Quantive®

How to Implement OKRs from Scratch

Contents

Introduction

When done correctly, OKRs can bring an array of benefits to you and your teams — enhanced focus, accountability, alignment, transparency, and engagement.

But the journey toward these desired outcomes is often filled with questions, uncertainty, and ultimately, no one-size-fits-all solution. Your predicament as someone who believes in OKRs, but may not know where to start, is why we created this guide.

This is your practical-use resource for launching OKRs from the ground up, focused on the prep work through the first six months of OKR implementation. If you've been stuck on any of the following questions, you're in the right place:

> What would starting OKRs look like for us?
> Can OKRs actually work for my organization?
> Are we ready for OKRs yet?
> How do I get my teams on board?
> How do we manage the OKR process?

At every step, we aim to eliminate uncertainties around OKR implementation. You should leave this guide with a clear idea of where to start, your top priorities, and a realistic expectation of what you're getting into. In this guide, we'll explore:

Phase 1: The OKR culture shift

Phase 2: Preparing for the OKR cycle

Phase 3: Creating your first OKRs

Phase 4: Refining and aligning OKRs

Phase 5: Launching and managing your OKRs

Phase 6: Ending your first OKR implementation cycle

Phase 7: Iterate and improve OKRs

Quantive®

Phase 1: The OKR culture shift

OKRs are as much about mindset as they are execution.

In considering OKRs, mindset must come before talks about strategy or launch. OKRs aren't a plug-and-play tactic and treating them as such is the quickest route to failure.

OKRs are a transition in thinking, from wanting to get things done, to getting the right things done. OKRs focus on desired outcomes, then work backward with your strategy in mind. To do so, they propose a few foundational questions:

> How do we communicate our strategy clearly to everyone?
> What needs to change in our approach to goal setting?
> What are the desired results or KPIs?
> How will we track progress?
> How do we define success?

Depending on your organization, this shift can be anywhere from a slight adjustment to a major overhaul, which presents some challenges.

What are you trying to accomplish with OKRs?

As questions regarding results will inevitably be a part of the conversation, it's important to determine what can be accomplished since creating clear expectations is critical for long-term adoption of OKRs.

Success may be as simple as, "My teams understand how OKRs work and are receptive to trying them again," but of course, you can aspire for more. Your organization can use the following questions to define short and long-term OKR goals:

How often are OKRs set?	Annual - Semi-annual - Quarterly - Monthly
How often will Key Results be updated?	Monthly - Bi-weekly - Weekly
How often will meetings be held? What types of meetings will occur?	Weekly for team - Bi-weekly for leadership - Monthly for company
How do you define success?	Committed vs Aspirational - 70% or 100% = Success?
Will you set limitation of OKRs management?	3 OKRs - 5 OKRs
Who owns Objectives? Key Results?	Teams - Individuals - Combination of both
What roles will everyone play?	OKR champions - Platform admins - Team leaders - View only users
How do we incentivize OKRs?	Team recognition - Fail awards - Quantive badges (Doing nothing signals a lack of importance or gravity)

Answering these questions will help you outline company OKRs and the OKR strategy. These may take 6-9 months (or 2-3 OKR cycles) to stick.

Quantive®

The question of change management and buy-in

The number one reason for OKR failure? Not preparing for OKRs from a change management perspective. Take the question above: "How do we define success?"

In the first OKR cycle, success may simply look like:

> Teaching your teams about OKRs through practice
> Developing the habit of weekly OKR check-ins
> Creating and optimizing automated reporting
> Using OKRs to move the needle
> Leveraging insights to change OKR strategy in the next cycle

When it comes to change management, especially when first using OKRs, the focus should be on managing expectations.

Quantive®

Tips for managing change in OKR execution

Change management is nothing new, especially in a post-pandemic hybrid working environment. While several approaches could apply to OKRs, we've leaned on the Model for Managing Complex Change.

The model represents change as a matrix of five components:

Vision

Why are you doing OKRs?

Skills

Do you have the skills to implement the change?

Incentives

What's in it for your participants?

Resources

Do you have the tools, time, investments, etc.?

Action plan

Do you have a clear execution blueprint?

To successfully introduce change, all five components must be present.

Quantive®

Tips for getting team buy-in

Regardless of the excellence of your plan, your OKR launch will not succeed without team buy-in. Here are five tips for getting OKR buy-in:

Tell it like it is

Share the vision for why the organization should adopt OKRs

Break it down

Show the detailed phases, steps, implementation plan, and timeline

Level set

Ensure teams have the training, resources, and time to incorporate OKRs into how they work

Hear them out

Address resistance and create OKR advocates within teams

Share early success

Showcase team wins and impacts of OKRs along the way

Remember, your initial launch should prioritize building the OKR muscle over perfection. This is also why OKR consultants and practitioners recommend starting with OKR software, as it shows your team you're committed to OKRs from the beginning.

