

# OKRify

Hub &  
KR Progress Update



# OKRify - HUB

Central place to view OKRs and Update Progress

The screenshot shows the OKRify HUB interface with several callout boxes pointing to specific features:

- Reportees - View Team Members' OKRs**: Points to the 'Reportees' tab in the navigation bar.
- My OKR - View all your OKRs**: Points to the 'My OKR' tab in the navigation bar.
- Company - View Organization's OKRs**: Points to the 'Company' tab in the navigation bar.
- Team Tabs - View team OKRs**: Points to the 'Marketing' and 'Sales' tabs in the navigation bar.
- Filter - Search OKRs with filters**: Points to the search bar and filter icons.
- OKR - User OKR Dashboard**: Points to the main dashboard content area.

The interface includes a top navigation bar with options like 'Hub', 'Meeting Hub', 'Objective Hierarchy', 'Team Hierarchy', 'HeatMap', 'Tasks', 'Teams', 'Periods', 'Dashboards', and 'Reports'. Below this is a secondary navigation bar with 'My OKR', 'Reportees', 'Company', 'Marketing', and 'Sales' tabs. A search bar labeled 'Search My OKR' is also present.

The main content area displays a table of Objectives/Key Results with columns for Owner, Confid, Progress/Target, and Task. A summary bar at the top indicates '8 KR's Overdue now' and '1 KR's due this week'.

Objectives/Key Results	Owner	Confid	Progress/Target	Task
> <b>Become a CPQ Consultant</b> Period : Q1 FY 2023	DM	4	69%	
> <b>Close record number of Opportunities with higher deal s...</b> Period : Q1 FY 2023 Team : Sales	DM	4	16%	(3)
> <b>Expand business globally</b> Period : 2021-2023 Team : Acme Corporation	DM	2	64.6%	
> <b>Improve Salesforce Skills</b> Period : Q1 FY 2023	DM	4	20%	
> <b>Increase numbers of Leads from Web and partners</b> Period : Q1 FY 2023 Team : Marketing	DM	4	32.8%	
> <b>Increase Revenue from Partners</b> Period : FY 2023 Team : Sales	DM	4	19.3%	(1)

The right sidebar contains a 'Welcome David McGee' section with metrics: Objectives (6), Non-Aligned Objectives (0), and Confidence (4). Below this is an 'Objective Progress' section with a progress bar showing 37% progress and an expected 73%. At the bottom, there are two donut charts: 'Objectives by Risk' and 'KR by Risk', both using a color scale from Very Low (lightest) to Very High (darkest).

# OKRify - HUB

Quick filter OKRs by Status or High Risk

Group by Team, Period or Owner

The screenshot displays the OKRify HUB interface. At the top, there are navigation tabs for 'My OKR', 'Reportees', 'Company', 'Marketing', and 'Sales'. A search bar labeled 'Search My OKR' is on the right. Below the navigation, a status bar shows '8 KR's Overdue now' and '1 KR due this week'. The main content area is a table of OKRs with columns for 'Objectives/Key Results', 'Owner', 'Confid', 'Progress/Target', and 'Task'. Two callout boxes with arrows point to the 'Objectives/Key Results' column header and the 'Owner' column header, respectively.

Objectives/Key Results	Owner	Confid	Progress/Target	Task
Acme Corporation (1)				
> <b>Expand business globally</b> Period : 2021-2023    Team : Acme Corporation	DM	2	64.6%	
Marketing (1)				
> <b>Increase numbers of Leads from Web and partners</b> Period : Q1 FY 2023    Team : Marketing	DM	4	32.8%	

# Hub - View OKR

Expand to view Key Results

Click OKR to view details in the side

Click Key Result to view or update progress

OKR Details

The screenshot shows the 'My OKR' interface. At the top, there are navigation tabs for 'Company', 'Marketing', and 'Sales', along with a search bar for objectives and tags. A notification indicates '6 KR's Overdue now'. The main table lists several OKRs with columns for Owner, Confidence, Progress/Target, and Task. The first OKR, 'Close record number of Opportunities with higher deal size', is expanded to show its details on the right side.

