

A close-up photograph of a hand placing a wooden peg on top of a row of other wooden pegs. The hand is positioned at the top left, with the index finger resting on the top of the central wooden peg. The wooden pegs are light-colored and arranged in a slightly curved line on a light-colored surface. The background is dark and out of focus.

**WORKPATH**

Workflows around  
our features

OKR Phases Fact Sheets

# Organizational OKR Drafting & Announcement

## Why this is relevant?




Organizational goals serve as a north star guiding strategic direction for all teams and providing purpose to their employees. The organizational OKR Drafting and Announcement is the starting point for the OKR planning phase as all teams use org. OKRs as one input factor for their OKR Drafting. They can be described in OKR, in case of doubt also in another form (e.g. strategic KPI incl. target corridor).

### Goal of the OKR Event

- Defining strategic organizational goals
- Alignment on the highest level resp. what is important for the next period

### Suggested Procedures

Collaboration in a personal or remote meeting

1. Recap: Why do we do OKR?
2. Review of strategic artifacts
3. Review and adjustment of KPIs in Workpath (if not happened yet) 
4. Deriving strategic priorities for the following cycle
5. Clustering priorities and voting
6. Objective drafting in Workpath: What is the added value for the (internal) customer? 
7. Deriving Key Result in Workpath: Measuring the promises in the Objective 
8. Determining the responsibilities (ownership)
9. Brief Retro of the session
10. Official communication / announcement to the organization

### Involved People

- Organizer & facilitator: Program Lead or OKR Coach
- Participants: Top management
- Optional: Stakeholder on the next organization level


### Duration & Frequency


- Duration: 4 h before the start of the new cycle (sufficient lead time, so that downstream levels have goals as input)
- Frequency: Yearly or in each cycle


### Input Factors

- Long-term strategic artefacts (e.g. vision)
- Top level KPIs
- Long-term customer requirements
- (Bottom-up) input from the previous cycles

 in Workpath

 Previous step:  
Review/Retro  
from last cycle

 Organizational  
OKR Drafting &  
Announcement

 Next step:  
Estimate free  
capacities in  
Workpath

# Team OKR Drafting

## Why this is relevant?







During drafting, teams independently create their OKRs to ensure focus on what matters most. The first drafts should also define who is responsible for finalizing and driving these OKRs and whether resources are needed from other teams. This is particularly important for the following Alignment and Execution during the cycle.

### Goal of the OKR Event

- Independent decentralized definition of team goals (outcome), initiatives (output) and responsibilities (owners)
- Identification of required contribution of other teams (alignment potential)

### Suggested Procedures

Collaboration in a personal or remote meeting

1. Review of team capacities or capacity planning in Workpath (if not happened yet) 
2. Review of organizational goals in Workpath 
3. Review of non-achieved goals from last cycle in Workpath 
4. Brainstorming/collection of team priorities
5. Voting of team priorities & derivation of Outcomes
6. Objective drafting in Workpath: What is the added value for the (internal) customer? 
7. Key Result derivation in Workpath: Measuring the promises in the Objective 
8. Initiatives derivation in Workpath: What do we do to achieve the Key Result? 
9. Definition of responsibilities (owners) for each OKR or KR (owners should send out contribution requests to required teams after Drafting)
10. Identification of required contribution of other teams (alignment potential)

### Involved People

- Organizer & facilitator: OKR Coach or Team Lead
- Participants: Team members and Team Lead


### Duration & Frequency


- Duration: 3 - 4 h depending on the size of the team
- (after announcement of org. OKRs)
- Frequency: Once per cycle

### Input Factors

- Organizational priorities and OKRs
- Learnings, team priorities and goals from previous cycles
- Team KPIs
- Calculation sheet to plan team capacities

 in Workpath

 Previous step:  
Estimate Team  
Capacity

 Team OKR  
Drafting

 Next step:  
Alignment

# Alignment

## Why this is relevant?



Through alignment the company's value creation can be made visible by revealing dependencies and bottlenecks, avoiding double work and synchronizing work flows. Mutual support requirements are also elicited and negotiated here. During execution this helps teams to identify blockers more easily and reach out to contributing teams for clarification.

### Goal of the OKR Event

- Identifying dependencies, synergy potentials and double work
- Agreement of contributions from or to other teams
- Understanding how the value we create contributes to the goals of others

### Suggested Procedures

Asynchronous between teams or through discussion in Workshops with all teams involved

1. Share Team priorities with the organization (within a meeting or via Workpath)
2. Detecting further alignment potential (in addition to the one identified during Drafting)
3. Check contribution requests to identify required Alignment in Workpath (=pending requests) 
4. Plan and schedule discussions
5. Negotiation of support needs in discussions (if not clarified via contribution request)
6. Collaboration: Teams owning or contributing to initiatives of other teams OKRs
7. Alignment: OKRs of a team actively contributing to OKRs or
8. KR of other teams
9. Connecting OKRs or adding initiatives to other team OKRs in Workpath<sup>1</sup> 

### Involved People

- Organizer & facilitator: OKR Coach or Program Lead
- Participants: Team Lead or OKR Owner<sup>2</sup>, selected team members


### Duration & Frequency

- Duration: 2 - 5 h depending on the amount of OKR teams
- Frequency: Once per cycle after the OKR Drafting

### Input Factors

- Organizational OKRs, Team OKRs
- Vertical Alignment and alignment potential from OKR Drafting
- Capacity planning (to know how much time is left for contributions)
- Pending contribution requests to schedule alignment discussions

 in Workpath

 Previous step:  
Contribution  
Request

 Alignment

 Next step:  
Refine Goals &  
Initiatives

# Conversation Meetings

## Why this is relevant?


Conversations help teams to keep focus in achieving their goals by discussing talking points defined by team members, that can range from celebrating successes, to blockers and learnings. In case a goal is not making any progress the team can iterate on the initiatives driving the goal. This leads to increased goals achievement and higher engagement of employees as teams receive direct feedback on how their work contributes to the strategy.

