



task prioritization, project planning, and optimizing objectives / check-ins

AN ADVANCED GUIDE



tasks, projects and objectives...

Understanding the difference between tasks and projects, and how they inform objectives will keep you focused on communicating what matters.

Aligning team efforts and sharing progress updates to keep initiatives on track is one of many great reasons teams use OKRs. However, ensuring you're not duplicating info from one product to another is an important step in creating great goal-setting habits.

This guide covers the difference between tasks, projects, and objectives, how they compliment one and another, what types of products help keep you on track, and tips to effectively communicate progress with your team at the right time.

Learn more about the objective and key results methodology in our practical getting started guide:

<http://bit.ly/7GeeseOKRsGuide>



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the intricate details of an obj.

There's no one perfect way to create a great OKR. However, there are a few moving parts that create common threads throughout getting on the right path to a great OKR.

This section will cover the following four topics:

1. Four questions to get started
2. Understanding how tasks, projects, and objectives compliment and empower the other, rather than compete
3. Why project planning is a strategic place to start when creating great objectives
4. The importance of visual representation in achievement and how to start visualizing your objective

starting is easy, it begins with answering, “ why?”

No one is more qualified to determine your most powerful emotional connection to your goal than you. The first step to creating great objectives is to reflect on these 4 questions...

1. Why do you care about this objective?

WHY? This builds a heartfelt connection to getting things done. It adds an element of “wanting” to achieve, not just “needing” to achieve it.

After reflecting on these four important questions, it's time to distinguish what aspects of your goal will be task driven, project oriented, or objective/measurement driven.

2. What motivates you?

WHY? It's not about choosing whether this objective intrinsically, extrinsically, or personally motivates you, but it's about making that connection heartfelt.

3. What resources will you need to make your objective animated?

WHY? Our brains have pictorial superiority when it comes to processing information. Anything visualized, whether that be in checklists, photos, or the form of mental visualization, when it comes to motivating oneself, imagery wins. Imagery gives life-like qualities to your objective. This heightens the amount of internal inspiration feeding into your achievement.

4. Are you prepared to be extremely specific?

WHY? Abstract words and measures convolute a clear visual path to achievement. Vividly picturing your objective means you have to be specific. Specificity creates a solid concept of what represents the “end.” The more specific you are, the harder it is to fight the feeling of knowing you'll achieve the completion that you've just visualized.

NEXT: tasks vs. projects vs. objectives

understanding how OKRs are not just task or checklists can make goal-setting less complex and motivating

In business, OKRs are used to guide outcome-based success. They are not used to act as a secondary checklist or task management process. Instead, they compliment tasks and projects by measuring outcomes.

Through using metrics and milestones, objectives focus on the outcome that tasks and projects combined generate for your business. They help define a success criteria, align efforts cross-functionally, and help measure everyone's impact.

Here's an example to put things in context: a few task items could be, *"write 2 blog posts this week"*, or *"post to Quora 5 times."* These two tasks can inform different outcomes. Are you increasing web traffic? Trying to generate new leads?

These tasks can also inform larger projects. In this case, perhaps they are informing a goal of becoming a thought leader in your industry. With these task items, you can confidently say that there are also other ways than blogging/posting on Quora that can inform becoming a thought leader.

Tasks and projects can change day-to-day depending on new strategic directions,

analytical data informing what is working and what's not, or, simply by what resources you have available in your team. Objectives go one step above tasks and projects. They inform outcomes you are going to use to confidently say, "we're a thought leader!"

TASKS

A task is a specific, detailed step "to-do" that is taken to achieve a desired outcome.

Tasks are often completed day-by-day.

They layout one-by-one, steps to accomplishing a project.

PROJECTS

A project is an initiative, one of many that move you forward towards an outcome or accomplishing a particular strategy.

OBJECTIVES

Define what you're hoping to achieve through your projects/tasks. They indicate how you know you've succeeded. They encourage cross-functional collaboration.

NEXT: how projects inform objs.

the best place to start creating objectives is to think about what projects you'd like to accomplish to bring strategies to life

The most common roadblock when creating objectives is how to transform tasks from projects and initiatives into results. This page provides a few tips and tricks to distinguish the difference.

Engineering and support teams are two functional areas that often work in bite-sized tasks and milestones. Engineers operate in Sprints, use AGILE frameworks, and tackle small chunks of projects at a time. There's also multiple people contributing to the same outcome, each person tackling different bite-sized bits. This can make it hard to see how that work is contributing to a key result.

In support, measures such as number of conversations sent by customers can be both good or bad. Customers are talking to us, that's great for relationship building! But it can also indicate problems in onboarding, lack of proper support documentation, etc. So how do problems like these still translate in objectives with measurable outcomes?

What's missing is that each small piece of any project, every task, is contributing to some larger outcome.

For example, each bug that a developer works on is contributing to removing tech debt, improving product performance, eliminating duplicative code, and so on. Each support conversation is contributing to customer loyalty and empowering successful relationships. While it's not efficient to track every single task or bite-sized to-do, it is important to relay how that work is contributing to establishing an awesome experience.

So start thinking bigger picture! The main outcome is to have a rockstar product, improve experiences, reduce churn, and have stellar relationships with customers.

Start thinking about how your work is helping your team. Instead of using language such as, *"Complete 50 product pull requests"*, think to what that effort is feeding into in the grander picture, such as, *"improve the 10 slowest, most used, areas of the product."* This communicates to others that are also invested in customer experience how you too are working to empower amazing experiences.

NEXT: visualizing these thoughts

humans are wired to learn faster with visual, not textual stimuli

Visualizing these four aspects of your objective will create a starting point that helps you see success, not just feel it.

1. Size

WHY? How big is your goal? Is it life-size or revolutionary like creating a new technology product or industry? Or, smaller, focused on improving something existing like putting internal processes in place to scale your team?

2. Color

WHY? What colors reflect how you'll feel when having achieved your goal? Colors are directly tied to emotion and meaning, so connect with a color that makes you feel successful and accomplished.

3. Setting

WHY? Objectives are made up of distinct tasks and projects that are completed along the way. How many different actions are you going to have to take before you can measure success? What meetings or other team members are going to need to be involved? It's also important to realize what will have to be let go of to move forward. Setting includes not only the steps along the way, but the resources and physical surrounding in which you are most productive.

4. Movement

WHY? Objectives are based on momentum towards an end goal—so in your visualization, what are you and others doing? What new things do you need to learn or get done to accomplish your objective?

After visualizing your goals, it's time to put them into words.

