Smartsheet Check-in

So, have the email and have clicked on it. You will arrive at a sheet, it looks like this in this situation, my name's Carl. It's Carl's OKR weekly personal check-in version one, and you will notice there's an action down here. The OKRs are grouped into initiatives, so if you want to collapse and just if you've got lots of them on the page, you shouldn't have too many, but let's say you do.

You might be looking at somebody else's some people who are reporting to you. you can just expand and contract these brown lines of objectives. They change colour every quarter. So, as we go through the quarters, they'll become purple and pink and, some other colours. But that band across just tells us that we are looking at an objective.

These are the key results that we've got and you'll notice I've already filled out some of these, but as you come into the sheet each week, it will say, check-in required. What is really neither, let's say you're on track for all of them. You could just simply drag it down. Save there. The colour's not going to change until you refresh using the refresh button.

So, if I had to refresh that it'll change to green. So those are the statuses. This one might be on track. Maybe we are starting to get behind on, on this one. We could be at risk on another one at risk means that there's a good chance. You're not going to make the key result behind just recognizing that you've got a bit of work to do some catching up to do, but for the most part, you think that you're going to make it to the end of the quarter.

Once you've delivered your key results, you can see over here, this one's achieved. You just mark it as achieved. And then when you come into a sheet, it won't say check and required. In fact, it's not going to say check-in required on anything that is achieved at risk behind or dependent. Those will be as they were last week.

And what we want you to do is just go through those again and say, oh, they're really at risk behind and dependent. I'll come back to the dependency one in a month let's go to this. So, you've done your status. There are a couple of other statuses. If an item is dependent, in other words, you can't actually do anything with this key result until the items above it, are resolved. You might be postponing this for quarter two. You might have just said, this is bad chaos. We need to cancel. At

the end of the quarter, you will come in and say whether you achieved or did not achieve. And then while you build up your OKRs in the setup phase, you might have it as a draft, but those are the key statuses.

And then basically the target will be set and it'll be locked. You won't be able to change a target. But we would want you to come here and upgrade these from last week. Let's say it's 0.6, five this one let's say 60. And for each one of these, I'm not going to do it in the video, but you might want to just put what your next activity is, so that it's all visible.

You've achieved 65 of the one. And you're going to schedule a design meeting. That's all you're going to do. That's the same as last week. And in fact, if you can see one of last week's activities, you just want to use it the same for this week. In other words, you want to use the same activity for the week, just copy and paste it.

There's no problem. And then you can put an optional feedback note on the feedback column. If you want a document, you can just simply click on the upload a file or point it to one of your Drop boxes or OneDrive. I'm just going to attach your file upload one quickly. And I'm just going to, I'll just do this roadmap.

If there's already a file called roadmap, PPTX it will ask you if you want to create another version of it in this case. I don't really, so if I'm, and what I can also do is I can add comments over here. I can say a design meeting, PowerPoint slide needs to be sourced. Okay. And you can obviously fix your spelling on that.

And then you can just add that as a comment and you can build a conversation over here. This is quite nice. So, the next person can come in and respond like any other social media. And that's quite a nice way to build up conversations. But if you want to have a look at this item here, you can just click on it and then download it or open it up.

And that's simple enough. So that's the personal check-in like we said, when you finish, you'll want to save it. And that's it. You can just close this and next week you'll get an email again. That will alert you. You're going to come here. Actually before, you maybe exit, you might want to just refresh to, just to check that where you are just don't get bogged down by the colours of this progress.

All this progress is doing is saying in a 90-day window, you've got 90 days. If you've used 30 of those days, you need to be 33 per cent ahead of the time used. However, there are situations where the milestone is only delivered on the last day of the quarter. That's going to stay red for the whole quarter.

On the last day, as you hit that milestone, it's going to change to green. So, we've kept it deliberately simple. If you really need to download it into Excel, you can always just export and there it'll come into Excel. And it will also have all the comments that are attached to these rows will be on a separate sheet over there.

There they are. But you want to stay out of Excel for as long as possible. You want to stay in Smartsheet because the date is live, but if you need it in an Excel spreadsheet, you want to send it out to someone that's no problem. Just download that. Other than that, you can have a look at Smartsheet, some of the other functionality that we have in Smartsheet, but that's all you need to update your OKRs

Smartsheet Check-in