

OKRify

Create OKR

- Number
- Percent
- Milestone



OKR Best Practice

Objective

- Inspirational
- Clear, Concise & Unambiguous
- Add value to the organization
- 3 to 5 OKRs per Team

Key Result

- Measurable
- Outcome Based
- Specific & Verifiable
- Maximum of 3 or 4 KRs per OKR

Create OKR

Create Team or Individual OKRs from OKRify Hub.

The screenshot shows the OKRify Hub interface. At the top, there is a navigation bar with the following items: OKRify, Hub, Meeting Hub, Objective Hierarchy, Team Hierarchy, HeatMap, Tasks, Teams, Periods, Dashboards, and Reports. Below the navigation bar, there is a search bar labeled 'Search objectives, tags.' and a set of icons: a plus sign (+), a document icon, a funnel icon, and an information icon (i). Two callout boxes are present: 'Create OKR' with an arrow pointing to the plus sign 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 'My OKR' and contains a table of objectives. The right section is titled 'SCORECARD' and contains a summary of objectives and progress.

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
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Objective Progress

Progress: 27%

Expected: 58%

Objectives by Risk

KR by Risk

Legend: Very Low, Low, Medium, High, Very High

Create OKR - 1 (Objective info)

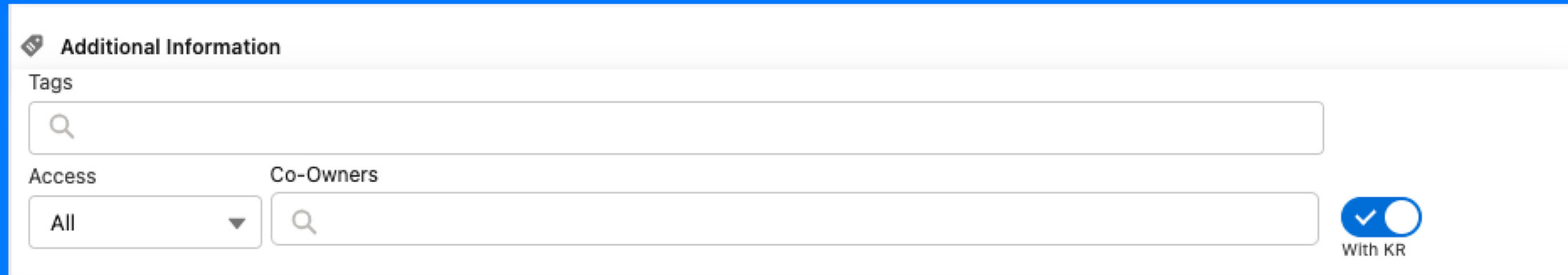


The screenshot shows the 'Create OKR' interface. On the left, a dropdown menu is open, showing options: 'Company', 'Team', 'Individual', and 'Strategic'. An orange arrow points from the 'Team' option to the 'Create Team OKR (Draft)' header of the main form. The form includes a 'Name' input field, a 'Period' 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 the 'Additional Information' section of an OKR creation interface. It features a 'Tags' search bar, an 'Access' dropdown menu currently set to 'All', a 'Co-Owners' search bar, and a 'With KR' toggle switch that 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)
4. Disable button “with KR” - KRs will be disabled and progress will be average of Child OKRs (Automatically updated)

Create OKR - 3 (Key Result - Number & Percent)

1. Change KR Owner if required (KR can update KR Progress)
2. Enter Key Result Name (Recommended to have a metric in Key Result Name)
 - Example: Close 20 Opportunities above 20K
3. Select UOM - Number/Percent (Important drives behavior of the Key Result)
 - Check next slide for detailed information of each UOM
4. Enter Target
5. Enter Weight (Sum of weight for all KR should be equal to 100)

KR Owner	* Key Result Name	* UOM	* Target	* Weight	Action
 	<input type="text" value="Hire 10 new Sales BDRs"/>	 <input type="text" value="Number"/>	<input type="text" value="10.00"/>	<input type="text" value="24"/>	  



Enter Spilt target details







Clone Key Result

Key Result UOM

UOM	How & When to use
Number	Set a target and manually track progress. Split target possible.
Percent	Set a percentage as a target and manually track progress. Split target possible.
Milestone	Use it for small projects or list of action items/milestones. Progress is tracked manually.
Subject	Track progress automatically based on Salesforce Object. Split target possible.
KPI	Define KPIs based on Salesforce Object and track progress automatically. Split target possible.
Report	Track progress automatically based on a Salesforce Report.
Linked OKR	Track progress automatically based on other Objectives or Key Results

Create OKR - 4 (Key Result Additional Info - Side Panel)

Click on a Key Result Name to open the Side Panel

KR Owner	* Key Result Name	* UOM	* Target	* Weight	Action
	Hire 10 new Sales BDRs	Number	10.00	24	  

1. **Target Type** - Change to Decrease to if target will be less than starting value
2. **Starting Value** (Required for Decrease to target type & optional for Increase to)
3. **Frequency** (Timeframe to update KR progress)
4. **Confidence** (Select confidence for achieving the target by end of the period)
5. **Contributors** (One or more users - Contributors can also update KR progress)
6. **Deadline** (Optional - if KR deadline is different from OKR's period)