Objectives and key results can be written in multiple ways: next, this guide presents 5 common ways to get started / elevate your objectives.

NEXT: objective examples

aligned objective examples

Borrowing from best practices from sales, product, development, and customer success/support the next section provides specific examples of great objectives highlighting five key areas that make up the blueprint of great objectives.

These objectives are in an example alignment tree to exemplify the cascading impacts great objectives can have to showcase team-wide efforts and impacts.



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objectives use concise language—they focus on forward moving metrics

Objectives and key results are meant to be focused, easy, and driven by results. However the blueprint for a great objective starts with understanding the language that goes into creating goals. This starts with the objective having a clear subject, object, and journey that subject aims towards.

This follows the forward-momentum component about goal-setting. You're always looking to push forward and achieve something new. Here's an example that follows this model:



KR: 80% of new customers continue their subscription after 2 months.

KR: 50% of new users return within 2 weeks.

KR: Churn rate is < 2% this quarter.

But what other components make this objective great? There's a few different numerical values in the key results: 2%, 50%, 80%, 2 weeks... This objective uses concise language, follows a target-driven model (focuses on improvement language, or where you want to end up to define success), and also uses a numeric value called a delta.

In the following pages, learn more about other success criteria that can be used to create objectives including: baseline metrics, personal language, and qualitative data.

More about this section:
Focusing on the important of visual representation, this section focuses on providing visual alignment trees, time-lines, and real examples from the team at 7Geese to help you learn how to elevate your own objectives.

EXAMPLES LEGEND

- blue box** PERSONAL OBJECTIVES
- green box** DEPARTMENT OBJECTIVES
- purple box** ORGANIZATION OBJECTIVES

NEXT: baseline result examples

EXAMPLES: USING BASELINE METRICS TO STAY MEASUREMENT FOCUSED

baselines are used as “start” value

A good key result incorporates a baseline measure you’re aiming for or moving away from. For example, you could be making \$250,000 in revenue per month. You’d like to increase revenue to \$275,000 as a team. *“Increase revenue by 10%”* would be your key result.

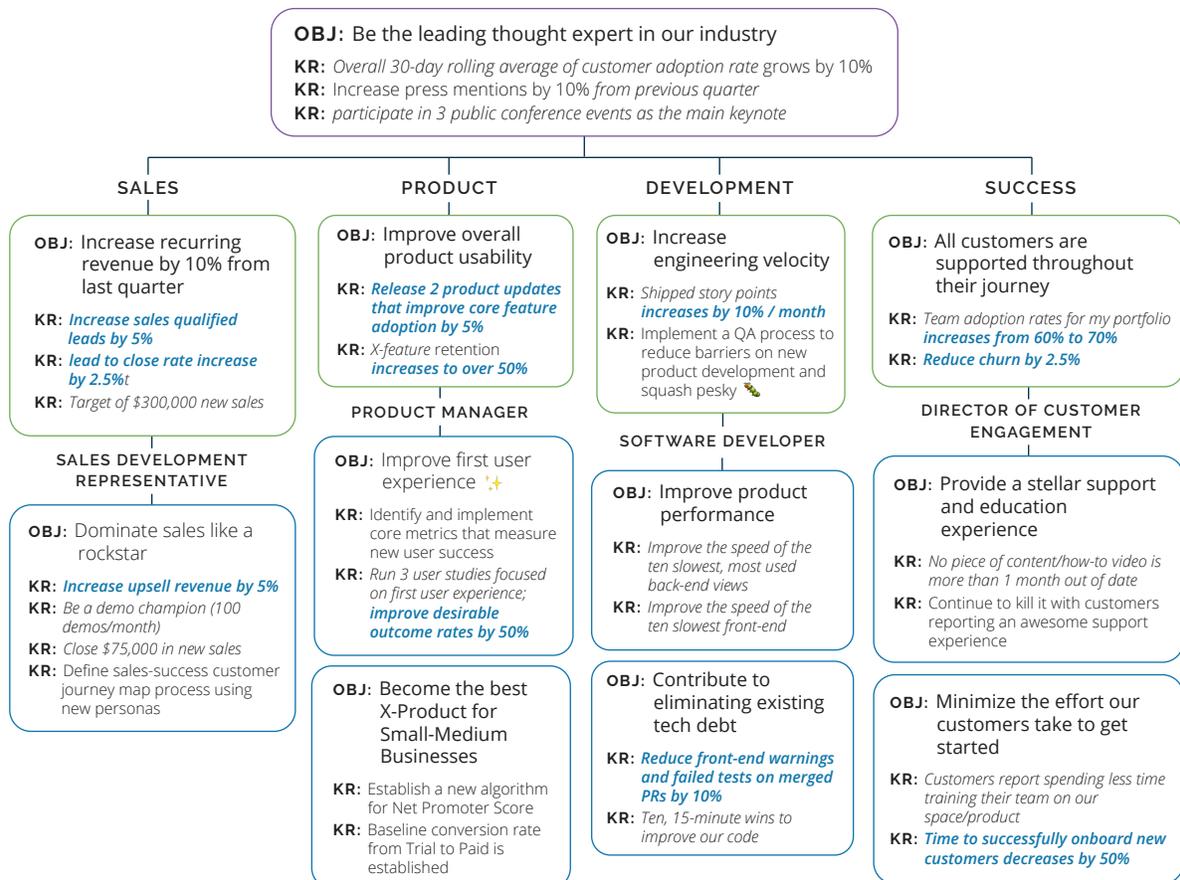
However, you wouldn’t track your to-do’s with your objective... this includes steps like demos with new leads, signing contracts, etc. Track instead the conversion of leads to signed contracts—the rest is just personal to-do’s.

EXAMPLE OBJECTIVE TREE

In this objective tree, most key results use language indicating a target of aiming to increase, grow, decrease, or improve a key value.

What makes these objectives great? There’s many tasks that are contributing to these changes, but only the outcome is measured, not those steps and to-do’s.

These examples are indicated by *blue bold text*.



USING BASELINE METRICS TO STAY MEASUREMENT FOCUSED

use milestones when focusing on execution

Key results can successfully incorporate larger picture task-driven milestones without being too granular or duplicative of tasks when they focus on the end goal. Here's an example milestone key result, "Identify and implement core metrics to measure new user success." This milestone measures the end goal: implementing new business metrics.

