growth and innovation by connecting teams to their company's greater objectives. By design, OKRs work cross-functionally to create a standard of alignment for entire companies, making them giving a connected purpose to teams and organizations.

OKRs stand for objectives and key results. An objective is what you want to achieve, and a key result is how you plan to measure whether you have achieved your objective.

◎ Objectives

Qualitative

Aspirational

Something you, your team, or your organization aim to achieve

📈 Key results

Quantitative

Measurable

Indicate if you achieved your objective

The difference between an objective and key result is clear. "Boost organic traffic" as an objective inspires numerous strategies for a marketing team. A key result like "Increase top 5 keywords ranking by X positions" brings "how" an objective is achieved into focus.

Who should own OKRs?

Company, functions, and teams will all have separate OKRs that connect and align in unique ways. OKRs can be owned individuals, but we recommend teams own the majority of OKRs. If you're implementing OKRs for the first time, team OKRs will simplify the implementation process.

How many objectives?

As a rule of thumb, both the company and each team should have up to three objectives per quarterly planning period (we'll get to this in a bit). However, don't feel pressure to create three objectives where one will suffice. Less is more with OKRs.

Your teams will quickly learn the value of focus if OKRs aren't overcomplicated.

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Maintaining a minimal OKR process ensures you will not overwhelm the team with learning a new process and full-blown planning at the same time.

How many key results?

In general, you're not limited on the number of key results. However, we want to maintain the theme of focus in OKRs — 3–5 is the sweet spot.

5+ key results are hard to maintain, but less than 3 won't define success clearly enough.

Tips for writing OKRs

A good OKR is simple, clear, and actionable. Any person in any function of your organization should be able to look at your OKR, understand what the objective is trying to achieve, and how your key results will drive progress.

We use a time-tested formula for writing OKRs at Quantive:

We will (objective), as measured by (these key results)

With this formula in mind, here is a checklist to help you write top-quality objectives and key results.

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Writing good OKRs

◎ Objectives

Are there too many or too few?

Are they actionable?

What impact will they have?

Why should anyone care?

Can they be clearer or more concise?

⌁ Key Results

Are there too many or too few?

Are your key results task or outcome oriented?

Are they ambitious enough?

Are the targets realistic?

Who is accountable for each key result?

Getting started

Launching the OKR process

Baymard conducts original large-scale research studies on all aspects. While these OKR basics provide you a standard overview of OKRs, we highly encourage you and your teams to check out our full introduction to OKRs if you want more information on:

> **OKR basics**

> **Breaking down the components of OKRs**

> **A more in-depth explanation on writing OKRs**

> **OKRs vs. KPIs**

> **Common mistakes when writing OKRs**

> **OKR examples**

With the preliminary OKR knowledge established, you're ready to get moving with your OKR process. So where do you start?

To ensure the process is seen as valuable from executives all the way down to individual contributors, you need to use the right approach to OKRs. Answering the question "why" is where all great OKR strategies begin.

Step 1: Understand why you want to adopt OKRs

Your organization faces a unique set of strengths, challenges, and environments. Whether you're a global enterprise or a scrappy startup, OKRs can boost business growth by enabling:

> **Focus**

> **Accountability**

> **Alignment**

> **Transparency**

> **Engagement**

But OKRs aren't about gaining a laundry list of benefits — you want to drive greater outcomes with this simple, but effective methodology. Let's explore how each core benefit translates to better results for your organization.

Focus

By helping hundreds of high-growth companies successfully implement OKRs, we've learned organizational focus is the most desired benefit of OKRs.

Productive, innovative teams often lack focus because in today's modern operating environment, "busy" is often confused with "effective."

While there's always something new to be done, the OKR framework ensures work focuses on priorities as opposed to unproductive or futile tasks.

Accountability

Even if your organization is the most focused, you won't accomplish much if your goals aren't connected. OKRs are a system of public ownership, assigning stakeholders for progress.

When supported by the right OKR platform, OKRs ensure you and your team's work contributes to overarching goals.

The public format of OKRs builds a culture of trust and transparency, increasing the consistency of your teams' efforts and empowering them to commit to your strategic objectives.

