

OKRify

Create Meeting

- Set Agenda Collaboratively
- Assign Action Items
- Ask Questions
- View OKRs & KPIs
- Collaborate with Comments/Notes



1:1



Team



Cross-functional

Meeting Hub

Meetings - View upcoming & Completed Meetings

Teams - View 1:1 & Team Meetings for your teams

Action Items - View users open items

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

Action Items Open Items 11 OverDue 11 Due-in Next 7 days 0

Upcoming Meetings Next 7 days

Name	Type	Organizer	Attendees	Date/Time	Recurring	Status
Management Meeting	Cluster	DM	DM MM	February 24, 2023 at 12:00 PM	Weekly on Friday	Scheduled
David/Victor	1:1	DM	DM	February 27, 2023 at 12:00 PM	Bi-Weekly on Thursday	Scheduled

Completed Meetings Past 7 days

Name	Type	Organizer	Attendees	Date/Time	Recurring	Status
Sales Team Weekly Meeting	Team	DM		February 22, 2023 at 12:00 PM	Weekly on Wednesday	Scheduled
Bruce Wayne David McGee 1:1	1:1	DM		February 22, 2023 at 01:30 PM	Weekly on Wednesday	Scheduled
John/David 1:1	1:1		DM	February 22, 2023 at 12:00 PM	Monthly on Last Wednesday	Completed
Cross Functional OKR Review Meeting	Cluster	DM	DM	February 22, 2023 at 10:00 AM	Weekly on Wednesday	Scheduled
Marketing Weekly Meeting	Team	DM		February 21, 2023 at 04:30 PM	Weekly on Tuesday	Scheduled

Meeting Hub - Team Tab

Scheduled Team meeting
or Create new team meeting

View Teams You
manage

Team Members

Scheduled 1:1
Meeting or Create 1:1

Managers for users

The screenshot displays the 'Meeting Hub' interface in the OKRify application. The top navigation bar includes 'OKRify', 'Hub', 'Meeting Hub', 'Objective Hierarchy', 'Team Hierarchy', 'HeatMap', 'Tasks', 'Teams', 'Periods', 'Dashboards', and 'Reports'. The main content area is divided into sections: 'Managing Teams', 'Team Members', and 'Teams'. The 'Managing Teams' section shows 'Marketing' with a 'Marketing Weekly Meeting' (Weekly on Tuesday) and 'Sales' with a 'Sales Team Weekly Meeting' (Weekly on Wednesday). The 'Team Members' section lists 'Mike Wise', 'Victor Mann', 'Bruce Wayne', and 'Tim Blake', with a 'Create/View Meeting' column and a 'Repeat' column. The 'Teams' section shows 'Acme Corporation' with a 'Managers' section listing 'John Connor' and 'Create/View Meetings' (John/David 1:1) and 'Repeat' (Monthly on Last Wednesday). Orange arrows point from the callout boxes to specific UI elements: 'View Teams You manage' points to the 'Managing Teams' header; 'Team Members' points to the 'Team Members' header; 'Scheduled 1:1 Meeting or Create 1:1' points to the '+' icons in the 'Team Members' section; and 'Managers for users' points to the 'Managers' header in the 'Teams' section. A white callout box at the top points to the 'Marketing Weekly Meeting' row.

Managing Teams		
> Marketing	Marketing Weekly Meeting	Weekly on Tuesday
∨ Sales	Sales Team Weekly Meeting	Weekly on Wednesday
Team Members	Create/View Meeting	Repeat
Mike Wise	Mike Wise David Mcgee 1:1	Weekly on Monday
Victor Mann	David/Victor	Bi-Weekly on Thursday
Bruce Wayne	+	
Tim Blake	+	
Teams		
∨ Acme Corporation		
Managers	Create/View Meetings	Repeat
John Connor	John/David 1:1	Monthly on Last Wednesday

Create 1:1 Meeting

Create 1:1 by clicking + in main Meeting tab or click + for a team member

Enter the Fields shown

For recurring meetings enter details

Create Meetings

Meeting Name: Bruce Wayne David McGee 1:1 Meeting Type: 1:1

Meeting Date: Feb 22, 2023 Time: 10:30 AM

Timezone: (GMT-08:00) Pacific Standard Time (America/Los_A... Duration (in Minutes): 30

Repeat: Meeting Occurrence: Weekly on Wednesday

Carry over open items (Move not repeat open items to next meeting)

