



A GUIDE TO THE OKRBODY OF KNOWLEDGE (OKRBOK[™] GUIDE)

4. OKR ARTIFACTS

The Practical Implementation Guide for Managing OKRs

Includes a section about aligning OKRs with other Agile Frameworks

4. OKR ARTIFACTS

4.1 Introduction

OKR (Objectives and Key Results) artifacts refer to the various documents, tools, or outputs that are used in the process of setting, tracking, and evaluating OKRs within an organization. These artifacts help to provide clarity, alignment, and transparency across teams and individuals. Common OKR artifacts include:

- OKR Framework Template
- Alignment
- Tools for Implementing OKRs
- OKR Templates
- OKR Dashboard
- OKR Review Meetings

4.2 OKR Framework Template

An OKR framework template is a structured format for setting and tracking Objectives and Key Results. The framework is designed to help teams and individuals align their efforts with the organization's strategic goals, ensuring everyone is focused on the right priorities. The template typically includes sections for clear definitions, measurable targets, and progress tracking.

Here is a detailed breakdown of a standard OKR framework template and its components:

4.2.1 Objective

The Objective is a qualitative, inspiring, and overarching goal that the team or individual aims to achieve within a specific timeframe (typically a quarter). Objectives should be concise, clear, and motivational to help the team focus on what's important.

- Example: "Increase brand awareness and customer engagement."
- Characteristics of a good Objective:
 - o Inspirational and motivating.
 - o Actionable, not vague.
 - Time-bound (usually quarterly).
 - Aligned with the organization's strategic direction.

Figures 4-1 to 4-3 show how objectives are defined in AI-enabled digital OKR tools:

Vabro Plan - Collaborate - Deliver	Goals Reports	Q Search		🌜 🥂 John Doe 👻
VMFoods	Organization Goals/Objectives	Vorkspace Goals 온 Individual Goals/Objectives		
Scole Organization Admin 🔻	Time Period: All 🔹 < >			Create Objectives
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My Goals Progress Board		Goal Name*	-	
E Reports		Increase Customer Satisfaction By 50%		
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		JS John Smith ×	<u> </u>	
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		• Public	<u> </u>	
		Cancel	Save	

Figure 4-1: Adding Objectives Using an Al-enabled Digital OKR Tool (Source: Vabro)

Figure 4-1 above displays an interface for adding organizational goals, specifying the goal owner, time period, and privacy settings within a structured dashboard.

🗄 👽 All Goals >			
22%	Increase brand awareness and engagement … The Objective is a qualitative, inspiring, and overarching goal that the team or individual aims to achieve within a specific timeframe	Jan 9 - Mar 31 🗳 Sharing & Permissions 🚺	P
Targets +	Add		٦
	ieve a 20% increase in website traffic <u>2 tasks, 1 List</u> ••• at 951 am	tasks 1/4	
Grov Feb 3	w social media followers by 30% 2 tasks, 1 List •••• at 438 pm	tasks 2/7	

Figure 4-2: Setting Objectives in an Al-enabled Digital OKR Tool (Source: Click-up)

Figure 4-2 above shows a goal-tracking dashboard showing progress on the objective 'increasing brand awareness and engagement', with assigned tasks and completion percentages.

Create Objective: VMFoods, Inc				\times
Name* ③			Create from Te	emplate
Increase brand awareness and custome	r engag	gement		
			Add Description	48/255
Period* (?)		Visibility* (?)		
Q1-2025	•	Public		~
Tags				
Please choose				~
Owner*				
O VMFoods, In × Add owner				

Figure 4-3: Creating Objective Using Template (Source: Profit.co)

Figure 4-3 above shows the "Create Objective using Template" window in Profit.co, listing predefined objectives like automating order management, delighting customers, and delivering amazing customer support.

4.2.2 Key Results

Key Results are specific, quantifiable outcomes that will indicate whether the Objective has been achieved. They should be results-focused (not tasks or activities) and measurable, ideally with a numeric value or percentage to track progress.

A typical OKR template includes three to five Key Results for each Objective. These Key Results should be challenging but achievable.

Objectives and Key Results Example:

Objective: "Increase brand awareness and customer engagement."

- Key Result 1: "Achieve a 20% increase in website traffic."
- Key Result 2: "Grow social media followers by 30%."
- Key Result 3: "Improve email open rate by 10%."

Characteristics of good Key Results:

- 1. Specific and measurable (e.g., increase, decrease, achieve).
- 2. Clear outcomes that show progress toward the Objective.
- 3. Time-bound (typically within a 90-day period).
- 4. Challenging but attainable.

Vabro Plan - Collaborate - Deliver	Goals Re	ports	Q Search		💱 John Doe 👻
WE VMFoods	Drganization Goals	습 Workspace/Team Goals 홈 Individual Goals			
VF VMPOODS John Doe Sector Role Organization Admin •	Time Period: All				+ Create Goals
🖑 Objectives & Goals	Ir	crease Customer Satisfaction By 509	% ~	• Ongoing • 16%	
My Goals Progress Board		Add Key Result	×	Q1, FY 25 🛗 😨	
Reports		Develop a mobile app to improve User experience			
	Ir	Owner* [©]		No Status 31%	
		JS John Smith ×	~	Q2, FY 25 🛗 👩	
	L	Additional Owner(1/2)		Q2, FT 23	
	E	BS Brijesh SB ×	~	Apr 01, 2025 - June 30,2025)	
	-	Time Period* Privacy	· · · ·	C OIT Hack C OTA	
	•	III Q3, FT 25 V Public	Cancel	Q3, FY 25 🛗 🌘	

Figure 4-4: Adding Key Results (Source: Vabro)

Figure 4-4 above displays a goal management interface for adding key results, assigning owners, setting time periods, and managing privacy settings within an organizational goal-tracking system.

Add Result			
Close X new accounts			
Description	Filter by category		
Add a description	Company Engineering Finance Marketing	>	
Lead	0		
John Smith	Company P Increase gross profit from X to Y	0	
Objective	P Generate revenue of €20MM		
Increase brand awa	P 3 acquisitions		
Measure as a:	P Increase labor productivity from 40 to 52		
# Numerical	P Increase gross margin from 56 to 65		
	P Up 21 places to be top 10 in F-100 best places to work	•	Add another Save

Figure 4-5: Adding Key Results using an Al-enabled OKR Tool (Source: Perdoo)

Figure 4-5 above shows a results entry interface where a user adds a new objective, assigns a lead, selects a measurement type, and filters goals by category for tracking progress.

4.2.3 Owner (Optional)

The Owner section designates who is responsible for driving each objective or key result. This accountability helps ensure that someone is actively managing progress and resolving challenges.

Example:

- Objective: "Increase brand awareness."
- Key Results:
 - Key Result 1: 20% increase in website traffic (Progress: 50% complete).
 - Key Result 2: 30% growth in social media followers (Progress: 75% complete).
 - Key Result 3: 10% increase in email open rates (Progress: 30% complete).

4.2.4 Progress Tracker

Progress tracking is essential to monitor how well the OKRs are being achieved throughout the cycle. This section might include a color-coded or percentage-based system to visually represent progress.

Many teams use dashboards or tools (like Gtmhub, 15Five, or Google Sheets) to track and update progress.

4.2.5 Score (Optional)

At the end of the OKR period, each Key Result is scored based on its completion. This score gives teams an idea of how well they performed and helps them assess the feasibility of their goals for the next period.

A common scoring system:

- 0.0 to 0.3: Key Result was not achieved.
- 0.4 to 0.6: Partial achievement (some progress made, but the target wasn't fully met).
- 0.7 to 1.0: Significant achievement (achieved the goal or very close to it).

Example:

- Key Result 1: Achieve a 20% increase in website traffic (Score: 0.8).
- Key Result 2: Grow social media followers by 30% (Score: 0.9).
- Key Result 3: Improve email open rate by 10% (Score: 0.5).

4.2.6 Notes / Learnings (Optional)

This section is for reflecting on the OKR cycle and capturing any important learnings, insights, or challenges that occurred. It's helpful for improving future OKR setting and alignment.

Example:

- "The website traffic increase was primarily driven by new blog content, but social media engagement dropped slightly."
- o "Improving email open rates required adjusting the timing of email sends."

4.3 Alignment

This section ensures that the OKRs are aligned with the overall company or team strategy. You might note which higher-level company OKRs the individual OKRs support, ensuring there's clear alignment at all levels.

- Example:
 - Objective aligns with the broader company goal of increasing market presence and customer engagement.

Example OKR Template

Objective	Key Results	Owner	Progress	Score	Notes
Increase brand awareness and customer engagemen t	1. Achieve a 20% increase in website traffic.	Marketing Team	50% complete	0.8	Progress mainly driven by new blog content.
	2. Grow social media followers by 30%.	Social Media Manager	75% complete	0.9	On track with influencer campaigns.
	3. Improve email open rate by 10%.	Email Marketing Lead	30% complete	0.5	Need to optimize email timing.

Table 4-1: OKR Template Example

Figures 4-6, 4-7, and 4-8 show alignment of OKRs with Company objectives in a digital OKR tool.

