



# The Ultimate Guide: OKR Implementation

A step-by-step plan to rolling out OKRs to your organisation





# Introduction:

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

Yet, some businesses are reluctant to implement OKRs because they fear a cumbersome, bureaucratic process and opt to stay with inefficient goal setting practices.

In order for a company to be successful with OKRs, you want to make sure they're implemented in a strategic way. The most successful groups take time to design how they'll use OKRs.

From preparing and following a detailed implementation plan to building a team to carry out the task with change management best practices in mind.

Using the right approach to implementation involves ensuring that the process is seen as valuable - from executive level all the way down to individual contributors.

**This guide will provide insights and advice on how to implement OKRs successfully in your organisation.**





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# 1. Establish vision & build the playbook

An effective OKR program can be built with several players, but absolutely requires leadership support and a program owner. **Key players include:**



**Executive Sponsor:** For many, this could be a CEO or another C-level executive who's passionate about OKR implementation. They're supportive of the program to accomplish the objectives identified and will help to evolve the program over time.

The sponsor's involvement will also help the OKR program owner succeed.



**OKR Program Owner:** This role is often filled by the Chief of Staff, Chief of Strategy, Chief Operation Officer, or another C-level executive who facilitates the strategic planning process.

Through collaboration with leadership, they develop and lead the communication strategy, oversee training activities, monitor program health, and coordinate the rollout and implementation of the OKR program in order to turn that strategy into action.



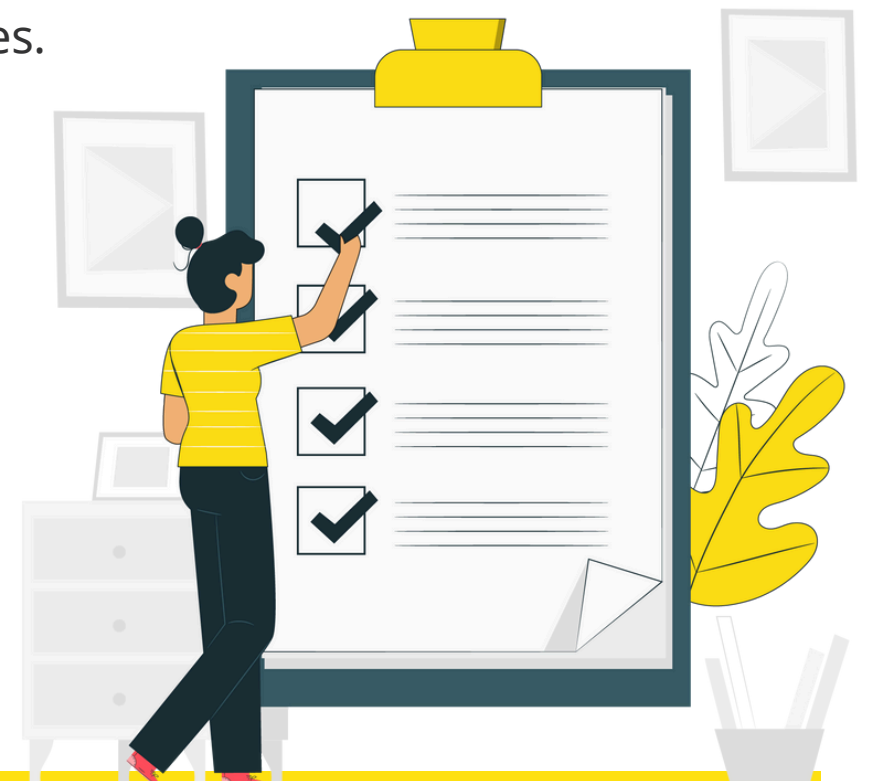
**Champions:** A set of leaders in the organisation that volunteer to evangelise, enable, and educate the org on the OKR program. These may also be your Early Adopters, who will help to increase the size of your army of change agents.

Make sure you keep these enthusiasts active and championing the OKR initiatives.



**Functional Leaders:** Beyond the Executive Sponsor, the rest of the leadership team needs to be on board or the whole process fails. This group is a core building block that will provide understanding and evidence to the rest of the organisation that the OKR process is worth their time.

If these leaders are on board, they will encourage their teams to have the same mindset.



## Building a Playbook

When introducing the OKR methodology, it's important to establish a common understanding. OKRs are intended to be implemented with rigour and discipline, with the end goal of accelerating performance.

Evaluating results requires us to go beyond the numbers to formulate the right follow-up questions and inspire future breakthroughs. If those required to use OKRs don't understand how they work, it can lead to increased overhead and some confusion.






There are multiple ways of interpreting and applying OKRs, and people may have questions about how they will be used in the organisation.

In order to make sure that everyone is on the same page across the organisation, developing a playbook will be essential so that everyone understands how they're being implemented.

This playbook will be the plan for rolling out and scaling OKRs in your company. Remember, **OKRs are a framework and an ongoing discipline** - not just a set of rules.