General items Action items Question and multiple options

Meeting Link (http:// or https// is required)
example: http://www.okrify.com

Weekly Meeting

Managers/Organizers: David McGee X

Users/Attendees: Bruce Wayne X

OKR: KPI: Salesforce Event:

CREATE MEETING

Enter Meetings Templates

Add Additional Organizers

Add attendee (Only 1 Attendee for 1:1 Meetings)

Add OKRs, KPIs & Create Sales Event by enabling buttons

If OKR and/or KPI is enabled - OKRs and/or KPIs for the attendee will be automatically added to the meeting

Create Team Meeting

Create team by clicking + in main Meeting tab or click + for a team

Enter the Fields shown

For recurring meetings enter details

Enter Meetings Templates

Select a Team

Add additional Organizers or Attendees if required

The image displays two screenshots of a meeting creation interface. The left screenshot, titled 'Create Meetings', shows a form with the following fields: Meeting Name (Sales Weekly Meeting), Meeting Type (Team), Meeting Date (Feb 23, 2023), Time (9:00 AM), Timezone ((GMT-08:00) Pacific Standard Time (America/Los_An...)), and Duration (45 minutes). It also includes a 'Repeat' section with a 'Weekly on Thursday' recurrence, a 'Carry over open items' section with checked options for 'General items', 'Action items', and 'Question and multiple options', and a 'Meeting Link' field. A 'CREATE MEETING' button is at the bottom. The right screenshot, titled 'Sales Team Weekly/Monthly Meeting', shows a 'Team' dropdown set to 'Sales', a 'Managers/Organizers' list with 'David McGee', and a 'Users/Attendees' list with 'Victor Mann', 'Tim Blake', 'Bruce Wayne', and 'Mike Wise'. At the bottom, there are three toggle switches for 'OKR', 'KPI', and 'Salesforce Event', all of which are turned on.

Add OKRs, KPIs & Create Sales Event by enabling buttons

If OKR and/or KPI is enabled - OKRs and/or KPIs for the attendee will be automatically added to the meeting

Create Cluster Meeting

Create Cluster(Cross-functional) meeting by clicking + in main Meeting tab

Enter the Fields shown

For recurring meetings enter details

The screenshot shows the 'Create Meetings' form with the following fields and values:

- Meeting Name: Management OKR Checkin Meeting
- Meeting Type: Cluster
- Meeting Date: Feb 23, 2023
- Time: 9:00 AM
- Timezone: (GMT-08:00) Pacific Standard Time (America/Los_An...
- Duration(in Minutes): 45
- Repeat: YES (toggle)
- Meeting Occurrence: Monthly on Last Thursday
- Carry over open items (Move not repeat open items to next meeting):
 - General items: YES
 - Action items: YES
 - Question and multiple options: YES
- Meeting Link (http:// or https// is required): example: http://www.okrify.com

On the right side, the 'Quarterly OKRs/Goals Planning Me...' window shows:

- Team: Sales X Marketing X Acme Corporation X
- Managers/Organizers: David McGee X John Connor X
- Users/Attendees: David McGee X Victor Mann X Tim Blake X Bruce Wayne X Mike Wise X
- OKR User: David McGee X Bruce Wayne X
- OKR: YES (toggle)
- Salesforce Event: YES (toggle)

Enter Meetings Templates

Select Multiple Team

Add additional Organizers or Attendees if required

Add OKR user (OKRs for these users will be added in the Meeting)

Add OKRs,KPIs & Create Sales Event by enabling buttons

If OKR is enabled - OKRs for Teams and OKR Users will be automatically added to the Meeting

Meeting View

The screenshot shows a meeting interface for "Sales Team Weekly Meeting" on 22 February 2023. The interface is divided into several sections: "Talking Points", "Actions", and "Sales OKR".

- Talking Points:** A list of three items with radio buttons for selection. Each item has a "Refresh" icon and a user profile icon (JC).
- Actions:** A list of two items with radio buttons. Each item has a "Refresh" icon, a list icon, and a user profile icon (JC or DM).
- Sales OKR:** A table of three OKR items with progress bars and completion percentages.