Company objectives listing > Company objectives detail	is → Allignment				¢	+	
Allignment 🛈					Individ	ual : Vibhu	
KR Wise Objective Wise				(Get Te	ch projects	100%
		\int	Team : Sales Sales Growth to be double	50%	-	leet revenue goal of 2000 4000	VIEW
	_		KR 1: SEO sales to go from 20 to 2000 250 20 2000	VIEW	0	2000	
Company Achieve Growth of Revenue	50%	$\left\{ \right\}$					
KR 1: Increase digital sales from 100 to 10000 800 100 10000	VIEW		Team : Sales Sales Growth to be double	50%			
			KR 2: Paid marketing sales to go from 20 to 4000 2000 20 4000	VIEW			
Company Achieve Growth of Revenue	50%		show 2 more				
KR 2: Increase tech sales from 200 to 20000 500			Individual : Sam Help in getting Tech projects	100%			
200 20000			KR 1: Do cross sales of tech for about 4000 3000 0 4000	VIEW			

Figure 4-6: Aligning OKRs with Company Strategies (Source: JOP)

Figure 4-6 above displays a goal alignment dashboard, illustrating company, team, and individual objectives with progress percentages, key results, and hierarchical goal connections for tracking performance.

Vabro Plan + Collaborate + Deliver	Home IT Goals Projects V Apps V Q Search	🌜 🖬 🍂 🎇 John Doe 👻
DA Develop Mob A John Doe	Crganization Goals/Objectives All Time Period: All	+ Create Goal
Objectives/Goals	Increase Customer Satisfaction By 50% >	On track • 16%
My Goals Progress Board Reports	▼ 3 Key Results	Q1, FY 25 🛗 🧑
	→ Develop a mobile app to improve User experience Q1, FY 25 On Track → Increase brand awareness Q1, FY 25 No Status	46% (2) >>> 16% (2) >>>
	Improving delivery speed & efficiency Q1, FY 25 No Status	24% 💿 »
	Improve Customer Response Time >	No Status 31%
	* 1 Key Results	Q2, FY 25 🗎 🤦
	Enhance Ticket Resolution Efficiency >	• On track • 61%
	▼ 2 Key Results	Q3, FY 25 🛗 🧔

Figure 4-7: Alignment of Individual OKRs with Company Goals (Source: Vabro)

Figure 4-7 above displays a goal-tracking dashboard displaying alignment of objectives and key results. it also shows progress bars, and status indicators, helping users monitor goal completion, track efficiency, and improve customer satisfaction within an organization.

		+ Creat	e goal 🗸 🛛 🗈 livinitlarge.net 🗎 Time periods	: All 🖉 💷 – + 💱	5				
			Geal 2 minutes ago On track						
			Geal 2 minutes ago • On trace						
		60.69	Increase Customer Satisfaction by 50%						
		231 232	∳ 25% - 3 subgoals						
			7 2570 * 5 Subgoals						
			Q1 FY25 + 🔝 livinitlarge.net + 🚊 John Smith						
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Develop a Mobile App	Nev 4, 2021 C Ontract		Increase Delivery Speed and Efficiency			Increase Brand Aw			and a second sec

Figure 4-8: OKR Hierarchy (Source: Asana)

Figure 4-8 above displays a hierarchical goal structure in Asana, showing objectives like increasing customer satisfaction, developing a mobile app, improving delivery speed, and boosting brand awareness.

		WHFoods, Inc OKRs Increase brand awareness 315 Level: WHFoods, Inc Period: Q1-2025	
WHFoods, Inc OKRs P Improve en sox Level: VMFoods Period: Q1-2025		WMFoods, Inc OKRs P Grow social media follower TX Level: VMFoods, Inc Period: Q1-2025	WMFoods, Inc OKRs Achieve a 20% increase in 46% Level: VMFoods, Inc Period: Q1-2025
Sales Market States Sales Market States Sales Sales Level: VMFoods, Inc Period: Q1-2025	Marketing Improve e 37% Level: VMFooc Period: Q1-20;		

Figure 4-9: Alignment of OKRs with Strategic Goals (Source: Profit.co)

Figure 4-9 above displays the "Create Objective using Template" window in Profit.co, listing predefined objectives like automating order management, delighting customers, and delivering amazing customer support.

4.4 Best Practices for Using an OKR Template

- 1. Focus on Outcomes, Not Activities: Make sure your Key Results measure what matters (the outcomes) rather than tasks or activities.
- 2. Set Challenging but Achievable Goals: OKRs should be ambitious, but they should still be attainable. Setting overly unrealistic goals can lead to burnout or disengagement.
- 3. Be Specific and Measurable: Each Key Result should be quantifiable so you can easily measure progress (e.g., increase revenue by 20%, improve conversion rate to 15%).
- 4. Review Regularly: Regularly check progress against the Key Results to ensure everyone is aligned and on track. Adjust if necessary.
- 5. Ensure Alignment: The OKRs should directly support larger strategic goals, so alignment at the organizational and team levels is essential.

4.5 OKR Templates

Objectives and Key Results (OKRs) framework has been widely adopted to set goals, align strategic priorities, enhance performance, and drive measurable outcomes. With the evolution of AI-powered OKR tools, organizations can now leverage intelligent automation to achieve these objectives. These tools offer pre-built OKR templates that help businesses establish structured, measurable objectives aligned with their strategy. AI enhances these templates by automating recommendations, tracking progress, and offering predictive insights to improve outcomes.

4.5.1 Tools for Implementing OKR

Google Sheets/Excel is a simple but effective tool for teams starting with OKRs. Whereas dedicated OKR Platforms or other SaaS products such as Vabro, Perdoo, Betterworks, Lattice, Gtmhub, Weekdone, or 15Five allow for better visualization, tracking, and alignment across teams.

OKR tools and platforms play a crucial role in helping organizations streamline goal-setting, foster accountability, and improve performance outcomes. By leveraging the right tool, businesses can enhance strategic execution and drive meaningful results. For organizations that prefer smooth OKR setup, templates can be a great alternative. These Al-enabled tools and platforms offer templates and step-by-step implementation guidance.

4.5.2 Overview of AI-Powered OKR Templates

Al-powered OKR platforms provide ready-to-use templates tailored for various industries, departments, and roles. These templates help organizations quickly define objectives and key results, ensuring alignment and clarity across teams. Al-powered OKR templates help organizations to:

- Set SMART Goals: Ensure objectives are Specific, Measurable, Achievable, Relevant, and Timebound.
- Align Across Teams: Automate goal alignment with company-wide strategies.
- Provide Recommendations: Suggest key results based on industry best practices, historical data, and performance analytics.
- Automate Updates: Use real-time data to track progress, predict outcomes, and flag at-risk objectives.

4.5.3	Types of	Al-enabled	OKR	Templates
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Template Type	Purpose	AI-Powered Features
Company-Wide OKR	Aligns strategic objectives across	Al-driven goal alignment
Templates	departments	suggestions
Departmental OKR	Focuses on specific teams (e.g.,	Automated tracking & progress
Templates	Sales, HR, IT)	reports
Individual OKR Templates	Helps employees set personal	Al-powered skill
	growth goals	recommendations
Project-Based OKR	Tracks short-term initiatives and	Smart deadline adjustments
Templates	deliverables	
Performance Management	Connects employee performance	Al-driven performance insights
OKRs	with business goals	
Customer Success OKRs	Improves customer experience and	Sentiment analysis & feedback
	retention	tracking
Sales & Marketing OKRs	Enhances revenue growth and	Predictive lead scoring
	market reach	
	Table 4-2: Al-enabled OKR Templates	

Table 4-2: Al-enabled OKR Templates

	Goals Re	ports		Q Search		🥑 🎇 John Doe 🤜
✓/F VMFoods John Doe	Goals > Increase	Customer Satisfaction By 50%				٩
) Role Organization Admin 🔻	🙆 Develop a m	obile app to improve Us	er experience			:
Objectives & Goals My Goals Progress Board	lige Key Result Comp 3 mont	h left in Q1 FY25	Ø Status	Set status	No Status	About this Key Result _{Goal} [©] • Increase Customer Satisfaction by 50%
🕮 Reports	Progress (No V 100% ^{Today} 80%	Vorkspaces Connected)		0	Progress Settings	Key Resulf - Develop a mobile app to improve User experience - 50% - Increase brand awareness - 25% - Improving delivery speed & efficiency - 25% Goal Owner John Smith
	40% 20% Jan	Feb	Har			Created On 23 Oct, 2024 Time Period (20, FY 25
			Mar	Apr	May	Set a custom due date Attachments (3)
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	Use Wor	kspaces to automati				Attachments (3) Data .Pdf Medical Certificate.png
	Use Wor	kspaces to automati		s Goal's pro		Attachments (3)
	Use Wor	kspaces to automati		s Goal's pro		Attachments (3) Data .Pdf Medical Certificate.png Comments (3)
	Use Wor	kspaces to automati ch for workspace Customer Service Finance		s Goal's pro		Attachments (3) Data .Pdf Medical Certificate.png Comments (3) Object patra 7 mins ago Your data request has been
	Use Wor	kspaces to automati ch for workspace Customer Service Finance Human Resources		s Goal's prog		Attachments (3) Data .Pdf Data .Pdf Medical Cartificate.png Omments (3) Our data request has been approved, enjoy your time off *** approved, enjoy your time off *** Ohn Doe 14 mins ago Great progress! Let's keep pushing to
	Use Wor	kspaces to automati ch for workspace Customer Service Finance Human Resources Information & Technology (IT) Learning & app Development Legal and Compliance		s Goal's prog		Attachments (3) Data .Pdf Medical Certificate.png Comments (3) Our data request has been approved, enjoy your time off Pixet Sproved, enjoy your time off Pixet Display Label La
	Use Wor	kspaces to automati ch for workspace Customer Service Finance Human Resources Information & Technology (11) Learning & app Development Legal and Compliance Marketing		s Goal's prog		Attachments (3) Data .Pdf Medical Certificate.png Comments (3) Our data request has been approved, enjoy your time of Pick- Sported a request has been approved, enjoy your time of Pick- Sported progress Let's keep pushing to hit the remaining key regults by the
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	Use Wor	kspaces to automati ch for workspace customer Service Finance Human Resources Information & Technology (IT) Learning & app Development Legal and Compliance Marketing Operations Product Management		s Goal's prog		Attachments (3) Data .Pdf Medical Certificate.png Medical Certificate.png Comments (3) Output parts 7 mins ago Your data request has been approved, enjoy your time off • Methers Output parts 7 mins ago Great progress Let's keep pushing to hit the remaining key results by the