## OKR Playbook Checklist

Here's a list of key things to include in your playbook:

-  The purpose of OKRs at the company
-  The strategic mission and vision of the company
-  How to write OKRs with examples
-  Key lists of contacts (OKR Program Owner and Executive Sponsor)
-  How OKRs will interface with other key processes like project management and performance management



## 2. Rally the Team

Many organisations prefer to pilot the OKR framework before rolling it out to everyone. This ensures that the team piloting the OKR methodology is committed to the process, and it gives them the opportunity to work out issues and train the OKR champions across the company.

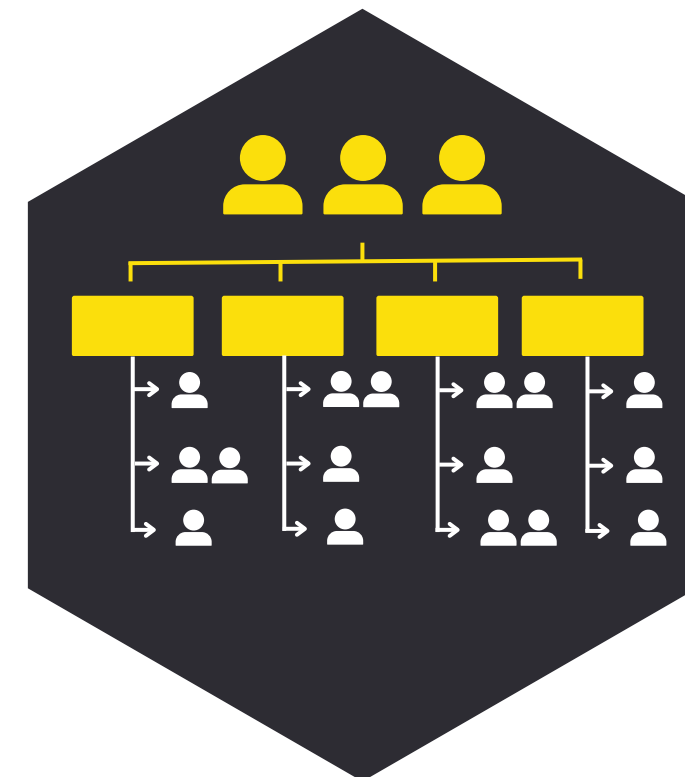
When piloting OKRs, three groups are natural candidates: the executive team, individual departments, or a strategic initiative.

### Pilot Option 1: Executive Level

This pilot option includes senior management at the executive level. The advantage of this pilot program is that key stakeholders from every department are involved from the start of the OKR program.

Once they go through a few cycles, these leaders then establish cadence at the executive level and can disseminate that rhythm throughout the rest of the company.

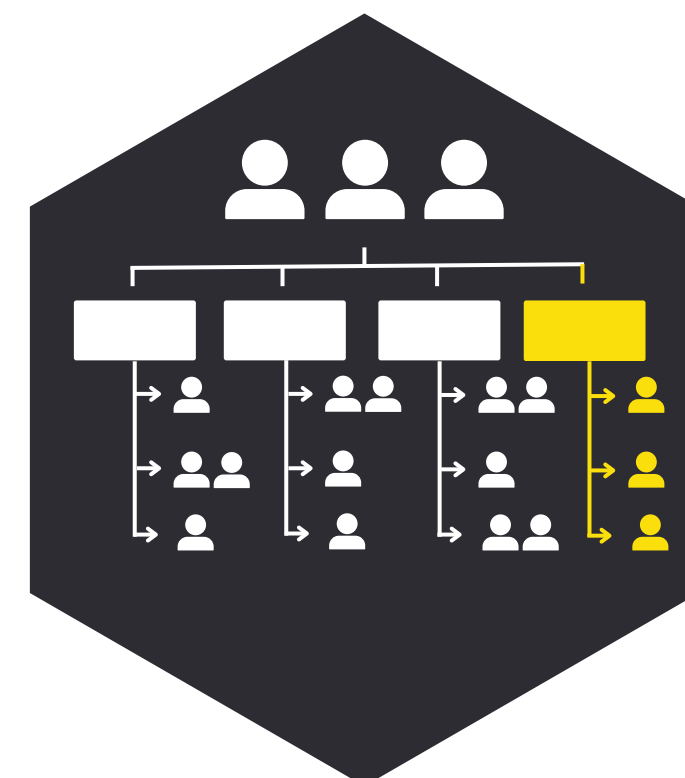
A potential disadvantage to this pilot option is that **teams may not have enough information to report on progress effectively**, as this option does not involve key contributors.



### Pilot Option 2: Department Level

This pilot option begins with one particular department, commonly the product or engineering team, and involves all levels within that team. This piloting process more realistically simulates a company-wide OKR rollout because all levels of contributors are involved, enabling accurate reporting.