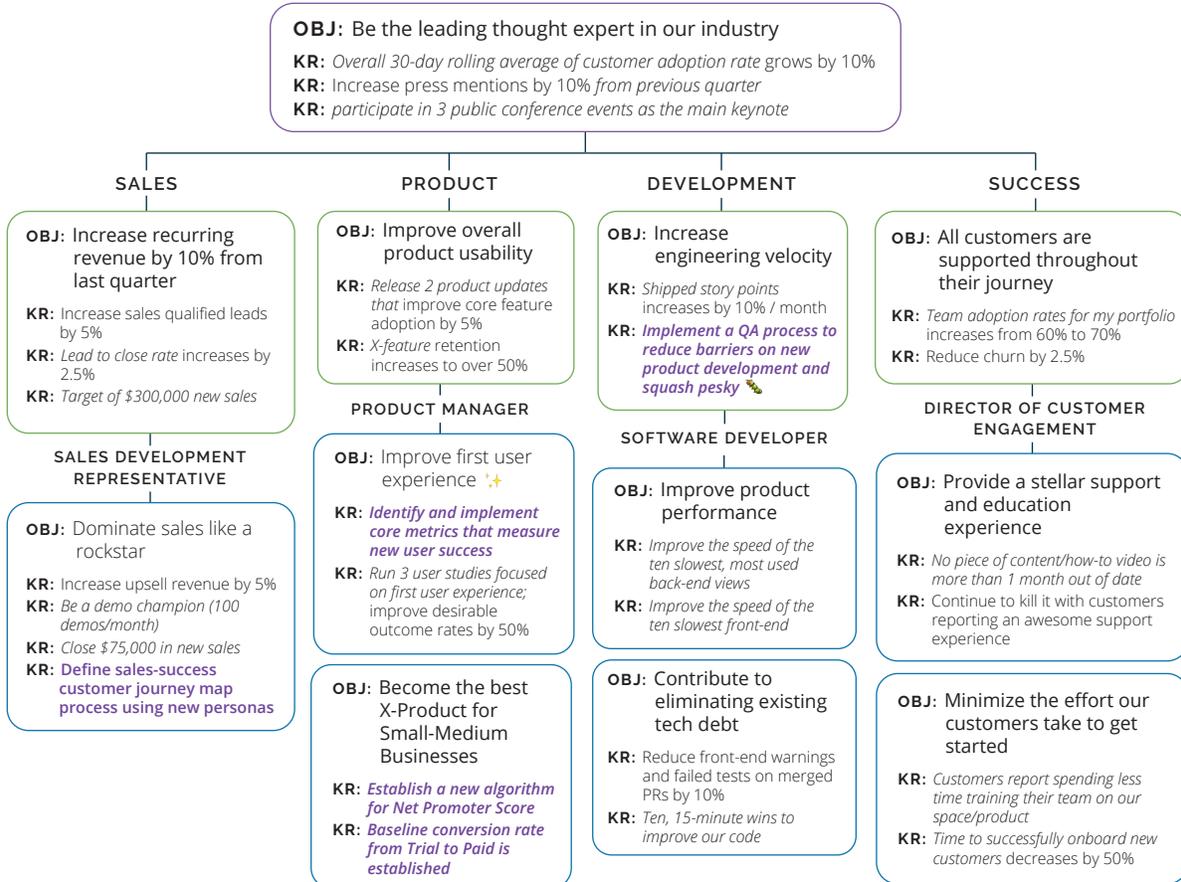
Associated tasks, such as looking at past data, meeting with other team members, or implementing a dashboard aren't included. They're the to-do's, while the implementation itself is the key result.

EXAMPLE OBJECTIVE TREE

In this objective tree, the language indicating a successful milestone metric includes: implement, identify, release, or establish.

What makes these objectives great? There's still multiple steps leading up to the completion of the key result. The milestone focuses on the end result.

These examples are indicated by *purple bold text*.



objective wording should be personally motivating

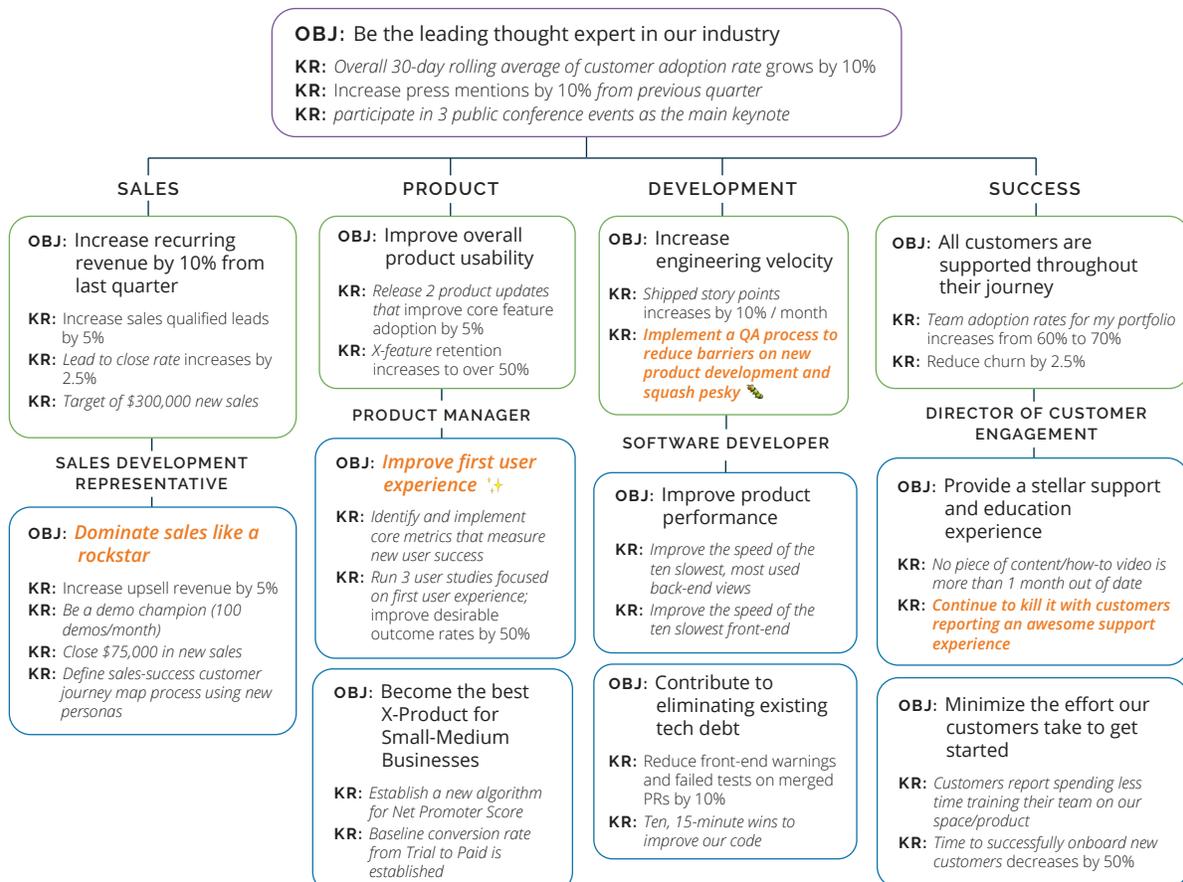
The philosophy behind objectives and key results goal-setting is to create a language for goals that motivates people to get started and push higher. Objectives need to be meaningful to empower teams, not distract them. This is where the power of having fun with goal-setting can create personal, heartfelt connections.