Objectives/Key Results	Owner	Confid	Progress/Target	Task
<ul style="list-style-type: none"> <li>Close record number of Opportunities with higher deal size Period : Q1 FY 2023 Team : Sales</li> <li>Close 25 Opportunities for the quarter</li> <li>Increase Average Deal size to 24k</li> </ul>	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%	

**OKR Details: Close record number of Opportunities with higher deal size**

Current: 14%  
Expected: 47%  
47/89 Remaining Days

Tags: AE

Open Hierarchy | Add Link/File

KR by Predicted Progress

- >= 70%
- < 70%

KR Update Score: 7

# HUb - Update Progress

View KR details  
& update progress

Objectives/Key Results	Owner	Confid	Progress/Target	Task
Close record number of Opportunities with higher deal size Period : Q1 FY 2023 Team : Sales	DM	3	14%	(3)
Close 25 Opportunities for the quarter	DM	3	6/25 ↑ 24%	
Increase Average Deal size to 24k	DM	2	1K/24K ↑ 4%	
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%	
Increase Revenue from Partners Period : FY 2023 Team : Sales	DM	4	18.4%	
Increase revenue to record levels in FY 2023 Period : FY 2023 Team : Sales		3	1.55%	

**KR Trend KR History**

### # Close 25 Opportunities for the quarter

Progress: 7  
Expected: 11.00 Target: 25.00  
Updated Date: Feb 13, 2023  
Confidence: 3

Progress for this is going great.

Enter current progress  
for Key Result

Select confidence of  
achieving final target

Add comments for  
the progress entered

Click save button to  
update the progress

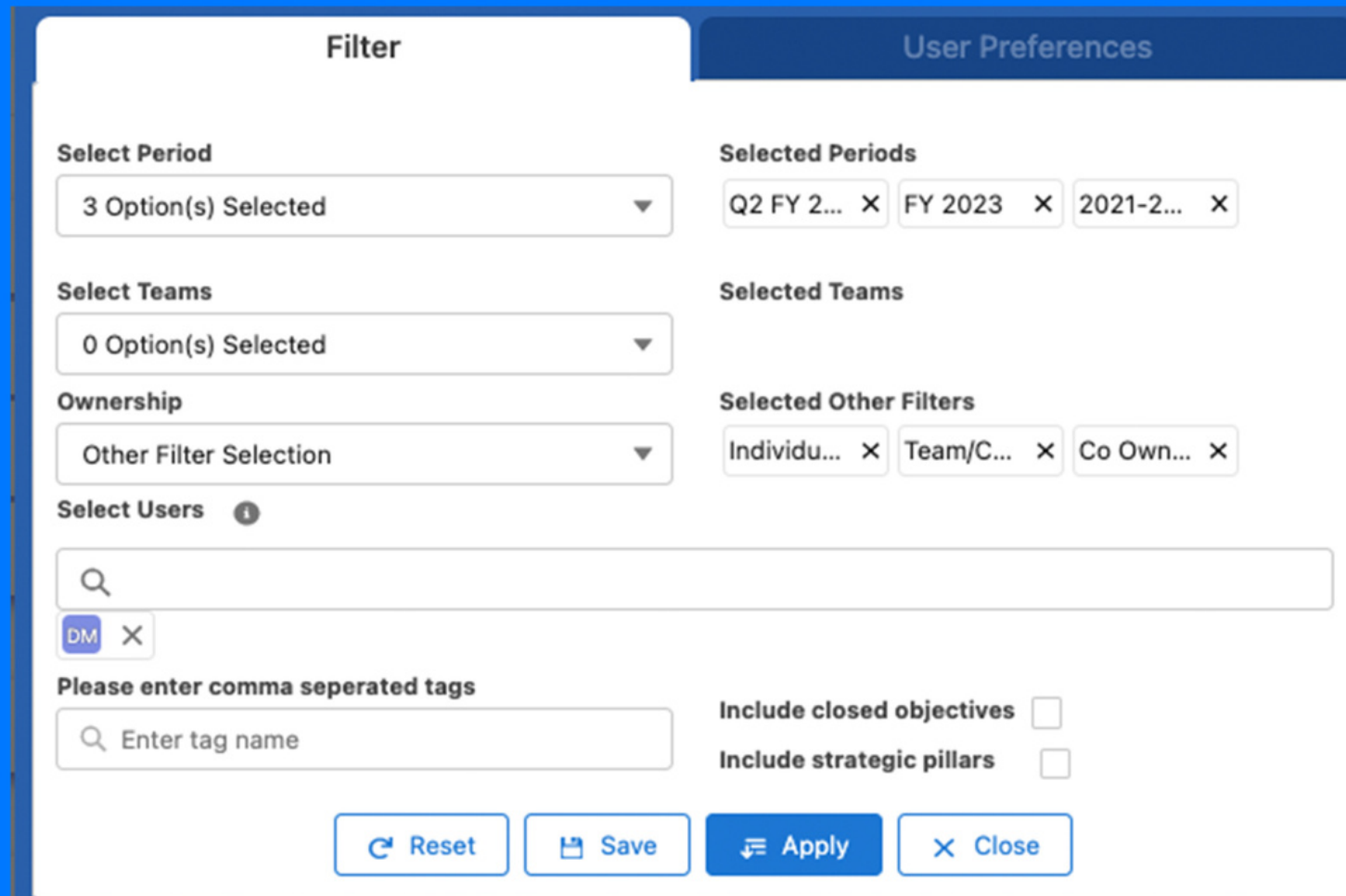
Note: If entering a lower value than current progress, you need to confirm the popup message and save again