Even so, **piloting OKRS at the departmental level carries the risk of reinforcing silos**. When starting with just one team, it causes a lack of cross-functional work due to the limitation of only one department. OKRS should be guided by strategic priorities and teams formed by drawing from different departments to work on them.



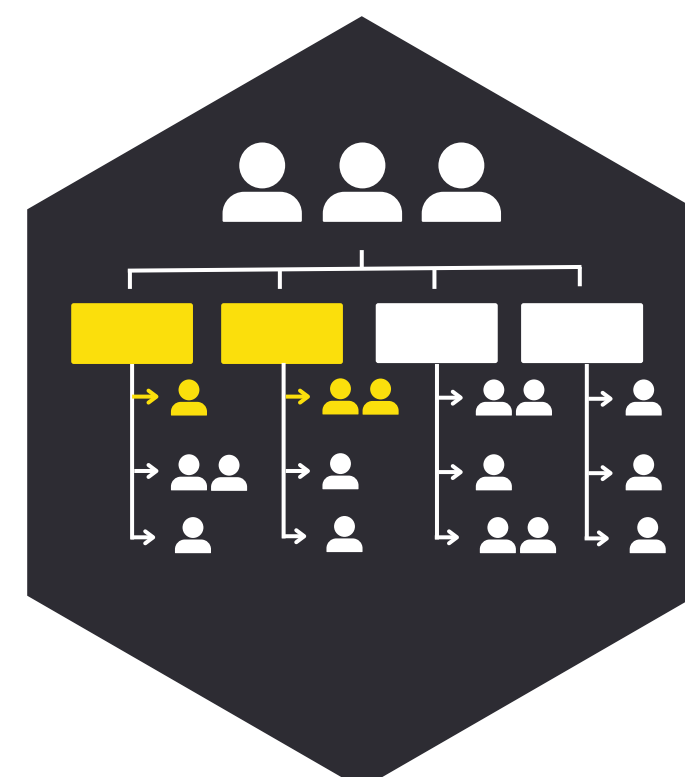
### Pilot Option 3: Strategic Initiative

This pilot option is focused on a specific strategic initiative that helps progress the annual OKRS established by executives. This is oftentimes a product launch or tactical campaign and spans cross-functionally across several departments.

OKRS are a great way to monitor progress towards a big goal and the benefit to this option is that it includes multiple functions across the organizations.

The drawback to this approach is that if the initiative's stakeholder group is very large it may be difficult to enable everyone on OKRs at the same time.

In addition, it may be a challenge to adequately train new users of the OKR methodology cross-functionally. Drawbacks aside, this is an excellent approach.



**Whichever pilot option you choose, it will help you discover best practices within your organisation and work out the kinks before involving the entire company.**



### 3. Tactical OKR Rollout Schedule

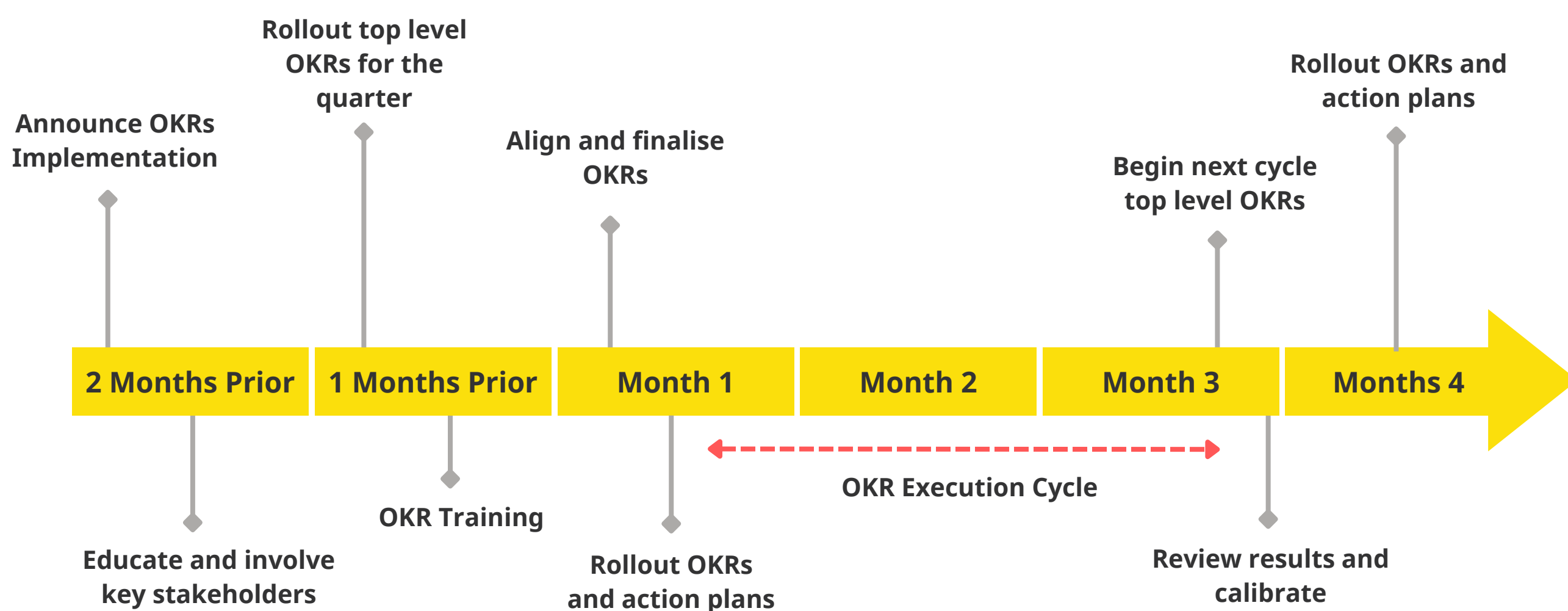
Establishing an operating rhythm associated with OKRs and communicating that to the organization is essential. The OKR Program Owner should share the timeline and expectations at each stage of the journey.