Figure 4-10: Al-enabled OKR Template (Source: Vabro)

Figure 4-10 above displays an OKR (Objectives and Key Results) template from "Vabro," containing goal progress, status, attachments, comments, and workspace selection for alignment.

Goals > Increase Customer Satisfaction & Improv	re Branding ~ 凸 ☆ 🔹 On track	JS 😫 Sha
Q1 FY25 • livinitlarge.net		
* Suggestions tailored to your goal	۵ ק ×	
Add a definition of success to your description to make it	measurable.	
 Definition of success for this goal Achieved: Customer satisfaction score increases by awareness improves by 20% as measured by surve Partial: Customer satisfaction score increases by at awareness improves by 15% 	eys	
< Suggestion 1/2 >	Refresh tips Copy text	

Figure 4-11: Using AI-enabled OKR Template for Tracking (Source: Asana)

Figure 4-11 above shows an OKR template focused on tracking the objective 'increasing customer satisfaction and branding'. It includes progress tracking, goal suggestions, and measurable success definitions for clear and structured performance evaluation.

Azure DevOps	CaseyS8739 / Microsoft Integration / Workboard / My OKRs	℅ Search	III 🗴 💿 🗞 😅
Microsoft Integration +	B WorkBoard My Objectives	C	UPDATE KEY RESULTS 3DUE
Cverview	OKRs I Own My Manager's OKRs Team OKRs		
🐯 Boards			
😰 Repos	INTEGRATIONS TEAM	Sh	now: Teams I manage and co-manage 🗸
Pipelines	Voice activation is a game changer for our customers and our positioning	52%	View details
👗 Test Plans	Casey Stevenson: Integrations + 31 days left		
Artifacts	41% of 100% 5 most frequent user requests can be initiated and fully executed by voice	Results from ADO	As of Jan 29, 2020
	482 of 0 0 P1 or P2 bugs at launch	Me 🕑 Update	As of Jan 29, 2020
Workboard	1.7 of 0.9 Response to voice command is < 1 second	Arash Areesh	As of Jan 29, 2020
() Key Results I Update	Eur teaming that scales	80%	31. days left 🛛 🗸
Ø Project settings			

Figure 4-12: OKR Template in an Al-enabled OKR Tool (Source: Azure DevOps)

Figure 4-12 above displays an Azure DevOps WorkBoard template displaying OKRs, progress tracking, key results, and integration team objectives with measurable targets, updates, and deadlines for effective goal management and execution.

4.5.4 Key Al-Driven Features in OKR Templates

Automated Goal Suggestions: Al analyzes company objectives and suggests relevant key results.

- Real-Time Progress Tracking: Al-powered dashboards update key results automatically.
- Predictive Analytics: Al forecasts goal achievement probabilities based on past data.
- Natural Language Processing (NLP): AI converts written goals into structured OKRs.
- Integration with Productivity Tools: Syncs with Jira, Slack, Asana, and CRMs for seamless tracking.
- AI-Powered Insights & Recommendations: Identifies areas needing improvement and suggests actions.

4.6 OKRs Dashboards

An OKR Dashboard is a centralized tool or visual display used to track and monitor the progress of Objectives and Key Results (OKRs). It helps teams and individuals stay aligned with their goals, providing real-time visibility into performance and progress. The dashboard allows organizations to easily assess whether they are on track to meet their objectives, identify potential challenges, and adjust when necessary.

Here's a detailed look at an OKR Dashboard and its key components:

4.6.1 Key Features of an OKR Dashboard

- 1. Objective Overview: The dashboard typically starts with an overview of the high-level objectives. Each objective will usually have:
 - o Objective Name/Title: A clear, concise description of the objective.
 - Objective Status: A visual indicator (e.g., color-coded) of whether the objective is on track, at risk, or off track.
 - Progress Indicator: A bar, percentage, or score showing how much progress has been made toward the objective.

Example:

- Objective: "Increase brand awareness."
- Progress: 70% complete (based on key results' performance).

Figures 4-13 to 4-16 show typical dashboards in Al-enabled digital OKR tools:

35

Vabro Plan + Collaborate + Deliver	Home IT Goals Projects 🗸 Apps 🗸	Q Search		• = * (🧏 John Doe 🔻
≪ DA Develop Mob A ✓	Organization Goals/Objectives	ives			
Sele Product Owner	Relevance: Show All 🔻 Time Period: All 💌 🔇				+ Create Goal
Ø Objectives/Goals	Increase Customer Satisfac	tion By 50% >		On track 16%	
• My Goals	3 Key Results			Q1, FY 25 🛗 🧕	
Reports	→ Develop a mobile app to improve User exp	erience Q1, FY 25	On Track	46% 🧕 »	
	→ Increase brand awareness	Q1, FY 25	No Status	16% 🙍 »	
	Improving delivery speed & efficiency	Q1, FY 25	No Status	24% 💿 »	
	Improve Customer Respons	e Time →		No Status Status	
	▼ 1 Key Results			Q2, FY 25 🛗 🤵	
	Enhance Ticket Resolution I	Efficiency >		• On track • 61%	
	▼ 2 Key Results			Q3, FY 25 🛗 🤵	

Figure 4-13: Sample OKR Dashboard (Source: Vabro)

Figure 4-13 above shows an OKR dashboard in Vabro capturing the goal Increase Productivity Using Figma by 50%. It tracks the Build Design System key result, currently at 0% completion. Users can connect User Stories/Task Groups to automatically update progress. The right panel displays goal details, owner, attachments, and comments.

Bivinitlarge.net ~ Strategy map Company goals Team goals My goals	Who can see goals?
+ Create goal ~	$\underbrace{ Send feedback } \left\langle Time periods; All \right\rangle \exists Filter \mathscr{O} Copy link \\$
Company goals	
Increase Customer Satisfaction & Improve Branding 🗠	 On track • 25%
	Q1 FY25 (JS)
 Develop a Mobile App 1 ib livinitiarge.net 	Q1 FY25 0n track 6% 4 (15)
Increase Delivery Speed and Efficiency Iivinitiarge.net	42% / 100% Q1 FY25 This goal is automatically updating progress based on connected projects.
Increase Brand Awareness	Q1 FY25 On track 43% * (15)

Figure 4-14: Sample OKR Dashboard (Source: Asana)

Figure 4-14 above displays an OKR dashboard of Asana. It shows task progress, timelines, and team collaboration, and integration of OKR management with broader workflows.

	P	Dashboard 🛱 2021 Quarter	1 ~	Q Search objectiv		Ģ C	
		COMPANY OBJECTIVES(12)				VIE	Create objective
2	Dashboard	Objectives 🗘	Due Date	Status	Owner	Confidence	
ſĿ.	Company 🔠	Achieve record revenues while increasing	30-05-2022 😗		40% 🎡 Paul	9	Add key result
2 2	Team 💿	Build a great corporate culture	30-05-2022		are a Canada		Give Feedback
2	My Actions	≥ 4 key results • 9 6 action			25% 🚯 Sandra	2	
o o	Insights	Improve the efficiency of the support team $\geq 4 \text{ key results} + 9.6 \text{ action}$	30-05-2022	-	10% 🚱 John	5	
0	Survey	DRAFT Launch beta version of the new product ≥ 4 key results	30-05-2022		🔵 👩 Madonr	na	
0	Feedback						
		TEAM OBJECTIVES(10)			Pre-Sales	Y VIEW A	u
		Objectives	Status		Owner	Confidence	
_		Achieve record revenues while increasing profit $\geq 4 \text{ key results} + \Im = 6 \text{ action}$	tability	40%	Paul	9	
đ	Madonna D'cruz MY SETTINGS	Build a great corporate culture ≥ 4 key results • % 6 action	-	25%	Sandra	2	
		Improve the efficiency of the support team	_	10%	(A) John	5	

Figure 4-15: Typical OKR Dashboard (Source: JOP)

Figure 4-15 above displays an OKR dashboard of Joy of Performing (JOY). It showcases objectives, key results, confidence ratings, and progress percentages, enhancing team productivity and performance alignment.

