

# How to Set Meaningful and Effective OKRs

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Goal-setting doesn't have to be complicated; it just needs to be measurable. Without a framework for how to achieve your goals, how will you know whether progress has been made? Whether you're new to using goals and OKRs, or in search of inspiration for reinventing your approach, you can use this guide as a starting point.

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1. **Reimagine:** Think differently about how your company challenges itself to grow.
2. **Redesign:** Learn what Os and KRAs are, and what they're not.
3. **Reinforce:** Align core elements in the goal/OKR cycle with your priorities.
4. **Practice:** Apply what you learned to your organisation's needs.

# Step 1: Reimagine Your Goals with OKRs

Every organisation sets business goals for their teams, but successful organisations use OKRs to shape the approach for how to achieve them. Pairing your organisation's goals with objectives and key results (OKRs) can help you approach growth with clarity and purpose, and explain that purpose to employees across the company.

**Objectives and Key Results (OKRs):** A framework for organisational goal-setting that stresses simplicity, frequency and transparency.

Every OKR pairing should be directly tied to key outcomes that are important to your business. These are some of the most common:

- **Alignment:** Get everyone on the same page with what teams are doing, why they're doing it, and how their work contributes to the organisation's success.
- **Prioritisation:** Bridge the gap between broader goals and the daily work necessary to achieve them. This empowers employees to prioritise day-to-day tasks and long-term initiatives.
- **Transparency:** Foster transparent company cultures by informing everyone of impact and priorities for teams and individuals across the organisation, from the CEO down to the interns.
- **Accountability:** Create accountability for performance expectations and remove confusion as to who's responsible for meeting specific goals.
- **Empowerment:** Show employees the impact of their work and give them a sense of ownership over their progress.

# Activity 1

Using the definitions above, rate each term on a scale of 1 to 5 based on how well your organisation is already succeeding in meeting these outcomes:

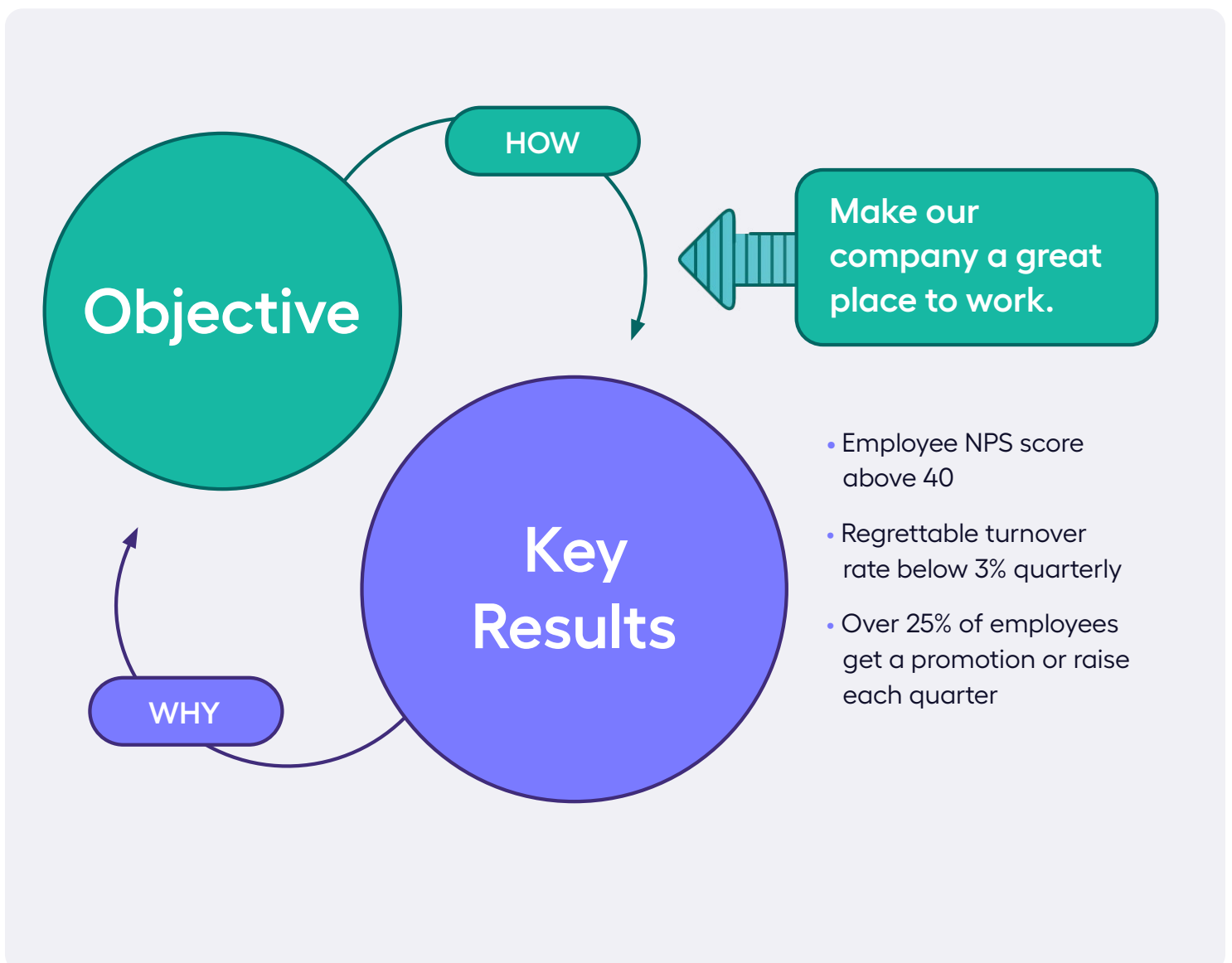
<b>Alignment:</b>	1	2	3	4	5
<b>Prioritisation:</b>	1	2	3	4	5
<b>Transparency:</b>	1	2	3	4	5
<b>Accountability:</b>	1	2	3	4	5
<b>Empowerment:</b>	1	2	3	4	5