Shepherding the process (i.e. herding the cats) during the first OKRS cycle will be challenging, but after two or three cycles, the process will become a familiar routine.

**A communication strategy is essential for rolling out the OKR cycle.**

This is very important at the beginning of the change management process, and oftentimes OKRs fail when this isn't done well. This can be at the start of the fiscal year, or it can be started outside of the annual planning process so that it isn't encumbered by the annual cadence of other inefficient planning cycles.

With this approach, your annual planning process will be informed and improved through your experience with the OKR process. Below is a timeline of how you could approach your communication strategy, alongside details of who should be involved.





**Kick-off Activity:** Two months prior to the first OKR period, the **Executive Sponsor** will announce OKRs to the rest of the organisation. This activity takes place in a company-wide meeting and provides the message of why OKRS matter and how they'll propel the company to greater accomplishments.

**One Month Prior to Implementation:** After OKRs are officially kicked off, you'll want the **OKR Program Owner** to invite all stakeholders to participate in OKR training. This will cover the basics of the overall strategy, including company and team objectives, OKR crafting, and how to manage the OKR cycle.

**Two Weeks Prior to Implementation:** The **Executive Sponsor, OKR Program Manager, and Department Heads** will publish company-level OKRs. Over the next two weeks, the rest of the organisation will complete workshops to create their OKRs. Each team will work vertically and horizontally with adjacent teams to ensure alignment.

**Month 1 of the OKR Cycle:** With the Company and Department level OKRS in place, everyone will have the transparency and information they need to get going. A regular process for communicating progress should be in place, ideally weekly to bi-weekly. During the first month, adjustments and tuning may be necessary.

**Month 2 of the OKR Cycle:** About halfway through the OKR quarterly cycle, the **Department Heads** and **OKR Program Owner** will send a summary of department progress. It's important to meet with teams during this time to see how they're progressing and recognise the impact and communicate shout-outs.

**Month 3 of the OKR Cycle:** Towards the end of the OKR cycle, the **Executive Sponsor** and **OKR Program Owner** will provide an OKR summary of the quarter to the entire company, typically at an all-hands. This will also lead to retrospective guidance and detailed plans for calibrating OKRs for the upcoming quarter.

This is an opportunity to incorporate lessons learned and take those insights into future cycles. In conjunction with the retrospective, at the beginning of month 3, you'll need to begin planning for the next cycle to stay on track.

From here, you'll repeat the OKR Cycle for the next quarter.



Shepherding the process during the first OKRs cycle will be challenging, but after two or three cycles, the process will become a familiar routine.

At every success, challenge, or request, **communication is crucial.**



## 4. Enablement

Conducting training at various levels of the company before the start of the first OKR cycle will help to ensure that it succeeds. Here are examples of training you should conduct to make sure everyone is educated and on the same page.



**OKRs for Leaders:** This executive-focused training is intended to create consistency around OKR adoption. These smaller workshops will extend the OKR program vision and OKR writing with an overview of how leaders can be most effective with their teams.



**OKR Facilitator Workshops:** This "train the trainer" workshop is intended to spread domain knowledge about OKRs with others that will facilitate future training.

Taught by the OKR Program Owner or an external OKRs consultant, topics should include OKRs program implementation, an overview of the OKR Cycle, and best practices for OKR writing, scaling, change management, and facilitation.

Key attendees will include OKR champions, subject matter experts, trainers, and select department heads.



**OKR Writing Workshops:** Hosting several OKR writing workshops sprinkled throughout the first month will help to reinforce good OKR practices.

