



A GUIDE TO THE

OKR BODY OF KNOWLEDGE

(OKRBOK™ GUIDE)

5. OKR CADENCES AND COLLABORATION

The Practical Implementation Guide for Managing OKRs

Includes a section about aligning OKRs with other Agile Frameworks



5. OKR CADENCES AND COLLABORATION

5.1 Introduction

OKR reports are essential tools for tracking the progress of Objectives and Key Results (OKRs), helping organizations assess performance, identify challenges, and ensure alignment across teams. Different types of OKR reports are used at various stages of the OKR cycle, such as planning, tracking, and reviewing, and each serves a unique purpose. The main types of OKR reports are as follows:

- OKR Progress Reports
- OKR Review Reports
- OKR Alignment Report
- OKR Health Check Report
- OKR Dashboard Report
- OKR Final Assessment Report

5.2 OKR Progress Report

- Purpose: To track the ongoing progress of OKRs during a specific period (e.g., weekly, monthly). They are a key tool for tracking progress, identifying potential roadblocks, and ensuring alignment across teams and departments.
- Audience: Team members, managers, and leadership.
- Content:
 - Objective Overview: A summary of each objective and its associated key results.
 - Progress Update: Current progress of each key result, usually with numerical percentages or status indicators (e.g., red, yellow, green).
 - Achievements: Highlights of what has been accomplished.
 - Challenges: Roadblocks or issues encountered that may prevent meeting key results.
 - Next Steps: Actions to be taken to get back on track or continue making progress.

Example:

- Objective: Increase website traffic
 - KR1: Increase organic search traffic by 25% (Currently 20% achieved)
 - KR2: Publish 15 blog posts (10 published, 5 remaining)
 - KR3: Improve site speed (Completed, site now loads 25% faster)

Figures 5-1 and 5-2 capture reports on goals and key results progress in OKR implementations:

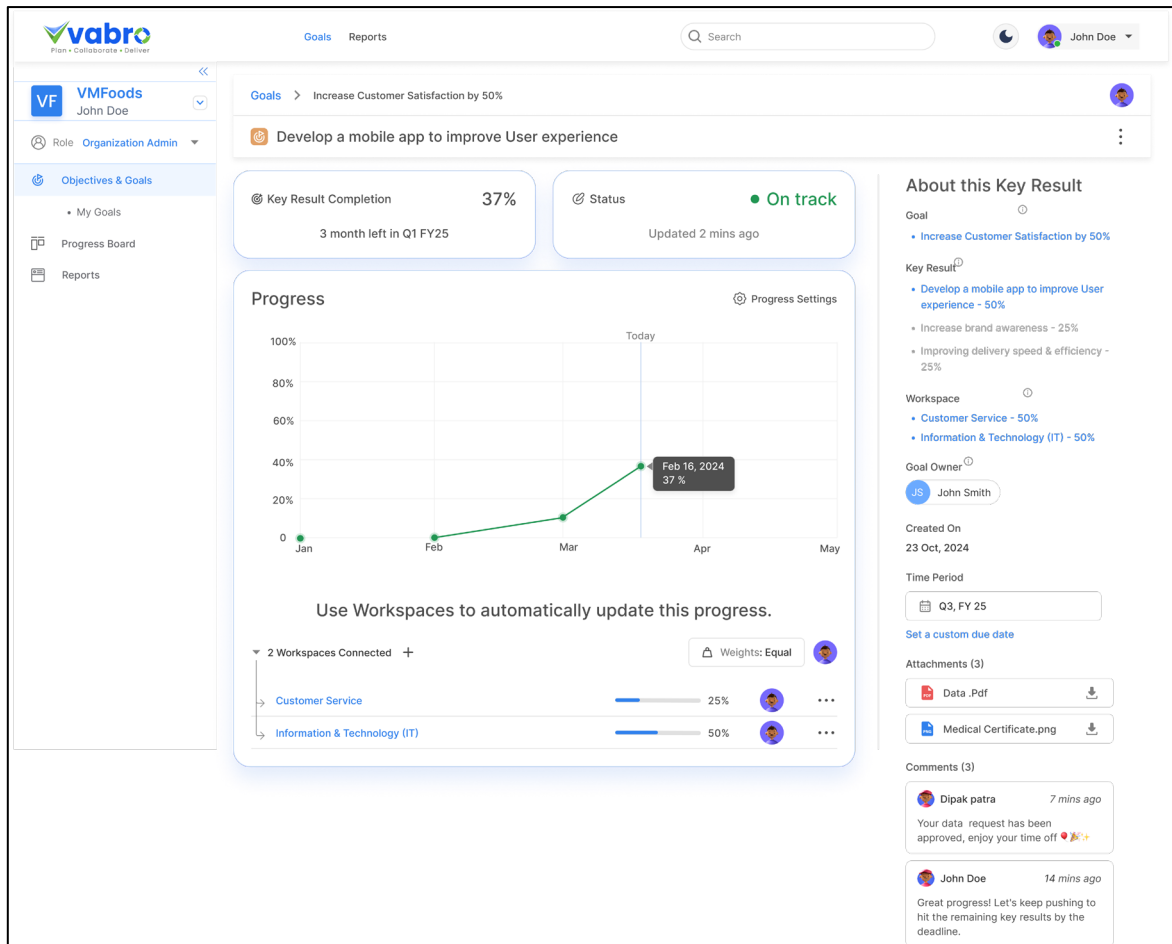


Figure 5-1: Key Result Progress Report (Source: Vabro)

Figure 5-1 above shows a Vabro dashboard displaying OKR progress report, including goal completion percentages, key result breakdowns, and visual graphs indicating overall achievement trends.

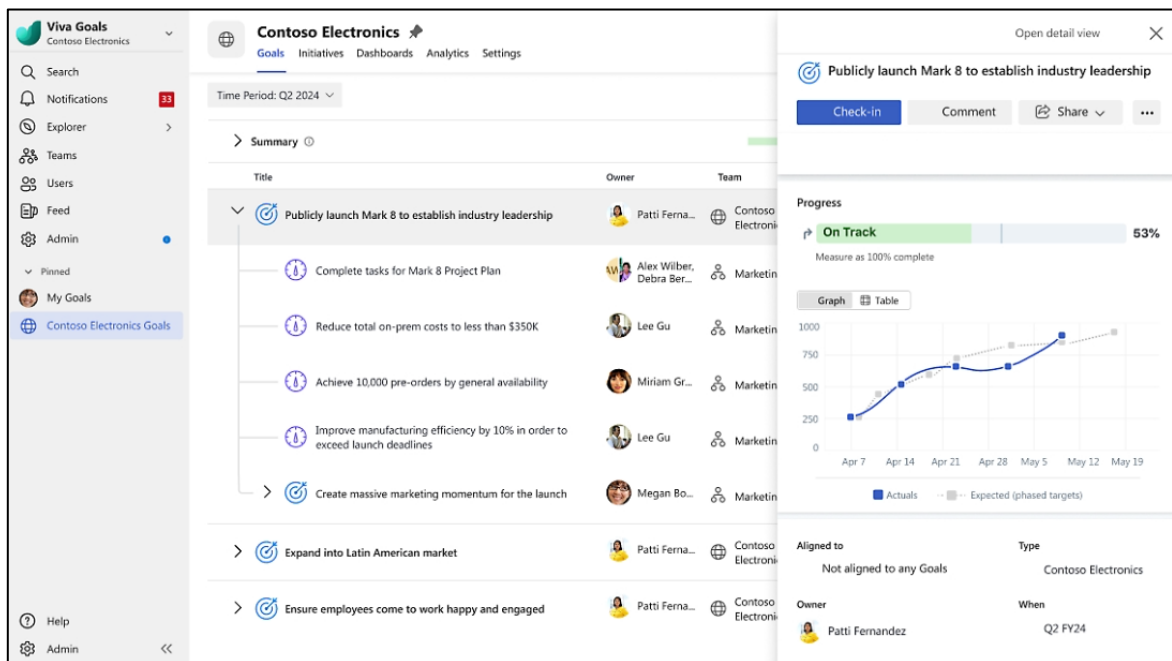


Figure 5-2: Goals Progress Report (Source: Microsoft Viva)

Figure 5-2 above depicts Microsoft Viva Goals dashboard presenting a progress report containing goal completion percentages, individual key result progress, and a summary of team-wide objective performance.