Alignment

Alignment eliminates time, energy, and resource waste.

OKRs foster alignment by removing silos and connecting employees to company and function-level objectives.

As OKRs display your organization's strategic direction — showcasing top-down initiatives from each function — work funnels towards the same objectives, increasing the potency and potential of everyone's contributions.

Transparency

While OKRs promote transparency, they also could not survive without it.

Knowing the purpose behind high-level decisions, the company's goals, and the projects your teams are working on makes organizational efficiency easier to achieve.

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Additionally, transparency is symbiotic with other OKR benefits. Visibility into organizational processes improves your teams' focus and promotes accountability, making alignment and motivation a breeze.

Moreover, real-time progress transparency condenses feedback loops, allowing you to adapt to changing conditions quickly and efficiently.

Engagement

OKRs empower individual contributors with the power of choice. By shifting the focus of the organization to the "why" behind work, teams can establish "how" their work is accomplished. This democratization of decision-making motivates employees to go all-in on the OKR process.

As a result, team engagement improves, as employees better understand how their work impacts progress at every level.

Step 2: Get buy-in from leadership and teams

You can spend all day planning out the perfect OKR implementation — without organizational buy-in, it may be a waste of time. Conceptually, you can't roll out OKRs if stakeholders don't support them.

Your leadership must justify the effort and resources to implement OKRs.

After gaining leadership interest, you're ready to focus on your teams. This doesn't mean going in heavy-handed to involve everyone during the initial OKR rollout. Rather, get the initial support of a few colleagues who can help set the rules and practices of OKR implementation in alignment with leadership's vision.

Getting buy-in early from your leadership and teams solidifies two crucial elements of OKR success: transparency and collaboration.

Step 3: Connect your mission to your OKRs

Answering the following goal-setting questions is a fundamental part of creating your OKRs:

> › **What are you trying to achieve?**
>
> › **Why do you want to achieve this?**
>
> › **When do you want to achieve it?**

Thankfully, your company's mission can guide your answers to these questions, helping you kickstart your OKR journey effortlessly.

Mission informs strategy

Stemming from your company vision, your mission should reflect a singular, time-bound, ambitious goal. Without a mission in place, your team may have a hard time coming up with meaningful complementary objectives.

Consider John F. Kennedy's mission statement for NASA before the space race in the 1960s — see if you can spot the connection between missions and OKRs:

> "
>
> This nation should commit itself to achieving the goal, before this decade is out, of landing a man on the moon and returning him safely to earth.

If this mission sounds like a SMART goal, it's because it is:

> **Specific**: land a man on the moon, return him safely

> **Measurable**: did the man land, did he return

> **Achievable**: for NASA, this was possible, but a stretch

> **Relevant**: NASA's job is aeronautics and space focused

> **Timely**: there is a deadline, before the decade is out

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While this isn't the only way to frame your mission, OKRs and SMART goals share many similarities. This SMART mission shares the specific, aspirational, and timebound qualities of OKRs.

As the guiding light for your teams, company OKRs closely align with your mission. Therefore, critical strategy questions sit between your company's mission and your company's OKRs.

Finding strategic purpose with company OKRs

The ultimate litmus test of creating company OKRs is the question of "why" — this answer lies in your company's mission. The mission provides a clear direction for your company-level OKRs by indicating what's trying to be achieved and why (see: the goal-setting questions at the beginning of the section).

Connecting company OKRs to the mission also ensures all stakeholders involved — executives, investors, shareholders — support the change OKRs will bring to your organization. By creating parallels between your mission's "why" and your OKRs' "why", you set the stage for alignment between your strategy and OKRs at the company, team, and individual levels.

We cover how to create company OKRs in Step 8.

Step 4: Select an OKR pilot group

The purpose of your OKR pilot is to serve as proof of concept across a small part of your organization. This builds OKR's credibility, showcasing its effectiveness for your organization.

Outcomes of an OKR pilot

You can run an OKR pilot to test one of many aspects like:

Broad engagement

Do non-leadership employees and individual contributors use the methodology?

Leadership engagement

Is there leadership buy-in with OKRs?