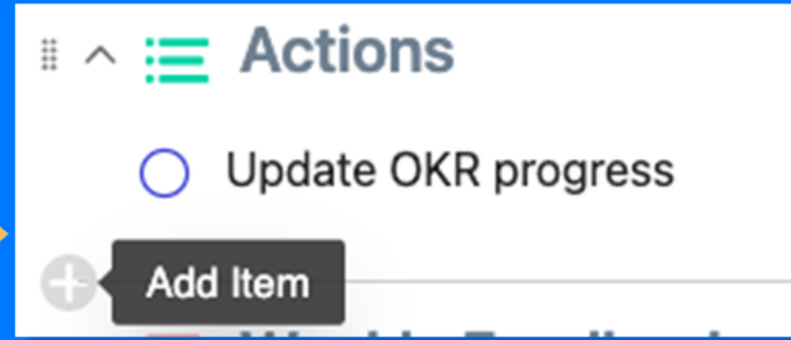
OKR Item	Progress Bar	Completion %
> Expand our sales region to Europe and Asia Period : FY 2023 Team : Sales	Green	16%
> ⚠ Generate 50 MQL every month Period : Q4 FY 2022 Team : Sales	Orange	28.2%
> ⚠ Improve revenue from Partners Period : Q4 FY 2022 Team : Sales	Orange	41.05%

Callouts and arrows point to the following features:

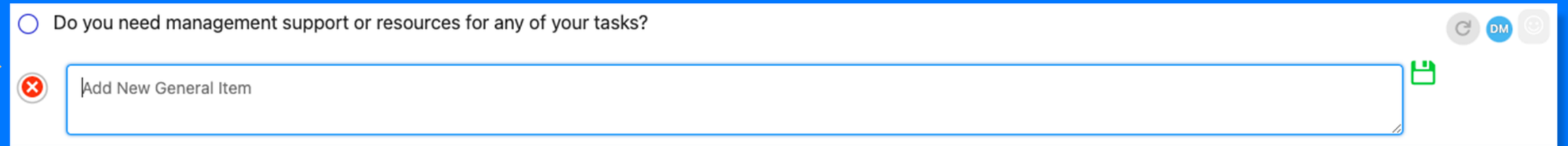
- Click Name to edit Meeting:** Points to the meeting title "Sales Team Weekly Meeting".
- Organizers:** Points to the "DM" icon in the meeting header.
- Attendees:** Points to the group of profile icons in the meeting header.
- Add Links & Attachments:** Points to the link icons in the meeting header.

Create New Items

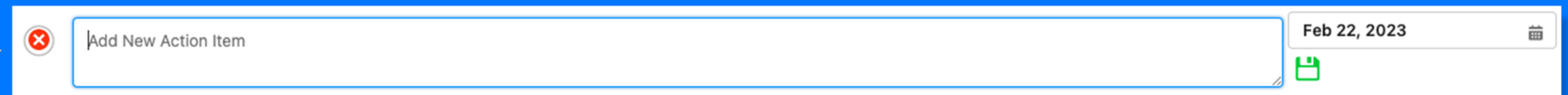
New items can be created by clicking enter from any item or clicking "Add item" Button