Here are some main components and details that are often included in an OKR progress report:

1. Summary of Objectives

- **Objective Overview:** A brief description of each objective for the current OKR cycle.
- **Objective Status:** A simple status indicator (e.g., red, yellow, green) showing whether the objective is on track, at risk, or off track.

2. Key Results and Their Status

- **Key Result Details:** A breakdown of each key result associated with the objective.
- **Progress:** The current progress percentage (e.g., 40% completed) or a qualitative assessment (e.g., 3/5 milestones achieved).
- **Status Indicator:** Similar to the objective status, each key result can be marked with a color or symbol (e.g., red, yellow, green) to indicate whether it's on track or needs attention.

3. Progress Against KPIs or Metrics

- **Quantitative Metrics:** If the key results are tied to specific numbers (e.g., revenue growth, user acquisition), you would include the latest performance against those metrics.
- **Graphical Representation:** Charts or graphs that show progress over time, helping to visually capture trends and changes.

4. Achievements and Milestones

- **Completed Key Results:** Highlight key results or milestones that have been fully achieved during the reporting period.
- **Completed Tasks:** Significant tasks or projects that have contributed to the completion of a key result.

5. Challenges and Obstacles

- **Roadblocks:** Describe any issues or challenges that have impeded progress, such as resource constraints, dependencies on other teams, or external factors.
- **Action Plans:** Outline steps that are being taken to overcome these challenges or any changes in strategy.

6. Adjustments or Changes

- **Revised Key Results:** If some key results are unrealistic or need adjustment, this section will show the modifications made (e.g., adjusting metrics, changing deadlines).
- **Shifts in Strategy:** If any shifts in strategy are required to stay aligned with the objective, these will be outlined here.

7. Next Steps

- **Immediate Actions:** A summary of the tasks and actions the team will focus on in the next reporting period to ensure continued progress.
- **Milestones for the Next Period:** Specific targets or dates when key results should be achieved.

8. Overall Progress Rating

- **Percentage Completion of OKRs:** An aggregate measure of the progress across all objectives and key results. This could be calculated based on the completion percentage of each key result.
- **Reflection and Learnings:** A quick reflection on what's been working and what could be improved for the next cycle.

Example of an OKR Status Report (Overview)

Objective: Increase Customer Satisfaction (Q1 2025)

Key Results:

1. KR1: Improve NPS score from 60 to 75 – 50% complete (NPS increased to 68)
2. KR2: Launch a new customer support portal – 100% complete (Launched)
3. KR3: Resolve 90% of support tickets within 24 hours – 70% complete

Achievements:

- Launched the customer support portal ahead of schedule.
- Improved internal processes, resulting in a 10% increase in support ticket resolution speed.

Challenges:

- The NPS score improvement is slower than expected due to delayed customer feedback collection.

Action Plans:

- Plan to expedite customer feedback collection via surveys.
- Focusing on faster response times for support tickets. (contd. In the next page)

Next Steps:

- Aim to achieve a 5% improvement in NPS by end of Q1.
- Continue to monitor support ticket resolution times closely.
- Overall OKR Status: On Track (70% of KR goals achieved so far)

5.3 OKR Review Report

- Purpose: To evaluate the overall performance of OKRs at the end of a cycle (typically quarterly or annually).
- Audience: Team members, leadership, and stakeholders.
- Content:
 - Final OKR Scores: Scores for each key result (e.g., 0.8, 1.0, etc.) or achievement levels.
 - Summary of Outcomes: A detailed summary of the objectives and their achievements, including insights on why certain key results were or were not met.
 - Lessons Learned: Reflection on what worked and what didn't, including any key insights or patterns.
 - Recommendations for Future OKRs: Suggestions for refining the OKR process, setting more realistic targets, or improving execution in future cycles.