	Search for users, reviews, goals and meetings	+ Create	쑴 Your team 💡 Leslie
습 Home			
🖶 Your Company	All goals		~ Actions
🗟 Meetings			
🖉 Instant Feedback	Q ∇ Filter States: Active +2 × $\widehat{\blacksquare}$ $\widehat{\boxdot}$	*	Focus: Off List Tree
🕼 Goals	31 goals set 5 Pending approval 5 On track 1 Delayed 1 Off track		
All goals	or goals act of chang approval o on track if bolly our for track		
Cycles	Leslie Leapsome		
Updates history Analytics	[Al-generated] Make work fulfilling for everyone	_	
1 maria	Dec 31 2023 Business goal	63%	● On track ∽
🖉 Reviews			
∿r Surveys	□ ∨ 😭 Become an exceptional communicator ⊟ Nov 30 2023 ♀ Development Goal 巻 4 ♡ Personal Development goals + 1	56%	• On track 🗸 🗄
🕮 Learning	Hov so 2023 - Development doar · A · + · · Personal Development goals + i		
Compensation			
🕸 Settings	Elizabeth Lemon		
🖰 Log Out	Create effective onboarding for new employees	700/	• On track ~
	🗆 🎽 🟠 Dec 31 2023 🍥 Business goal 🛇 Business Performance goals	78%	● Un track ♥ :

Figure 4-16: Standard OKR Dashboard (Source: Leapsome)

Figure 4-16 above shows an OKR dashboard showing individual and company goals with progress percentages, goal types, deadlines, and status filters, fostering performance management and personal development.

	Home				Q Search	ê	.	?	•
ń									
\oslash									
d.		Check-in Cycle 18 Sep 9 - Sep 22		Ō Due	on Sep 22 Che	ck-in			
Goals				0.540					
*		✓ You've submitted your check-in for Cycle 17			View check-ir	history			
÷		My Goals My Teams Direct Reports							
. P									
Perform		KPIs							
æ		P NPS ≥ 30	Conversion rate ≤	Apdex					
٢		• 15	5%	0.925	•				
Strategy		Active OKRs			🗞 Hide	Results			
A									
Ø		Deliver the best UX ever ♣ Devon Webb		Image: Point of the second	ds attention	:			
Favorites				8/10					

Figure 4-17: Typical OKR Dashboard (Source: Perdoo)

Figure 4-17 above shows a typical OKR dashboard featuring goal tracking, progress updates, and strategy alignment to drive company performance and growth.

- 2. Key Results Tracking: For each objective, the dashboard should display the corresponding Key Results. Key results are tracked individually and shown with:
 - Key Result Description: A specific, measurable outcome.
 - o Progress: A visual representation of progress, such as a percentage or completion score.
 - Target: The numeric goal or target that needs to be achieved.
 - o Actual Value: The current value of the key result (e.g., current traffic, revenue, followers).
 - Status: A color-coded indicator (e.g., green = on track, yellow = at risk, red = off track).

Example:

- Key Result: "Increase website traffic by 20%"
- Target: 20% increase.
- Actual: 15% increase (Progress: 75% complete).
- Status: Yellow (at risk).

Figures 4-18 to 4-21 shows OKR interfaces in Al-enabled digital OKR tools:

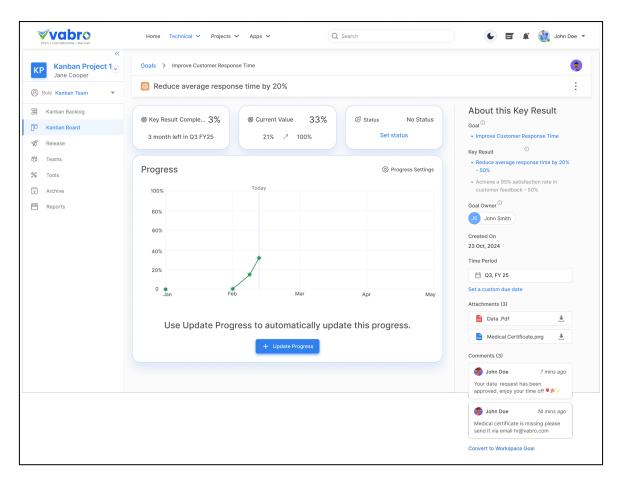


Figure 4-18: Key Results Progress Tracking (Source: Vabro)

Figure 4-18 above shows an OKR tool interface that tracks goal progress with visual charts, custom statuses, and automatic updates. Enables collaboration through attachments, comments, and goal-specific insights.

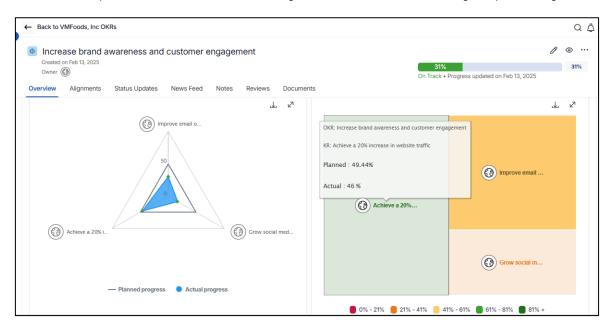


Figure 4-19: Tracking Progress of OKRs (Source: Profit.co)

Figure 4-19 shows OKR tracking with detailed key result progress, alignment visualization, and individual performance contributions across organizational objectives.

ag				
25%	322	4	0	11
Progress	Days to deadline	Objectives	Objectives hit	Key Results
The mean progress of Objectives within this session (with 11.54% of time passed).	This session's deadline is 01 January, 2026.	Total number of Objectives within the session.	Total number of Objectives achieved so far.	Total number of Key Results within the session
1	5	6	0	11
Key Results hit	Key Results going	Key Results in danger	Dynamic Key Results	Manual Key Results
Total number of Key Results achieved so far.	well Total number of Key Results that are likely to be achieved.	Total number of Key Results that are not on track to be achieved.	Total number of Key Results that are automatically updated.	Total number of Key Results that are manually updated.

Figure 4-20: OKR Progress Tracking (Source: Quantive)

Figure 4-20 above shows an interface depicting data-driven OKR tracking with automated updates, detailed metrics, and alignment features to improve goal management and performance transparency.

		Team Goals	Q. E. (+)
GOALS	Production Team	Add Goal	Q Search for a team or team member
MYWORK	Release 3 new products in Q2 🗡	ACHIEVE BY 1/31/15 DAYS LEFT 73	Sal SVP
WORK	EgoBlow Feature Complete 62% TARGET: 100% by 12/19	Beta Quality – Max Unresolved Issues 66 TARGET: 50 by 1/31	Victor VP
теам	C 2%	350 300 250 200	Production Team
REPORTS	62*	150 100 50 0 Aug Sep Oct Nov Dec Jan	Brett Business Mary Manager
HELP SETTINGS	Last data update: 10/20/14 Add metric data	Last data update: 10/20/14 Add metric data	Director of BD Tech director
	Workstreams		Olivia Office Owen Ops Office Manager Director of Ops
	Coverage Improvement	✓ 29 0 19	
	Monitor Beta	✓ 68 0 36 0 7	Art Smith Director of Art
	DA Dev	✓ 119 0 13	See Downline Goal Summary
	EgoBlow Dev	🗸 78 🌒 52 🛛 6	

Figure 4-21: OKR Progress Monitoring (Source: Workboard)

Figure 4-21 shows an OKR interface that combines OKR tracking with business outcomes, offering goal visualizations, key result tracking, and performance summaries with collaborative team features.

- Score/Completion Metrics: At the end of the OKR period (typically at the end of a quarter), the dashboard often includes a score or completion metric for each key result. This is usually based on a scoring system:
 - \circ 0.0 to 0.3: Key result was not achieved.
 - o 0.4 to 0.6: Partial achievement (some progress, but the goal wasn't fully met).
 - o 0.7 to 1.0: Full achievement or very close to meeting the goal.
 - Example:
 - Key Result: "Increase social media followers by 30%" (Score: 0.9).
- 4. Visualization of Progress: A good OKR dashboard often includes graphical elements to help visualize progress more easily. These visuals might include:
 - o Progress Bars: Display the percentage of completion for each key result.
 - Pie Charts: Show overall achievement versus the target.
 - o Heatmaps: Use color coding to indicate whether key results are on track.
 - Gantt Charts/Timelines: Track the timeline for each key result and show how the team is progressing over time.
- 5. Alignment with Organizational Goals: A good OKR dashboard will show how team or individual OKRs align with larger organizational or departmental OKRs. This ensures that teams are focused on priorities that contribute to the company's success.
 - Example: The dashboard might show that the objective to "Increase brand awareness" aligns with the larger organizational goal of expanding market reach.
- 6. Updates and Changes: The dashboard should include a section to document any updates or adjustments made to OKRs over time. This helps maintain transparency, particularly if key results were modified or new actions were taken.
 - Example: "Key result 1 adjusted to 15% increase in website traffic instead of 20% due to recent SEO changes."
- 7. Actionable Insights and Alerts: Many OKR dashboards come with alerts or notifications to flag areas where progress is off-track. These can be automatic or manually set.
 - o Red Flags: If a key result is lagging behind, a notification or alert might be triggered.
 - Action Items: Dashboards may allow users to assign or track action items to correct course if a result is at risk.

