

Checklist for OKRs

Is your organization ready for OKRs?

- Is your OKR program backed by leadership / management / CEO?
- Have you defined your mission and vision?
- Are you and your team(s) willing to commit the time and effort to your OKR program?
- Do you have an OKR champion / practitioner?
- Are you committed to transparency and accountability across teams / company?

Checklist for OKRs

Checklist for drafting OKRs

Are your Objective:

- Achievable
- Actionable
- Qualitative
- Ambitious
- Aligned with company mission and vision
- Time-bound, (ideally a quarterly basis)
- There are only 1-5 Objectives

Are your Key Results:

- getting closer to the objective
- Realistically targeted
- Measurable
- Assigned a lead (someone is responsible)
- Not a task or to-do list

Download Checklist: <https://okrinstitute.org/okr-checklist>
or in the OKR e-learning access

Checklist for OKRs

Checklist Best Practise

- You published an OKR Playbook (Guideline for Your Organization how to use OKRs)
- Your organization is educated on OKRs
- Too many OKRs? Ideally 1-5 Objectives and 3-5 Key Results per objective (also can start only with 1 OKR first to build up your OKR muscle)
- OKRs aren't too easy or unrealistic
- OKRs are shared publicly (sensitive OKRs can be hidden)
- OKRs are focused on outcomes, not tasks
- Our OKRs process allows for flexibility and change (vs. seeking perfection)
- Review what went well and what didn't (at the end of the quarter)
- Celebrate your wins / successes

Checklist for OKRs

Checklist for OKR Practitioner

- Our entire company participates
- We facilitated OKR training across the company
- We set OKRs on a quarterly basis
- Every team has healthy OKRs (1-5 Objectives, each with 3-5 KR)s)
- Everyone updates progress minimum weekly
- Our OKRs process allows for flexibility and change (vs. seeking perfection)

Checklist for OKRs

Checklist for Enterprise Context

Establish Enterprise Context

- Announce the process. Describe why you implement now this OKR, describe the problems a formal OKR process will solve, or how they will improve the company's performance.
- Set company goals for the quarter. Management (and the CEO) should be responsible for defining and choosing these goals.
- Share goals with the company. 2-weeks before the start of the quarter, publish the company's OKRs in a highly-visible and transparent location, best via OKR software

Checklist for OKRs

Checklist to Co-create

Co-create and Localize OKRs

- Each team publishes their goals ~2 weeks before the start of the quarter.
- In the week preceding the quarter, teams collaborate and review each other's OKRs and adjust accordingly
- Teams publish and commit to their shared and reviewed OKRs before the start of the quarter.

Checklist for OKRs

Checklist for Action Plan

Develop Action Plans

- Identify the leads and contributors who are responsible (leads) for delivering each KR.
- Establish a regular check-in schedule to evaluate progress, ideally on a weekly cadence. (via OKR software emails can be sent on a weekly base)
- Schedule bi-weekly or monthly reviews and quarterly retrospectives.

Checklist for OKRs

Checklist for Check-ins and Scoring

Check-ins and Scoring

- Set aside time each week (during team meetings if possible) to discuss objectives. Keep these meetings short and crisp - they shouldn't turn into a long status update.
 - Every other week the team should do a confidence check-in to discuss progress and whether or not the team's OKRs will be achieved. (can be updated via the OKR software)
- Ask hard questions:
- What changed in the Key Results since the last meeting / check-in?
 - What is the confidence level that we can deliver our key results?
 - What is slowing us down or jeopardizing our progress as a team?
 - How can we increase confidence or remove hurdles?

Cecklist for OKRs



Checklist for Reviews

Quarterly Reviews

- Have the lead (owner) of each KR scored the result based on how much was accomplished
- Discuss as a team what went well for each KR, as well as obstacles and blockers. Common questions to help guide the review process include: What came up unexpectedly? Did priorities shift and impact OKRs? How did you do on each KR? What worked, what didn't, and why? What adjustments will we make for the next cycle?
- Talk through what your team should start doing for goals, stop doing, and continue doing. Use this to create an action plan moving forward.
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- impact OKRs? How did you do on each KR? What worked, what didn't, and why? What adjustments will we make for the next cycle?