Quantive®

How do OKRs fit in with your existing practices?

While trying to harmonize OKRs with your current systems won't happen perfectly during the initial OKR launch, it should be considered when looking to solidify OKRs into your business operations (otherwise redundancies will compound, and inconsistencies will emerge).

Successful OKR launches aren't about abandoning your existing processes or methods but rather finding a way to create harmony and reduce friction during your initial launch. Here are a few existing practices you may have questions about:

> **OKRs vs KPIs**: OKRs deliver focus, alignment, engagement, and transparency to your activities while KPIs evaluate the success of your activities (e.g., projects, programs, products)

> **OKRs and BAU (business as usual)**: OKRs focus on top efforts, priorities, and challenging your teams, while BAU is the ongoing process and "keep the lights on" actions

> **OKRs and performance management**: OKRs are about impact and outcomes, usually centered on ambitious team goals, while performance management covers individual contributions and personal attainment

Quantive®

> **OKRs and CFRs**: OKRs are more straightforward and definitive in their depiction of success, while CFRs encourage depth and complexity in goal tracking (with OKRs as a subject within)

> **OKRs and check-ins:** Check-ins are an effective way to ensure focus on the short-term tasks and habits that contribute to long-term company-wide OKRs

Establishing your OKR champion

To help your OKR program be successful, you need to establish someone as your OKR champion. This in-house specialist helps guide the OKR process and teaches your teams how to use OKRs effectively. The champion will also support your teams as they integrate OKRs into your existing processes.

To ensure your OKR implementation goes smoothly, the OKR champion:

> **Drives adoption**: By setting milestones, deadlines, and ensuring the organization is moving along as expected

> **Designs the process**: By initiating any necessary tweaks and adjustments to drive performance

> **Serves as the OKR expert**: By answering OKR questions and keeping the process clear

> **Chooses and maintains OKR tools**: By organizing how OKRs are managed in spreadsheets or OKR tools (like Quantive Results) while helping teams use these

Phase 2: Preparing for the OKR cycle

When you feel like your organization is ready to embrace OKRs, you can start preparing for your first OKR cycle. Creating an OKR cycle is a core component of any OKR implementation. Without it, you lose the benefits of proper planning, ongoing optimization, and the performance-enhancing pressure that deadlines create.

The actual OKR launch is just a point in the timeline — pre-launch and follow-up work will define your success with OKRs. While you may need to expand or condense based on your organization, here's our outline for a typical OKR cycle.
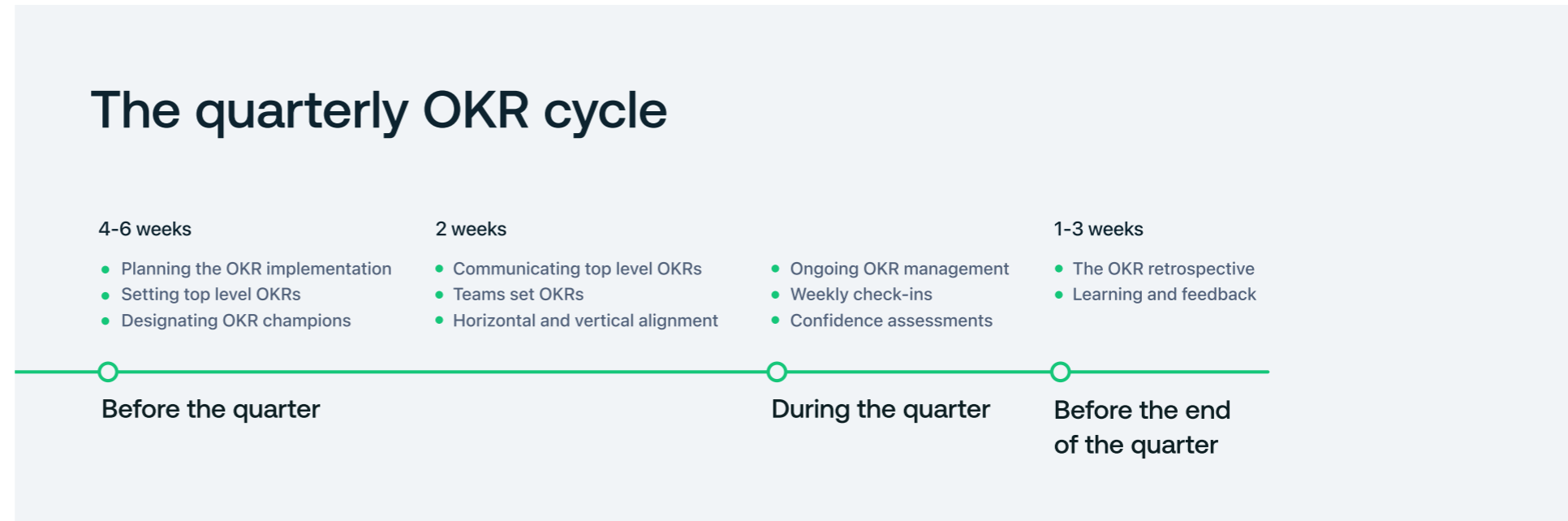
Timing: preparation should begin around 6-8 weeks before your desired OKR launch date.