Example:

- Objective: Improve customer retention
 - KR1: Reduce churn by 15% (Achieved 10% reduction)
 - KR2: Launch a loyalty program (Completed successfully)
 - KR3: Increase customer satisfaction (CSAT) by 10 points (Achieved 7 points increase)

Lessons Learned:

- The churn reduction goal was too ambitious given external factors like the market downturn.
- The loyalty program had a positive impact on retention but required more resources than initially planned.

5.4 OKR Alignment Report

- Purpose: To ensure that all team and department OKRs align with the overall company objectives.
- Audience: Leadership, department heads, and cross-functional teams.
- Content:
 - Top-Level Organizational OKRs: The primary OKRs set at the company or leadership level.
 - Team or Department OKRs: OKRs for individual teams or departments, showing how they contribute to the organizational OKRs.

- Alignment Status: An assessment of how well team OKRs align with broader objectives and whether they are working towards the same strategic priorities.
- Gaps or Misalignments: Identify any misalignments or areas where teams may be working on objectives that don't directly support the company's overall strategy.

Example:

Organizational Objective: Improve customer experience

- Marketing Department OKR: Increase brand awareness by 30%
- Customer Support Department OKR: Reduce response time to less than 5 minutes
- Product Development Department OKR: Launch a new customer feedback tool

Assessment: All departments' OKRs align well with the company's objective of improving customer experience.

Figures 5-3 and 5-4 show typical Alignment Reports in AI-enabled digital OKR tools:

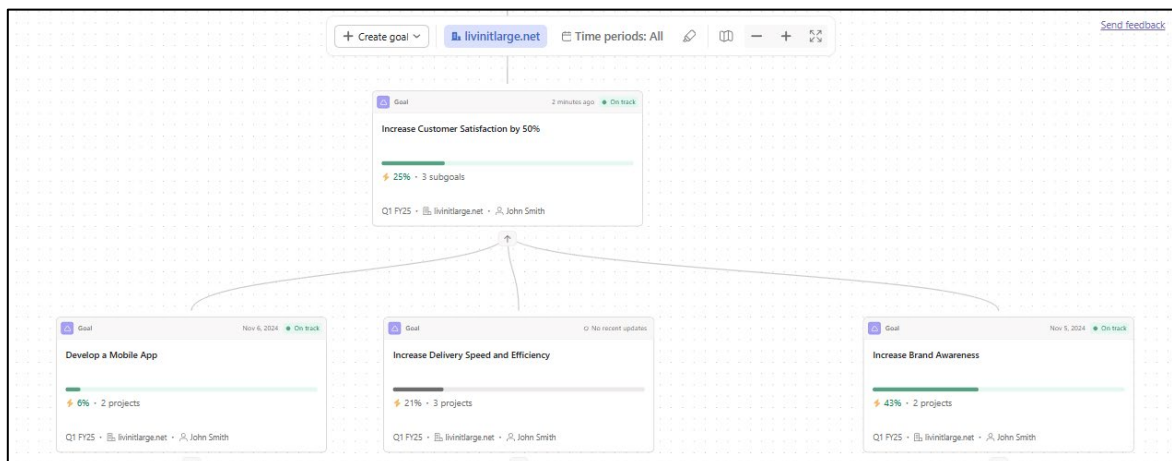


Figure 5-3: Alignment Report (Source: Asana)

Figure 5-3 above depicts an Alignment Report in Asana showing how company objectives cascade into team goals, with alignment lines linking parent objectives to dependent sub-goals.