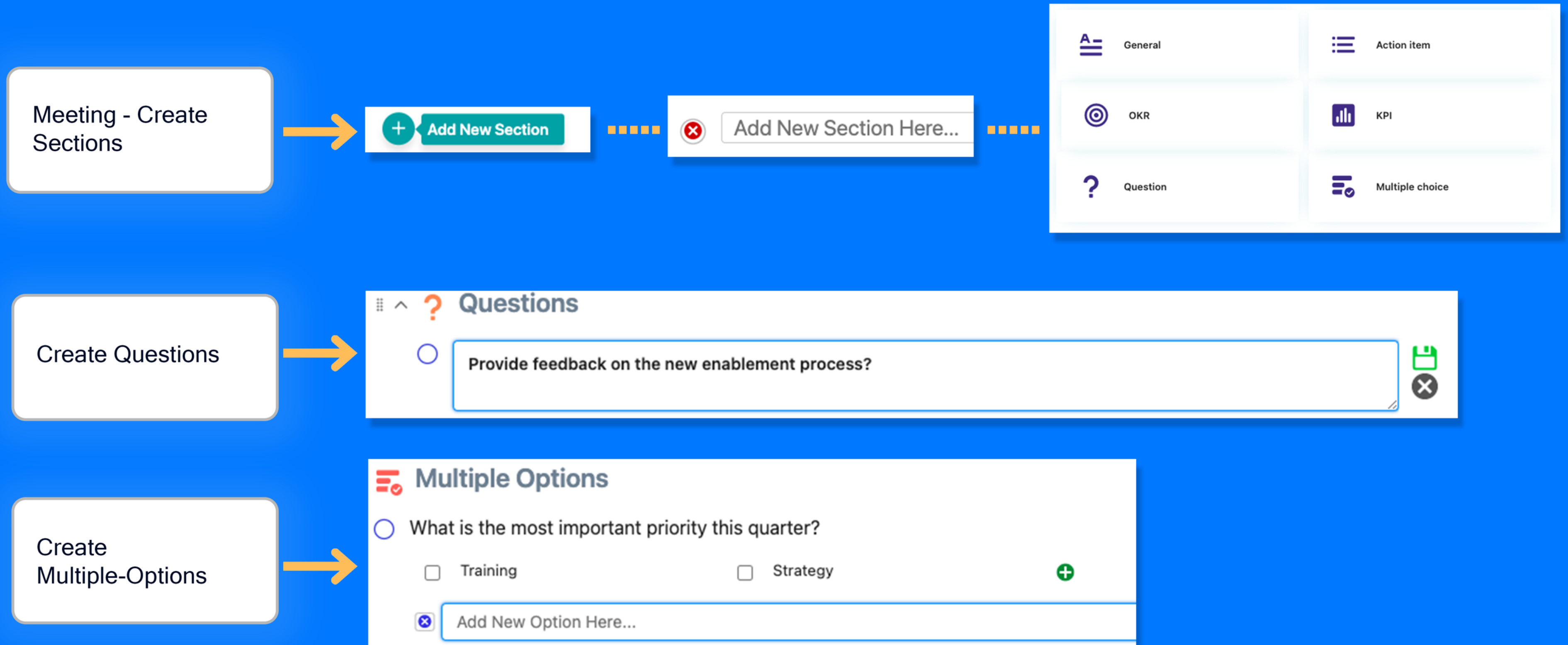
Create New Talking Point



Create New Action items



Create Sections, Questions, Multiple-Options

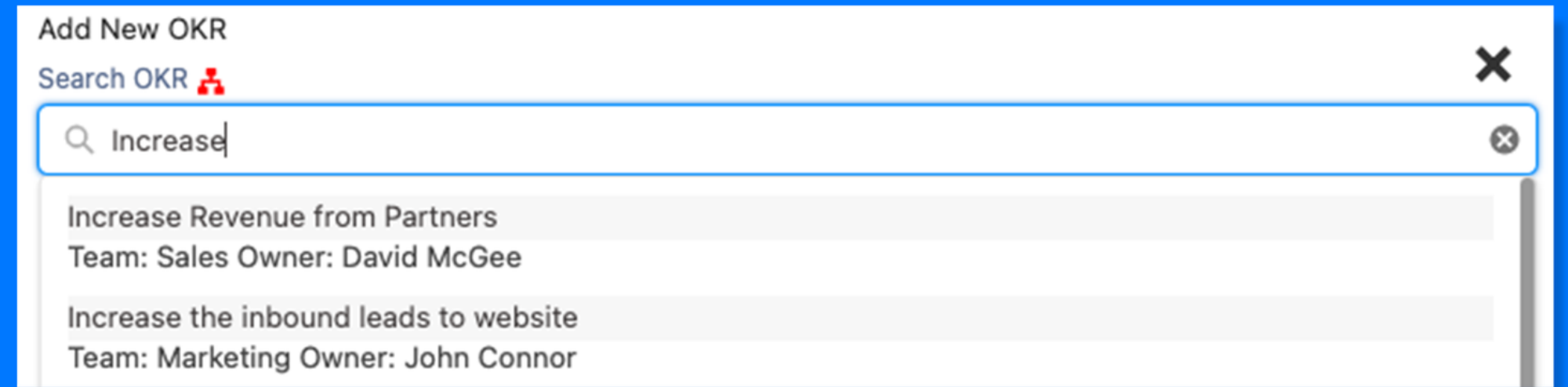


Add OKR/KPI

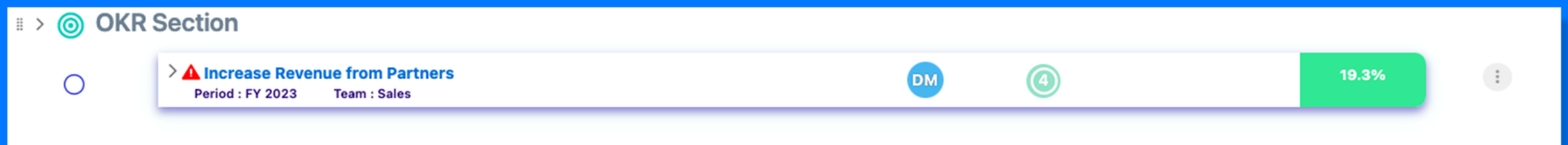
Click + icon in the OKR/KPI Section to add an OKR or KPI