Scale and growth

Do processes, logistics, and technologies support OKRs at scale?

Technology fit

Does your technology enable people to focus on their objectives? Does it work for distributed teams and hybrid work?

Conceptual fit

Do OKRs fit into your organization's culture and working style?

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As large, sweeping initiatives often fail, you can use an OKR pilot to prove OKRs can deliver desired outcomes with minimal risks.

Additionally, a pilot program can highlight the potential obstacles in your change management process, allowing you to strengthen your OKR implementation strategy before scaling it.

The success of your OKR pilot depends on six distinct processes:

> **Onboarding**: Can we get people started with OKRs?

> **Activity**: Do people engage with the process?

> **Alignment**: Are organizational goals aligned with OKRs?

> **Transparency**: Have OKRs reduced silos and improved collaboration?

> **Focus**: Are we prioritizing what's important with OKRs?

> **Attainment**: Are OKRs helping us achieve our objectives?

As your OKR pilot group can make or break the success of your OKR implementation, choosing the most suitable pilot group is essential.

Choosing your OKR pilot group

You can choose your OKR pilot group in two ways: management-specific (e.g., managers and executives) or function-specific (e.g., engineering). While both approaches have their benefits, we strongly recommend the function-specific pilot.

As OKRs can improve transparency, focus, and alignment in your organization, they should be deployed to groups who can benefit from these the most.

Your OKR pilot participants need to represent the day-to-day dynamics of your organization — management is important for operations but shouldn't be the majority of your participants.

Using a function as a pilot group can allow you to see how the OKR process works vertically, from the most junior to the most senior person in that function. Additionally, other functions may be more eager to adopt OKRs if they see them benefiting an adjacent function.

Regardless of how you choose your OKR pilot group, we recommend a gradual approach in a controlled environment. In our experience, companies that jump straight in spend 3-6 months trying to manage the process at an unnecessarily large scale.

Step 5: Appoint OKR leadership

As you wouldn't expect long-term marketing success without a CMO, or sales to excel without a CRO, OKRs need dedicated leadership to be efficient.

Deciding on an OKR sponsor, champion, and program owner is important for OKR planning and longevity. These key players undertake OKR responsibilities such as decision making, motivating teams, and managing operations. They're especially vital when rolling out OKRs and scaling these throughout your organization.

OKR sponsor

Strategy-focused OKR support figure

OKR program owner

Executive monitor for planning and strategy

OKR champion

Execution-focused operator

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OKR sponsor

Typically, the OKR sponsor works to establish OKR credibility and authority. More focused on strategy and less focused on execution, they're trusted with defining OKR success, creating the communication strategy, and supporting the rollout of OKRs.

Without an OKR sponsor, getting leadership and team buy-in is nearly impossible. Having a support figure for OKRs ensures the methodology can develop and flourish, as OKR sponsors maintain the efficacy of OKRs by integrating them into the fabric of operational culture.

OKR champion

Complementing the OKR sponsor, the OKR champion is a highly operational role. They establish a framework for OKR adoption, evangelizing the methodology across the organization.

As part of this, OKR champions act as an internal expert on all things OKRs, providing your organization with ad hoc OKR knowledge. This role is particularly important as OKRs take a while to get used to, making streamlining them a lengthy process.

As the final decision maker in OKR-related matters, the champion covers the who, what, when, how, and why of OKRs, pushing the process forward by removing bottlenecks and making it as effective as possible.

OKR program owner

As an intermediary between the strategy-focused sponsor and the execution-focused champion, the OKR program owner role is often filled by the chief of staff, chief of strategy, chief operating officer, or another C-level executive focused on supporting strategy through planning.

It's the program owner's responsibility to make the OKR strategy actionable by fulfilling the communication strategy, overseeing training activities, and monitoring program health.

Without a program owner, nobody is steering the proverbial OKR ship, creating misalignment between the strategic vision and its execution.

Step 6: Establish an OKR rollout strategy

With leadership established, you're ready to formalize your
OKR rollout strategy.

