



WEBINAR

# How OKRs Help Teams Be More Successful and Drive Business Results



**Carolina Mantzalos,**  
Lattice

# Welcome!

- Thank you for joining us!
- Please use the Q&A tool to ask your questions
- This session is recorded and you'll receive a link via email
- We'll be asking poll questions throughout
- Share your thoughts and experiences in the chat function
- Use chat or 'raise a hand' if you have technical problem



# Today's Agenda

- 01 Why OKRs are an ideal goal-setting tool
- 02 How to write effective OKRs
- 03 Best practices for implementing OKRs
- 04 How to manage goal tracking
- 05 Q&A



# Speaker



**Carolina Mantzalos**  
Customer Success Manager, Lattice



# Why OKRs are an ideal goal-setting tool



POLL

Where are you at in your  
OKR journey?



# What is goal setting?

“The end toward which effort is directed.”  
(Dictionary definition by Merriam-Webster)

“Desired states that people seek to obtain, maintain or avoid.” (Psychology Today definition)

“Goals move us forward in life; they give oxygen to our dreams.” (Elon Musk)

Goal-setting theory is an employee-engagement tactic that involves setting specific and measurable goals to improve productivity.

- Edwin Locke



# Goals help manage teams in 5 core ways





# The history of OKRs

- Introduced by Andy Grove @ Intel in 1970's, later popularised by Google
- Structure for writing goals
- Core differentiator = descriptive of the process & philosophy



Andy Grove



**"OKRs have helped lead us to 10x growth, many times over. They've helped make our crazily bold mission of "organizing the world's information" perhaps even achievable. They've kept me and the rest of the company on time and on track when it mattered the most."**



Larry Page, CEO of Alphabet and co-founder of Google.



# How to write effective OKRs



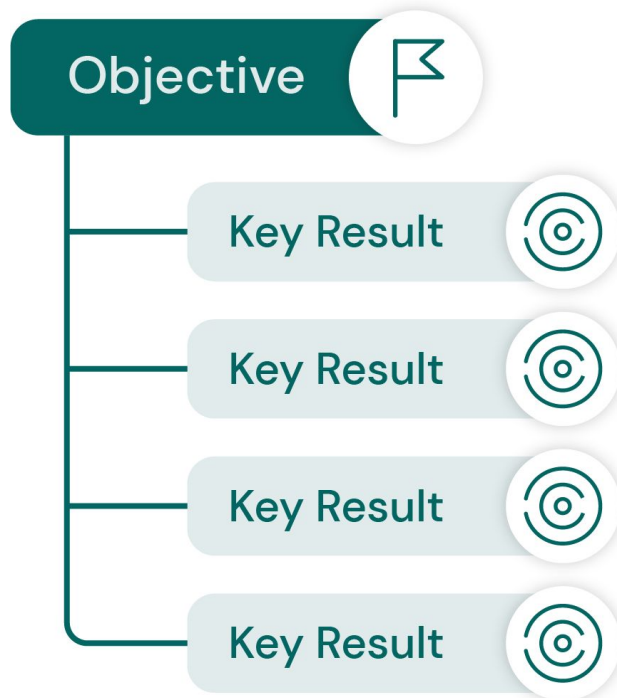
# Structure of an OKR

## Objective:

Where do I want to go?

## Key Result:

How will I get there?



# Example Objective

Support the sales team

- Does this represent **change** and improvement? **NO**
- Is this of high value or **impact**?  
**NO**



# Example Objective

**Increase revenue potential by  
reaching new markets**

- Does this represent **change** and improvement? **YES**
- Is this of high value or **impact**? **YES**



