

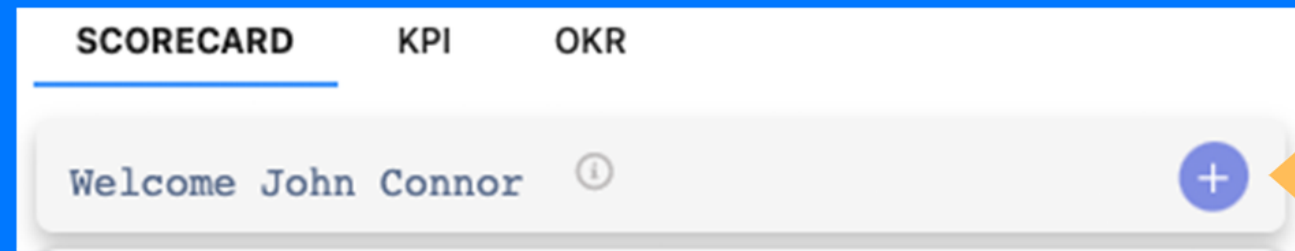
OKRify

Scorecard

- Create Scorecard
- View Scorecard
- View Leaderboard



Create Scorecard



Click Create icon from Scorecard tab in Hub

A screenshot of the 'Rep Quarterly Scorecard (Active)' configuration form. The form is titled 'Rep Quarterly Scorecard (Active)' and has a 'Save & Activate' button in the top right corner. The form is divided into several sections:

- Name:** A text input field containing 'Rep Quarterly Scorecard'.
- Timeframe:** A dropdown menu set to 'Quarterly'.
- Enable Leaderboard:** A toggle switch that is turned 'ON'.
- Start Date:** A date picker field set to 'Jul 1, 2022'.
- End Date:** A date picker field set to 'Dec 31, 2023'.
- Team:** A search input field with 'Sales' selected below it.
- Manager:** A search input field with 'John Connor' selected below it.
- Users:** A search input field with several users listed below it: John Connor, David McGee, Victor Mann, Tim Blake, Bruce Wayne, and Mike Wise.

Enter the following fields

- Name
- Timeframe (Weekly, Monthly, Quarterly or Annual)
- Start Date (Can be in Past)
- End Date
- Team (Multiple teams can be entered - Managers & users from teams will be automatically populated)
- Manager - Add additional managers for Scorecard (Can edit scorecard)
- Users - Add additional users (Users for whom KPIs will be tracked)










Add Scorecard KPIs

Add all the KPIs that needs to be tracked in the Scorecard

Assigned to - Will be used to assign KPIs to the respective users

Weight to calculate Score (Sum should be 100)

Target for each user

| SI.No | KPI | Assigned to | Weight | Target | | |
|-------|----------------------------------|---------------|--------|--------|---|---|
| 1 | Meetings Monthly X | Created By ID | 10 | 12 |  | + |
| 2 | Closed Opportunity Ratio X | Owner ID | 20 | 40 |  |  |
| 3 | New Accounts Quarterly X | Owner ID | 15 | 5 |  |  |
| 4 | Sum of Clsd Opportunity Amount X | Owner ID | 30 | 25,000 |  |  |
| 5 | Inbound Web Leads X | Owner ID | 25 | 5 |  |  |