Identify one to two terms that need the most improvement. How would focusing on them help your organisation?

## Step 2: Redesigning OKRs to Focus on Impact

OKRs are made of two components, but the power lies in combining them into a single goal. The relationship between goals and measurement is self-reinforcing. Each component answers the other's question:

- **Objectives:** the why, creates meaning
- **Key Results:** the how, confirms measurement



### To make your objective meaningful, ask yourself:

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

### To make your key results meaningful, ask yourself:

- Are your key results measurable with a number?
- Do they have a definitive end point?

If you only had an objective, you'd have inspiration with no end goal. With only key results, you'd have a list of outcomes, but no reason why they're important.

### Objective Example:

Ineffective Objective	Effective Objective
Meet our sales target	Achieve record revenue this quarter
 Represents change	 Represents change
 High value	 High value

### Key Results Example:

Ineffective Key Results	Effective Key Results
Launch marketing campaign	Generate 200 leads from campaign by January 20th
 Measurable	 Measurable
 Definitive end point	 Definitive end point

## Activity 2

Write down 2 objectives that would help your organisation achieve its goals.

What Key Results would help measure the impact?

Make the connection: Why are these OKRs relevant to your goals?

# Step 3: Reinforce Your Goals Program with an OKR Cycle

Creating a goal-setting cycle helps teams build a cadence for progressing with OKRs annually and quarterly. We recommend repeating these three stages:

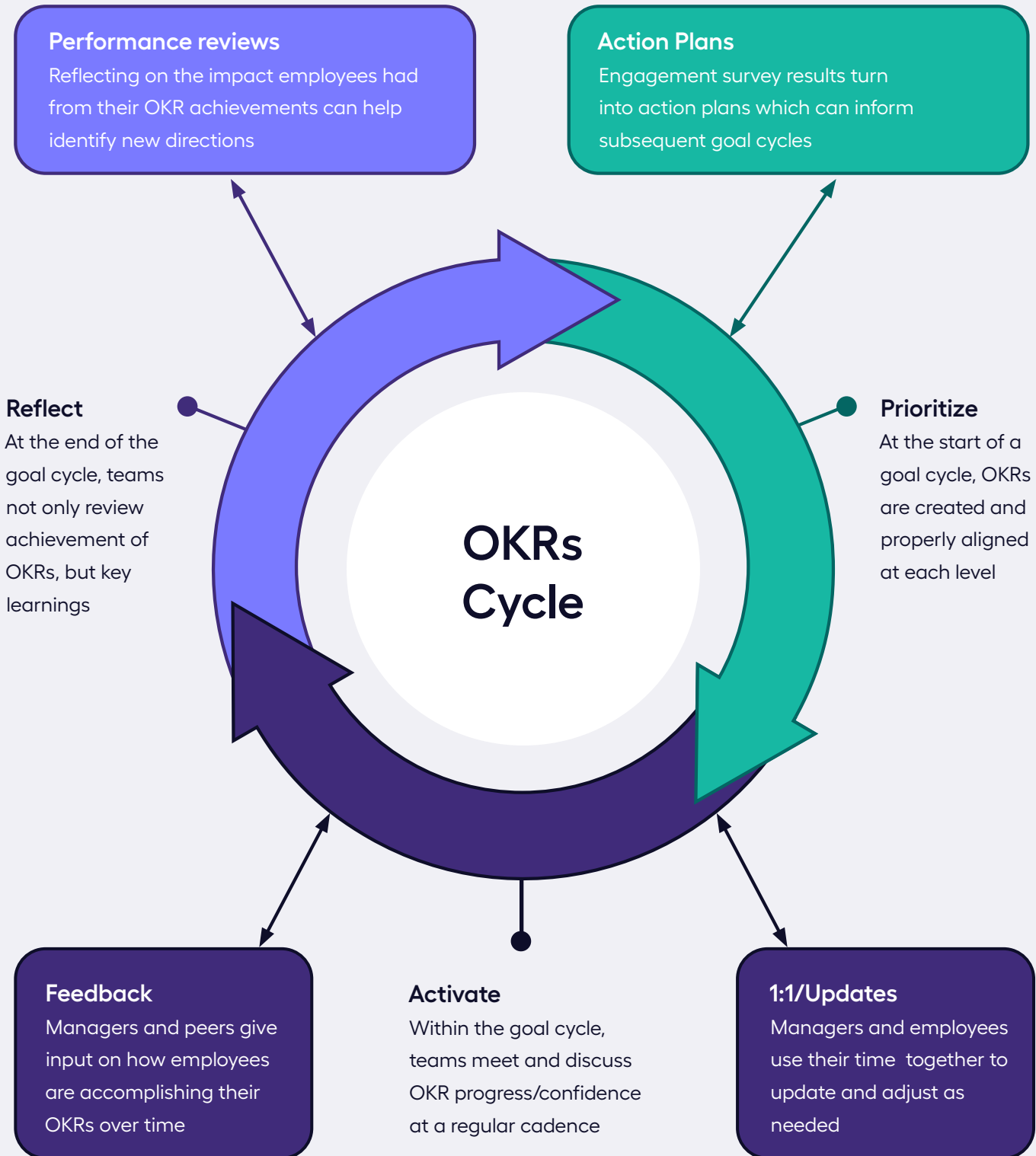
- **Prioritise:** At the start of each goal cycle, OKRs are created in alignment with organisational capacity and prioritisation.
- **Activate:** Throughout the cycle, teams meet regularly to discuss progress and evolving needs. Managers can touch base with direct reports individually and as a group, and escalate any concerns to executive leadership.
- **Reflect:** At the end of the goal cycle, teams review their achievements and discuss what they learned. How was everyone's capacity managed? What could have been communicated better? The results of these reflections should inform how the cycle is repeated.

Within each of the above stages, managers and team leaders can take several actions to reinforce the purpose and progress tied to each OKR pairing:

- **Action plans:** Having a plan fosters alignment across teams to understand expectations and move forward with tactics to achieve each goal. Action plans should include key stakeholders, communications plans, and resources for leaders to distribute new OKRs to their teams.
- **1:1s and weekly updates:** Regular check-ins between managers and employees help each team member keep a pulse on progress, highlight new concerns, and identify opportunities to innovate.
- **Feedback:** Employees provide and receive input about how they're communicating with each other and achieving team goals.
- **Performance appraisals:** Managers evaluate employee performance and provide feedback about a job well done and areas for improvement.



# Goals and OKRs Cycle



# Activity 3

Using the image above, choose one management tool that would be effective for checking on progress throughout the year.

How often should this tool be implemented?

Annually

Quarterly

Monthly

Other: \_\_\_\_\_

Who needs to be involved?

How should progress be documented?

## Section 4: Practice

Take one of the objectives you identified in Activity 2 and use the workspace below to flesh it out. Then use the following prompts to create a plan for how you'll reimagine, redesign, and reinforce it.

- **Reimagine:** Link business goals to departmental goals.
- **Redesign:** Identify key metrics and measurable results.
- **Reinforce:** Choose management tools to reinforce mindset and growth.

**Part 1: Choose one goal from your organisation that needs reimaging.**

Who are the key stakeholders for this goal?

**Part 2: Write out an objective that will help meet your chosen goal.**

List 3 key results that will help achieve that objective.

- 1.
- 2.
- 3.

**Part 3: Identify 3 to 4 management tools that would be effective for checking on progress throughout the year. Who needs to be involved? How should progress be documented?**

- 1.
- 2.
- 3.
- 4.

Now that you have a plan, use these tips for getting OKRs to work for your organisation:

- Keep your OKRs flexible. Don't obsess over alignment between levels.
- Incorporate learnings from old OKRs to iterate success and create new OKRs.
- Highlight executive sponsorship when rolling out OKRs plans to teams.
- Set OKRs frequently — ideally quarterly, but at least every six months.
- Ensure OKRs are ambitious, measurable, and transparent.
- Use tools that make tracking OKRs easier and top-of-mind.

**For more resources on bringing your OKR strategy to life with purpose and clarity, download our ebook, [Unlocking People Success at your Organization](#).**