# Example Key Result

Launch marketing campaign

- Is this measurable with a **number**? NO
- Does this **define done**? NO



# Example Key Result

**Generate 200 MQLs from “New Year’s” Campaign by January 20th**

- Is this measurable with a **number**? YES
- Does this **define done**? YES





# Best practices for implementing OKRs



# Alignment of OKRs across organisational levels



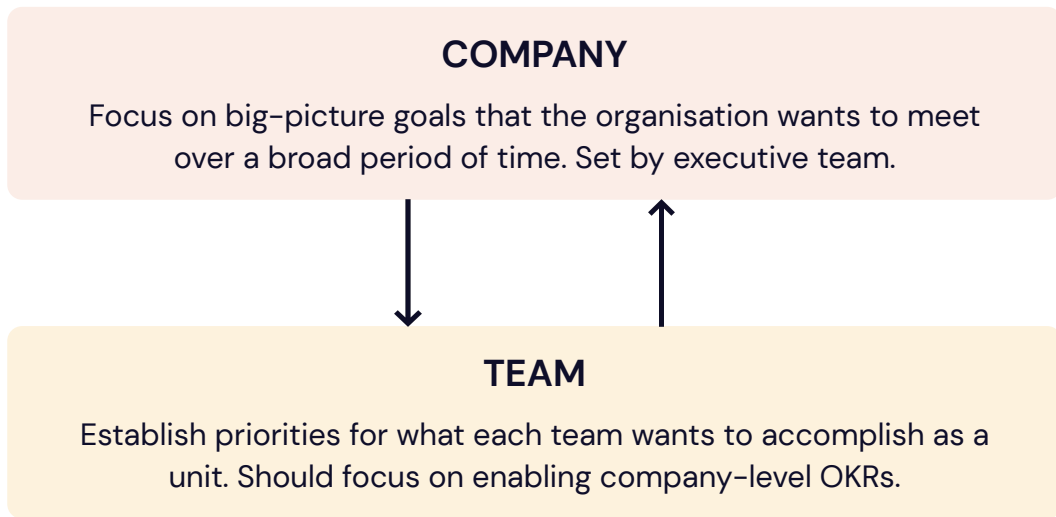
# Alignment of OKRs across organisational levels

## COMPANY

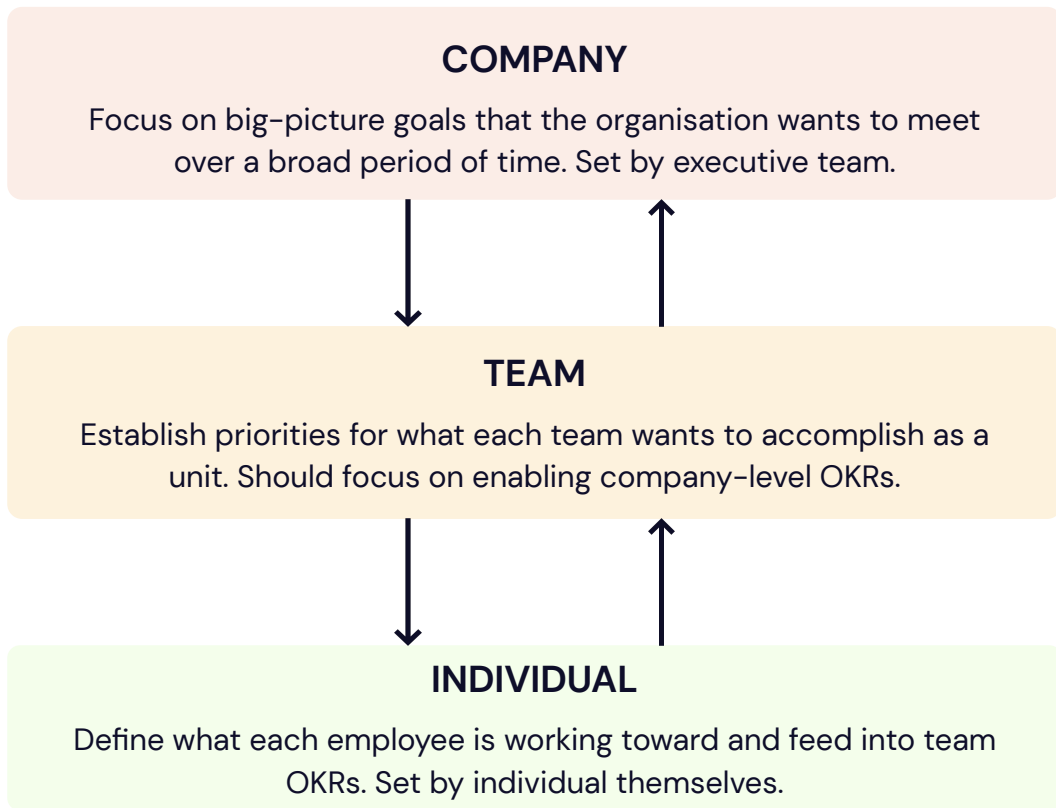
Focus on big-picture goals that the organisation wants to meet over a broad period of time. Set by executive team.