Click custom target to set different targets for each user & period

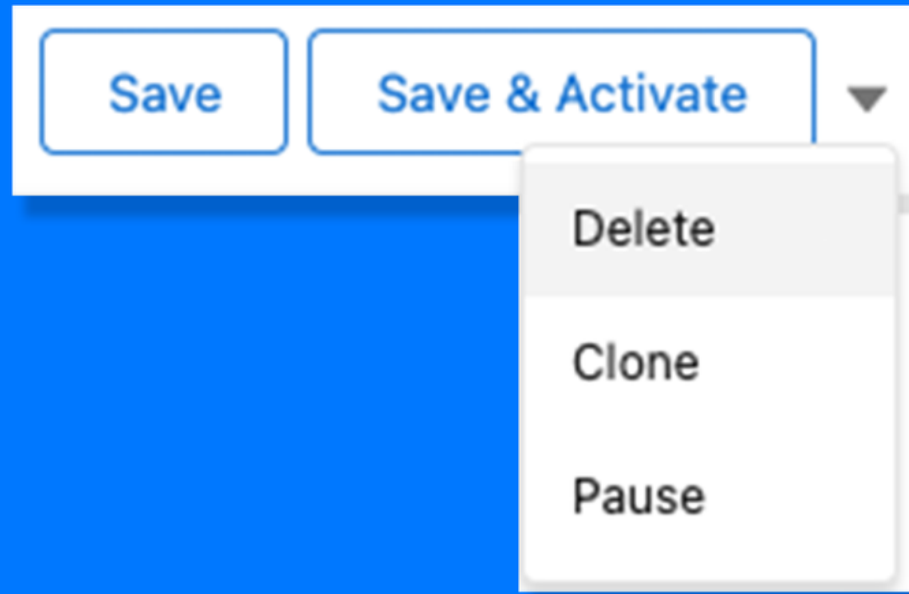
“ Check KPi Guide for information on creating KPIs”

Custom Target

Assign target per user and period for each KPI

| Meetings Monthly | | | | | | |
|------------------|-----------|-----------|-----------|-----------|-----------|-----------|
| | Q3 - 2022 | Q4 - 2022 | Q1 - 2023 | Q2 - 2023 | Q3 - 2023 | Q4 - 2023 |
| David Mcgee | 10 | 11 | 10 | 10 | 10 | 10 |
| Victor Mann | 8 | 8 | 8 | 8 | 8 | 8 |
| Tim Blake | 7 | 9 | 12 | 12 | 12 | 12 |
| Bruce Wayne | 10 | 12 | 12 | 12 | 12 | 12 |
| Mike Wise | 8 | 8 | 10 | 10 | 10 | 10 |
| John Connor | 12 | 12 | 12 | 12 | 12 | 12 |

Scorecard Actions



Save - Save Scorecard in draft status (Only visible for Scorecard Manager)

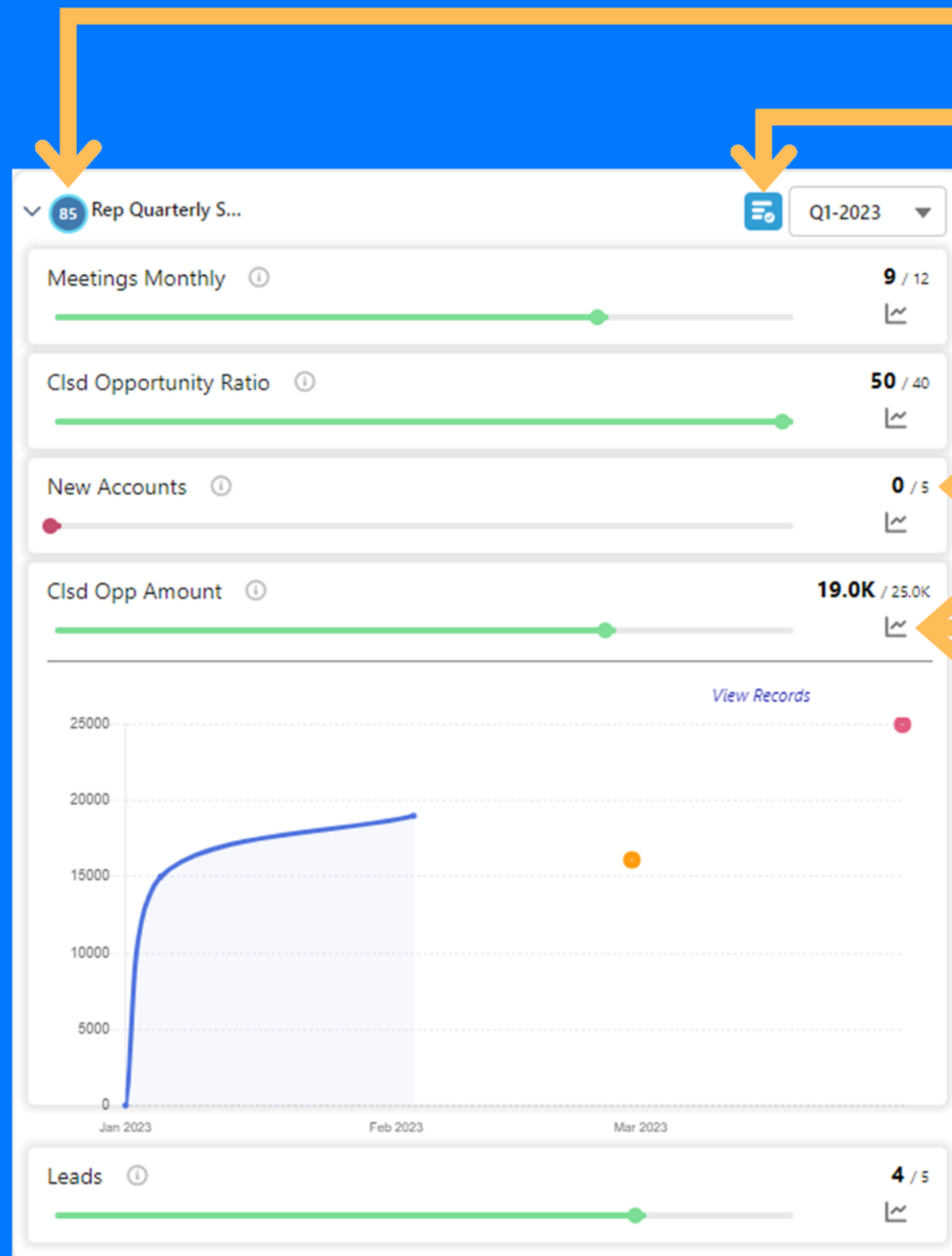
Save & Activate - Save Scorecard in active status (Scorecard visible for managers & users)