Operational rhythm

Understanding your OKRs' operating rhythm is key to an effective rollout.
The program owner should share timelines and expectations for the OKR
cycle. While the first cycle is challenging, subsequent cycles establish OKRs
as a familiar routine.

**Without clear expectations or an operational "flow," OKRs can
feel forced or rushed.**

Mapping out each step of the OKR process with desired outcomes in mind
will give you the best shot at successfully implementing OKRs. But how do
you communicate your OKRs and ensure visibility every step of the way?

While this overview gives you a base-level understanding of OKR cycles and
rollout strategies, our guide covers the step-by-step process of successful
OKR cycles and rollouts.

Communication strategy

Effectively communicating your OKR rollout is essential to the OKR cycle. Whether it's at the start of the fiscal year or outside the annual planning process, choosing when you communicate isn't as important as how you prepare for it.

For your communication strategy, you must consider:

> **Kickoff activity**: How OKRs are announced to your teams

> **Months before implementation**: OKR training, strategy, and cycle management

> **Weeks before implementation**: Company OKRs, developing and aligning team OKRs

> **OKR execution**: OKR deployment, adjustments, progress metrics, etc.

> **Next implementation planning**: Review quarterly results, recalibrate, and continue

Answer your team's OKR questions

With the cadence and communication strategy established, the success of your OKR implementation depends on buy-in from your teams. If they have their hands full with complex daily operations, this may require a little convincing.

Asking teams to take on OKRs will only succeed when there's a "why."

Most teams have the same questions when it comes to using OKRs. Anticipating and tending to questions can alleviate stress around OKR rollouts. So, let's look at how you can go about answering some common OKR questions:

> What are we going to do?

> Why are we doing it? What's in it for me?

> How do we do it? And how do we do it well?

> How can managers help make OKRs stick?

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What are we going to do?

"We're rolling out OKRs so we can focus on the larger impact of your work as opposed to isolated tasks. OKRs will also increase transparency and alignment inside your team and across the organization, ensuring a better understanding of overarching processes."

As employees like to understand their work's contributions, emphasizing how OKRs unite teams for impactful work helps make efforts purpose-driven and conducive to success.

Why are we doing it? What's in it for me?

"Setting wider team and company goals will give you more autonomy in shaping our company's future. You'll have the freedom and authority to choose how you'll deliver on those goals — and we'll celebrate the wins we see across all teams."

As Dan Pink mentions in *Drive*, people need three things to be motivated: autonomy, mastery, and purpose. Remind teams you trust them by empowering specialized, autonomous work that fulfills motivation.

How do we do it? And how do we do it well?

"We're going to have weekly check-ins to reflect on progress and confidence levels surrounding goals. Each team will be responsible for pinpointing issues and figuring out a plan to overcome them.

Using tracked metrics and your professional intuition, you'll assess how likely you are to achieve your goals. Transparently stating your confidence in goal attainment can help the rest of the organization stay aligned with your progress and set additional goals to support your initiatives."

When setting up teams for successful OKR adoption and attainment, account for these three factors:

> Regular review cadences
> Transparency in goal progress and process
> Understanding how individual teams impact each other

How can managers help make OKRs stick?

"Training your team on OKRs will reduce any knowledge gaps. Coaching best practices will reinforce positive behaviors. Showing progress and celebrating wins turns metric-tracking from a rote exercise into a vehicle driving positive change."

Team leads are the first ones to hear about teams' discontentment.

Helping managers handle objections and the process facilitates employee buy-in.

Step 7: Set OKR rules of engagement

You will find many rules when it comes to OKRs. In practice, however, everyone tweaks these to suit their needs. In our experience, adjustments are great if everyone is aware of them. Below, we list some important OKR rules everyone in your organization should be aware of.

Rules of engagement checklist:

☑ **Define your chosen OKRs planning cadence**

☑ **Determine how frequently OKRs should be updated**

☑ **Decide the maximum objectives a person or team can own**

☑ **Decide the maximum key results attached to a single objective**

☑ **Choose how often teams should meet to discuss OKR progress**

☑ **Nominate who sets OKRs for teams and individuals**

Set OKR rules of engagement

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What OKR cycle length will you be using? Typically, companies use quarterly OKR cycles, but fast-paced organizations may opt for OKR cycles of four, six, or eight weeks instead.