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4.6.2 Types of OKR Dashboards

- 1. Manual Dashboards: These are usually created using spreadsheets like Google Sheets or Microsoft Excel. Teams track OKRs manually by inputting data and updating it regularly.
 - Pros: Low cost, customizable.
 - o Cons: Time-consuming to update, harder to visualize, prone to human error.

Example Template for Google Sheets/Excel:

Objective	Key Result Description	Target	Actual	Progress (%)	Status
Increase brand awareness	Increase website traffic by 20%	20%	15%	75%	Yellow
	Grow social media followers by 30%	30%	22%	73%	Yellow
	Increase email open rate by 10%	10%	5%	50%	Red

Table 4-3: Manual OKR Dashboard

- Automated Dashboards: These dashboards use specialized OKR software tools like Gtmhub, Weekdone, 15Five, Vabro or Jira to automate the tracking process. These tools often provide real-time updates and advanced reporting features.
 - Pros: Automated, visually rich, real-time updates, integration with other tools.
 - Cons: Costly, requires learning curve for team members.

Popular OKR Dashboard Tools:

 Vabro: provides a customizable dashboard that helps organizations streamline goal-setting, track progress, and improve team alignment through real-time progress visualization, workspace integration, automated updates, and collaboration features.

Figure 4-22 shows Vabro's OKR dashboard:

Vabro Plan + Collaborate - Deliver	Home IT Goals Projects V Apps V	Q Search		6	a 🖈	🥂 John Doe 👻
Oevelop Mob A	Drganization Goals/Objectives 名 Individual Goals	/Objectives				
A John Doe Several product Owner	Relevance: Show All 💌 Time Period: All 💌	$\langle \rangle$				+ Create Goal
C Objectives/Goals	Increase Customer Sat	sfaction By 50% >		On track	• 16%	
My Goals						
Progress Board	3 Key Results			Q1, FY 25	•	
Reports	→ Develop a mobile app to improve U	ser experience Q1, FY 25	On Track	46%	»	
	→ Increase brand awareness	Q1, FY 25	No Status	16%	»	
	Improving delivery speed & efficient	Q1, FY 25	No Status	24%	»	
	Improve Customer Res	conse Time >		No Status	• 31%	
	▼ 1 Key Results			Q2, FY 25	a	
	Enhance Ticket Resolut	ion Efficiency >		On track	• 61%	
	✓ 2 Key Results			Q3, FY 25	•	

Figure 4-22: OKR Dashboard (Source: Vabro)

Figure 4-22 above showcases the Vabro OKR dashboard, displaying goal tracking, progress visualization, attachments, comments, and key result creation, enabling organizations to monitor and achieve objectives efficiently with real-time collaboration and updates.

- o Gtmhub: Provides a user-friendly, customizable dashboard with real-time tracking of OKRs.
- o Weekdone: Visualizes OKRs with detailed progress reports and performance metrics.
- o 15Five: Offers a weekly check-in tool that integrates with OKRs and team progress.
- WorkBoard: Offers features for tracking both OKRs and performance outcomes, often used by larger teams.

Figure 4-23 shows WorkBoard dashboard:

4

👂 WorkBoard			BOARDS	0BJECTIVES		EAMS		⊕ Q 👂 👳 🦚∼
Objectives	l←	Objective Al	ignment					Patty Pomise
= Jump to							4	Melinda Sanchez
Due for update now My Objectives	3						Emma Smith	Giorgio Mandrake
Heatmap					6		Dede Mandrish	Susan Johnson
Alignment Timeline					02	Mary Cmoso	Paul Carter	Joan Baez
Engagement						Carlo Marco	Rachel Palmera	Marianne White
▲ COLLAPSE ALL						Dan Levitz		
✤ FAVORITES			6			Allen Bart		
			Jack Ceomack			Shelly Hansen		
			CEO			Joe Smarts		
						Alice Peoples		
		Jack Ce CEO	omack		💮 Магу СМО	Cmoso	Emma Smith Marketing Manager	Melinda Sanchez Product Marketing
		GROWTH: Max by optimizing o			Drive deman pipeline	d and build the sales	Enable sales to set meetings and win deals	Produce unique & original content to support sales
		\$3.1M in net nev		2.59m	MQLs	1.81k	Add 1000 contacts to top of funnel 450	1 new blog post per week 9
Add personal objective	2	Gross margins n 79%	iove from 74% to	75.1%	SQLS	617	1 targeted email campaign to CIOs 8 per week	3 new ebooks 2
Add team objective		\$1.28M total MR	R EOQ	965k	Customer Acqu across all chan	ilsition Cost (CAC) 1.32k nels	Executive webinar series for 78% prospects	4 customer case studies 2

Figure 4-23: OKR Dashboard (Source: WorkBoard)

Figure 4-23 above shows WorkBoard's OKR dashboard, visualizing goal dependencies, team objectives, progress tracking, and performance metrics for streamlined strategic alignment and execution.

3. Project Management Tools: Many teams also use tools like Vabro, Trello, JOP, Asana, or Monday.com to track OKRs alongside project tasks. These platforms allow teams to break down key results into actionable tasks and track progress toward those tasks in real time.

Figure 4-24 shows a JOP board:

Current Completed All		🔶 H	ligh priority Mediur	n priority 🔷 Low priority	×
C : Actions	Objective	Key Result	Due Date	Status	
+ ADD NEW ACTION					,
Cost estimate for next year's marketing plan	Achieve record revenues while increasing profitability	KR 3: Introduce 6 new quarterly campaigns	12-02-2021	• Open	*
SEO Keyword analysis	2 Increase site traffic by 60%	KR 1: Get final approval on social media strategy	10-05-2021	 In Process 	*
Cost estimate for next year's marketing plan	 Achieve record revenues while increasing profitability 	KR 3: Introduce 6 new quarterly campaigns	10-05-2021	Completed	*
Create facebook ad campaign for new product launch	Launch beta version of the new product	KR 4: Increase new product awareness	10-05-2021	 In Process 	^
Draft sales proposal for Mondelez international	 Achieve record revenues while increasing profitability 	KR 3: Introduce 6 new quarterly campaigns	10-05-2021	 Completed 	۶
Create google adword campaign for new product launch	Launch beta version of the new product	KR 4: Increase new product awareness	10-05-2021	 In Process 	^

Figure 4-24: JOP Board Tracking Progress (Source: JOP)

Figure 4-24 showcases a JOP board containing Objectives as a list and associated Key Results. Team members can update the status or add comments to track progress.

4.6.3 Benefits of an OKR Dashboard

- 1. Transparency: Provides visibility into how well teams and individuals are progressing, ensuring alignment across the organization.
- 2. Alignment: Helps ensure that all OKRs are aligned with the larger strategic goals of the organization.
- Real-Time Tracking: Allows teams to quickly adjust their efforts if they are falling behind on certain key results.
- 4. Data-Driven Decisions: The visual nature of dashboards makes it easier to make data-driven decisions about where to focus resources and energy.
- 5. Motivation and Accountability: Seeing progress visually can motivate teams to keep moving forward. It also holds individuals accountable for achieving their key results.

Tips for Creating an Effective OKR Dashboard:

1. Keep It Simple: Don't overload the dashboard with too much information. Focus on the most important metrics to track.

- 2. Make It Visual: Use graphs, charts, and color coding to make the progress clear and easy to understand.
- 3. Set Up Alerts: Configure automated notifications or alerts for when progress is off-track, so teams can act swiftly.
- 4. Use It Regularly: The dashboard should be updated regularly (ideally weekly or bi-weekly) to ensure that it reflects real-time progress.

A real-time tool or dashboard (could be in a tool like Vabro, Google Sheets, Jira, or specialized OKR software such as WorkBoard, Ally.io, Perdoo, 7Geese, Lattice, Gtmhub, Koan, Quantive, Gtmhub, Leapsome, Mooncamp, Joy of Programming (JOP), Profit.co, Betterworks, etc. where the progress of OKRs is tracked and updated regularly. This provides visibility to everyone in the organization about how objectives are being met.

Objectives and Key Results (OKRs) are measured using progress percentages to track how close a team or individual is to achieving their goals. This measurement ensures alignment, transparency, and accountability across all levels of an organization.

4.6.4 Measuring OKR Percentages

OKR progress is typically calculated based on the completion status of Key Results (KRs). Here's how it's done:

Basic Formula for Progress Calculation:

OKR Progress (%) = (\sum Key Result Progress/Total Number of Key Results) × 100

Example:

Objective: Improve Customer Satisfaction

Key Results:

- Increase NPS from 60 to 80 → 50% complete
- Reduce churn rate from 5% to $3\% \rightarrow 75\%$ complete
- Conduct 10 customer interviews → 100% complete
- OKR progress: (50+75+100/3) = 75%

4.6.5 Cascading OKRs Across Organizational Levels

Cascading OKRs means breaking down company-wide objectives into departmental, team, and individual goals. This ensures alignment at every level.

a. Levels of Cascading:

Company-Level OKRs: Broad, strategic objectives (e.g., "Expand Market Share").

