

OKRify

Create OKR 2

- Subject
- KPI
- Report
- Linked OKR



Create OKR

Create Team or Individual OKRs from OKRify Hub.

The screenshot shows the OKRify Hub interface. At the top, there are navigation tabs: OKRify, Hub, Meeting Hub, Objective Hierarchy, Team Hierarchy, HeatMap, Tasks, Teams, Periods, Dashboards, and Reports. Below this is a secondary navigation bar with 'My OKR', 'Company', 'Marketing', and 'Sales'. A search bar contains the text 'Search objectives, tags.'. On the right side of this bar, there are three icons: a blue circle with a white plus sign, a blue circle with a white document icon, and a pink circle with a white downward arrow. Two callout boxes are present: 'Create OKR' with an arrow pointing to the plus icon, and 'Create OKR from Templates' with an arrow pointing to the document icon. The main content area is divided into two sections. The left section is titled 'Objectives/Key Results' and contains a table with columns: Owner, Confd, Progress/Target, and Task. The right section is titled 'SCORECARD' and contains a 'KPI' tab and an 'OKR' tab. It displays a welcome message for David McGee, a summary of 6 Objectives, 2 Non-Aligned Objectives, and a Confidence score of 4. Below this is an 'Objective Progress' section with a progress bar at 27% and an 'Expected' bar at 58%. At the bottom, there are two donut charts: 'Objectives by Risk' and 'KR by Risk', both with legends for Very Low, Low, Medium, High, and Very High.

Create OKR

Create OKR from Templates

OKRify Hub Meeting Hub Objective Hierarchy Team Hierarchy HeatMap Tasks Teams Periods Dashboards Reports

My OKR Company Marketing Sales

Search objectives, tags.

6 KR's Overdue now

Objectives/Key Results	Owner	Confd	Progress/Target	Task
Close record number of Opportunities with higher deal s... Period : Q1 FY 2023 Team : Sales	DM	3	14%	(3)
Expand business globally Period : 2021-2023 Team : Acme Corporation	DM	2	64.6%	
Improve Salesforce Skills Period : Q1 FY 2023	DM	4	20%	
Improve the customer satisfaction Period : Q1 FY 2023 Team : Customer Support	DM	4	20%	(1)
Increase numbers of Leads from Web and partners Period : Q1 FY 2023 Team : Marketing	DM	4	26.8%	

SCORECARD KPI OKR

Welcome David McGee

Objectives 6 Non-Aligned Objectives 2 Confidence 4

Objective Progress

Progress 27%

Expected 58%

Objectives by Risk

KR by Risk

Very Low Low Medium High Very High

Create OKR - 1 (Objective info)

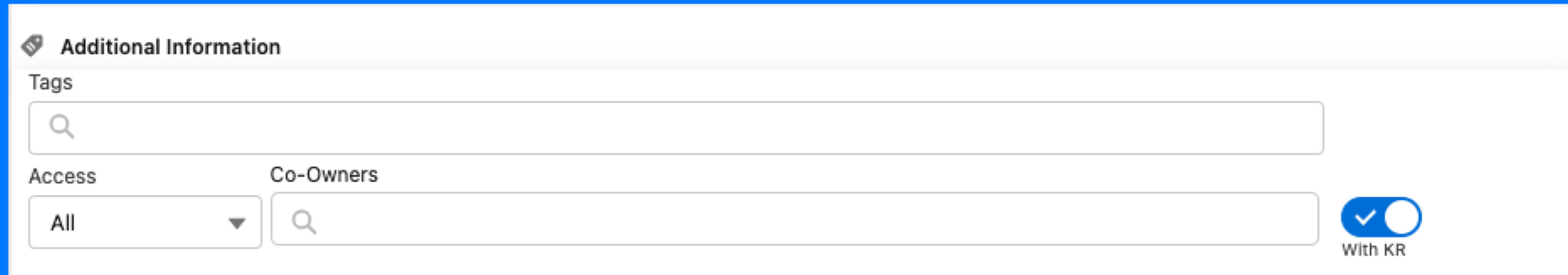


The screenshot shows the 'Create OKR' interface. On the left, a dropdown menu is open, showing options: 'Company', 'Team', 'Individual', and 'Strategic'. An orange arrow points from the 'Team' option to the 'Create Team OKR (Draft)' header of the main form. The form includes a 'Name' input field, a 'Period' dropdown set to 'Q1 FY 2023', a 'Team' dropdown set to 'Global HR', and a 'Parent Objective' dropdown set to '--None--'. There are also 'Save' and 'Save & Activate' buttons at the top right.