Select an OKR/KPI to add the section



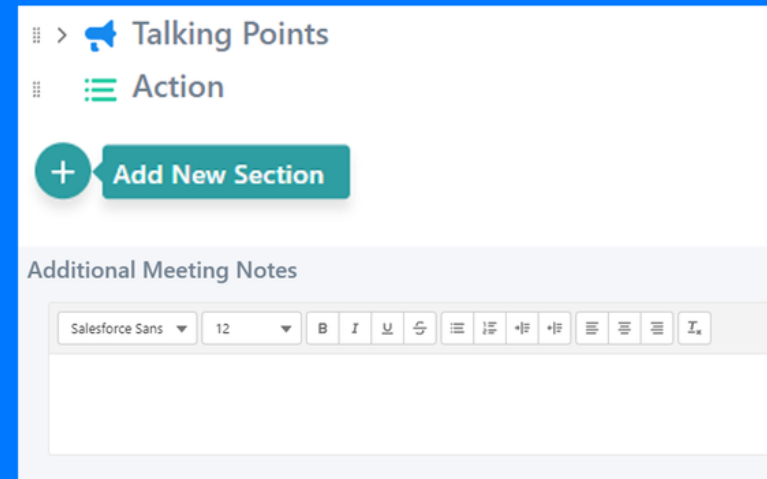
OKR/KPI is added to the Section



Meeting Objects

Any Salesforce Object records can be added to Meeting for collaboration or 1:1 coaching