If you like emojis, use them! More serious? Keep your objective tone more to the point. Focus on what gets you excited to act.

EXAMPLE OBJECTIVE TREE

What makes these objective examples great? They use the language and are personalized to the team member who owns them. This creates a personal connection to the objective, increasing the likelihood of being motivated to succeed and aim higher.

These examples are indicated by **orange bold text**.



EXAMPLES: USING NUMBERS (THE MOST COMMON KEY RESULT MEASURE)

numbers keep things simple

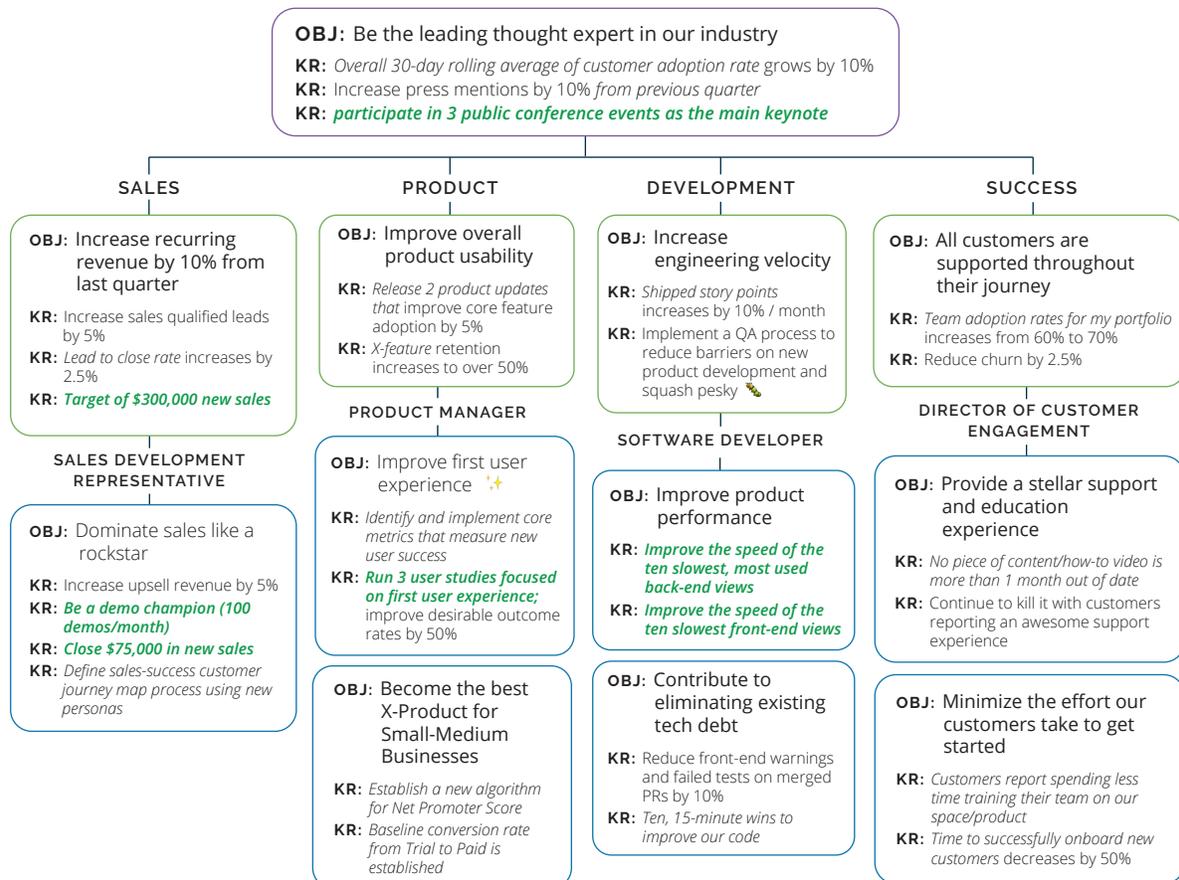
Any number used in key results should follow the S.M.A.R.T model—specific to the business, measurable, attainable in the given cycle of the objective, relevant to your OKR, and is time-bound.

Key results that use numbers are typically counts, or integers, or measures you wish to reach, or dollar figures. Numeric insights can move conversations from actions taken, to data patterns across quarters. This helps when analyzing patterns and assessing next steps.

EXAMPLE OBJECTIVE TREE

What makes these objective examples great? The references to numbers are easily understood. You know you want to get to point B from point A. I want to achieve X—this is clear and concisely defined with numbers. There’s no fancy wording that takes away from the main target.

These examples are indicated by *green bold text*.