1. Select Team or Individual OKR
2. Enter Objective Name
3. Select Aspirational if OKR is a stretch goals (Optional)
4. Change - Owner,Period,Team if required
5. Select a Parent Objective (Optional - Highly recommended)

Create OKR - 2 (Objective Additional Information)


Expand Additional information to add information for OKR





The screenshot shows a white panel titled "Additional Information" with a tag icon. It contains three main sections: "Tags" with a search input field; "Access" with a dropdown menu currently set to "All"; and "Co-Owners" with a search input field. To the right of the "Co-Owners" field is a toggle switch labeled "With KR" which is currently turned on.

1. Enter Tags for categorizing & searching (Optional)
2. Select Access
 - Team - Access for only team members (Team OKR)
 - Private - Access for Owners-Co-Owners (Individual OKR)
3. Add one or more users as Co-Owners (Co-Owners can edit & update Progress)


KR Subject (Data from Salesforce Object)

1. Change KR Owner if required (KR Owner can update KR Progress)
2. Enter Key Result Name(Recommended to have a metric in Key Result Name)
3. Select UOM - SObject
4. Click Icon  to enter Salesforce Object information



  Close 500K new business from Partners  Subject   500,000.00 60    

Subject Information

 Close 500K new business from Partners ✕

Object	Function	Aggregate Field	Date (Optional) i
Opportunity ▼	Sum ▼	Amount ▼	Close Date ▼
Filters			All Conditions are met ▼

1. Select Object
2. Enter Function (Count, Sum, Avg, Min or Max)
3. Enter Aggregate Field (This field will be used to calculate the KR Progress)
4. Select Date Field (Records will be filtered with this date for Objective Period Dates)

Subject Information - Filter

Object	Function	Aggregate Field	Date (Optional)
Opportunity	Sum	Amount	Close Date

Filters: All Conditions are met

	Field	Lookup Object Field	Operator	Value	
	Lead Source		equals	Partner Referral	+
AND	Opportunity Type		equals	New Customer	✖
AND	Stage		equals	Closed Won	✖
AND	Account ID	Account Type	equals	Customer - Direct	✖

1 AND 2 AND 3 AND 4

Save Preview Cancel


1. Select Filter Condition (All Conditions are met, Any Conditions is met, Custom Logic or No Filter)
2. Enter Filter
 - a. Filter field (All fields except long text for the Object is available)
 - b. Lookup Object Field (If a Lookup field is selected then the Lookup Object field will be available)
 - c. Select Operator
 - d. Enter value
3. Conditions (Conditions has been entered for Custom Logic)
4. Click Preview the view the data based on the filter
5. Click Save

*Check Appendix for more complex Subject examples

Subject - KR




The screenshot shows a horizontal toolbar with the following elements from left to right: a user profile picture and edit icon, a text input field containing 'Close 500K new business from Partners', a green list icon, a dropdown menu labeled 'Subject', a blue cloud icon, a text input field containing '500,000.00', a text input field containing '60', and four icons: a refresh icon, a calendar icon, a document icon, and a trash icon.