# Alignment of OKRs across organisational levels



# Alignment of OKRs across organisational levels



Members

Goals

Not updated

0



OBJECTIVE - PRIVATE



**Grow globally by increasing international ARR from 19% to 22.5%; and increasing New Customer Bookings in Europe from 8% of total to 15%**



+3



OBJECTIVE



**Increase New Customer Bookings in Europe from 8% of total to 15%**



+3



OBJECTIVE



**Build a strong analytics team**



+3



OBJECTIVE - PRIVATE

**INTERNATIONAL: Grow Lattice from 19% to 22.5%; and increase New Customer Bookings in Europe from 8% of total to 15%**

Last update: Sep 29



OBJECTIVE - PRIVATE

**INTERNATIONAL: Grow Lattice globally by increasing international ARR from 19% to 22.5%; and increasing New Customer Bookings in Europe from 8% of total to 15%**

LG



Things are moving and we're testing to see the modal with multiple key results.

# Conditions for Success

01

## Leadership buy-in

Without an executive sponsor, don't try

02

## Transparency and Trust

You've got to jump in with both feet

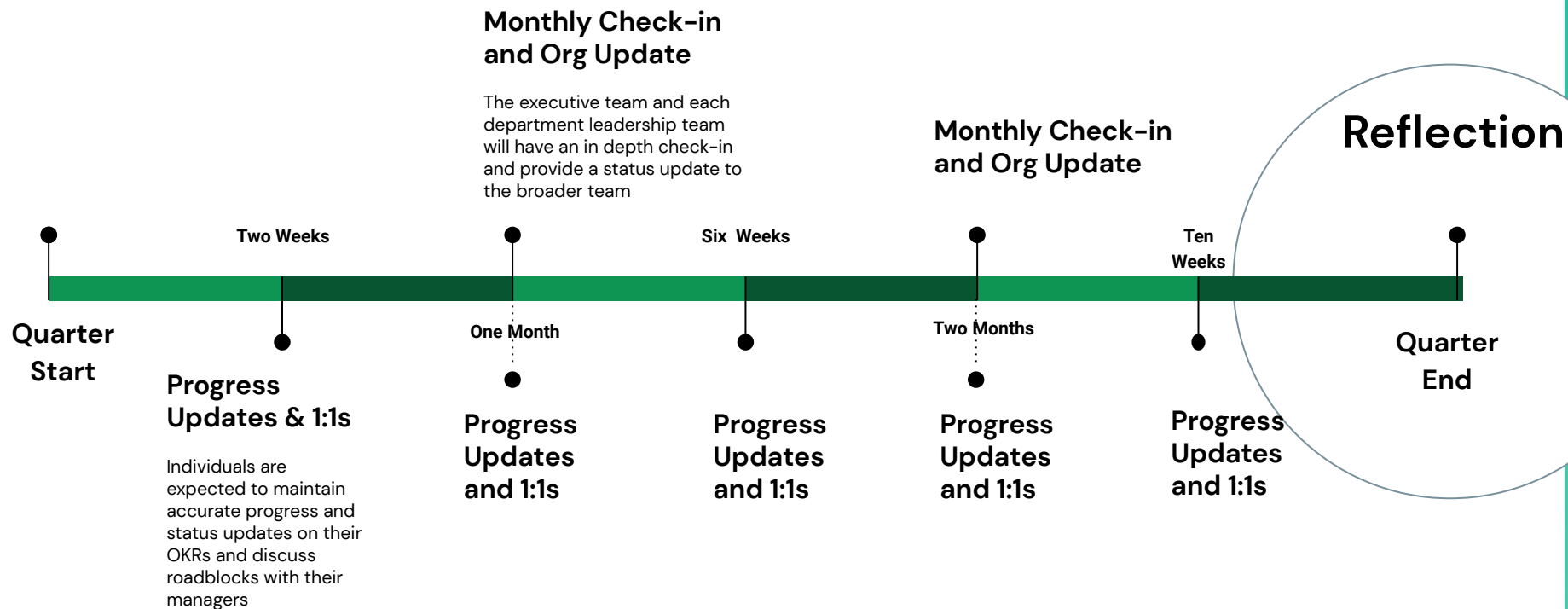
03

## Resourcing and Governance

Do you have champions who will own this over time



# Activation Timeline





# Activation tips from the trenches

01

## **Give yourself time to get it right**

Expect maybe 3+ quarters to get the results you want

02

## **Start simple**

Gradual ramps are great for ensuring buy-in and adoption

03

## **Be open and clear with communication**

Plans and timelines should be widely shared