While this timeframe may seem generous, it's intentional for two reasons:

> It's long enough to ensure a smooth launch
> It's short enough to keep teams motivated and attentive

We suggest using the five Ws to structure your OKR cycle: **who, what, when, where, why?**

The quarterly OKR cycle

4-6 weeks

- Planning the OKR implementation
- Setting top level OKRs
- Designating OKR champions

2 weeks

- Communicating top level OKRs
- Teams set OKRs
- Horizontal and vertical alignment

- Ongoing OKR management
- Weekly check-ins
- Confidence assessments

1-3 weeks

- The OKR retrospective
- Learning and feedback

Before the quarter

During the quarter

Before the end of the quarter

Where in the organization are you planning to launch OKRs?

Testing the methodology in a highly adaptive environment, at limited scale, creates the proof of concept for a larger OKR implementation.

For your first OKR launch, we strongly recommend starting with a company OKR, then aligning department and team OKRs to it. After that, the OKR

champion will help create alignment across the OKR hierarchy. While individual OKRs can be useful, at this stage they can create unnecessary complications for an initial launch.

Company OKRs for launch

For this guide's purpose, we recommend starting with company-level OKRs. Without leadership buy-in, even a successful OKR launch may not be enough to keep them around. Your leaders must be as committed as you are.

Department and team OKRs

A single company OKR can dictate the direction of any department/team OKRs. For simplicity, we recommend beginning with one department and one subsequent team. OKRs may work in a leadership echo chamber, but seeing how they operate top-to-bottom is a better indicator of where iterations may be needed.

Choose a department most receptive to taking on a change like OKRs. Marketing teams, for example, may be better suited to this shift than engineering teams (who, by design, are more output-driven).

Phase 3: Creating your first OKRs

You've done the prep work. Now it's time to craft your initial OKRs.

Timing: Starting 4-6 weeks before your OKR launch.

Providing plenty of delivery time allows more people to be hands-on with the process, creating more collective buy-in — remember, this is success within itself. Additionally, an extended timeline allows the OKR process to occur without too much stress or pressure.

Where should you draft your OKRs?

As your organization starts brainstorming ideas, it may be easy to put your OKRs into a spreadsheet. After all, it is a low-friction way to get started... but it's not the best way to do OKRs. Anyone serious about committing to OKRs avoids spreadsheets from the start.

Not only do spreadsheets create a time-intensive manual process, but they also result in ineffective OKR management and misaligned priorities.

Who exactly is "in charge" of the first OKRs?

Creating OKRs should be a collaborative team activity. However, it's easier for the OKR champion and respective leadership to work on draft objectives first and present them to the team. Then, when key results are being discussed, get the team involved.

When it comes to OKRs, staring at a blank piece of paper is a lot harder than reviewing work in progress.

OKR champions will help drive the OKR creation process, but the final ownership looks like this:

> **OKRs:** Department/team leaders, managers
> **Key results**: Project teams or individuals

OKR software can help ease the shift from OKR champion/leadership to teams and individuals.

