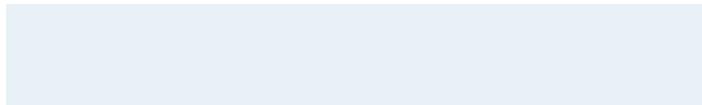
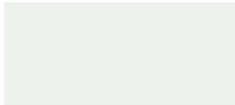
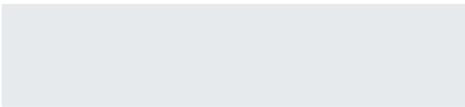




your first quarter with OKRs

A TIMELINE VIEW OF BEST PRACTICES
AND PRODUCT TIPS



education and draft OKRs

This timeline view covers suggested best practice milestones to help you through your first quarterly cycle with objectives and key results.

OKRs are unique in that every time you go through a full cycle, there will be a different structure. They link to areas of responsibility,

business priorities, and stages of your business. Every cycle you'll discover new things. You'll have different milestones based on your priorities and strategies.

This timeline is meant to be a guide to help build great habits so you can create a frequency that works best for you.

[COMPLETE TIMELINE VIEW ON PAGE 6 PRINTABLE AT 11X17](#)

RECOMMENDED GUIDES:

- Practical guide to OKRs
- Introducing OKRs to your team
- Alright, OKRs! Now what?!
- Effective coaching best practices
- Beginners guide to achievement
- Creating a collaborative team

PRODUCT HOW-TOS:

- Core feature training videos
- Browse the permission matrix
- Complete the rollout checklist and implementation guide

Access these resources here:
<http://bit.ly/7GeeseWelcomeBundle>

DRAFT OKRS



PLANNING: Have all leadership team members put draft OKRs into the OKRs review template. Review as a team once complete. Template: <http://bit.ly/DraftOKRs>

Each team lead can continue to repeat these steps with their direct teams and reports.

DISCUSSION TOPICS: grading criteria that will be used at the end of the quarter, what defines "success" for each OKR, supporting KPIs, and major contributing projects.

TIP! *As you create your OKRs, think about how you'll provide updates. Is this OKR something you assess weekly or monthly?*



EDUCATION



SETUP



COMMITTED
OKRS

progress updates and check-in's

A great objective is one you think about in everything you do. Every time you check-in, you're consistently turning goal-setting into a natural habit. This changes how individuals approach engagement at work.

Work is no longer a series of tasks, but higher-level achievements tied to team success and business impact.

This focuses conversations on what needs to be done next to aim even higher. Every great OKR incorporates a discussion where everyone gets asked, "can you realistically commit to all of this?"

Have conversations that answer what success means, how each team will support the other, and what resources are needed.

CHECK-IN!

Check-in within your first week to start building a habit. Weekly check-ins also will leave you with 12 snapshots in time at the quarter's end to reflect back on.

TIP! *Download the browser extension to check-in without disrupting where you're already working.*

Click the ... in the 7Geese navigation or here: <http://bit.ly/7GChrome> to download

STATUS UPDATE

By week 3 add an on/off track indicator. Assess what resources, priority shifts, or adjustments need to be made. Get through the rest of the quarter with confidence, feeling empowered.

Knowing you have the proper resources (tangible, or in the form of coaching) increases the likelihood of completion of your OKR.

 **HAVING TROUBLE REMEMBERING TO CHECK-IN?**
Turn on the check-in email reminder for your OKRs!



WEEK 1



WEEK 3

roadblocks and planning

Goal-setting coaches concentrate on keeping goals manageable and on-time.

Short-term goal coaching should focus on the achievable, action oriented component of long-term achievement. Coaching keeps goals not just realistic, but relevant to the long-term personal development of the

mentee. As a goal-setting mentor, you should keep goal conversations focused on, "can your goal really be done?" where you break down long-term goals into short-term, actionable items.

LEADERSHIP MEETING

It's important to meet at the half way mark to discuss where things are at, provide team-level updates on whether OKRs are being understood at all levels

SUGGESTED DISCUSSIONS: Were we realistic? Any roadblocks? How can we help each other?

Q2 PLANNING

Go over yours and your team's current OKR performance and evaluate how things went and why. Document how you plan to ensure mistakes from this quarter aren't carried over.

OUTCOME: commit to next quarters organization objectives + dept. projects



CONTINUOUS 1-ON-1S, ONCE A MONTH RECOMMENDED

Focus on breaking long-term OKRs into actional next steps and how OKRs fit into their day-to-day.

SUGGESTED TEMPLATE: Monthly OKRs 1-on-1 <http://bit.ly/Monthly1-on-1Template>



WEEKS 6-9



WEEK 10



END OF THE QUARTER

grading and coaching

REMEMBER! OKRs, when done great, are a tool for motivating and aligning people to work together. They spur perspective sharing, moments of discovery and make even your high performers achieve more.

They increase transparency, accountability and empowerment.

They are not designed to be used as a process or tool to use against your team to keep tabs, micro-manage, or couple with negative performance assessments.

Q2

CLOSE OKRS

DRAFT Q2 OKRS

Individually, have everyone assess their OKRs. A great place to start with grading is providing a simple expectations assessment: at the end of the quarter, did you meet the expectations for your OKR that you committed to?

Why or why not. Self-reflect!

Team leads should have 1-on-1s with their direct team to talk career journey in relation to their OKRs and performance.

TIP! Close your OKRs directly from the home page. Once over due, a close option appears when you hover over the objective.

SUGGESTED 1-ON-1 TEMPLATE: Quarterly Performance Reflection—Accessible here: <http://bit.ly/Quarterly1-on-1Template>



END OF THE
QUARTER



A FEW DAYS
LATER



SETUP



complete timeline view

CONTINUOUS 1-ON-1S, ONCE A MONTH RECOMMENDED

It's common in Q1 for teams to not understand how OKRs fit into their day-to-day/how to continuously measure higher level targets.

These 1-on-1s focus on educating and supporting your team build strong goal-setting habits.

SUGGESTED TEMPLATE: Monthly OKRs 1-on-1 <http://bit.ly/Monthly1-on-1Template>

RECOMMENDED READING:

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- Alright, OKRs! Now what?!
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PRODUCT HOW-TOS:

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PLANNING: Have all leadership team members put draft OKRs into the OKRs review template. Review as a team once complete. Template: <http://bit.ly/DraftOKRs>

Each team lead can continue to repeat these steps with their direct teams and reports.

DISCUSSION TOPICS: grading criteria that will be used at the end of the quarter, what defines "success" for each OKR, supporting KPIs, and major contributing projects.

TIP! As you create your OKRs, think about how you'll provide updates. Is this OKR something you assess weekly or monthly?

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Knowing you have the proper resources (tangible, or in the form of coaching) increases the likelihood of completion of your OKR.

It's important to meet at the half way mark to discuss where things are at, provide team-level updates on whether OKRs are being understood at all levels, and discuss what changes need to happen to keep everyone engaged.

SUGGESTED DISCUSSIONS: Were we realistic? Any roadblocks? How can we help each other?

Go over yours and your team's current OKR performance and evaluate how things went and why.

Document how you plan to ensure mistakes from this quarter aren't carried over.

OUTCOME: commit to next quarters organization objectives + dept. projects

Individually, have everyone assess their OKRs. A great place to start with grading is providing a simple expectations assessment: at the end of the quarter, did you meet the expectations for your OKR that you committed to?

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QUARTERLY PERFORMANCE REFLECTION—Accessible here: <http://bit.ly/Quarterly1-on-1Template>

TIP! Close your OKRs directly from the home page. Once over due, a close option appears when you hover over the objective.



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