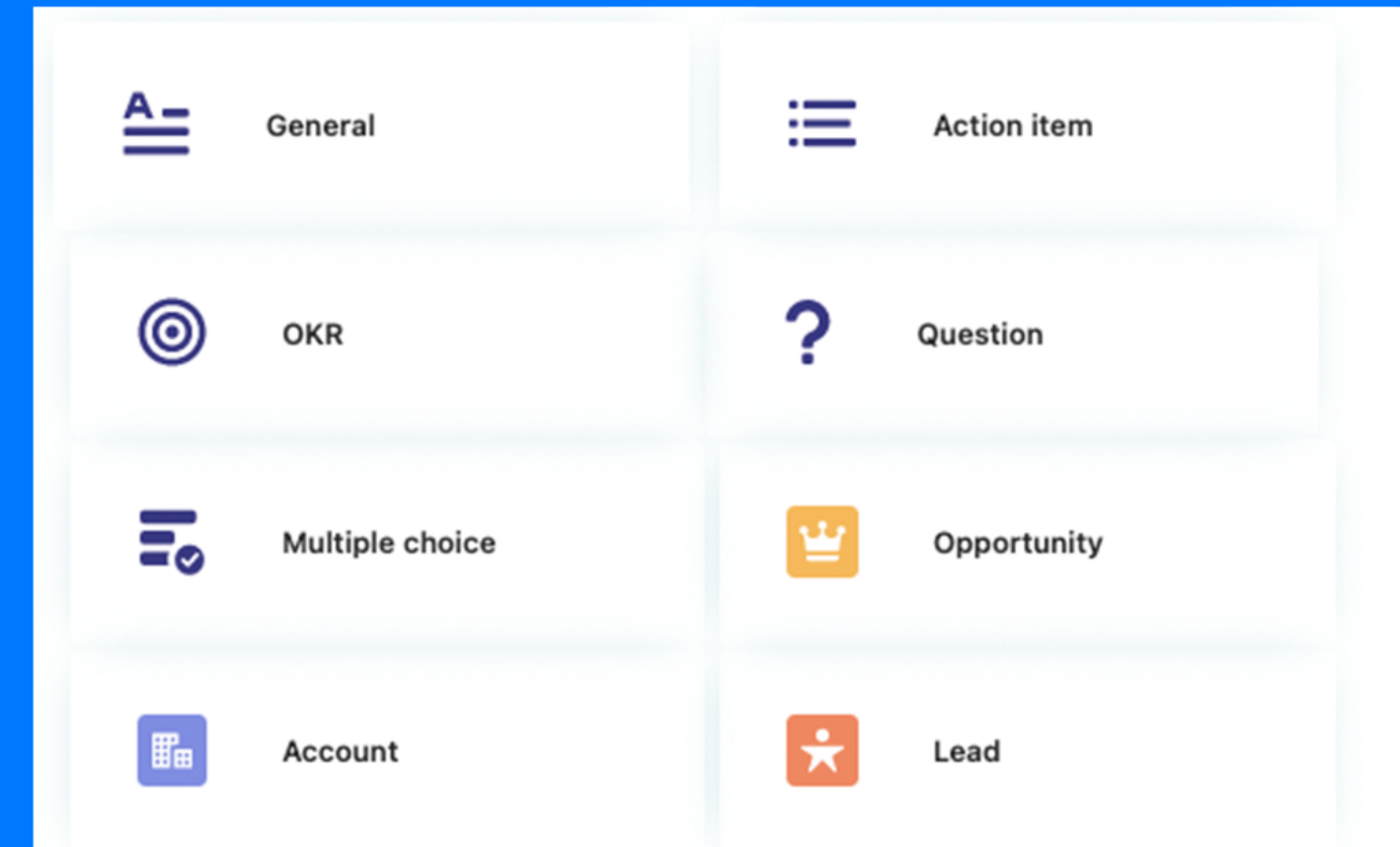
Click Add New Section



Add a name to your section



Select Salesforce Object



Click  to add records



Search and add records

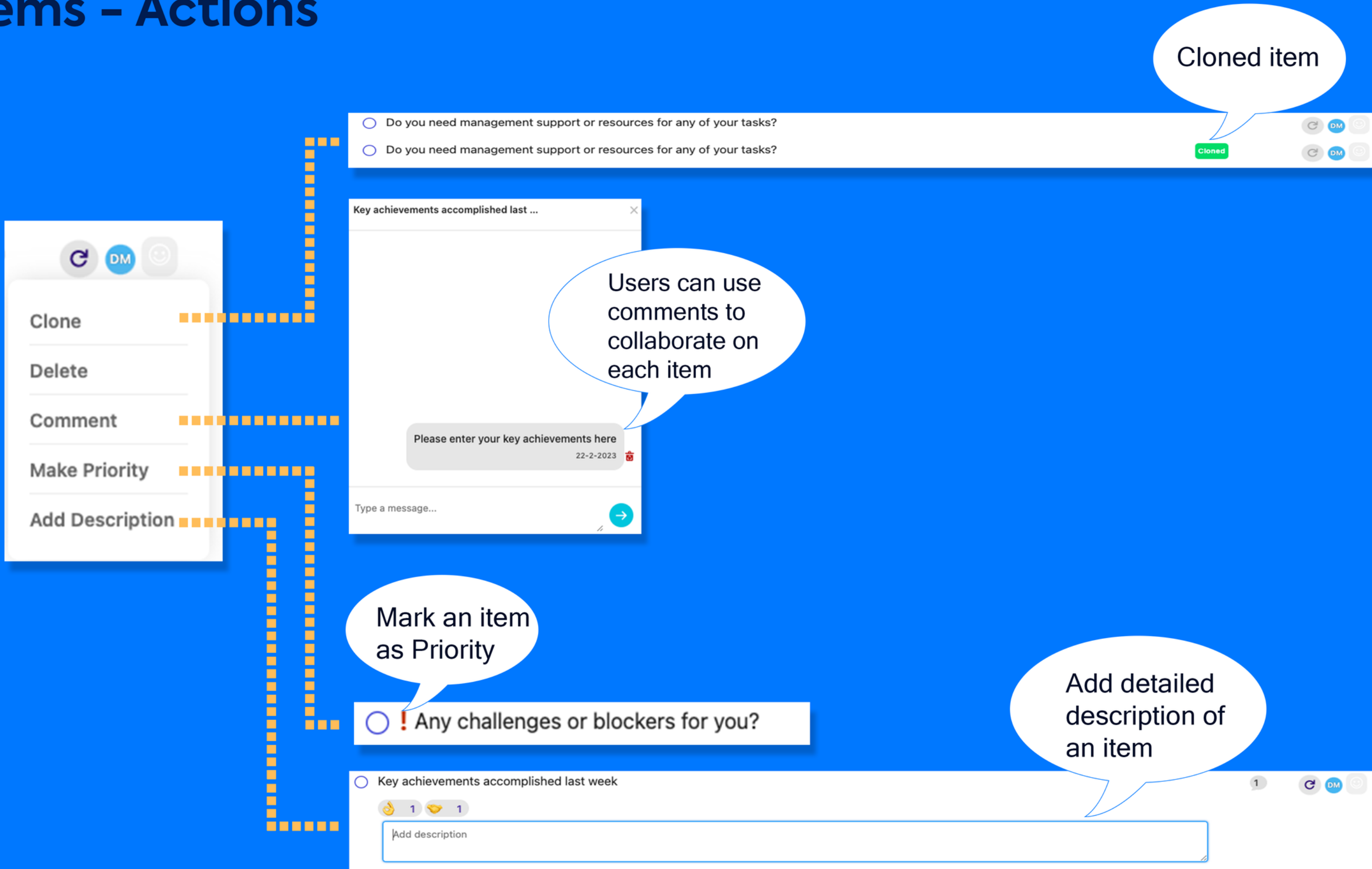


View the configured fields for the records in the meeting

Name	Owner ID.Full Name	Amount	Stage	Close Date
▼ Burlington Textiles Weaving Plant...	John Connor	235000	Closed Won	2020-04-18
Account ID.Account Name	Account ID.Account Type	Main Competitor(s)	Created Date	
Burlington Textiles Corp of America	Customer - Direct	John Deere	2022-5-10	
▼ Comfort Zone Appliances	David McGee	4000	Closed Won	2023-02-03
Created Date				
2023-2-7				

Collaborate with comments, reactions for each of the records.

Items - Actions



Items - Reactions & Reorder

Add reactions to any item



○ Key achievements accomplished last week

👍 1 ❤️ 1

1 🔄 DM 😊

Popular



Reorder items by dragging



☰ ^ 🗨 Talking Points

- Key achievements accomplished last week
👍 1 ❤️ 1
Description: Opportunity Won, Contract Extension
- How is your progress on your goals and tasks for the past week?
- ! Any challenges or blockers for you?
- Do you need management support or resources for any of your tasks?



☰ ^ 🗨 Talking Points

- Key achievements accomplished last week
👍 1 ❤️ 1
Description: Opportunity Won, Contract Extension
- ! Any challenges or blockers for you?
- How is your progress on your goals and tasks for the past week?
- Do you need management support or resources for any of your tasks?

☰ ^ 🗨 Talking Points

- Key achievements accomplished last week
👍 1 ❤️ 1