1. Enter Target
2. Enter Weight
3. Split target can be entered by clicking icon 
4. Enter additional KR Info on the side window if required

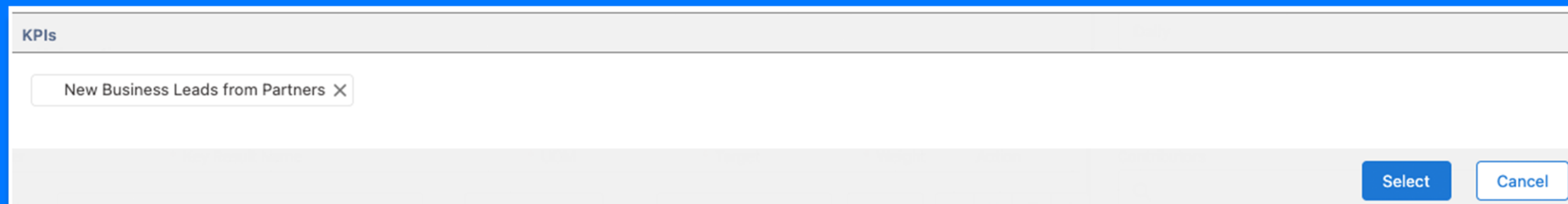
*Check Create OKR Guide for information on Split Target & additional KR fields

KR KPI

1. Change KR Owner if required (KR Owner can update KR Progress)
2. Enter Key Result Name(Recommended to have a metric in Key Result Name)
3. Select UOM - KPI
4. Click Icon  to enter KPI




5. Select the required KPI

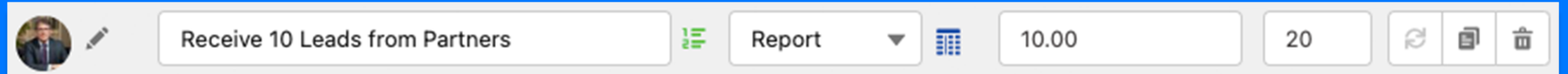


6. Click Select

*Check Create KPI for information on how to create KPI

KR Report

1. Change KR Owner if required (KR Owner can update KR Progress)
2. Enter Key Result Name(Recommended to have a metric in Key Result Name)
3. Select UOM - Report
4. Click Icon  to enter Report



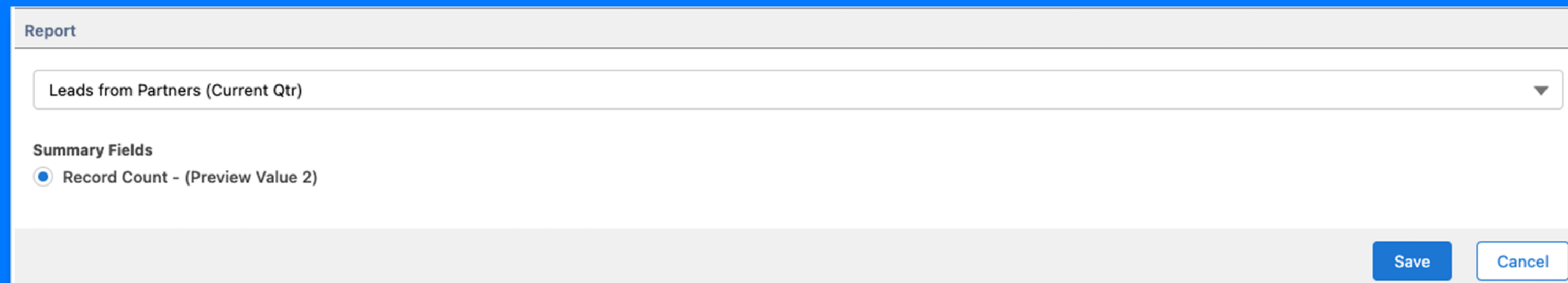
Receive 10 Leads from Partners

Report

10.00

20

5. Select the required report



Report

Leads from Partners (Current Qtr)

Summary Fields


Record Count - (Preview Value 2)