How OKR software helps your team create the first OKRs
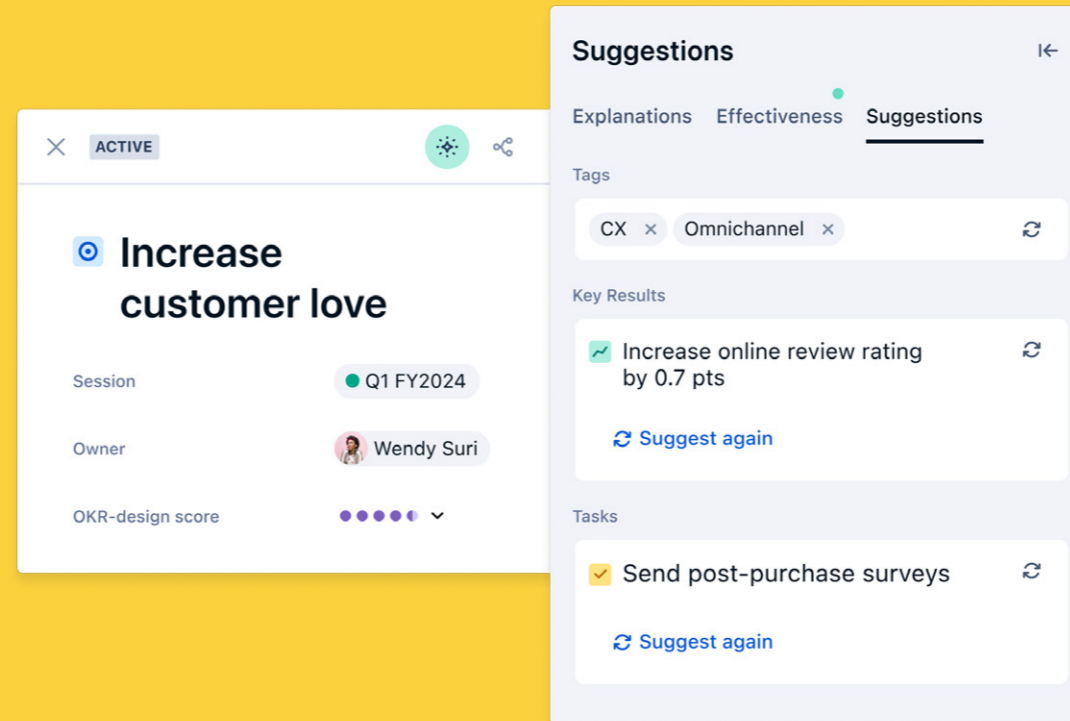
Quantive Results enables users to create OKRs with built-in best practices — recommending OKRs, reviewing OKR design scores, and suggesting improvements. It ensures equal access to a built-in OKR expert, driving adoption and regulating the OKR creation process.

Alternatively, if you want more guidance with a less-manual approach, generative AI can do some of the heavy lifting for you. Built-in Platform Intelligence can suggest OKRs for you based on what you'd like to achieve.

Quantive

How do you get started?

When it comes to how many OKRs to set, simplicity is the goal. Use the 1-1-1 setup for your organization — one OKR at the company, department, and team levels. This creates a cohesive OKR process, without any complex dependencies to start.

Next, set up an OKR brainstorming session for anyone involved to help drive ownership, accountability, and commitment to the program.

Use techniques like the question "why?" in your brainstorming sessions to focus on the ultimate desired impact first. From there, find specific, established action steps that will help you achieve that impact and engagement. Defining key results is defining what success looks like.

Better key results = better performance = better team buy-in

The creation process — from strategy talk, to OKR creation, to assigning ownership — will create layers of complexity. Make sure you can easily collaborate and share information critical to your OKRs.

Quantive®

How OKR software helps with collaboration

Quantive Results' Whiteboards offer a blank canvas for the OKR process, from OKR creation and alignment to retrospectives and reviews. You can create draft OKRs and alignments, then share with teams for their input. Think of it as your team-tool feature for collaborative OKRs.

Quantive®

Using Whiteboards, teams can:

> Create their OKRs
> Vote and react to others' suggestions
> Draft OKR alignments

With one click, you can turn notes into objectives, or import OKRs from other areas of the business. Whiteboards also come with tried-and-tested templates to guide you through OKR creation at the organizational, team, or individual level.

Quantive®

Phase 4: Refining and aligning OKRs

With the "hard part" of creating your first OKRs out of the way, it's time to dial in.

Timing: Within 2 weeks of the OKRs launch

Refining your OKRs

OKRs should be aspirational, represent a desired future state, and make you feel a bit uncomfortable about their odds of achievement.

Consider the following questions to further develop your OKRs.

Are objectives formulated as if they were already achieved?

There are three ways to think about objectives (via Measure What Matters):

An incremental change

Is your change an increment away from the status quo? By how much? Incorporate this into your phrasing.

A discovery

Are you trying to learn something about your business? Phrase the objective like a hypothesis that needs testing.

A leap

Are you asking your team to think outside the box? Use inspirational language to help them get there.

Do most key results contain metrics?

In *The OKRs Field Book*, Ben Lamorte shares three types of key results:

Metric, Baseline, Milestone

Metric key results are the most common, and they look like, "Move metric A from X to Y."