Description: Opportunity Won, Contract Extension
- ! Any challenges or blockers for you?
- How is your progress on your goals and tasks for the past week?
- Do you need management support or resources for any of your tasks?

01 🔄 DM 😊
🔄 DM 😊
🔄 DM 😊



Notes

Add meeting notes - all meeting user can view/edit this



Additional Meeting Notes Draft

Salesforce Sans 12 B I U

Shared meeting notes

Click Private Note to open private notes section. Only visible to the user.



Private Note

Private Meeting Notes

Salesforce Sans 12 B I U

Schedule & Create Calendar

Bruce Wayne David McGee 1:1
22 February 2023 (Draft)



Schedule



Click Schedule to schedule the meeting (Meeting will be available in Meeting Hub for attendees)

× Bruce Wayne David McGee 1:1 Save

22 Feb 2023 1:30pm to 2:00pm 22 Feb 2023 Time zone

All day Doesn't repeat

Event Details Find a Time

[Join with Google Meet](#)

meet.google.com/ndv-vvgo-jvz Up to 100 guest connections

Online

Notification 30 minutes

Add notification

OKRify OKR Goal Management App in Salesforce

Busy Default visibility

This is the Salesforce Meeting Link

https://okrtstrun-dev-ed.my.salesforce.com/lightning/n/Okryfy_View_Meeting?c__MeetingId=a008a00000fay6wEAA

Talking Points

1. Key achievements accomplished last week
2. Any challenges or blockers for you?
3. How is your progress on your goals and tasks for the past week?
4. Do you need management support or resources for any of your tasks?

Guests

Add guests

OKRify OKR Goal Management App in Sales...
Organiser
newbruce@okryfy.com *
okrmeetingmail@17sphpby7yh6bz2bkn...