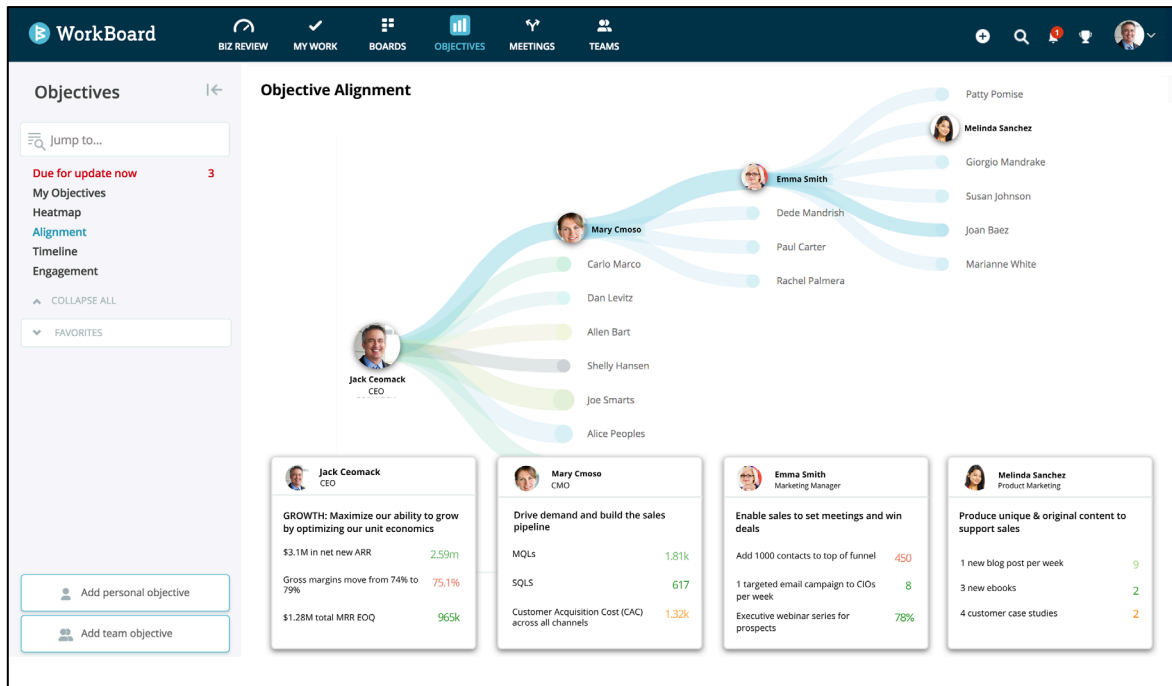


Figure 5-4: Sample Alignment Report (Source: Workboard)

Figure 5-4 above shows an alignment report showing interconnected objectives across teams, with a visual map highlighting dependencies and strategic alignment across multiple organizational levels.

5.5 OKR Health Check Report

- **Purpose:** To regularly assess the health of OKRs throughout the cycle (usually done weekly or bi-weekly).
- **Audience:** Teams and managers, usually during OKR check-in meetings.
- **Content:**
 - **Key Results Progress:** Quick overview of how each key result is progressing.
 - **Health Indicators:** Status updates such as whether the key results are on track, delayed, or need attention (often using a color-coding system like red, yellow, and green).
 - **Blockers and Dependencies:** Any roadblocks or issues preventing progress, including dependencies on other teams or resources.
 - **Support Needed:** Specific requests or actions required to address challenges or accelerate progress.

Example:

- Objective: Increase sales pipeline
 - KR1: Generate 500 leads (50% achieved)
 - KR2: Convert 30% of leads to qualified prospects (25% achieved)
 - KR3: Train sales team on new CRM (Completed)

Health Status:

- KR1: Green – On track
- KR2: Yellow – Progress slower than expected due to delays in lead generation campaigns.
- KR3: Green – Completed successfully.

Figure 5-5 shows a typical Health Check report in an AI-enabled digital OKR tool:

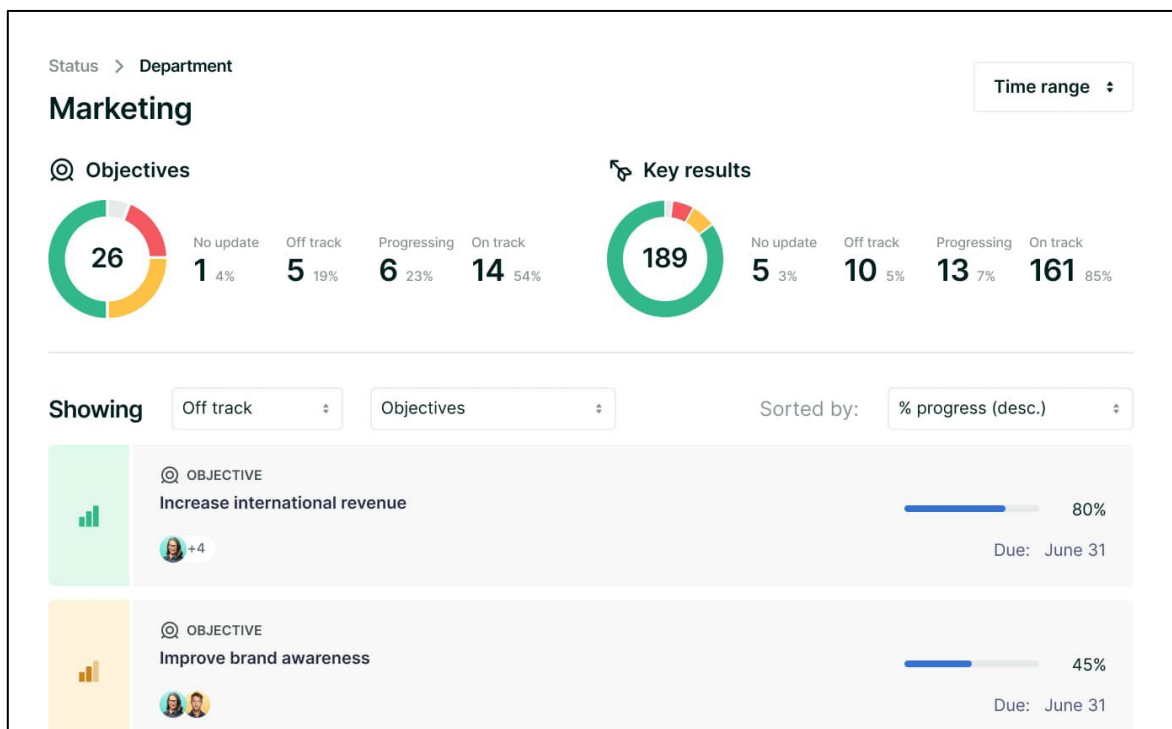


Figure 5-5: Sample Health Check Report (Source: Lattice)

Figure 5-5 above shows a health check report showing team sentiment, goal alignment percentages, and key results progress with color-coded performance indicators.

5.6 OKR Dashboard Report

- Purpose: A visual and real-time display of OKR progress, typically used in tracking systems or software.

- Audience: Teams, leadership, and any stakeholders who want quick, up-to-date progress information.
- Content:
 - Progress Bar/Graph: Visual indicators of the progress of each key result (percentage completion, timelines, etc.).
 - Status Indicators: Color-coded icons or charts (e.g., green, yellow, red) to show how close each key result is to completion.
 - Trends Over Time: Charts or graphs that show progress over weeks or months, providing insights into how progress is evolving.
 - Summary Statistics: Quick stats such as the percentage of OKRs on track, overdue, or at risk.

Example:

A real-time dashboard might show:

- Objective: Improve employee engagement
 - KR1: Increase employee satisfaction score by 15% → 10% achieved (Yellow)
 - KR2: Implement 3 new employee wellness initiatives → 2 implemented (Green)
 - KR3: Increase internal promotion rate by 20% → 18% achieved (Yellow)

Figure 5-6 shows Dashboard reports used in OKR implementations:

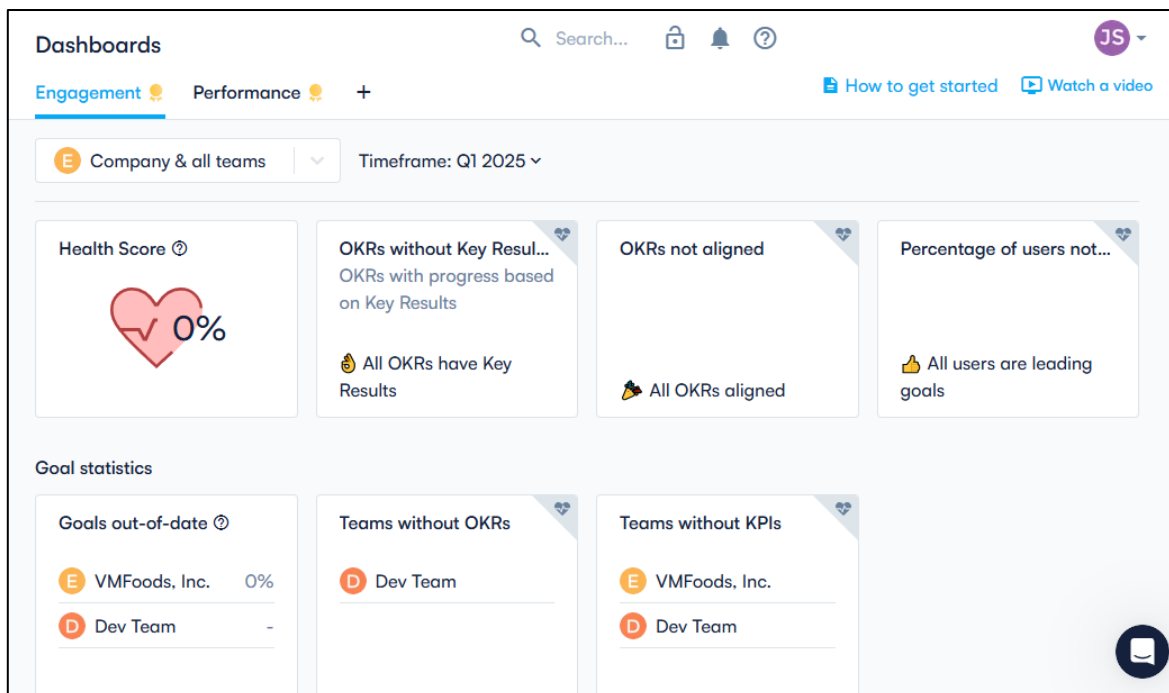


Figure 5-6: Dashboard Report (Source: Perdoo)

Figure 5-6 depicts a Dashboard Report displaying objective health, current progress rates, and insights on top-level and departmental goals using progress bars and color-coded indicators.

5.7 OKR Final Assessment Report

- Purpose: A detailed analysis at the end of the OKR cycle to assess the success or failure of OKRs.
- Audience: Senior leadership, team leads, and HR.
- Content:
 - Final OKR Scores: Summary of scores for each key result, giving a final evaluation of how well objectives were met.
 - Impact and Outcomes: Evaluate the real impact of achieved OKRs on business performance or team goals.
 - Post-Mortem: Identify reasons for not achieving certain OKRs, including any external factors, resource limitations, or unrealistic targets.
 - Recommendations for Next Cycle: Based on the evaluation, suggest improvements for setting or achieving OKRs in the next cycle.

Example:

- Objective: Improve product quality
 - KR1: Decrease customer-reported bugs by 30% → 25% decrease (Score: 0.75)
 - KR2: Increase feature release frequency by 20% → 10% increase (Score: 0.5)
 - KR3: Reduce average response time to product support tickets by 40% → 40% achieved (Score: 1.0)

Conclusion:

Each of these OKR reports serves a specific purpose in different stages of the OKR cycle, providing stakeholders with insights into progress, alignment, challenges, and opportunities for improvement. Regular tracking, alignment checks, and reviews are essential to ensure OKRs are on track and that teams are working toward the same overarching goals.