Baseline key results don't have a starting point (X). Their point is to establish a foundation for future key results to be measured by. Setting a baseline key result in your initial OKR launch will set you up for successful follow-up OKR cycles.

Milestone key results express yes-or-no achievements. While most key results should be metric-based, if you don't have the data, a milestone key result may also prove useful. Should you decide to use a milestone key result:

> Include a date to incorporate stretch. How quickly can you accomplish the milestone without sacrificing quality?
> Try to use them in combination with a metric or baseline key result. Consider how one key result may affect the other.

Do the OKRs make you feel a little uneasy?

If you were to achieve the OKR(s) you've drafted, how would you feel? Christina Wodtke says in her book *Introduction to OKRs*:

"If you are getting a funny little feeling in the pit of your stomach saying, 'we are really going to have to all bring our A-game to hit these,' you are probably setting them correctly.

If you look at them and think, 'we're doomed,' they're too hard.

If you look them and think, 'I can do that with some hard work,' they are too easy."

Aligning your OKRs
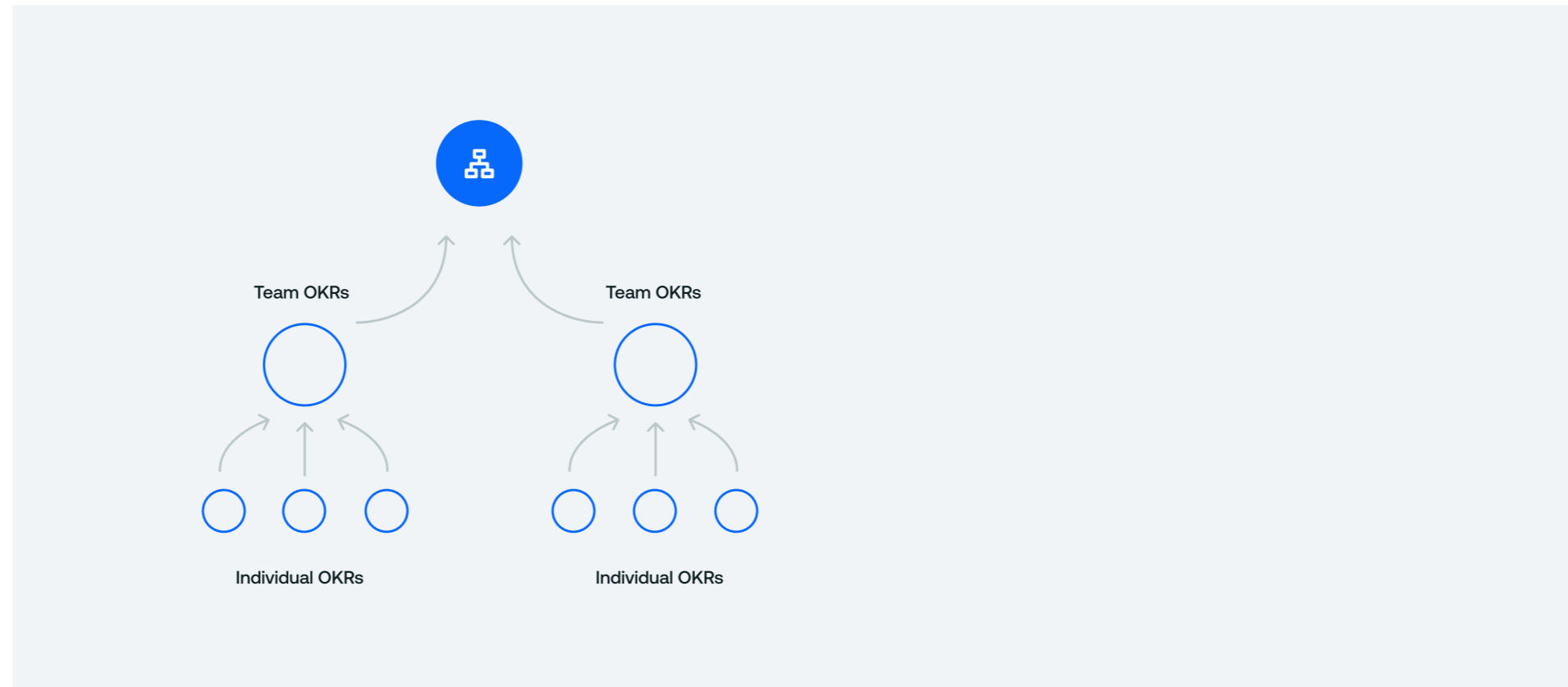
Alignment doesn't just visualize the OKR hierarchy, it also highlights dependencies and helps show which teams need one another for key result progress. In the initial OKR rollout (where you limit the number of teams or departments involved), this may not be as common. Yet, OKR alignment is important to consider as you scale OKR adoption.