Save Cancel

6. Click Save

*Check Create OKR Guide for more information on KR fields

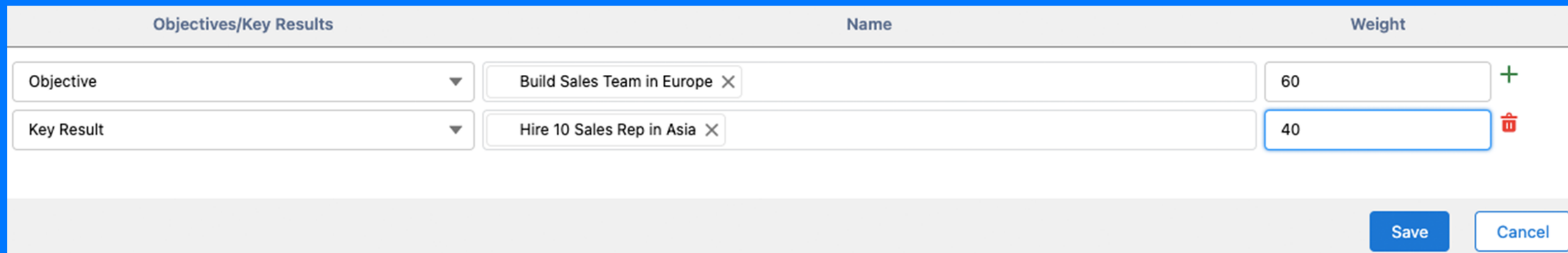
KR Linked OKR

1. Change KR Owner if required
2. Enter Key Result Name(Recommended to have a metric in Key Result Name)
3. Select UOM - Linked OKR
4. Click Icon  to enter Objectives and/Or Key Results



A screenshot of the top portion of an OKR card. On the left is a profile picture of a man in a suit. To its right is a pencil icon. The main text of the card is "Build Sales Team in Europe and Asia". To the right of the text is a list icon. Further right is a dropdown menu labeled "Linked O..." with a downward arrow. Next to it is a target icon. To the right of the target icon is a text input field containing "100.00". To the right of that is another text input field containing "25". On the far right are three icons: a refresh icon, a copy icon, and a delete icon.

5. Select Objective or Key Results
6. Search for Objective or Key Result
7. Enter Weights



Objectives/Key Results	Name	Weight	
Objective	Build Sales Team in Europe X	60	+
Key Result	Hire 10 Sales Rep in Asia X	40	+

Save Cancel

8. Click Save

*Check Create OKR Guide for more information on KR fields

Appendix

Subject Example 1

Average deal size for Opportunities for Upgrade or Replacement from Phone and other Lead Source

Object	Function	Aggregate Field	Date (Optional) ?
Opportunity	Avg	Amount	Close Date

Filters Custom Logic

	Field	Lookup Object Field	Operator	Value	
1	Opportunity Type		equals	Existing Customer - Upgrade	+
2	Opportunity Type		equals	Existing Customer - Replacement	✖
3	Stage		equals	Closed Won	✖
4	Lead Source		equals	Phone Inquiry	✖
5	Lead Source		equals	Other	✖

(1 OR 2) AND 3 AND (4 OR 5)

Save Preview Cancel

Subject Example 2

Converted NA Leads from Web, Phone or Purchased List

Object	Function	Aggregate Field	Date (Optional) i
Lead	Count	--None--	Created Date

Filters Custom Logic

	Field	Lookup Object Field	Operator	Value	
1	Lead Source		equals	Web	+
2	Lead Source		equals	Phone Inquiry	🗑
3	Lead Source		equals	Purchased List	🗑
4	Status		equals	Closed - Converted	🗑
5	Country		equals	USA	🗑
6	Country		contains	Canada	🗑
7	Country		contains	Mexico	🗑

(1 OR 2 OR 3) AND 4 AND (5 OR 6 OR 7)

Save Preview Cancel

Key Points

01 Subject & KPI

Automatically update KR progress with data from any Salesforce Objects

02 Report

Use any Salesforce Report to automatically update KR progress

03 Linked OKR

Update KR progress based on other Objectives and/or Key Results



More OKRify Guides

Scorecard

Guide for Creating Scorecard, setting targets for multiple KPIs & users.

Create OKR

Guide for creating team & individual OKR with Number, Percent or Milestone Key Results

Meetings

Guide for 1:1, team or cross functional meetings in OKRify