Check-ins

How often should OKR owners update key results? Generally, once a week — on a specific, chosen day — is enough.

Maximum number of objectives

What is the maximum number of objectives a team or individual can own? While we generally recommend three at most, we advise beginners to start with one. This makes it easier to weed out distractions when choosing an initial focus.

Maximum number of key results

What is the maximum number of key results per objective? In our experience, 3-5 key results are optimal. Too many key results complicate OKRs, diminishing their focus. If an objective seems to require more than five key results, try breaking it up into two objectives instead.

Retrospective meeting cadence

How often should teams meet to discuss OKR progress? To drive performance and accountability, the OKR progress needs to be reviewed regularly. Typically, this entails a short weekly or bi-weekly meeting, depending on the size and needs of your organization.

How will OKRs be set?

OKRs can be set in three ways:

> **Top-down**: Fosters alignment, quick planning

> **Bottom-up**: Fosters engagement and motivation, requires little coordination

> **Bidirectional**: Middle ground between top-down and bottom-up

OKRs should strike a balance between the need for managers to drive results and the need for individuals to own their journeys. Regardless of which method you choose for setting OKRs, it is important to bear in mind the core benefits of each approach.

Top-down

All objectives are set by a manager, supervisors, or executives. This approach is best for companies that have sweeping projects or need to completely realign.

Bottom-up

Employees set their own OKRs based on what they think should be accomplished. To make this work, company and function OKRs should be clearly defined. This approach gives your teams more influence on the goals the company takes up as its main drivers. If there are no fires to put out, or if you need more ground-level knowledge to uncover the company's strategic deficiencies, the bottom-up approach can help surface unseen gaps or empower projects that teams are truly excited about working on.

Bidirectional

Managers and employees negotiate OKRs. Typically, the manager will frame these OKRs with "We need to achieve X and Y in this quarter, how can you help us?" Most companies develop a hybrid of the three approaches through negotiation. Some teams may require more autonomy, while service-focused functions may benefit more from a top-down approach.

Step 8: Define company OKRs

Before setting individual and team objectives, you need clear company objectives in place. These involve both annual and quarterly objectives, where quarterly objectives ensure annual objectives are attained.

Annual objectives

Annual company objectives are the most important and ambitious. When preparing these objectives, leadership can look at your organization's mission and vision for inspiration. Annual objectives are designed to help your company achieve its mission with its vision in mind.

Here's a thought exercise for annual objectives — if there were only three things you could achieve this year, what would they be?

Examples:

> **Drive more upsells and cross-sells**

> **Become an industry thought leader**

> **Grow faster than competitors**

Depending on the size of your company, you may have more than three annual objectives. Please keep in mind, though, OKRs are all about focus. We highly advise having no more than 3-5 annual objectives.

Quarterly objectives

With your mission and vision-focused annual objectives in place, defining your quarterly objectives should be straightforward. Quarterly company OKRs inform functional, team, and individual level OKRs, aligning them with annual objectives in a specific and tactical manner.

For example:

> **Improve upsells of our entry-level customers (vs. Drive more upsells and cross-sells)**
> **Get media coverage (vs. Become an industry thought leader)**
> **Deliver a new vertical solution (vs. Grow faster than competitors)**

Essentially, quarterly objectives break down annual objectives into smaller, focused avenues. If these objectives produce results, they'll likely be carried into the next quarter — if not, leadership can pivot to a new focus.

Step 9: Define function and team OKRs

All the work you've done setting company OKRs pays off at the function and team level. With company OKRs connected to the mission and vision, function and team OKRs align as tactical pursuits.

Function OKRs describe what departments and large sectors of the organization are trying to achieve, while team OKRs are the rallying point for individual contributors.

The constructive challenge of team OKRs

At the function and team level, OKRs are separate enough from the overarching strategy to become tactically focused — this presents both an opportunity and a challenge.

The opportunity is in the outlook provided by management on how OKRs will drive real results. The challenge is in the disconnection of teams and pursuit of alignment.