5.8 Collaboration in OKR Implementations using Forms

Forms—The use of forms is another key means of collaboration in OKR. Teams can create and share forms at the OKR Board level. Fields can contain single-line text, multi-line text, check boxes, radio buttons, calendars, attachments, descriptions, and so on. Forms can be created and used by teams across divisions/departments to get the work done. Figure 5-7 illustrates how a form is created by a team member to collaborate with other team members in the context of distributed teams using a digital OKR tool:

The screenshot shows the Vabro Form Builder interface. The top navigation bar includes 'Home / Ticket Management / IT Service Desk / Forms'. The main area is titled 'Form' and has tabs for 'Inputs', 'Responses', and 'Settings'. The 'Inputs' tab is active, showing a list of input types on the left: Short Text, Paragraph Text, Number, Email, Phone Number, Date, URL, Dropdown, Multiple Choice, Checkboxes, and Attachments. The central area is labeled 'Click or drag and drop components here' and contains a preview of the form. The form has the following fields: 'Name' (with value 'Adam Dawson'), 'Email' (with value 'adam.dawson.2023@gmail.com'), 'Department' (with value 'Technical'), and 'Designation' (with placeholder 'Enter text'). A 'Description' field at the top right contains the text: 'Task: IT Support Request Form. Create a user-friendly form for employees to submit IT support requests, ensuring timely resolution of technical issues.' A 'Preview' button is located at the bottom right of the form builder area.

Figure 5 - 7: Creation of a Form for Collaboration in a Digital OKR Tool (Source: Vabro)

Figure 5-7 above shows a Vabro interface showing how forms are used for collaboration when using a digital OKR tool.

Figures 5-8 and 5-9 illustrate variations in Form creation in multiple digital OKR tool:

The screenshot shows the Asana Form Editor interface. The top navigation bar includes 'Home', 'My tasks', and 'Inbox'. The main area is titled 'Edit form' and has tabs for 'Form content' and 'Settings'. The 'Form content' tab is active, showing a form titled 'Requests for Creative Production' with the instruction 'Please complete this form to submit a creative request to our design team.' The form has the following fields: 'Name of request' (with placeholder 'Name of request'), 'Description' (with placeholder 'Description'), 'Department Requesting Team' (with a dropdown menu), and 'When do you need this by?' (with placeholder 'When do you need this by?'). The 'Settings' tab is also visible, showing options for 'Form settings' (including 'Select who can access the form' and 'Share this link directly'), 'Copy all responses to task description', 'Copy embed code', and 'Confirmation message'. A 'Done' button is located at the bottom right of the form editor area.

Figure 5 - 8: Form Creation (Source: Asana)

Figure 5-8 above shows a Asana form editor interface displaying a creative production request form with input fields, form settings, organization access permissions, and task collaborator options for submission tracking.

The screenshot displays the Jira 'New Campaign' form builder. The main area shows a task form with the title 'Project New Campaign - Task Form'. Below the title, there are three main sections: 'Summary', 'Description', and 'Attachment'. Each section has a text input field with placeholder text 'Add a description' and 'Answer will be written here'. On the right side, there is a sidebar titled 'Fields' with the instruction 'Drag fields to build your custom form.' Below this, there is a list of fields: Assignee, Category, Department, Due date, Labels, Priority, Start date, and Team. At the bottom of the sidebar, there is a button labeled '+ Create new field'.

Figure 5 – 9: Form Creation (Source: Jira)

Figure 5-9 above shows a Jira form builder interface displaying a task form for the "New Campaign" project with summary, description, attachment fields, and customizable form field options on the right.

5.8.1 Other means of collaboration in OKR Implementations:

- **OKR Cadences or Meetings**—Cadences or meetings play a critical role in facilitating effective collaboration among teams and stakeholders by ensuring that certain events occur at regular intervals. These cadences ensure that a team maintains consistent workflow by planning, implementing, and reviewing work on a regular basis.
- **Reports**—Teams can generate comprehensive reports on cycle time, ideal time, and team performance to provide valuable insights into workflow status and work progress. These reports can be shared with stakeholders to keep them informed of the progress being achieved and help them make key decisions to safeguard their interests.
- **External Collaboration**—Other means of collaboration can include integration with third party tools and collaboration with groups outside of the current OKR Teams. This helps the OKR Teams to collaborate with those using other tools or workflows.

The Practical Implementation Guide for Goal Setting with OKRs

The Objectives and Key Results Body of Knowledge (*OKRBOK™ 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 *OKRBOK™ 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 *OKRBOK™ 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™ Guide* standardizes the OKR approach globally, significantly enhancing business performance, transparency, and return on investment.