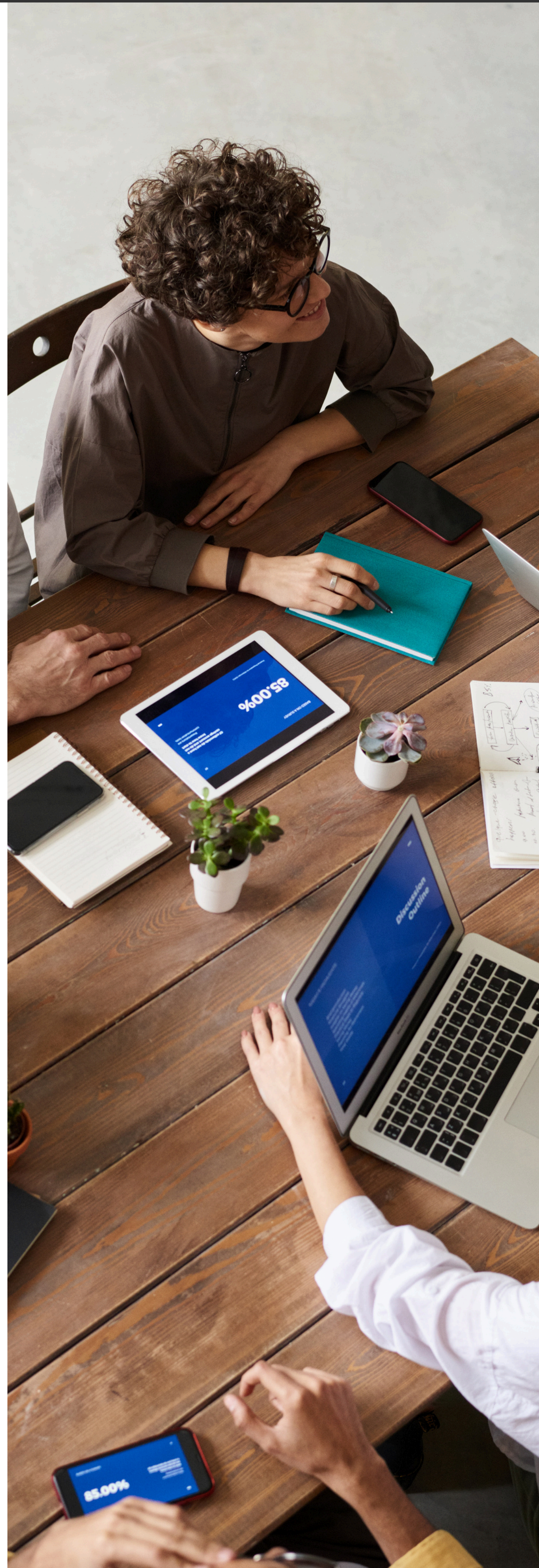
Open to all employees, these workshops should cover guidelines for writing quality OKRs and anti-patterns, as well as understanding best practices and common pitfalls.

These workshops should be followed by OKR practice drafting.

Here at **There Be Giants**, we connect team, company and personal objectives to measurable results.

Our team is committed to working with you to develop a robust and adaptable framework based on your organisation's needs, not one based on theories and management bestsellers.

Learn more about how our powerful and proven **OKR solutions** can help you reach and optimise all of your organisational goals.