Figure 4-25 shows a company-level OKR in an AI-enabled OKR tool:

Vabro	Goals Reports	Q Search	🖌 🌏 John Doe
« VMFoods —			
John Doe	Goals > Increase Customer Satisfaction by 50%		0
Role Organization Admin 💌	Develop a mobile app to improve User	experience	:
Objectives & Goals	Key Result Completion 37%	@ Status • On track	About this Key Result
My Goals			Goal
Progress Board	3 month left in Q1 FY25	Updated 2 mins ago	Increase Customer Satisfaction by 50%
Reports			Key Result
	Progress	Progress Settings	 Develop a mobile app to improve User experience - 50%
	100%	Today	 Increase brand awareness - 25%
	100%		 Improving delivery speed & efficiency - 25%
	80%		Workspace
	60%		Customer Service - 50%
			Information & Technology (IT) - 50%
	40%	Feb 16, 2024 37 %	Goal Owner
	20%	37.74	JS John Smith
			Created On
	0 Jan Feb	Mar Apr May	23 Oct, 2024
			Time Period
	Use Workspaces to automa	tically update this progress.	🕀 Q3, FY 25
			Set a custom due date
	▼ 2 Workspaces Connected +	🛆 Weights: Equal	Attachments (3)
	Gustomer Service	25% 💿	📔 Data .Pdf 📃
	Information & Technology (IT)	50% 💿 …	🗎 Medical Certificate.png 🛓
			Comments (3)
			Dipak patra 7 mins ago
			Your data request has been approved, enjoy your time off • >>>
			🌍 John Doe 🛛 14 mins ago
			Great progress! Let's keep pushing to hit the remaining key results by the deadline.

Figure 4-25: Company-level OKRs (Source: Vabro)

Figure 4-25 shows displays Vabro's OKR dashboard, tracking company-level key results and goal progress. It features real-time updates, workspace integration, performance metrics, and collaboration tools for effective objective management.

Department-Level OKRs: Support company OKRs (e.g., Marketing increases brand awareness).

Figure 4-26 shows a department-level OKR in an AI-enabled OKR tool:

Add OKR		×			
Name					
Budgets are cost effective	across all departments				
Alignment	Filter by category				
What will this OKR do?	<pre>K ice Marketing Operations Product Sales ></pre>				
Owner	Marketing				
VMFoods, Inc.	Launch an engaging weekly newsletter				
Lead	P Launch a higher converting site for working				
John Smith	moms				
Advanced Options V	P Strengthen our SEO ranking for 'affordable beauty'				
2.4223277924220792626143	P Optimize SEO through technical upgrades				
Active Draft S Pu	P Double-down on our growth loops Cancel Sa	ve			
	P Optimize content production to increase MQLs	-			

Figure 4-26: Department-level OKR (Source: Perdoo)

Figure 4-26 showcases OKR interface in Perdoo, where users can define department-level objectives and key results. It includes alignment options, category filtering, ownership assignment, and status selection.

Team-Level OKRs: Focus on specific functions (e.g., Content team boosts organic traffic).

Figure 4-27 shows a team-level OKR in an AI-enabled OKR tool:

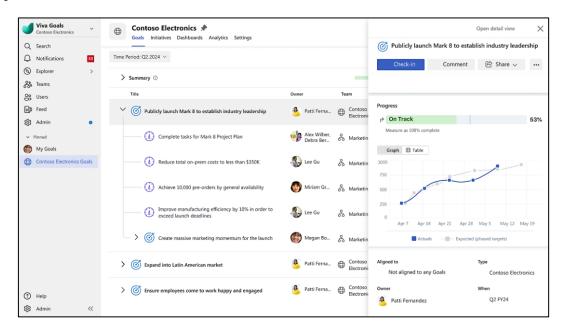


Figure 4-27: Team-level OKRs (Source: Microsoft Viva)

Figure 4-27 showcases team-level OKRs in Microsoft Viva, displaying a structured goal-tracking system for Contoso Electronics team. It includes objectives, key results, owners, progress tracking, and alignment details.

Individual OKRs: Personal goals aligned with team objectives.

Figure 4-28 shows an individual-level OKR in an AI-enabled OKR tool:

Me	ф (+
My Profile My Objectives My KRs Drafts	
Achieve record revenues while increasing profitability 40% 9	
Build a great corporate culture ∴ Awy words + ∀ & duture	Madonna D'cruz
Improve the efficiency of the support team	36 12 4 Objectives Backges Foredbacks

Figure 4-28: Individual-level OKR (Source: JOP)

Figure 4-28 above shows an individual's goal-tracking dashboard with objectives, key results, progress bars, and personal performance metrics.

b. Cascading Methods:

Top-Down: Leadership sets objectives, which are broken down by departments and teams.

Bottom-Up: Teams propose objectives aligned with company goals.

Bidirectional: A mix of top-down directives and bottom-up input.

4.7 OKR Review Meetings

OKR Review Meetings are a crucial part of the OKR framework. These meetings provide an opportunity to assess the progress of your objectives and key results, identify challenges, and make any necessary adjustments to stay on track. Here's a breakdown of the key elements and best practices for conducting effective OKR Review Meetings:

1. Purpose of the Meeting

- Progress Check: Evaluate the status of each objective and its associated key results.
- Problem Solving: Discuss any roadblocks or challenges that might be preventing progress and find ways to overcome them.
- Alignment: Ensure that the team's objectives are aligned with the broader organizational goals.
- Adjustment: If necessary, adjust the strategy, timelines, or key results to ensure that objectives can still be achieved.
- 2. Frequency of the Meetings
- Typically held quarterly as OKRs usually span 90-day cycles, but depending on the organization, monthly or bi-weekly reviews can be scheduled, especially for more agile teams.
- 3. Participants
- OKR Owners: Individuals responsible for setting and driving progress toward specific OKRs.
- Team Members: Anyone involved in the execution of the OKRs.
- Stakeholders/Leadership: Senior leadership or department heads who are interested in the broader progress toward the organization's goals.
- Optional: Other teams or departments who might be impacted by or contributing to the OKRs.
- 4. Structure of the Meeting

Here's a typical structure for an OKR review meeting:

- Opening (5-10 minutes)
 - o Set the context: Remind everyone of the objectives and key results being reviewed.
 - o Review meeting agenda: Ensure everyone knows the flow of the meeting.
- Progress Review (15-30 minutes)
 - Objective-by-Objective Review: Each OKR owner or team updates the group on the progress of their objectives.
 - How close are we to achieving each key result?

- What's the current score (e.g., 0-1.0 scale, or percentage completion)?
- Any key milestones reached or blockers encountered?
- Discuss any challenges or roadblocks faced.
- Analysis & Discussion (15-20 minutes)
 - Identify challenges: Are there significant obstacles preventing key results from being achieved?
 - Root cause analysis: What's causing these obstacles (e.g., lack of resources, misalignment in teams, unclear expectations)?
 - Strategic adjustments: Should any key results be adjusted, redefined, or recalibrated based on current circumstances?
 - o Alignment check: Are the OKRs still aligned with overall business priorities?
- Action Plan (10-15 minutes)
 - Decide on concrete actions for the next period, such as:
 - Resource allocation.
 - Adjusting deadlines.
 - Shifting priorities.
 - Setting new action items to resolve challenges or complete key results.
 - o Assign ownership: Make sure everyone knows who is responsible for what moving forward.
- Closing (5 minutes)
 - o Summarize key decisions and action items.
 - Confirm the next review date.
 - o Optionally, get feedback from participants about the meeting to improve future OKR reviews.
- 5. Best Practices
- Transparency: Be open about where things stand. It's okay if some OKRs aren't fully on track as long as the team learns from it.
- Data-Driven: Always base discussions on data and progress metrics. Use OKR dashboards or tracking tools to show objective completion percentages.
- Focus on Solutions: Instead of just highlighting problems, focus on how to resolve challenges and keep progressing.
- Time Management: Stick to the allocated time to ensure the meeting is productive. Avoid getting bogged down in details that aren't relevant.

- Collaborative: Encourage feedback and contributions from everyone involved to ensure diverse perspectives on progress and solutions.
- Document Outcomes: Make sure action items and decisions are documented clearly for follow-up in the next review.
- 6. Key Outputs
- Updated OKR Progress: A refreshed view of how well objectives are being achieved.
- Action Items: Any changes to strategy or tactics moving forward.
- Potential OKR Adjustments: Any revisions needed to the key results or objectives themselves.
- Learnings: Insights on what worked well or could be improved for the next OKR cycle.
- 7. Tools for OKR Review
- OKR Dashboard: A centralized tool for visualizing progress, such as software like Vabro, Gtmhub, 15Five, or even Google Sheets/Excel for smaller teams.
- Project Management Tools: Tools like Vabro, Jira, Asana, or Trello to track tasks and progress related to OKRs.
- Meeting Notes/Documentation: Use shared documents or collaboration tools like Notion, Google Docs, or Confluence to record meeting outcomes and action items.

8. Challenges to Be Aware Of

- Overly Ambitious OKRs: It's tempting to set bold, stretch goals, but unrealistic OKRs can lead to frustration.
- Lack of Ownership: Without clear ownership of each key result, accountability can be diluted.
- Misalignment with Business Strategy: OKRs should always reflect the company's top priorities; otherwise, they can drift into unrelated tasks.
- Too Much Focus on Metrics: Key results should be outcome-focused, not just about numbers. It's
 important to also measure impact and value.