* Calendar cannot be shown

Suggested times

Guest permissions

- Modify event
- Invite others
- See guest list



Calendar Icon (Available for Schedule meeting) to create meeting in Gmail/Outlook

Make necessary changes and send Calendar

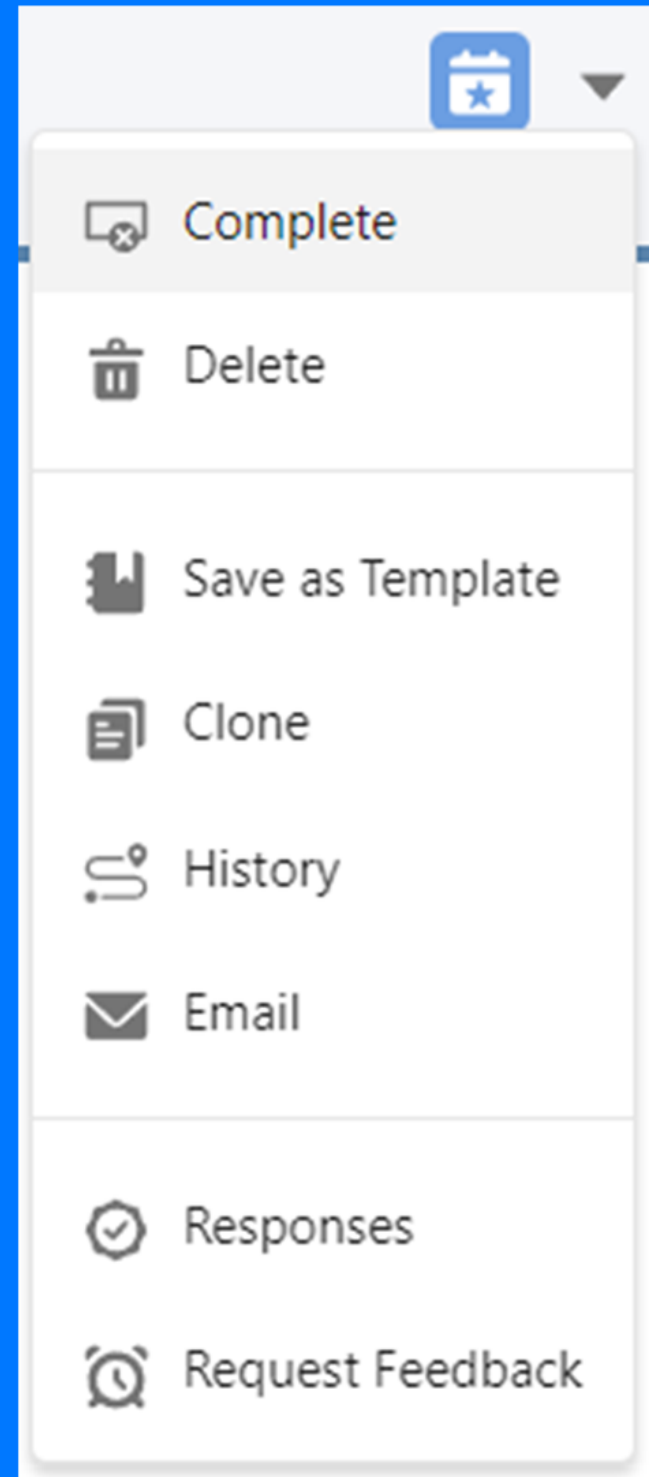
Bruce Wayne David McGee 1:1
22 February 2023 (Scheduled)



Online Meeting Link Updated

Calendar Event Link (Only for Gmail)

Meeting Actions



Complete: Complete this meeting & create next meeting
(Only for recurring meeting)

Delete: Delete the meeting

Save as Template: Save the meeting as a template

Clone: Clone the meetings

History: View previous meetings for recurring meetings

Email: Send meeting details as email to attendees or any email address

Feedback: Provide feedback to the Meeting

Responses: View feedback from attendees (Only for organizers)

Request Feedback: Send email to request feedback for meeting

Key Points

01 Effective Meetings

Run productive 1:1, team or cross-functional meetings in Salesforce

02 Collaboration

Collaborate to set agenda, assign action items, comments in meetings

03 Real-time

View real-time OKRs & KPIs in your meetings



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

Create OKR 2

Guide for creating OKR with automatic progress update with Subject, KPI, Report or Linked OKR Results