Key Result **Hire 10 new Sales BDR**

Target Type *
Increase

Starting Value
0.00

Frequency *
Weekly


Confidence
1 2 3 4 5

Contributors

Deadline


Key Result (Split Target - Optional)

Split Target can be used to enter targets for smaller periods such as Month or Week

 Achieve 2M New Business ✕

Select Split Period	KR Start Date	KR End Date	KR Target Sum ▾
Month ▾	2023-01-01	2023-03-31	2,000,000







Month	Start Date	End Date	Target
Jan 2023	2023-01-01	2023-01-31	500,000.00
Feb 2023	2023-02-01	2023-02-28	600,000.00
Mar 2023	2023-03-01	2023-03-31	900,000.00













1. Click Split Target Icon 
2. Select a Period (AnnualOKR - Quarter/Month & Quarterly OKR - Month/Week)
3. Select Sum or Average next to KR Target
4. Enter Target for Each period
5. Total of Period Targets should be equal to KR Target (Only for Sum)
6. Save Split Target

Info: Use Average in Split target if you are tracking ratios such as close rate, utilisation rate, etc.

Key Result (Milestone)

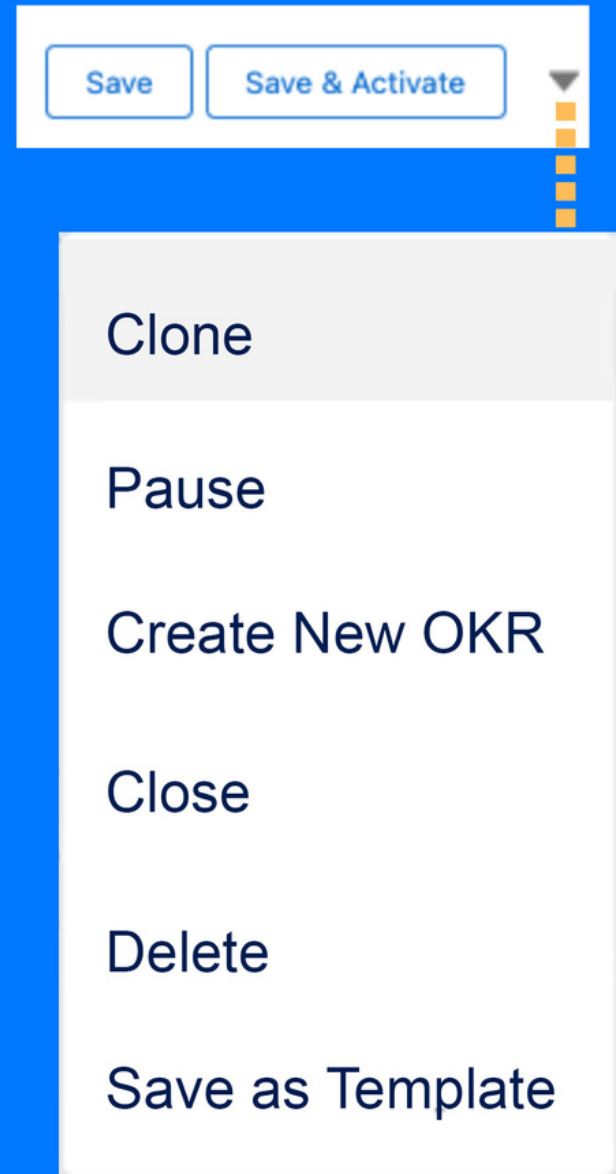
Milestone KR – Track multiple milestone/tasks in one KR. Suited for list of tasks or small project

  Update Employee Onboard Guide  Milestone  100.00 30  

Milestone	Assigned to	Date	Weight	
Review current employee onboard guide	Devon Convay 	Jan 29, 2023 	25	
Update with new company culture & policy	Devon Convay 	Feb 17, 2023 	30	
Review with HR Director	Joe Anton 	Feb 28, 2023 	20	
Management Review & Approval	Matt Henry 	Mar 15, 2023 	25	

1. Click Milestone Icon next to KR UOM
2. Enter the fields for each milestone
 - Milestone Name, Assigned to, Due, Weight (Total weight to all milestones should be 100)
3. Save Milestone

Actions



Save - Save OKR in Draft status

Save & Activate - Save OKR in Active Status

Clone - Clone OKR

Pause - Pause OKR (Change OKR to Status - OKR in Pause Status
progress cannot be updated)

Close - Save OKR in Closed status

Delete - Delete the OKR

Save as Template - Save the OKR as an Objective Template

Key Points

01 Create OKR

Recommended to have 3 to 5 OKRs for a team or an individual

02 Key Results

Number, Percent & Milestone Key Result require manual progress update

03 Update Progress

Can update progress if Owner, Co-Owner, Key Result contributor or Team manager



More OKRify Guides

Create OKR 2

Guide for Creating Subject, KPI, Report & Linked OKR Key Results

Hub & Update Progress

Guide for viewing Hub and update Key Result Progress

Meetings

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