By defining team OKRs, each team will have a unique perspective and approach to the process. Some teams may be directly in line with the strategic vision, while other teams may challenge that vision.

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Uncertainty in the team OKR process is normal — you should encourage teams to take risks here, as not all team OKRs must align at the company level.

Why not individual OKRs?

While we at Quantive once recommended individual OKRs, the methodology continues to mature and evolve. Getting too granular at the individual level creates unnecessary risk from a performance management perspective — it's no longer our recommended best practice for writing OKRs.

Tying an individual's performance directly to OKRs is a red flag.

OKRs are meant to push teams. Without the freedom to fail, risk-tasking is discouraged and OKRs lose their aspirational aspect. Maintaining focus on how team OKRs drive company goal progress mitigates this risk.

OKR examples

Creating your own OKRs from scratch is intimidating and time-consuming. Get inspired by our OKR examples before defining your company, function, and team OKRs.

Company OKR example

Objective: Become growth-obsessed

Key result 1: Decrease avg. net MRR churn by 25%

Key result 2: Compound MoM MRR growth of 15%

Key result 3: 2,000 Customers

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Function OKR example — sales

◉ Objective: Generate new bookings pipeline

📈 Key result 1: Generate of $10M in 'Land' pipeline

📈 Key result 2: Generate $2.5M in 'Expand' pipeline

📈 Key result 3: Average 6 product demos per week per sales rep

Team OKR example — content (via marketing)

⊙ Objective: Bring in new visitors with our bi-weekly newsletter

📈 Key result 1: Double the number of subscribers from 1,500 to 3,000

📈 Key result 2: Increase the open rate of the newsletter from 20% to 35%

📈 Key result 3: Create the content strategy and the topics for the next 3 months

📈 Key result 4: Increase the CTR to >8%

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Step 10: Align and rollout OKRs

With company, function, and team OKRs set, it's time for organizational alignment and the official rollout. As a rule of thumb, don't expect every objective to neatly cascade from one level to the other.

Align function and team OKRs to company OKRs

While cascading isn't the goal, alignment is, but not every goal must align with company OKRs — your HR team's goal might not align with revenue. But your company goals should represent top priorities and each team should contribute where they can.

Think of your objectives as a graph or web — even if some elements are detached from the whole, they should align across peer teams and towards the company's goals. The alignment phase is also your last review of OKRs. This is the opportunity to stress test each function and team's OKRs, while ensuring the company OKRs are a solid foundation. Ideally, each function contributes to a key result(s) in a company OKR, balancing accountability for results across teams.

The alignment phase ensures each key result has a contributor and connects team goals before they're finalized.

Rollout OKRs

Once team goals are set, they should be shared publicly. Teams can then revise their goals to ensure cross-functional alignment when needed. This makes all OKRs more meaningful and cohesive, uniting teams and individuals through a common purpose.

Leadership shouldn't dictate every detail in the rollout. Front-line initiative is an indicator of a healthy, empowered culture — employees with autonomy in their goal setting have a stronger sense of ownership and work harder to accomplish their goals.

OKR rollout checklist:

☑ **2 weeks before next quarter: Every team publishes their goals**

☑ **1 week before next quarter: Teams collaborate and review each other's OKRs to ensure alignment and adjust goals**

☑ **Days before next quarter: Teams publish and commit to their shared OKRs**

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Align and rollout OKRs

Create action plans

Creating OKRs is not the same as the action plan. Planning helps anticipate obstacles and keeps the team on track.

An action plan, enhanced with tasks, boosts productivity and focus.

Your plan for achieving your OKRs should include planned initiatives, tasks needed to be done, and benchmarks with deadlines. This should be tracked separately from your OKRs so the process doesn't distract from the outcomes.

Action plans checklist:

☑ Action plans are outputs, OKRs are outcomes

☑ Identify leads and contributors responsible for KRs

☑ Establish a weekly check-in schedule to evaluate progress

☑ Link your action plan documentation to your OKRs

☑ Schedule monthly reviews and quarterly retrospectives

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Step 11: Set OKR reviews and retrospectives

To drive performance and accountability, OKR progress should be reviewed regularly. These should not be all-hands meetings, but rather short, weekly meetings to discuss progress against objectives and to set priorities for the next week. The goal is to make these team-specific.