EXAMPLES: SOMETIMES KEY RESULTS JUST NEED TO BE AMBIGUOUS

subjectivity can be alright in key results

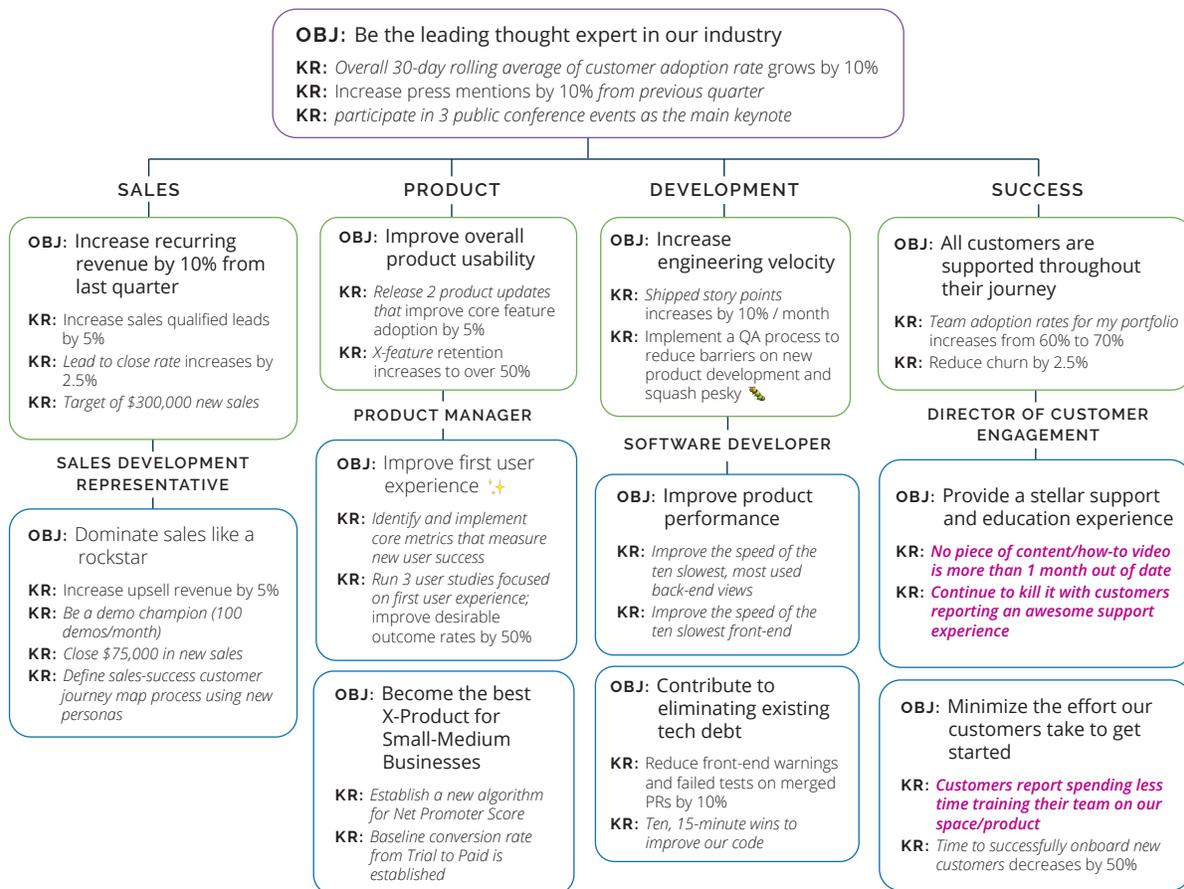
Not every objective is going to have a clear numeric value or metric that can be measured using quantifiable data. Some are based on qualitative data, such as customers reporting great experiences and support interactions.

When thinking about how to check-in with progress updates, you'll have to look to how you receive feedback from customers. These check-ins should be based on the meaningful impact each interaction brings.

EXAMPLE OBJECTIVE TREE

What makes these objective examples great? Not every key result will have a dedicated number, but these examples stay true to the language and culture of the team member who owns them. They are also still communicating higher level impacts their work has on overall team objectives.

These examples are indicated by *pink bold text*.



example objective alignment tree

This objective alignment tree provides great objective examples with actionable key results that follow best practices for keeping goals measurable, specific, time-bound, action-oriented and realistic.

LEGEND

blue RESULTS WITH DELTAS (CHANGING %S)

purple (MILESTONE METRICS)

orange (LANGUAGE THAT IS PERSONAL)

pink (SUBJECTIVE, QUALITATIVE RESULTS)

green (NUMERIC RESULTS)

ORGANIZATION OBJECTIVE

OBJ: Be the leading thought expert in our industry
KR: Overall 30-day rolling average of customer adoption rate **grows by 10%**
KR: **Increase press mentions by 10%** from previous quarter
KR: **participate in 3 public conference events as the main keynote**

SALES

PRODUCT

DEVELOPMENT

SUCCESS

DEPARTMENT OBJECTIVES

OBJ: Increase recurring revenue by 10% from last quarter
KR: **Increase sales qualified leads by 5%**
KR: Lead to close rate **increases by 2.5%**
KR: **Target of \$300,000 new sales**

OBJ: Improve overall product usability
KR: **Release 2 product updates** that **improve core feature adoption by 5%**
KR: X-feature **retention increases to over 50%**

OBJ: Increase engineering velocity
KR: Shipped story points **increases by 10%/month**
KR: **Implement a QA process to reduce barriers on new product development and squash pesky** 🐛

OBJ: All customers are supported throughout their journey
KR: Team adoption rates for my portfolio **increases from 60% to 70%**
KR: **Reduce churn by 2.5%**

SALES DEVELOPMENT REPRESENTATIVE

PRODUCT MANAGER

SOFTWARE DEVELOPER

DIRECTOR, CUSTOMER ENGAGEMENT

PERSONAL OBJECTIVES

OBJ: **Dominate sales like a rockstar**
KR: **Increase upsell revenue by 5%**
KR: **Be a demo champion (100 demos/month)**
KR: **Close \$75,000 in new sales**
KR: **Define sales-success customer journey map process using new personas**

OBJ: **Improve first user experience** ✨
KR: **Identify and implement core metrics that measure new user success**
KR: **Run 3 user studies focused on first user experience; improve desirable outcome rates by 50%**

OBJ: Improve product performance
KR: **Improve the speed of the ten slowest, most used back-end views**
KR: **Improve the speed of the ten slowest front-end views**

OBJ: Provide a stellar support and education experience
KR: **No piece of content/how-to video is more than 1 month out of date**
KR: **Continue to kill it with customers reporting an awesome support experience**

OBJ: Become the best X-Product for Small-Medium Businesses
KR: **Establish a new algorithm for Net Promoter Score**
KR: **Baseline conversation rate from Trial to Paid is established**

OBJ: Contribute to eliminating existing tech debt
KR: **Reduce front-end warnings and failed tests on merged PRs by 10%**
KR: **Ten, 15-minute wins to improve our code**

OBJ: Minimize the effort our customers take to get started
KR: **Customers report spending less time training their team on our space/product**
KR: **Time to successfully onboard new customers decreases by 50%**



project work and checking in

When creating OKRs it's important to think about how you'd like to measure progress throughout your cycle to ensure you're duplicating comments and communicating effectively about next steps to your team.

The best way to do this is to break down what resources you already have existing in your work-flows and define what product will be used and for what purpose.

This next section goes over examples from work-flows here at 7Geese incorporating task prioritization, project planning, through to measuring progress and key results. It will cover well known product types and clearly breakdown the purpose of each product and how to use them effectively when using objectives and key results for goal-setting.