## 5. Execute the OKR cycle

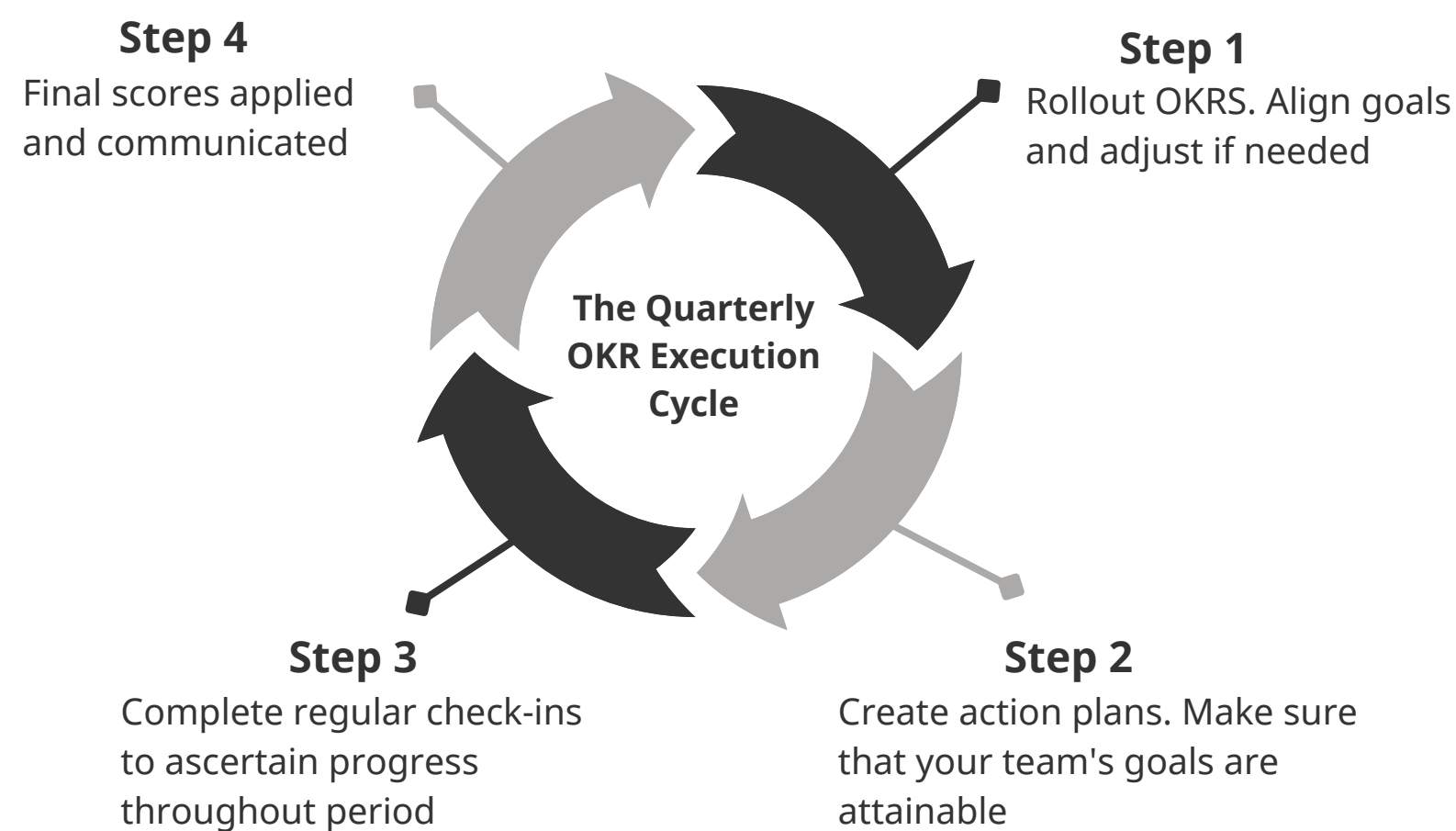
OKR cycles can vary for different organisations as everything should be tailored to meet the specific needs of a business. But in general, most will follow the same pattern. The OKR Cycle encompasses an ongoing discipline with four key steps.

**1. Rollout OKRS:** Communicate company OKRs, then departments and teams develop their own OKRs and share them with each other.

**2. Create Action Plans:** Once OKRs are created, it's time to develop action plans that provide details around how the team will achieve these OKRs.

**3. Regular Check-ins:** Throughout the quarter, employees measure and share their progress, checking in regularly with their own and adjacent teams.

**4. Score and Reflect:** At the end of the quarter, teams give their OKRs a final score and complete retrospectives on what they have accomplished.



Cycles typically are set up quarterly, with three months per cycle. This allows enough time for cycles to make a difference whilst keeping goals short-term.

However, smaller businesses that are just starting out with OKRs may want to trial cycles that last six to eight weeks.

We could go on about OKRs all day and our team is always on hand to help you streamline your OKR planning process. So, **if you want to discuss OKR cycles further**, contact a member of our team for a much-welcomed chat.

**Talk to us about your OKRs**



## 6. Roll out OKRs

OKRs are driven by teams. The work the teams do should, *either directly or indirectly*, push the company level goals towards completion.

For example, if the company goal is set around revenue, the product team should create something to sell, the sales team should sell the product, and the support team should prevent churn.

When rolling out OKRs, we want the team to come together to define what the OKRs will be. More often than not, OKRs are created by the manager and then handed to the teams to complete, which is a major anti-pattern.

**Creating OKRs through a collaborative process that incorporates and engages all team members will motivate everyone to work towards goal achievement.**

Once team goals are set, they should be shared publicly. This gives teams the option to revise their goals if the rest of the org is aligned towards other outcomes. Working with others across the organisation when crafting OKRs will make all the goals more meaningful, will connect individuals to the goals, and will increase overall alignment.

### Create Action Plans

Defining what the OKRs are is not the same as the action plan. Planning helps prepare for and anticipate obstacles and keep the team on track. **An effective action plan will boost productivity and drive focus.**

Your plan for achieving your Key Results, and therefore your Objectives, should include what initiatives you're going to take, what tasks need to be done, and what benchmarks need to be hit by when.

This should be tracked separately from your OKRS so that the process doesn't take attention away from the outcomes.

### Regular Check-ins

It's important to incorporate the entire OKR process into every team's daily routines. Throughout the quarter, all employees should regularly measure and share their progress. Developing this weekly routine will help **build accountability**.

During weekly status updates, teams can review progress, check confidence, identify blockers, and make adjustments.

### Score and Reflect

At the end of each OKR cycle, conducting a retrospective on the quarterly OKRS is essential in evaluating what worked and what didn't, and incorporating those learnings into future OKR cycles.