Delete - Delete the Scorecard

Clone - Clone the Scorecard

Pause - Save Scorecard in pause status (Only visible for Scorecard Manager)

Scorecard View



Overall Score is displayed on top

Leaderboard will be available if enabled

Each KPI with targets are displayed

Progress graph for KPIs are available

(Users will see their current progress & target and managers will see the total progress & total target)

Leaderboard

| Rep Quarterly Scorecard | | | | | | | Q1-2023 | | |
|-------------------------|------------------|------------------------|--------------|-----------------|-------|-------|--------------------|-----------------------|-------------|
| Team Members | Meetings Monthly | Clsd Opportunity Ratio | New Accounts | Clsd Opp Amount | Leads | Score | Annual | | |
| John Connor | 19/12 | 40/40 | 3/5 | 1.5M/25.0K | 4/5 | 96 | New Accounts Total | Clsd Opp Amount Total | Leads Total |
| David McGee | 9/12 | 50/40 | 0/5 | 19.0K/25.0K | 4/5 | 85 | 1/60 | 34.0K/180.0K | 7/60 |
| Mike Wise | 2/12 | 0/40 | 1/5 | 0/25.0K | 2/5 | 17 | 4/60 | 22.0K/160.6K | 2/60 |
| Bruce Wayne | 0/12 | 0/40 | 0/5 | 0/25.0K | 0/5 | 0 | 6/60 | 1.5M/155.5K | 5/60 |
| Tim Blake | 0/12 | 0/40 | 0/5 | 0/25.0K | 0/5 | 0 | 0/60 | 0/151.5K | 0/60 |
| Victor Mann | 0/12 | 0/40 | 0/5 | 0/25.0K | 0/5 | 0 | 0/60 | 0/247.0K | 0/60 |
| | | | | | | | 0/60 | 0/150.0K | 0/60 |

- All KPIs along with target for each user is displayed
- Sorted based on overall Score
- Leaderboard is available to Managers by default and to users if enabled

Key Points

01 Scorecard

Track performance of multiple KPIs for all team members

02 Targets

Set flexible targets for each user and/or period

03 Weighted Scoring

Automatic score calculation with weights to focus on the behaviors that drive business outcomes



More OKRify Guides

KPI

Guide for Creating KPI (Simple or advanced), assign KPI to user or team

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