OKR review meetings are key to keeping everyone on track and ensuring continuous alignment with the organization's overarching goals.

4.8 **OKR Retrospectives**

An OKR Retrospective is a critical review meeting or process that occurs at the end of an OKR cycle (typically quarterly or annually) where teams reflect on their performance, learn from both successes and challenges, and identify areas of improvement for the next OKR cycle. It is an opportunity to assess whether OKRs were successfully achieved, understand why certain key results were not met, and adjust the process to ensure greater success in future cycles.

Here are the key details of an OKR retrospective:

4

- 1. Objective of the Retrospective
- Review and Reflection: The main goal is to reflect on the performance of the OKRs, discuss what went well and what didn't, and gather insights for continuous improvement.
- Actionable Improvements: Identify changes in strategy, process, or execution that can be implemented in the next OKR cycle.
- 2. Key Components of an OKR Retrospective

A. Review of OKRs

- Objective and Key Results Summary: Recap the OKRs that were set for the cycle, and present their final outcomes.
- Successes: Celebrate the key results that were achieved or exceeded, recognizing teams or individuals who contributed to those successes.
- Challenges: Discuss the key results that weren't met, and explore the reasons why. Was it due to unclear objectives, lack of resources, unrealistic targets, or something else?

B. Data and Metrics Review

- Quantitative Review: Measure the actual results against the targets (e.g., percentage completion of key results, actual performance vs. goal metrics).
- Qualitative Feedback: Gather feedback from stakeholders or team members about their experience with the OKRs (e.g., was the objective motivating, were the key results clear and actionable?).

C. Insights from the Cycle

- What Went Well: Identify practices, strategies, and behaviors that helped achieve OKRs (e.g., effective collaboration, clear communication, great focus on key priorities).
- What Didn't Go Well: Examine what could have been improved. Were there any missed opportunities, obstacles, or inefficiencies (e.g., unclear key results, insufficient resources, lack of focus, misalignment across teams)?
- Key Learnings: Discuss any significant insights from the OKR cycle. For instance, did certain strategies, tools, or behaviors help achieve progress? Were there any recurring roadblocks?

D. Root Cause Analysis

- Identify Underlying Causes: Analyze the reasons why some OKRs were not achieved or fell behind. This could involve looking at resources, prioritization, stakeholder involvement, or external factors.
- Focus on Systemic Issues: Rather than focusing solely on individual mistakes, look for broader patterns or systemic issues that might have contributed to success or failure.
- E. Actionable Takeaways
- Process Improvements: Identify adjustments or changes that can be made to the OKR process itself. For example:

- Refining the way objectives are defined.
- Ensuring that key results are measurable and achievable.
- o Improving how teams are aligned to OKRs.
- Behavioral or Strategic Changes: Any changes to the team's approach to achieving OKRs. For example:
 - Setting more realistic key results.
 - Improving cross-functional collaboration.
 - Enhancing communication and feedback loops.
- 3. OKR Retrospective Frameworks and Activities

There are a few common frameworks or activities that can be used during an OKR retrospective to guide the process and ensure that it's focused on reflection and actionable takeaways:

- Start, Stop, Continue:
 - Start: What new practices or processes should be introduced in the next OKR cycle?
 - o Stop: What practices should be stopped because they weren't helpful or caused problems?
 - o Continue: What practices or behaviors should be continued because they worked well?
- The 5 Whys: This technique helps identify the root cause of problems by asking "why" five times (or until you reach the core issue). For example:
 - o Why was the NPS score improvement slower than expected?
 - Because customer feedback was delayed.
 - Why was customer feedback delayed?
 - Because the survey process was too slow.
 - And so on, until the root cause is uncovered.
- Plus/Delta: A simple method for gathering feedback.
 - Plus: What went well during the OKR cycle?
 - Delta: What could be improved?
- Feedback Loops: Collect qualitative feedback from the team members about the OKR process itself. What could be done differently in terms of clarity, communication, or focus?
- 4. Facilitating the Retrospective
- Facilitator: A neutral party (often someone from HR, operations, or an external consultant) can guide the conversation, ensure everyone has a voice, and keep the discussion productive.

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- Team Participation: All team members, including leadership, should be involved in the retrospective to ensure diverse perspectives are captured.
- Safe Environment: Create a safe environment where team members feel comfortable sharing honest feedback without fear of blame or judgment.
- 5. Documenting and Communicating Results
- Document Key Insights: Write down the main takeaways from the retrospective, focusing on lessons learned, process improvements, and new actions to implement.
- Action Plan for Next Cycle: Create a concrete action plan that includes changes to be made for the next OKR cycle, addressing the issues identified.
- Share Findings: Communicate the findings of the retrospective with relevant stakeholders, such as leadership teams, and other departments, to ensure transparency and accountability.

Example of an OKR Retrospective Summary

Objective: Improve Customer Retention (Q4 2025)

Key Results:

- 1. Increase repeat purchases by 20% Achieved 15%
- 2. Launch loyalty program Completed (Launched late in the quarter)
- 3. Reduce churn rate by 10% Achieved 5%

What Went Well:

- The launch of the loyalty program was well-received by customers, even though it was delayed.
- Teams were highly collaborative in addressing early churn issues.

What Didn't Go Well:

- The churn rate reduction target was too ambitious given the seasonality of the business.
- The team didn't fully anticipate delays in the loyalty program rollout.

Root Cause Analysis:

- The loyalty program launch was delayed due to insufficient coordination between marketing and tech teams.
- The churn reduction efforts weren't aligned with the seasonality data, which impacted results.

Actionable Takeaways:

- Align marketing and tech teams earlier to prevent future delays.
- Set more realistic and seasonally adjusted targets for churn reduction in future cycles.

Next Cycle Action Plan:

Improve cross-departmental planning for product launches.

Set a more data-driven target for churn reduction based on historical trends.4

4.9 OKR Scoring System

The OKR Scoring System is a way to measure and evaluate the progress of key results within an OKR cycle. It helps teams and organizations assess how well they've achieved their set objectives and key results, providing clarity on whether they are on track or need to make adjustments.

Here's a detailed breakdown of how the OKR scoring system works and different approaches to scoring:

1. Traditional Scoring System: 0-1 Scale

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This is a simple and widely used scoring system, where each key result is scored based on its completion status.

- 0.0: Key result has not been started or has made no progress.
- 0.3: Key result has made some progress but is far from being completed (e.g., initial phases of work have been done).
- 0.6: Key result is halfway to completion, with significant progress made.
- 0.8: Key result is nearly complete, with only minor work left to do.
- 1.0: Key result is fully achieved and completed as intended.

Example:

- Key Result: Increase revenue by 25%.
- Progress so far: 18% increase in revenue \rightarrow score 0.7.

2. Percentage-Based Scoring

Some organizations prefer to score key results based on the percentage of completion. This is more granular and may better reflect incremental progress, especially for measurable key results.

- 0% (0.0): No progress or completely off-track.
- 25% (0.25): Minimal progress made, but little to no tangible results.
- 50% (0.5): Moderate progress made, some key deliverables completed but not at full scale.
- 75% (0.75): Significant progress made, close to the finish line.
- 100% (1.0): Key result fully achieved.

Example:

- Key Result: Launch new website by the end of Q1.
- Current progress: 60% of website content is complete, and design is almost finalized → score 0.6.

3. Qualitative Scoring (Descriptive)

This scoring method is more subjective and focuses on the quality and outcomes of the key result rather than just the raw numbers. Teams can score based on the impact, effort, or value delivered rather than simply measuring progress against a fixed number.

- Achieved (1.0): Fully completed with significant positive impact.
- On Track (0.75): On track to completion with high-quality progress.

- Partially Achieved (0.5): Some progress made, but key challenges remain.
- Limited Progress (0.25): Very little progress or low-quality completion.
- Not Achieved (0.0): No progress or failed to deliver the key result.

Example:

- Key Result: Improve customer satisfaction score (CSAT) from 75% to 85%.
- Current score: 82% → "On Track" → score 0.75. However, the improvement was more qualitative in terms of customer feedback quality than quantity.

4. Weighted Scoring (For Multiple Key Results)

This method is often used when different key results are seen as having different levels of importance. You can assign weightings to each key result to reflect its relative importance toward achieving the overall objective.

- Weighting: Each key result gets a weight (usually between 1 and 3, or as a percentage of the total 100%).
- For each key result, calculate the score and multiply it by the weighting to get the weighted score.

Formula:

Weighted Score=Score × Weighting\text{Weighted Score} = \text{Score} \times \text{Weighting}Weighted Score=Score × Weighting

After scoring all key results, sum the weighted scores to get a final OKR score.

Example

- Objective: Increase customer engagement
 - o KR1: Increase daily active users by 20% (Weight = 0.4) → Progress: 15% → Score: 0.75
 - \circ KR2: Launch new feature (Weight = 0.3) \rightarrow Progress: 100% \rightarrow Score: 1.0
 - KR3: Improve support response time to 5 minutes (Weight = 0.3) \rightarrow Progress: 50% \rightarrow Score: 0.5

Weighted Score Calculation:

- KR1: 0.75 × 0.4 = 0.3
- KR2: 1.0 × 0.3 = 0.3
- KR3: 0.5 × 0.3 = 0.15

Final OKR Score: 0.3 + 0.3 + 0.15 = 0.75 (This would be your overall OKR score).

