Smartsheet Weekly Check in Process

Alright in this video, we're going to talk about weekly check-ins. So firstly, why would we do weekly check-ins? Well, in the OKR system, you want to identify issues in your weekly check-ins you want to propose solutions, you don't want to solve the problems in the meetings that takes too long, but what you might want to do is help, the owner of another OKR just give them some pointers and propose solutions, you want to unify the team remember, it's like a stand-up, it's a very short meeting, want to get everyone together, do a little bit of an Oral moment and just unify the team, you want to make sure that you connecting the work that you're doing to the outcomes you want to strengthen that ownership and accountability for the OKR you set you to want to celebrate incremental wins, so as certain key results, throughout the quarter, let's celebrate and celebrate those incremental wins, and you want to keep my momentum going the whole time.

This is quite critical, just checking in every week creates that momentum that we need. o we are back to a process flow. We're going to run weekly check-ins and the first step is that the system needs to reset for the week. So, we have some automations in Smartsheet and we'll tell you about it as we go. Secondly, we want to complete the OKR pre-check in requests we want to follow up on late or inconsistent updates, and we want to hold team meetings to communicate status and progress, and lastly, we want to prepare for the ex-co meeting, which is going to be in the week as well.

So, the first step, again, your strategy office in the system in Smartsheet system will set the system up to handle that automation. This is an important step, what we want people to do is to pre-check-in, so in other words, update all the numbers, the statuses, the tasks, again, the strategy officer is going to be, the drumbeat that keeps it going, but everybody is involved here the strategy office will then follow up, if people haven't done what they were supposed to do, this person should follow up.

And then we're going to hold team meetings, again strategy officer is going to make sure that meeting happens, but the OKR owners or the people who are actually going to be leading the discussion, the content of the discussion and everybody's contributing, and then the strategy officer goes offline to prepare for ex-co and the OKR owners, they need to get their preparations done, for ex-co. So on a Sunday night, or we normally run Monday to Friday, but, on a Sunday night or the first day of the week, the system will start, doing this weekly workflow, and messages will get sent out, maybe want to just make sure all the messages are getting out we will measure that, the next step is, the inputs are really those messages have gone out, complete this in time for the team meeting, so we want each person to complete it, there'll be system reports and personal records that you need to complete your check-ins, so those might be in different systems, CRM systems, ERP systems, your emails, project, information, you're going to need that to populate your progress on your OKRs and at the end of that process, the smart sheet is updated and we'll know how many staff did not check-in or checked in and what percentages we have on each.

Then, the strategy officer will check what is in the system, they'll run some exception reports. They want to produce a dashboard with all the updated figures and numbers, and they will probably have metrics like the number of follow-ups or the number of incomplete items, it's really making sure this process is working properly then you hold your team meetings, and maybe if it's Friday if you're running Monday to Friday, it says Friday starts at 10:00 AM, you've got a list of issues, you've got a list of risk you've got a list of KRs achieved, you'll go straight to the dashboard and look at your numbers and get each person then to just give a quick couple of minutes update and you will then have some stats around what was the quality score of the tasks, how many key results not checked in the percentage completion of activities from the prior week? We want to know at our team meetings if we're getting through the work or not doing what we need to do, and then in preparation for ex-co, you're going to just take the dashboard, get your list of issues and risks as inputs, and we haven't got a measurement date.

This is what's happening at a weekly level accepting with all different teams because your OKR is maybe broken up into finance, HR ops, supply chain, et cetera. And, this is just on the ground, making sure that, work gets done. So, the next, little step that we have is, and I'll take you through one by one or what it would look like. So, your strategy officer will send out an email to say what you need to do is open that email and click on the link, and it will say, please use your URL below to do your OKR weekly chicken, click on that link, and I'll take you through the next step.

So, you will then arrive at a page that looks like a spreadsheet, and it's got the initiative that the objective rolls up into so the initiative is like a one-year sort of time frame optimize inventory in this example is rolling up into business excellence and optimizing inventory phase two is also rolling up revenue growth at the bottom launch, the around digital product. That's rolling up into revenue growth. So, what you want to do as the first step is to change the status from check-in, so by default, the status will be checking required. what we want people to do is go to each one of those yellow check-ins required and update it with something like achieved or on track for the due date at risk behind, you can see the status as they all go into the system a little bit later in the next lesson. That's the first step. And then the actual column, if you chasing down, let's look at row number four, they achieved 80% acceptance of categories from the executive. So, there's 80%. Maybe we've only achieved 50% next week we might get 55, 60 and so forth. That's what we want to do, update the status and the actual, and then we'll move on to add next step. So, the next steps, they call it next activity in the system, and here, you just want to say what you're going to be doing for the next week. Just to be transparent, just to have an action plan. How do you move this key result forward for the next week? that's all that we try to do, in this step.

The next item is an attach optional, by the way, let me just go back there, the column next to it. Last activity, whatever you say this week, next week will be last activity. So, the system will roll whatever you say this week into last activity for next week. So, you can see what you said last week and what you need to do this week. In many cases, things will roll over for two weeks, you might just want to copy and paste exactly the same last activity you'll copy and paste it into next activity, cause you rolling that over for the week, then on the feedback, what we find often is people want to just give feedback. It's not, it wasn't the next activity, but there's just some extra commentary they want to put in. You can put it in the feedback field and then it's visible, or if it's in a lengthy document, it's in a spreadsheet or PDF just attach it to the row and it will stay there, and if you attach a new version of it, it has version control in it. And then finally, what you want to do is safe, remember, this is a cloud app. If you don't save, you going to lose your work. So that's the check-in process. Very simple it's meant to be simple; you're going to get workflows just put in the key information. I'll go into the system in a couple of lessons. And just show you what it looks like practically.