60%

“can’t I just use a spreadsheet?” from tasks to projects, to tracking objective progress... there’s a suite of apps to help you out

The answer to the question, “*can’t I just use a spreadsheet?*” depends on the stage your team is at with OKRs. When spreadsheets are helpful is during draft brainstorming sessions and project planning—they are not good when it comes to continuous check-ins, progress updates, analytics and visually aligning impacts.

Different products have different main functions in the life-cycle of OKRs. Task management projects, such as Asana and Trello, help with sharing next steps on projects and keeping team members up to date with snapshot moments. Products like Confluence, are great for internal knowledge sharing and building an internal community hub. On the other-hand, Google spreadsheets, a go-to for chart and list making, can also be helpful when brainstorming and preparing ideas.

However, what all these products lack is a continuous, high-level, communication hub for progress. Progress linked to collaborative coaching.

A key component of the objectives and key results goal-setting method is that they align efforts throughout entire teams. This is where task management focused

products become limited and something more robust compliments them.

Objectives and key results are best executed when there is progress roll-ups, visual alignment, and continuous in-context conversations. So how do products that task-driven, and other products that are coaching driven empower the other to create a goal-setting and tracking cycle?

In the next section, explore the granular differences between common task, project, and objective software.

Learn how these different products compliment each other, rather than compete. When it comes to full objective life-cycle management for teams, it’s important to define what work-flows and products you use to leverage their functionalities effectively. This will help you become a rockstar goal planner and executer, knowing exactly where to go for what purpose.

NEXT: comparing task/project/objectives product matrix

example task, project, and objective product matrix

	PRODUCT TYPE	BEST TO USE...	USED BY...	PURPOSE	LIMITATIONS FOR OKRS
	task management	On a personal / small team level to track granular day-to-day to-do's	Product managers / small teams / project groups and Shared task management	Team communication and task or project management (conversations instead of emails in context to tasks/projects)	tasks and strategies continuously changing and Transactional micro initiatives
	task management	AGILE/Sprint Planning, Quality Assurance, Project management, Version control and code repository	Developers, Project and product managers	Tracking development and product work, Complex work-flows / heavy duty product management that need reporting of time spent vs. items completed	Transactional, granular day-to-day development tasks, related to developer-specific work-flows, not inclusive to all team work-flows
	project management	Team brainstorming, virtual sticky notes, checklists, visual task prioritization, index cards, phased project planning	Personal level / small teams, teams that have partners needing visibility of certain projects	To brainstorm/provide transparency into projects, small group collaboration on projects	Project collaboration and brainstorm commenting, no progress tracking apart from milestone measurements, personal tracking (no automated team transparency)
	task management	Creating draft OKRs, commenting, and initial planning, Set it and forget goal lists, Static KPI tracking, collaborative spreadsheets projects	Personal projects, spreadsheet functionality, cross-functional projects, data sharing	When drafting/planning how your projects impact business success, personal spreadsheet use, static data sharing	real-time, visual progression of progress can't be tracked automatically, no analytical reporting, Lack of visual alignment and weighted, auto roll-ups
	wiki software	When sharing/storing internal knowledge and documents	entire organizations	Documentation and storage, Process hub for internal strategies, Team file manager, ask questions about team processes (internal community)	Data storage limits practicality of building goal-setting habits
	objectives and coaching	For visual alignment, continuous updates, progress reflection, coaching in context to objective progress, transparency of team priorities, reporting and analytics on objectives	entire organizations and or entire teams	Coaching in context, peer-to-peer feedback, strategic objective communication, reporting and analytics, and team recognition	Light project planning (milestone metrics)

example work-flow: tasks to objectives

TRACK SUCCESS



An important element of objectives that make them unique compared to most goal-setting methodologies is the component of continuous check-ins and progress sharing.

Using the example of integrating a product with Slack, this section offers insight into a work-flow that incorporates project planning, task completion, and objective measuring throughout.

It also provides example check-ins, and what makes them great progress updates. This will help answer the common question, “is this worthy to share with the team? When do I share it?”



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many projects and tasks feed into a single objective... let's walk through an example

Many small projects incorporate many granular to-do's, which then feed into a single objective. With understanding of how each of these categories complement each other, it's important to visualize this difference on a time-line.

Using the example project of integrating a product with Slack, you'll see how different steps can still include check-ins on your objective, but not create duplicative work when it comes to completing and executing on tasks.

Objectives follow you throughout your process, acting as a measure of success. You may have several teams and projects within those teams working to reduce churn, improve product experience, or build stellar customer relations. This is why objectives are so important—they act not only as a guide to store and track progress, but they keep everyone connected with next steps and status updates.

TIP! Objective check-ins shouldn't replace any existing work-flows that your team utilizes to stay in touch. Focus on how these check-ins can create efficiencies within existing frameworks.

For example, you may have weekly reflections where you talk about what you learned that week, what you are proud of, and what you would redo/would like help with moving forward. Use your check-ins to supplement your reflection. It's hard remembering everything that happens all the time, so it's a great in-context tracking option.

Alternatively, you could present your progress on your objective in team meetings instead of having to relay everything you've worked on task-by-task. Quicker updates means more execution time.

Starting at the concept phase, the example time-line will walk you through the 5 major steps of any project and how to keep your objectives top of mind throughout.

NEXT: step 1: brainstorming

STEP 1: CONCEPTUAL BRAINSTORMING AND IDEATION (WIKI SOFTWARE)

start with brainstorming and planning
action-plans for initiatives and projects—keep
things strategic



STAGE: document integration / feature specs / detailed project plans / share with the team to get feedback

EX/ KEY RESULT: complete Slack integration specs / prototype to get feedback pre-build

OBJ. OWNER: product manager
(OBJ): *Improve product work-flows to support common customer needs to improve adoption*

EXAMPLE CHECK-IN: *ex/ 1: "The Slack integration spec is ahead of schedule by 2 weeks. The prototype will be ready next week. @successmanager let's talk about next get this in front of customers."*

ex/ 2: "The Slack integration is behind schedule. We had to revamp the original prototype to include customer feedback around first-user experience. @leadengineer dev work won't start for another 2 weeks. Please re-prioritize next SPRINT."

WHAT MAKES THESE CHECK-INS GREAT...

They are the sum of all tasks related to completing a prototype, keeping updates focused on major milestones.

They incorporate next steps and key stakeholders to move things forward (@successmanager / @leadengineer).



