OKR end-to-end Process

Okay to get things started. Let's talk about the OKR end-to-end process. It's important that we understand the big picture before we start jumping into the tools and looking at Smartsheet and how we going to run it in a Smartsheet system. So, this is just a process summary. We always describe a process in five steps using this tool.

We set up the objectives for the quarter. We communicate with the OKRs across the organization. We run weekly check-ins, we review the status and progress by ex-co at a consolidated level, not in detail, step three is where the detail happens and then we close out the quarter and identify new OKRs for the new quarter.

So, the key roles here, and I want to point out that first role, the strategy officer, strategy exec, or that can be a project manager change manager, if you've got a business analyst, you'd want to give them the skills of project management so that they understand the context of what is being spoken about, but they've also got good admin and good project skills. So, we are saying that person is going to take accountability to make this process run. They're not obviously taking accountability for the success of the business, but they're running this process and they're accountable to make this process run smoothly.

So ex-co are going to be responsible. They're going to bring in OKR owners to be co-responsible and all staff are going to be either contributing or Bing informed so the next step is once you set up your objectives for the quarters, communicate them, and the CEO and possibly some EXCOM members would be contributing critical contributors to the staff. On a weekly basis, you want to be running check-ins and a lot of the next lessons will be what does look like again, it's the strategy officer together with OKR owners that will be driving that staff will be pulled in to do certain parts of the key results of the next task. Then you want to have your review meeting.

Again, if you can hold it weekly with ex-co doesn't have to be a long meeting, but again, the strategy officer is accountable and responsible ex-co or they're also contributing OKR owners are contributing and informed, and then you close out the quarter and identify new OKRs for the new quarter again pretty much

the same roles, so what we're going to be looking at first the key outputs is company-wide OKR, team OKRs, personal OKRs the inputs into that would be the business strategy, the goals with targets and of course smart sheet because that's what we're talking about here. And then down in the KPI section, when we say KPIs, we also referring to metrics that you're going to plot on a dashboard and be able to monitor this process as it goes through its steps, but we want to know how many key results each person has an average, how many objectives they are, how many key results.

The percentage of OKR is perhaps defined by week one of the new quarter. That's quite a key metric, and like I said, these KPIs are more process metrics, in step two what we want out of this is visibility to the OKR personal check-in reports configured. Smartsheet workflow-enabled ready to go. In the second step coming out of run weekly check-ins you want your Smartsheet updated, and this is where we're going to introduce a dashboard to say, let's put a dashboard on top of this process and understand each status each OKR by its status.

We want to understand the progress of the OKR the behind items, the at-risk, and there's a whole lot of metrics there how many stuff pre-checked in, the percentage you pre-checked in, number of key results not checked in very detailed things to see if our process is running smoothly, and then all that information that you get from the weekly check-in will become input into the EXCOM meeting and coming out that, you're going to have a list of action items, and finally, when you close up the quarter, I'm just going to point straight at those key KPIs, number of objectives achieved, percentage of objectives achieved, number of key results, achieved, percentage, how many OKRs are you carrying over to the next quarter and how quickly days to close out the quarter, that would be a key metric because you want to make their transition very quickly.

So just talking about the quarterly timeline. it's a little bit of a repeat the slide, but basically, what we're showing here two weeks before the quarter starts, you want to get set up with the key players, get your OKRs aligned departmental OKR with team OKRs you can call them that as well, get those aligned. You then want to in the first two weeks, the quarter, ideally the first week of the quarter, you want to start your OKRs, activate them, they're all ready to go, you happy with the targets, you happy with the definitions, you happy with the wording and who's responsible, that's what we mean by the activate.

Video Transcript

Week three to 12, you're going to be checking in week after week, don't lose that rhythm, keep it going, and then right at the end of the quarter, you'll creep into the first week of the new quarter, that you want to roll over very smoothly so the OKR owners, ex-co kind ties back to the first step of setup, but you're going to report back and sign off the OKRs from the first quarter and then go into your second quarter. So that's the overview and we're going to go into more detail in the next lessons.