Creating alignment through OKRs happens through five core actions:

Empower autonomy

Allow your teams to draw the lines, while you guide them along

Communicate at every stage

Keep teams focused from creation, to iteration, to the final OKR

Trace back to goals

Continue to communicate the "why" in each stage so teams can define the "how"
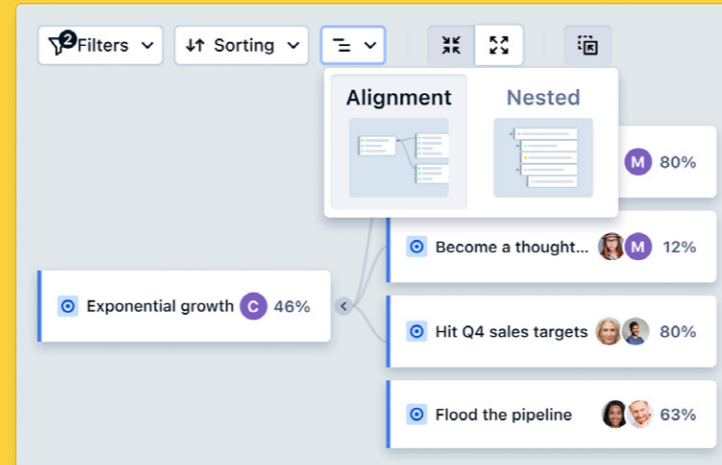
Check in regularly

Alignment is an ongoing process — check in on key results and weekly tasks

Use the right solution

OKR software creates an immediate display of company alignment

Quantive®

How OKR software helps align OKRs

Using Quantive Results' Alignment View, you can effortlessly display and communicate OKR relationships and dependencies.

 In this view, team members can see:

> How their OKRs contribute to team OKRs

> How (and which) OKRs have dependencies

> How team OKRs contribute to department OKRs

> How all OKRs align to the company OKRs

By allowing teams to see how their work contributes to organizational success, OKR software improves motivation and transparency, facilitating alignment and buy-in for the entire OKR process.

Quantive®

Phase 5: Launching and managing your OKRs

Quantive®

Creating an OKR management cadence keeps your initiatives on track and ensures the best chances for the methodology to stick.

> "
>
> **Now this is not the end. It is not even the beginning of the end. But it is, perhaps, the end of the beginning.**
>
> Winston Churchill

The preliminary OKR work — strategy, brainstorming, launching OKRs — is just the first step. What do you actually do now that your OKRs are finalized and you're ready to begin?

OKR check-ins

OKR check-in meetings should be intentional, precise, and discuss what's most important. Avoid the excess.

Timing: OKR launch date and every two weeks

While you shouldn't expect your teams to eat, sleep, and breathe OKRs from the start, building a foundational habit using an OKR cadence can start with something as simple as bi-weekly meetings. Some pointers:

> Make meetings short, but effective — your teams are busy

> Problematic and prospering OKRs are a priority — fix and learn

> Update OKRs beforehand — don't waste those 10-15 minutes at the start

Quantive®

Building the OKR habit

Unlike traditional goal-setting methods, the OKR method has mechanisms that overcome the common "set and forget" syndrome. Throughout the quarter, your team members measure their progress through key results, as well as check in with managers and team members for accountability and problem-solving.

Some OKR habits you can use throughout the quarter include:

Personal OKR check-ins

Aside from OKR meetings, individuals will report on the initiatives they helped push or results they achieved for the week
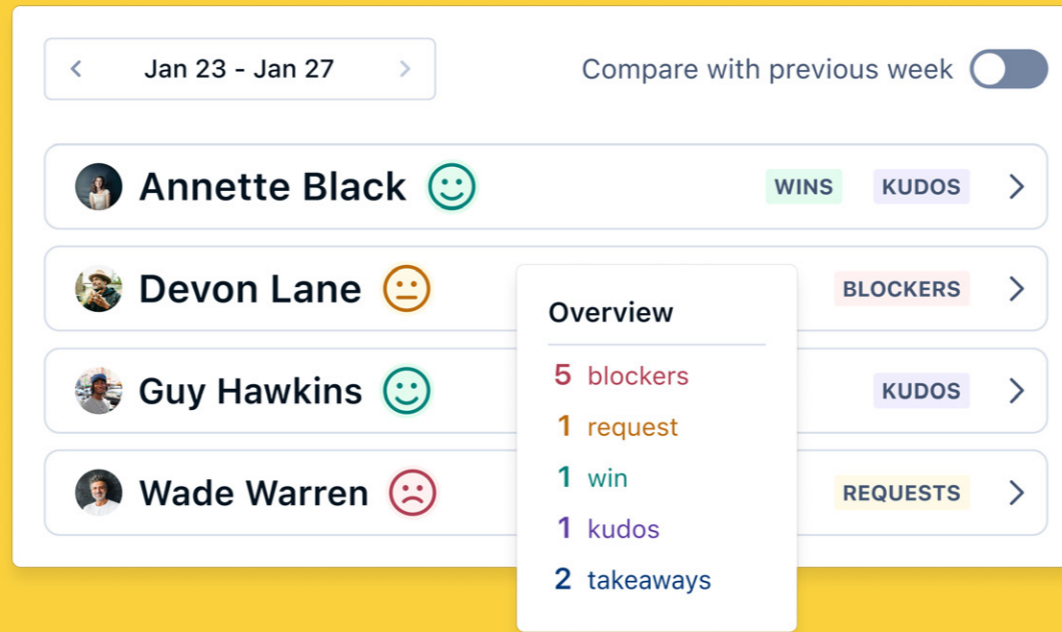
Confidence assessments

OKR owners will score how likely they think they are to meet key results

Recalibration

Depending on confidence levels and group analysis, teams and OKR owners may adjust their strategy and execution to increase the likelihood of meeting key results

How OKR software helps with check-ins and confidence

Quantive Results' Check-ins feature builds in the OKR habit directly through software. Check-ins embed strategic priorities into day-to-day work, providing an effective way for teams to focus on the short-term tasks and habits that are necessary to achieve long-term company-wide goals.

Quantive®

For managers, Check-ins help to create a positive team experience with greater cohesion, support, and feedback. For team members, Check-ins give them better alignment, understanding, and visibility of what teammates are working on while also enabling them to see how their work contributes to the company's success which leads to greater collaboration.

Common OKR mistakes

While omitting regular check-ins is a surefire way to fail with OKRs, three other mistakes are common during OKR implementations:

> **Abandoning OKRs:** OKRs should stay steadfast with a few exceptions (e.g., sudden changes to the market or strategy, loss of key personnel)

> **Shifting focus:** Roadblocks and challenges can be used as excuses to drop OKRs when, in actuality, they are the solution to better execution

> **Not leveraging data:** The OKR process needs to be data-driven for accurate progress assessments and decision-making

Phase 6: Ending your first OKR implementation cycle

At the end of each quarter, you will need to conduct a review of what was accomplished, what was learned, and where you'll go from here. This is known as the OKR retrospective and occurs at the individual, team, and company levels.

Timing: 2-3 weeks before the end of your OKR launch

The purpose of the retrospective is to look at the bigger picture and gather insights to inform future OKR cycles. There is no "correct" outcome for the first attempt at OKRs because the measures of success are contextual.

Let's use our change management examples from the beginning of the guide:

> Teaching your teams about OKRs through practice
> Developing the habit of weekly OKR check-ins
> Creating and optimizing automated reporting
> Using OKRs to move the needle
> Leveraging insights to change OKR strategy in the next cycle

A successful OKR cycle may look like all these things or only one of them. Don't be discouraged if the launch didn't go as smoothly as planned — OKRs are a process, and if you and your teams learn this, then you had a successful launch.

Running the OKR retrospective

Each team should take an hour to reflect on the prior OKR cycle and apply what was learned. During this "reflect and reset" session, each key result gets scored, has documented learning, and is classified into three categories:

	Description	Decision
Keep	The KR's final score is not where we want it to be	We will keep focused on moving this KR forward
Modify	The KR needs to be adjusted based on what we've learned	We will modify the metric accordingly and move the KR forward
Remove	This KR is no longer worth pursuing or is best monitored as a health metric	(If applicable) We will monitor this KR as a KPI from now on

You can use the following questions to help classify these:

> What were the overall scores for each OKR?

> What were the causes of underperformance?

> What problems did we focus on?

> What did we learn?

> What went well?

> Did priorities shift?

> Did we trace our key results to the right behaviors?

> Does it make sense to carry on the same OKRs to the next quarter?

> Are there any ways to improve the OKR process?