WHY WIKI PRODUCTS ARE A GREAT PLACE TO START

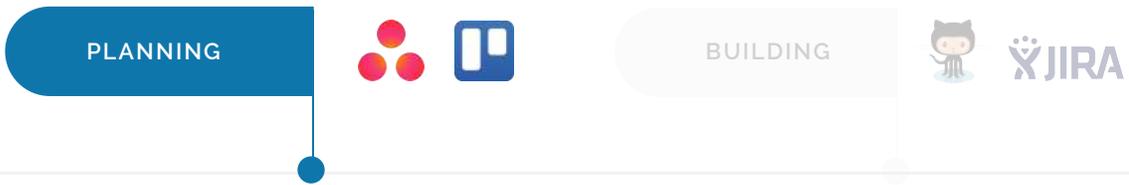
Wiki products like Confluence help with initial concept planning because they encourage team communication and collaboration.

Wikis are great for getting started as they include summaries. Once decisions are made, they act as historical reference for why decision were made and what questions were asked/answered along the way. Not everyone on the team may be involved in creating the initial concept, so it's a great in-context hub to brainstorm in a shared, public way.

NEXT: step 2: planning

STEP 2: PLANNING NEXT STEPS AND TASK ALLOCATION (TASK MANAGEMENT PRODUCTS)

next, plan your projects, to-do's, and next steps to get things executed—assign sub-tasks and due dates



STAGE: Track shared tasks needed to get the integration from spec to development and launched

EX/ KEY RESULT: complete Slack integration specs / prototype to get feedback pre-build

OBJ. OWNER: product manager (**OBJ:** *Improve product work-flows to support common customer needs to improve adoption*)

EXAMPLE CHECK-IN: "All project planning is complete. You can follow the project on the Slack Integration Trello board. Major milestone tasks are tracked in Asana. Major time-line due date are also listed with stakeholders responsible. Please direct specific questions about each step to the appropriate stakeholder."

WHAT MAKES THIS CHECK-IN GREAT...

Check-ins should communicate where the rest of your team can stay updated, but not be a step-by-step duplication of these granular to-do's.

This check-in provides where to find that information without listing out everything already documented in the task and planning app.



WHY YOU SHOULDN'T DUPLICATE TASKS IN YOUR OBJECTIVES

This creates busy-work! You're already tracking them in a separate product, why carry them over? Keep tasks and associated comments, due dates, and project planning in the product you are already doing this in. Instead, track the end result of all those to-do's. This is a milestone metric

Milestone metrics are handy to check-in to outside of to-do's because they communicate next steps and loop in stakeholders that need to act when your work is done.

NEXT: step 3: building

STEP 3: EXECUTION AND ADJUSTMENTS (TASK/PROJECT MANAGEMENT PRODUCTS)

while tracking to-do's, you'll also be executing. Check-ins will increase at this phase as there is more being completed



STAGE: Track development time to build integration / Code repository / Track bugs after it's deployed

EX/ KEY RESULT: Work on 150 story points that focus on providing a great product experience

OBJ. OWNER: software developer (OBJ: *Improve customer experiences through product development*)

EXAMPLE CHECK-IN: *ex/ 1: "This week the integration was stalled due to some tech debt in the code. Internal improvements and deploys have been done to move the project forward. The new time-line for the release date is in 3 weeks."*

ex/ 2: "Stellar week! With the newest additions to the development team we were able to increase our velocity by 25%. @successmanager We will be able to release this integration ahead of schedule by two weeks."

WHAT MAKES THIS CHECK-IN GREAT...

They don't duplicate what's been documented in other task-oriented products. Instead, they focus on where the project is at and who should be notified that is impacted by its status.



WHY YOU SHOULDN'T DUPLICATE TASKS IN YOUR OBJECTIVES

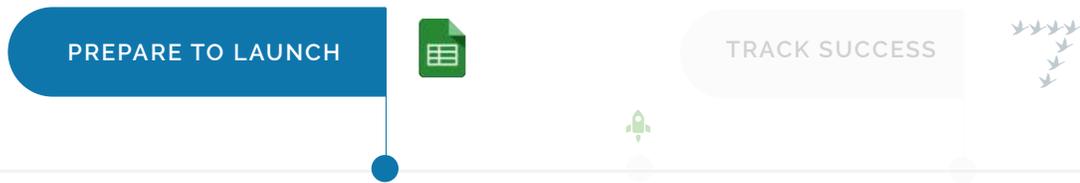
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NEXT: step 4: prepping to launch

STEP 4: PREPARATION TO LAUNCH (SPREADSHEETS)

checklists and draft prep can be doing using Google spreadsheets (which offers version control for collaborative work!)



STAGE: Collaboratively brainstorm key customers that should be notified first and what messages they'll receive

EX/ KEY RESULT: *none. This is a task. Key results will come into play during the measuring phase.*

OBJ. OWNER: *not applicable*

EXAMPLE CHECK-IN: *not applicable.*
A good practice would be to *reply to the check-in* from the engineer team to let them prep-work is complete so they can move forward with the launch.



WHY YOU SHOULDN'T DUPLICATE TASKS IN YOUR OBJECTIVES

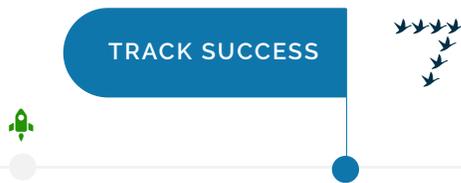
This creates busy-work! You're already tracking them in a separate product, why carry them over? Keep tasks and associated comments, due dates, and project planning in the product you are already doing this in. Instead, track the end result of all those to-do's. This is a milestone metric

Milestone metrics are handy to check-in to outside of to-do's because they communicate next steps and loop in stakeholders that need to act when your work is done.

NEXT: step 5: measure success

STEP 5: WRAPPING UP YOUR PROJECT AND MEASUREMENT (GOAL-SETTING PRODUCT)

add final check-ins, analytical reflections, and seek feedback / coaching to assess how things did or didn't go as expected



STAGE: 7Geese is used throughout, but at this stage track final check-ins/reflections and seek feedback and coaching

EX/ KEY RESULT: product manager (OBJ: *Improve product work-flows to support common customer needs*)
customer success (OBJ: *Help improve product adoption by 15% for key core features*)

EXAMPLE CHECK-IN: ex/ 1: "The integration hasn't taken off as hoped. Will be asking for first-impression feedback to improve the integration."
ex/ 2: "25 accounts I support have setup the integration and mentioned this is going to improve their communication work-flow So far I see an increase of 7% in product adoption from these customers."