**OKRs are meant to be aspirational**, and not hitting all of your Key Results is a normal occurrence.

### Rollout OKRs Checklist

- 2 weeks before the start of the quarter, every team publishes their goals
- 1 week before the start of the quarter, teams collaborate and review each other's OKRs to make sure they are aligned and adjust goals if necessary
- At the start of the quarter, teams consolidate on the previous cycle and align for the new cycle. Then, teams publish and commit to their shared and reviewed OKRs

### Create Action Plans Checklist

- Action Plans are "Outputs", OKRS are "Outcomes"
- Identify the leads and contributors who are responsible for delivering each Key Result
- Establish a weekly check-in schedule to evaluate progress
- Link your Action Plan docs to your OKRs
- Schedule monthly reviews and quarterly retrospectives

### Regular Check-ins Checklist

- Discuss goals during weekly team meetings
- Ask for a confidence check to gauge whether the team's OKRS will be achieved
- Share changes since the last meeting
- Identify if there are any blockers that are impeding on team progress

### Score and Reflect Checklist

- The owner scores each KR based on how much was accomplished
- Discuss as a team what went well for each KR, as well as obstacles and blockers
- Identify what adjustments will be made for the next cycle



## 7. Quarterly Retrospective + Repeat






Before starting a new quarterly OKR cycle, it's important to reflect on the previous cycle and make necessary adjustments.

This is a great time to look at actual scores, determine where changes need to be made at the company level, and incorporate lessons learned into planning for the cycle ahead.

**No one gets OKRs right the first time** - and that's okay - focus on learning and improving. [Our blog is a great resource](#), and we're just a call away if you need some support.

Some OKRs will carry from one quarter to the next and just need to be calibrated, others will end and new ones will be created.

### Common Quarterly Questions Checklist

-  How did we score on our 1st Quarter OKRs?
-  What went well?
-  Where could we improve?
-  Have company-level OKRS changed?
-  Has anything changed with other teams that we share a dependency with?

### Repeat the OKR Cycle

Now you're ready to start the OKR cycle over again! Each time you go through the process, **OKRs will get easier and you'll become more efficient** as a company.

As you go through the next cycle, make sure to incorporate what you've learned. Often, you'll find that you'll want to have OKRs that are more aspirational in nature. This is especially true and the Company level.

Thematic Objectives and higher level Key Results at the Company level inspire the organisation and enable individual departments and teams to create goals that are relevant to their work, allowing for autonomy and ownership.

During the next cycle and the reflection process, it's often wise to involve a third party consultant who can come in with a fresh set of eyes.

It's a natural part of organisational dynamics to hold onto ideas, initiatives and goals that may not be relevant or as important as they once were.

[Learn more about OKR cycles](#)





## 8. Potential challenges

Implementing OKRS correctly and effectively into your organization is no easy feat, and you'll face some challenges along the way. At a broad level, we see OKR implementations fail for the following reasons:

**"Set and forget" OKRs:** This is the number one way implementations fail. **OKRs require a commitment** of time and effort and it's important to establish a cadence of regular checkpoints to examine progress.

**Lack of planning:** An executive delivers a mandate to implement OKRs, but teams don't take the time to understand the framework or to incorporate it into the organisation. These **OKRs often end up looking a lot like the SMART goals, KPIs, or project milestones** used in the past.

**Missing strategy:** **Teams lacking clarity and direction** deliver underwhelming results, to the frustration of everyone involved. When there isn't a clear strategy, OKR implementation tends to fail because it doesn't gain the confidence of the teams responsible for producing the OKRs.

**No accountability:** Teams are given OKRs to deliver but have no input in defining them. Ultimately, you want to **create a process where teams feel empowered** to create their OKRs and then challenge teams across the business to ensure they're focused on the right priorities at the right time. This process encourages creative thinking and informed risk-taking, all to push your business forward.

**Limited cross-functional communication:** OKRs are not visible or transparent and there is no collaboration across teams about their OKRs, so **teams are disjointed with what they are working toward**. This can often lead to last-minute scrambles and misalignment.

**Focus on deliverables, not outcomes:** Many teams tend to turn OKRs into a date-driven task list related to outputs, but ultimately, it won't ensure the desired outcome. **Knowing what outcomes you want to achieve** leads to the projects required to achieve them. Don't overspecify. A watertight plan at the start of the process will choke out creativity and innovation as new information becomes available down the line.

**Too many Objectives and/or Key Results:** It's easy to get caught up in everything you want to accomplish as an organisation, but remember: **OKRs are meant to be strategic and ambitious** goals, not to-do lists. Leaders can attempt to tackle way too much, leading to many more Objectives. Lack of prioritisation of the critical few priorities that drive breakthrough performance can lead to delays and slower execution.

**Cascading OKRs:** It's tempting to cascade OKRs down through the organisation. But if all your goals fit together into a pretty parent/child tree, teams almost by definition aren't thinking creatively, taking risks, or showing initiative. It hinders alignment and collective buy-in across the organisation.

**Goals should align** and be focused on delivering a common result, but forcing a level-by-level "hard link" of goals removes the autonomy that motivates teams.