How OKR software helps retrospectives
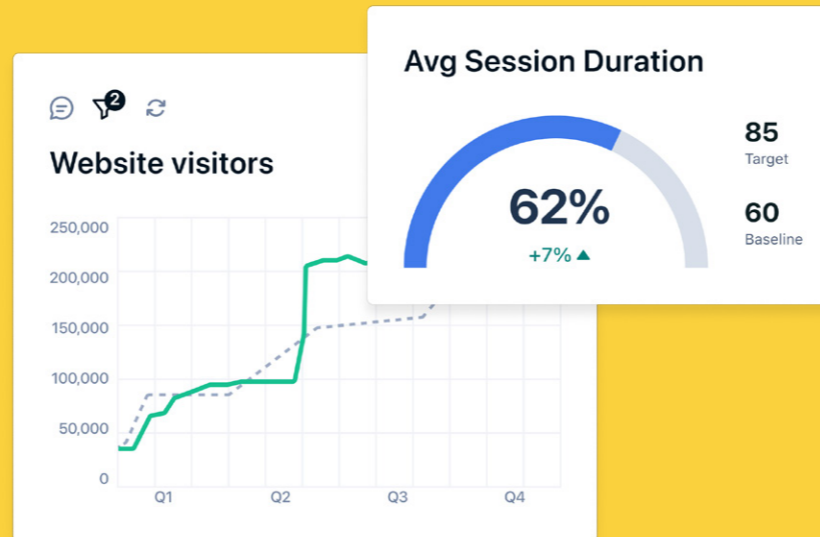
Insightboards within Quantive Results serve as the secure repository for OKR and KPI data — these store key insights and metrics vital to the OKR process like:

> OKR achievement

> KR updates

> Average confidence level

> Number of OKRs per team

> Which key results create the best objective achievement

From here, you can refine your OKR process to improve attainment.

Quantive®

Quantive Results also offers Benchmark Reports, allowing you to review your OKR process and achievement against other Quantive customers of similar size, industry, and maturity.

Quantive®

After the OKR retrospective

The insights gathered from your first-time OKR experience will shape future success.

With an initial OKR implementation, you're expected to underperform or experience issues. As Ben Lamorte says, "It's okay to achieve a zero with a key result, as long as we can apply that learning to the next cycle."

The end of your OKR launch period should be used to synthesize your learnings and adjust — what do you need to do to improve your OKR process and better achieve your OKRs next quarter?

Once you've completed this analysis, you can then create better OKRs and a more robust OKR implementation plan.

Phase 7: Iterate and improve OKRs

"Figuring out" OKRs is a continuous process, where each OKR cycle brings you one step closer to implementing OKRs throughout your organization.

Now that you've set the foundation and launched OKRs — the hardest part of driving real progress — everything from this point on is about optimization and iteration.

After doing your OKR reflections and retrospectives, reset the team and plan the next quarter's OKRs. Use the lessons from your retrospective and remember the question of "why" whenever you're formulating or adjusting OKRs.

Take the time to find what works for your teams, and when you're in a good spot with OKRs as a habit, scale the process out in your organization. For support in your OKR growth journey, check out the appendix section in this guide for additional resources on executing OKRs, scaling your OKR process, and helping OKRs stick in your organization.

Appendix

Help your teams get started with OKRs

What are OKRs? Objectives and Key Results Explained (article)

Create better OKRs and goals

Goal Setting Guide: The 7 Steps to Effective Goal Setting (article)

How to Write Great OKRs: OKR Best Practices (article)

Execute OKRs better

The Ultimate OKRs Playbook (article)

How to Choose the Right OKR Software for Your Business (article)

The 20 Most Common OKR Mistakes (and How to Avoid Them) (article)

30+ Real OKR Examples for Different Teams (article)

Quantive®

Appendix

Scaling your OKR process

How to Run an OKR Pilot (article)

The OKR Cycle: A Step-by-Step Guide (article)

Buyer's Guide: How to Choose the Right OKR Software for Your Business (article)

Make OKRs stick within existing your ways of work

The Difference Between OKRs and KPIs (article)

MBO vs OKR: What's the Difference? (article)

OKRs vs. SMART Goals: Similarities, Differences, and Uses (article)

OKRs and CFRs: How They Work Together (article)

How OKR and Agile Work Together (article)

OKRs and Performance Management: What to Know (article)

Quantive®

Put these lessons into practice

When you're ready to take the first step in launching OKRs, look no further than Quantive.

Through this guide, you've seen how Quantive can ensure your OKR launch is effortless, streamlined, and collaborative. If you're committed to trying out OKRs, why not start with a platform built to support the OKR process from start to finish?

From planning OKRs in Whiteboards, to aligning your OKRs with dedicated views check-ins, and reporting, Quantive is your go-to, seamless platform for launching OKRs the right way.

Get started by signing up for our free-forever Quantive Essentials plan.

Use for free

Quantive®