WHAT MAKES THIS CHECK-IN GREAT...
They provide details about key observations that the integration influenced in their respective objectives.
They provide a quick summary of next steps to keep everyone informed.



CHECK-INS AND OBJECTIVES SHOULD ALWAYS BE TOP OF MIND

Measuring the impacts of projects and tasks is where objectives have their largest impact. Not every step will be happening inside 7Geese, but acts as a hub for tracking, sharing, and aligning the impact your actions take.

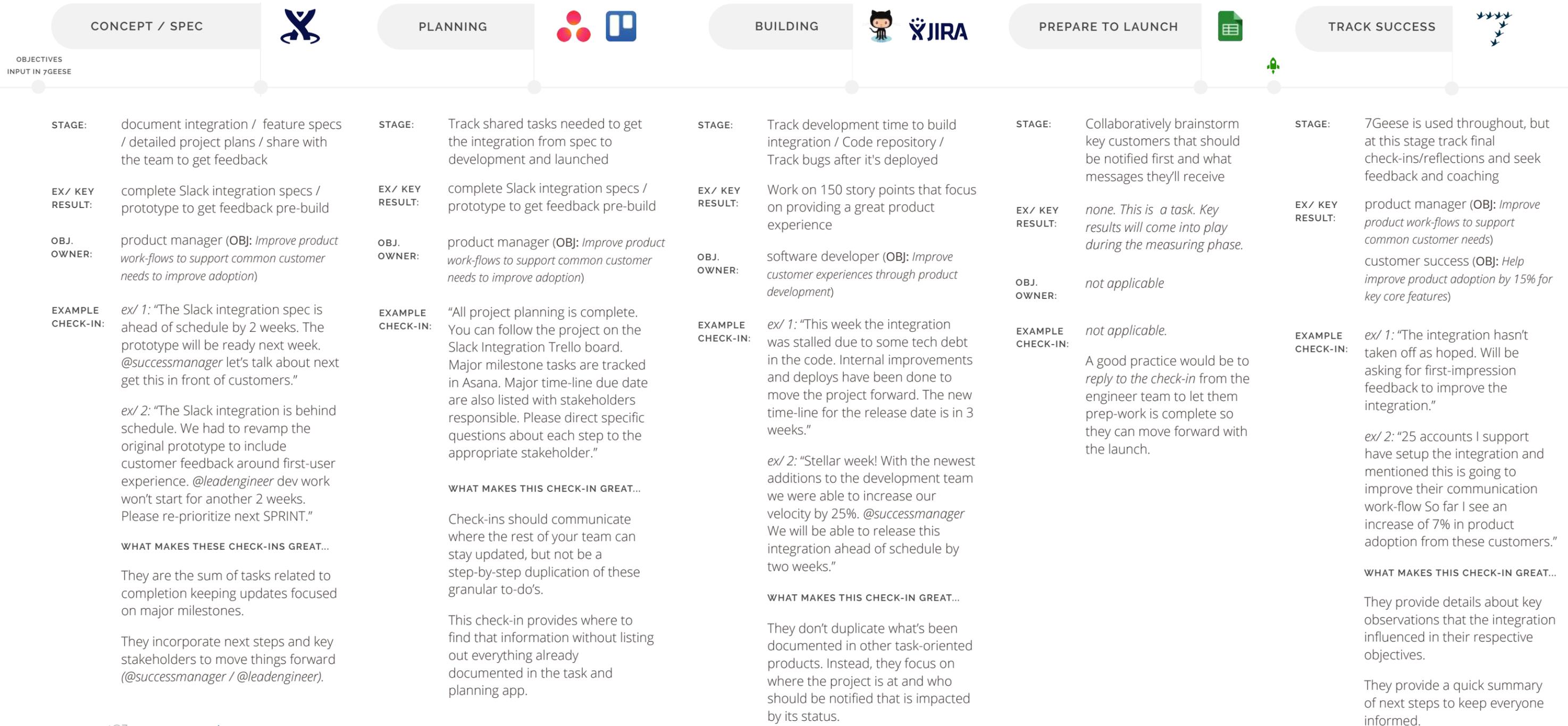
Higher-level progress updates, and continuous check-ins shouldn't be saved until the end, but occur throughout the entire project. Objectives are worded to measure how you are defining success with your projects. This is what would be stored in your 7Geese OKRs.

NEXT: full printable time-line

example task to objective time-line

PROJECT: INTEGRATE PRODUCT X WITH SLACK

This project time-line provides example check-ins at each step of a project. It includes why these check-ins are good based on what to include in relation to task-tracking.





tasks, projects, and objectives: in summary

Remember, objectives are meant to motivate and rally people to work together and give insight into otherwise silo'd conversations. They spur perspective sharing, moments of discovery, and make even your high performers achieve more.

While there can be intricate work-flows and moving parts to linking tasks, projects, and objectives together... the main focus should always be to increase transparency, accountability, and empowerment of your team.

This last section covers four key points to remember throughout your objective cycle.

one last piece of advice... be sure to always know the answer to, “can I realistically commit to all of this?”

Realistic commitments are important, even in stretch goals that are meant to challenge you. Without proper resources or time dedication to get things done, you can't start to elevate your productivity. Elevating your objectives requires mapping tasks to projects, and projects to measures of success in a realistic way that best suites your existing work-flows.

To help you along the way keep in mind these four key tips:

- 1. If you find yourself duplicating a comment somewhere, take a step back.** Reflect on the most appropriate for tracking this type of update and alter your other notes accordingly.
- 2. Visualization is key.** If you're looking to elevate your work-flows, visualize your steps prior to taking them. This will help keep you focused on performing the right actions, in the right places
- 3. Keep your objectives simple.** Focus and simplicity is they key. Don't add complex numbers to your key results. Objectives are for communicating impact and keeping everyone updated. If you have to sit down and do hours of math to check-in, break down your goal some more.
- 4. Focus on sharing what you would want to know from someone else.** If you're worried about over-sharing or under-sharing, focus on giving the same amount of information that you'd like to know about if it was someone else checking-in. Alternatively, set up expectations for when updates should regularly occur at the beginning of your cycle.

Looking for more? Check out our best practices FAQ guide, Alright, OKRS! Now what? here: <http://bit.ly/OKRsFAQGuide>

contact us



300-55 Water St.
Vancouver, BC V6B 1A1
Canada

support@7geese.com
+1.800.280.2967
+1.604.568.1296