**Not training or educating the organisation:** As part of gaining buy-in, training on OKRs as a methodology is helpful, providing background into the "whys and hows" OKRs will be implemented specifically in your company. **Educating and including everyone** on OKRs will be essential to its success within the organisation.

**Not using retrospectives to continuously improve:** Commonly, **teams don't review the previous quarter's OKR results** and just move ahead to the next quarter. This is a missed opportunity to dig into growth opportunities and take time to see all of the progress that has been made as a team. It's also an opportunity to adjust OKRs based on the current needs of the business.





## 9. OKR Software

Implementing the OKR methodology using ad-hoc tools like spreadsheets or wiki pages (*or worse, with no tools at all!*) is the first sign that the implementation will struggle.

**Spreadsheets don't scale;** beyond a group of collaborators, they're simply another way for strategies, goals, and progress to disappear. They also prevent teams from deeply aligning their goals, missing one of the key organisational benefits of OKRS alignment.

Simply put, managing OKRs in spreadsheets (or other ad-hoc tools) doesn't work. Managing OKRs through a dedicated software platform improves efficiency, collaboration, and insight. An ideal OKR tool will build and reinforce great practices while **fitting in seamlessly with the way your team already works**.

The right software supports great practices and cross-functional collaboration—crucial to the success of an OKR implementation at scale.








### "What software should we use for OKRs?"

We're up to speed on the best tools when it comes to OKR software. An OKR software is a powerful goal-alignment platform that provides huge amounts of actionable and insightful data once the most impactful and alignment-focused OKRs are in place.

When implemented with the right foundation, it connects teams to your organisation's strategic priorities, unites them around your mission and purpose, and drives meaningful business results.

#### Together, we will:

-  Determine business outcomes and define success
-  Discuss best practices of your OKR model setting
-  Configure system settings and integrations
-  Carry out scaled onboarding
-  Launch and roll out a dedicated OKR software to your employees

**Talk to us about OKR software**





## 10. OKR Consultants

While OKRs build stronger alignment and clarity across an entire organisation, they don't manage themselves.

A common pitfall is when a leader picks up a copy of "*Measure What Matters*" by John Doerr and then attempts to "do OKRs." **It's important to remember that every business is different** and an OKR consultant understands that they take into account every single factor that makes your business unique.




For teams new to OKRs, **expert consultants can help make sure you're setting effective goals**. It's often better to have a trusted advisor from outside the organisation to impartially guide, train, enable, and tune your process. OKR consultants can provide objective guidance on change management and getting your organization completely bought into the process.

When you work with a consultant, OKRs are tailor-made to your organisation. Understanding the ins and outs of what you're trying to achieve and helping you to foster a culture where OKRs are accepted and can prosper.

**A consultant can help to blend your culture with skills, technology and practice** so you get the performance and results you want.

The **benefits of working with OKR consultants** can promote long-term business growth, boost sales and increase profit. Once you've got to grips with the OKR process, you'll have everything you need to keep the momentum going.

OKR consultants essentially help you embed OKRs within your organisation. Here at **There Be Giants**, we want you to become awesome at OKRs. That's why you can expect a bit of tough love, which means:

-  We'll both guide and challenge you to make sure you learn and embed OKR skills and practice
-  While we've decoded OKRs for you and our methodology gives you a starting point, steps to follow and shows you what best practice looks like, we won't always hand you the answers – we will sometimes coach you so you get there yourself
-  We'll help you to build up an internal resource of OKR knowledge and skills which will help sustain OKRs after we've left

We get the human side of business, but not at the expense of actually getting the business done

Soft and fluffy we ain't.

The OKR framework is a powerful and flexible way to align your business strategy and help employees to work with purpose.

Many companies have achieved amazing results with OKRs, but less attention is paid to the vastly better working environment an effective OKR implementation will create.

If everyone knows how their work adds value to the organisation, motivation goes up. Teams that are engaged and work with purpose work better!



# A proven process for successful OKRs



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Fully embracing OKRs can be transformative, but comes with some challenges.

You might become discouraged with your initial attempt because it doesn't go according to plan, and the transformation doesn't occur overnight.

**So, how do you make sure that you don't fall at the first hurdle?**

While OKRs are great for providing the “*what*”, you also need to get clear on your values too as they go straight to the heart of “*how*” you want your people to perform.

Implementing the right OKRs ensure that your business maintains momentum while achieving ambitious goals.

The great thing is, that by using our approach to OKRs both your people and your business will see growth - it's a genuine win-win.

**If you are thinking of implementing OKRs and want to speak with an expert, then click the button below to schedule a call.**

**Find a time that works for you**

**Are you ready to join other leading brands to harness the power of OKRs?**

We're a leading global consultancy focused on supporting organisations to develop their own performance centres of excellence.

We've worked with over 200 clients in a variety of sectors globally, using our propriety OKR methodology and performance framework to unlock innovation, alignment and ambition.



Organisations we've supported to implement OKRs...