# Filters & User Preference

Click filter  to set default filters for any tab in Hub

Click Reset to delete saved filters

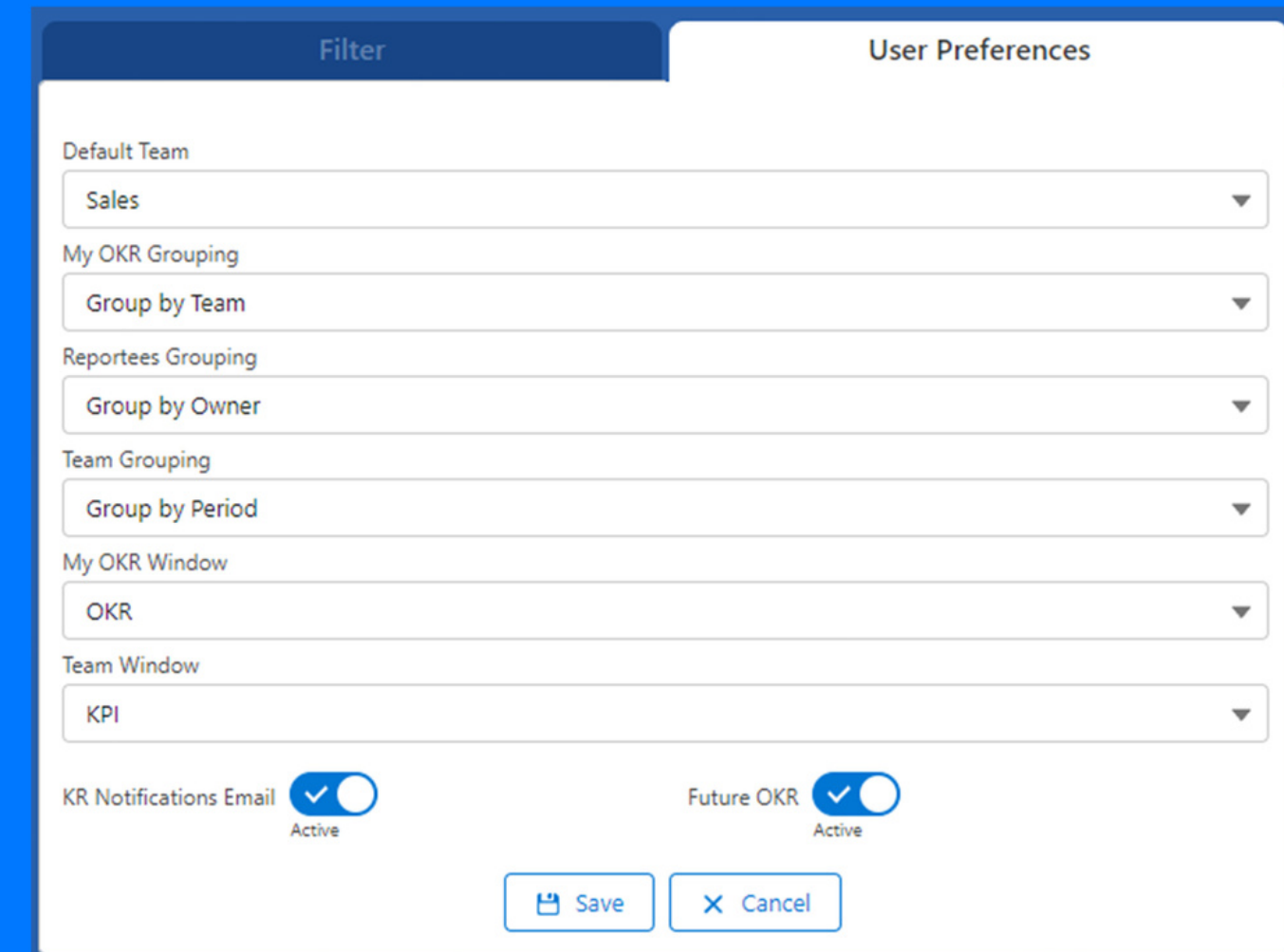
Set User Preferences



The Filter panel is divided into two main sections: Filter and User Preferences. The Filter section includes:

- Select Period:** A dropdown menu showing "3 Option(s) Selected".
- Selected Periods:** Three tags: "Q2 FY 2...", "FY 2023", and "2021-2...".
- Select Teams:** A dropdown menu showing "0 Option(s) Selected".
- Selected Teams:** No tags are present.
- Ownership:** A dropdown menu showing "Other Filter Selection".
- Selected Other Filters:** Three tags: "Individu...", "Team/C...", and "Co Own...".
- Select Users:** A search bar with a magnifying glass icon and a tag "DM".
- Please enter comma separated tags:** A search bar with a magnifying glass icon and the text "Enter tag name".
- Include closed objectives:** A checkbox that is unchecked.
- Include strategic pillars:** A checkbox that is unchecked.

At the bottom of the Filter section are four buttons: "Reset", "Save", "Apply", and "Close".



The User Preferences panel is divided into two main sections: Filter and User Preferences. The User Preferences section includes:

- Default Team:** A dropdown menu showing "Sales".
- My OKR Grouping:** A dropdown menu showing "Group by Team".
- Reportees Grouping:** A dropdown menu showing "Group by Owner".
- Team Grouping:** A dropdown menu showing "Group by Period".
- My OKR Window:** A dropdown menu showing "OKR".
- Team Window:** A dropdown menu showing "KPI".
- KR Notifications Email:** A toggle switch that is turned on (Active).
- Future OKR:** A toggle switch that is turned on (Active).

At the bottom of the User Preferences section are two buttons: "Save" and "Cancel".

# Key Points

## 01 My OKR

View all OKRs the user is Owner, Co-Owner, or Key Result contributor

## 02 Team

In Team tabs, view all team OKRs

## 03 Update Progress

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



# More OKRify Guides

## Create OKR

Guide for creating team or individual OKR in OKRify

## Meetings

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

## KPI & Subject

Guide for create KPIs and subject type OKRs to automatically update progress using Salesforce data