For retrospectives, it's important to review the previous OKR cycle and make necessary adjustments. This is a great time to look at OKR progress, determine which company OKR changes need to be made, and incorporate lessons learned into the planning cycle ahead.

The all-hands review of the past OKRs session is important for several reasons:

> It demonstrates how serious a company is about OKRs — if things get done and no one notices, it doesn't matter

> It is a chance to give credit to people who excelled at their OKRs

> It is a learning opportunity for people and the company to see where things didn't go well and how they could be improved

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No one gets OKRs right the first time, so focus on learning and improving. Some OKRs just need recalibration from one quarter to the next, while others will end and new ones will be created.

Common questions to help guide the quarterly review process:

> How was the progress in our first round of OKRs?

> Were they well aligned?

> What went well?

> Where could we improve?

> Have company-level OKRs changed?

> Has anything changed with other teams we share dependencies with?

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Step 12: Common OKR challenges and mistakes

When trying to implement OKRs correctly and effectively, you'll face some challenges along the way. At a broad level, OKR implementations fail for many reasons — here are three major OKR stumbling blocks:

"Set and forget" OKRs

This is the number one-way implementations fail. OKRs are not a passive methodology threy require consistent time and effort. The more your teams engage with their OKRs and provide updates, the better your chances of driving real results.

To counter this mistake, it's important to establish a cadence of regular checkpoints to examine progress.

No accountability

In this scenario, teams are usually given OKRs to pursue but have no input in defining them. No accountability stems from poor engagement (no choice in goals), leading to the disconnected work silos OKRs are meant to prevent.

To counter this mistake, you need a process where teams are empowered to create their OKRs. Each function then must challenge the other to focus on

the right priorities. This encourages accountability through inspired creative thinking and informed risk–taking, all pushing the business forward.

Focus on deliverables, not outcomes

For some teams, OKRs turn into a data-driven, output-focused task list. This won't ensure the desired outcome from OKRs — this is simply conducting business as usual.

Without a focus on outcomes, you're ensuring mediocrity at best.

To counter this mistake, emphasize the outcomes you want to achieve without over-specifying the projects required to achieve them. A watertight plan at the start of the process will choke out creativity and innovation as new information becomes available down the line.

Step 13: Choose OKR software

Advantages of OKR software

Using purpose-built software to support an OKR implementation creates significant advantages, like:

Deliver outcomes, not tasks

Teams use the OKR software to stay focused on measurable progress, make course corrections, and celebrate wins.

Greater visibility and better focus

Team members have easy access to strategic objectives and OKRs across the business, focusing teams on what's important to highlight, what's working, and what's not.

Out-of-the-box best practices

OKR software incorporates best practices that support teams at critical junctures throughout the cycle.

Reduced meetings and process

Streamlined and automated OKR updates eliminate status-check emails and reduce unnecessary meetings. Slack and email notifications keep the team informed the way they want.

Less stressed, more enjoyable work

Platforms help teams raise concerns and catch issues before fires start, reducing employee stress and wasted efforts through better alignment and focus.

Improved team engagement

Team members and managers give and receive direct feedback on OKRs, increasing engagement and ensuring consistent collaboration.

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Your ideal OKR software will build and reinforce great practices while fitting in seamlessly with the way your team already works.

Software like Quantive prioritizes OKR best practices and cross-functional collaboration which is crucial to the success of OKR implementation at scale.

Through Quantive, OKRs are easy-to-use, trackable, flexible, and scalable.

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Quantive is your bridge between strategy and execution. Founded on the objectives and key results (OKR) methodology, our Strategy Execution Platform is where businesses plan successful strategy, focus and align teams to it, and stay on the leading edge of progress.

As your company looks to achieve the best possible results, you need a modern approach to run your business and change your business. The Modern Operating Model brings strategy, teams, and data together to help make decisions faster, optimize operations, and drive better business outcomes.

Whether you're a large enterprise facing competitive disruption or a small business leading the innovative charge, Quantive helps gets you where you want to go.

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