5. Custom Scoring Systems

Some organizations create their own OKR scoring frameworks based on specific needs or processes, particularly when the key results have more complexity or unique requirements. For example, a company might use a 0-10 scale or add specific criteria like quality of execution, alignment with other goals, or impact on business KPIs.

- 0-3 scale: Low completion (0), moderate completion (2), full completion (3).
- 0-10 scale: Ranges from 0 for no progress to 10 for fully exceeding the key result.

This system is often more nuanced, allowing for more detailed feedback on performance.

6. Progress Indicators (Red, Yellow, Green)

Some teams use a traffic-light system to score key results based on their completion status:

- Green (1.0): Fully completed and on track to deliver.
- Yellow (0.5-0.75): On track but need attention, some progress made but not complete.
- Red (0.0-0.25): No progress, off track, or requires significant intervention.

This approach helps teams quickly assess whether key results are in a healthy state or need urgent attention.

Some key characteristics desired in Scoring OKRs:

- Clarity & Alignment: Choose a scoring system that makes sense for your team or organization and helps align all stakeholders with clear expectations of success.
- Transparency: Ensure that the scoring system is transparent and understood by everyone involved in setting and achieving OKRs.
- Flexibility: Be open to revising the scoring system as your OKR process matures and you refine how you set and track goals.
- Continuous Improvement: OKR scoring should also include feedback loops to improve how goals are set, executed, and reviewed in the future.

These artifacts are part of the larger process that helps an organization stay focused on its most important goals, ensuring alignment and tracking progress towards those goals.

OKR (Objectives and Key Results) **metrics** are measurable indicators used to track progress toward achieving key results. These metrics ensure that objectives are specific, quantifiable, and actionable.

4.10 OKR Metrics

OKR metrics are measurable indicators used to track progress toward achieving objectives. They include output metrics (task completion), outcome metrics (impact measurement), leading metrics (predict future success), and lagging metrics (evaluate past performance). These metrics ensure clarity, alignment, and accountability across teams, driving business growth and efficiency.

1. Output Metrics

Measure the completion of specific tasks or deliverables.

Example: "Launch 3 new product features by Q2."

2. Outcome Metrics

Focus on the impact of completed tasks rather than just activity.

Example: "Increase customer retention rate from 75% to 85%."

3. Leading Metrics

Predict future performance based on current actions.

Example: "Increase website traffic by 20% to boost sales."

4. Lagging Metrics

Measure past performance and final outcomes.

Example: "Achieve \$1M in revenue by the end of the year."

Example of some sample OKR Metrics by Department

Sales

- Revenue growth (\$X in new sales)
- Number of new deals closed
- Customer conversion rate

Marketing

- Increase website traffic by X%
- Lead generation (X qualified leads per month)
- Social media engagement rate

Product & Engineering

- Reduce system downtime to <1%
- Increase feature adoption by X%
- Improve customer satisfaction score (CSAT) to X

Customer Support

- Reduce average response time to <5 minutes
- Improve Net Promoter Score (NPS) to 80+

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• Decrease customer churn rate by X%

HR & People Operations

- Increase employee engagement score to X
- Reduce employee turnover by X%
- Hire X new employees in key positions

OKR metrics should be specific, time-bound, and aligned with business goals.

4.10.1 Use of Al-enabled OKR Tools to Select Default OKRs

Al-enabled OKR tools streamline goal-setting by selecting default OKRs for all templates using machine learning and data analysis. These tools assess industry trends, organizational goals, and historical performance to recommend relevant objectives and key results.

By integrating with business intelligence, AI identifies patterns in successful goal-setting and suggests OKRs tailored to each department. For example, sales teams may receive objectives like "Increase quarterly sales by 15%," while customer support teams might get "Enhance customer satisfaction by reducing response time."

Al also personalizes recommendations based on past achievements, industry benchmarks, and companyspecific challenges. These tools continuously learn from user feedback, refining their suggestions over time.

Additionally, AI ensures adaptability by dynamically updating OKRs in response to changing market conditions or internal performance data. This enhances alignment, agility, and strategic execution, helping organizations focus on impactful goals while reducing the manual effort involved in goal-setting.

Figures 4-29, 4-30, and 4-31 show how default OKRs can be selected for templates.

orkflow Name: Account Manageme	nt		
e Account Expansion Workflow is o eamline the management and grow counts within the Customer Service ovides a structured approach to tra- tial contact through to account expa- ention. The workflow is divided into owing teams to efficiently manage to portunities for upselling, and ensur- tisfaction. With this template, teams	th of customer e workspace. It ck progress from ansion and o several stages, casks, identify e customer s can collaborate	Figure technique (term 1/2) (termset) Scrumboard Vert finance (termset) Vert finance (termset)	ber barg = ber barg
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 wes that arise, thereby building strotationships with customers and drive bowth. Sample Objectives and Key Res 	ults (OKRs) Key Results Sample Key renewals b	, ,	increase in customer rate by 5% in the next two

Figure 4-29: Use of Sample OKRs for Selected Templates (Source: Vabro)

Figure 4-29 above displays sample OKRs for Account Expansion Workflow template. It streamlines customer account management, enhances retention and upselling, and utilizes OKRs to drive business growth and customer satisfaction.

PROFIT.CO	OKRs > My OKRs > Assigned to Me	Create Objective using Tem		·				×
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	< Q1-2025 > = Filter +	Template Name	Objective Name	Action			Add Description	0/255
\$ []	Name	Automate Order Management	Automate Order Management	Select		Visibility* 🕐		
⊻ €	 ✓ (JS) John Stone 	Build a high-performance customer service team	Build a high-performance customer service team	Select	·	Public		~
	▼	Build Career Development Programs	Build Career Development Programs	Select				•
	P Get Profit.co Setup	Delight Customers	Delight Customers	Select				
	Schedule a free personalized	Deliver Amazing Customer Support	Deliver Amazing Customer Support	Select				
		Distribute Product X	Distribute Product X	Select				
	P Create 3 Individual or T		2025 John Stone Please Cho	oose	•			
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Figure 4-30: Use of Default OKRs based on Selected Templates (Source: Profit.co)

Figure 4-30 above displays a "Create Objective using Template" interface, allowing users to select predefined objective templates for goal-setting, streamlining OKR creation and alignment.

Add OKR		×
Name		Name
Solidify finances so we're	ready to take our product to the next level	Be inspirational and provide a clear
Alignment	Filter by category	direction.
What will this OKR do?	Company Engineering Finance Marketing >	Make sure your Objective name:
Owner		Is no longer than 70 characters
E VMFoods, Inc.	Company Solidify finances so we're ready to take our	Obesn't contain a metric Need inspiration? Check examples.
Lead	product to the next level	need inspiration. Oneok examples.
John Smith	P Crush the competition through acquisitions	
	P We're as seamless as a McDonald's franchise	
Advanced Options 🗸	P Be a top place to work in the US	
Active Draft S P	Prove that our great idea will make a great company	Cancel Save
	P Build a marketplace that Amazon would envy	

Figure 4-31: Adding Default OKRs for Selected Templates (Source: Perdoo)

Figure 4-31 above displays an "Add OKR" interface, enabling users to define objectives, align them with company goals, and select predefined suggestions for structured goal-setting.

The Practical Implementation Guide for Goal Setting with OKRs

The Objectives and Key Results Body of Knowledge ($OKRBOK^{m}$ Guide) provides a structured yet flexible approach to successfully implementing the OKR framework—a widely adopted framework for goal setting, strategic alignment, and performance management. First introduced in the technology sector, OKRs have since been embraced across various industries, including software development, finance, healthcare, retail, education, human resources, sales and marketing, and more. This framework is applicable to organizations of all sizes, from startups to global enterprises, helping them focus on measurable outcomes and continuous improvement.

The *OKRBOKTM Guide* is built on insights from thousands of goal-setting implementations across industries, with significant input from experienced OKR practitioners, business leaders, and experts in organizational strategy. Its development was a collaborative effort involving contributions from diverse fields, ensuring a well-rounded and practical approach to OKR adoption. Feedback from the global OKR community and inputs from the VMEdu[®] Global Authorized Training Partner Network—comprising over 2,000 companies in more than 50 countries—played a significant role in its creation. The development of the *OKRBOKTM Guide* has truly been a collaborative effort involving numerous experts and practitioners from diverse disciplines.

The *OKRBOK[™] Guide* is a comprehensive yet easily accessible resource that includes real-world examples of OKR implementation using popular IT tools. It helps organizations and teams establish meaningful objectives, track progress effectively, and ensure alignment across functions. The guide also explores how OKRs integrate with other Agile methodologies such as Scrum, Kanban, and DevOps, providing a holistic view of modern business strategy execution.

This guide serves as a valuable resource for both experienced OKR practitioners and professionals new to goal-setting frameworks. Whether you are a leader looking to drive alignment or a team member seeking clarity in execution, the $OKRBOK^{m}$ Guide standardizes the OKR approach globally, significantly enhancing business performance, transparency, and return on investment.