# How to manage goal tracking



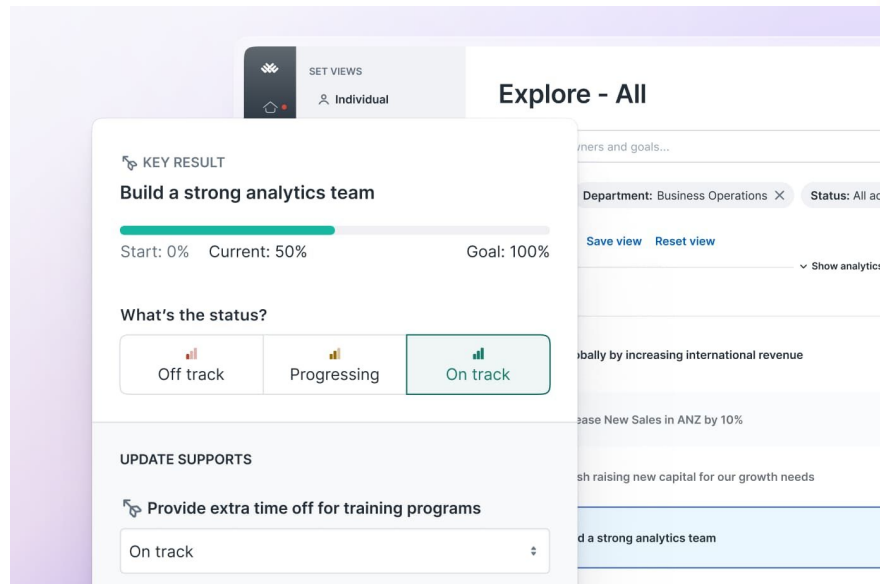
POLL

**Which of the following do you include in your employee performance review?**



# Evaluating Progress

OKRs should be **evaluated frequently** and with **consideration for the nature** of your goals & business



# Recognition & reward

Ongoing recognition for the **effort and persistence** that goes in is important for sustaining motivation



Lattice APP



Diana Glad

**Diana Glad received public praise from Dylan Choi!**

I'm constantly impressed by all the resources you're creating and revamping for the CS team. This most recent one is a game changer for Business Reviews, and it's so pretty and easy to reproduce!

**Values:** Chop Wood, Carry Water | Ship, Shipmate, Self



12



10



8



7



7



# Key Takeaways

1. Goals help teams across the organisation find focus, get aligned, and stay motivated
2. OKRs are a great framework to involve everyone in a top down and bottoms up approach that will facilitate achieving shared business success
3. OKRs should be re-visited quarterly and evaluated frequently
4. Effort and success should be celebrated to maintain engagement and motivation



# Q&A



# Thank you!

01

## The COO's Guide to OKRs

[Lattice Playbook](#)

02

## Resources For Humans

[Articles, Webinars and ebooks from Lattice](#)

03

## What Matters

[Content from the team that brought you  
Measure What Matters](#)

04

## OKR Champ Camp

Lattice Customers Only

Ask your Customer Success Manager!