### Goal of the OKR Event

- Focus and clarity on work on OKRs and initiatives
- Updating goal progress and adjusting plan to drive goals (if necessary)
- Discussions on prepared talking points and how to prevent risks as well as resolve blockers

### Suggested Procedures

Collaboration in a personal or remote meeting

1. Decide and schedule a Conversation meeting (as part of an existing team meeting)
2. Prepare Conversation in Workpath 
  - Prepare talking points for objectives and key results that you would like to discuss
3. Update OKRs where applicable (including Confidence Level)
4. Discuss different talking points in meeting
5. Define action items and next steps that result from talking points

### Involved People


- Organizer & facilitator: OKR Coach or Team Lead
- Participants: Team members, Stakeholders


### Duration & Frequency


- Duration: 15 - 30 min depending on the size of the team
- Frequency: (bi-)weekly or adapted to existing team meeting rhythm (e.g. Scrum meeting rhythm)

### Input Factors

- Output of each team member of the previous weeks
- OKRs in order to be able to assess the effect of the outcome
- Learnings, risks and blockers of each team member
- Capacity planning to see if you are still spending time right

 in Workpath

 Previous step:  
Activating  
Goals

 Conversation  
Meetings

 Next step:  
Review &  
Retrospective

# Review

## Why this is relevant?


Reviews are one driver of continuous improvement in strategy execution focusing on the OKR content - so what should have been achieved over the cycle. They are used to discuss and assess the progress on goals or KR's, check the set hypotheses behind the OKR's and identify success drivers. OKR's that have not been achieved but are still priorities should be carried into the next cycle.

### Goal of the OKR Event

- Overview and assessment of the team's goal achievement
- Gaining knowledge to improve strategy execution in the upcoming cycle

### Suggested Procedures

Collaboration in a personal or remote meeting

1. Review in Workpath: Which goals have we achieved, which have we not? 
2. Evaluation: How satisfied are we with the goal achievement?
3. Cause analysis: What are reasons for achievement/non-achievement?
4. Reflection: What are success stories?
5. If needed: What are goals that should be taken into the next cycle and how could we re-shape them to be more realistic?
6. Defining concrete actions or next steps
7. Define Review Learnings to share back to the Program Lead Office

**Tip:** In order to reduce the amount of meetings you can do the Review together with your Retro just make sure you clearly delineate the meetings so they don't get diluted.

### Involved People

- Organizer & facilitator: OKR Coach or Team Lead
- Participants: OKR Team, Stakeholders


### Duration & Frequency

- Duration: 30 min - 1.5 h depending on the size of the team (before the drafting for the next cycle; at the end of the current cycle)
- Frequency: Once per cycle/OKR Team


### Input Factors

- OKR's with grade of achievement + progress bar and comments to recap activities over the cycle (to be accessed in Goal Rooms)
- Learnings from the previous cycle to identify patterns

 in Workpath

 Previous step:  
Check-in  
Meetings

 Review

 Next step:  
Copy goals to  
the next cycle  
(if applicable)

# Retrospective

## Why this is relevant?

Retros are another driver of continuous improvement in strategy execution focusing on the OKR process - so what could be improved regarding the way of working with OKRs including timing, meeting rhythm, Check-ins or other meeting formats. Thus, Retros allow the organization to adapt the OKR methodology to their respective needs.

### Goal of the OKR Event

- Gaining knowledge to continuously improve the OKR process and way of working (e.g. communication, formats and rhythms)

### Suggested Procedures

Collaboration in a personal or remote meeting

1. Reflection: What went well?
2. Reflection: What needs to be improved?
3. Reflection: What should we start with?
4. Reviewing learnings from past cycles
5. Defining concrete actions or next steps
6. Define Retro Learnings to share back to the Program Lead Office

**Tip:** In order to reduce the amount of meetings you can do the Retro together with your Review just make sure you clearly delineate the meetings so they don't get diluted.

### Involved People

- Organizer & facilitator: OKR Coach or Team Lead
- Participants: OKR Team

### Duration & Frequency

- Duration: 0.5 - 2.5 h depending on the size of the team (before the drafting for the next cycle; at the end of the current cycle)
- Frequency: once per cycle/OKR Team


### Input Factors

- Learnings from the Review
- Learnings from past Reviews and Retros

 in Workpath

 Previous step:  
Review

 Retrospective

 Next step:  
Update your settings and KPIs as first step of the next cycle

# Quarterly Business Review

## Why this is relevant?


Receive a summary of the last OKR Cycle and Strategy Execution Process with respect to created business value and challenges, and elaborate new (success) use cases for your transformation.

### Goal of the OKR Event

- Challenges of the last cycle identified and business impact assessed
- Priorities for improvements identified and action plan for the next cycle defined

### Suggested Procedures

Collaboration in a personal or remote meeting

1. Review of last cycle along the four phases planning, alignment, execution, adaption via Outcome Management Report in Workpath (quantitative and qualitative) 
2. Identification of challenges and success stories
3. Assessment of status quo regarding anticipated goals, expectations and success metrics
4. Definition of concrete actions or next steps

### Involved People

- Organizer & facilitator: Workpath Customer Success Manager
- Participants: Program / Transformation Lead(s), Workpath Account Executive


### Duration & Frequency


- Duration: 1.5 h after the cycle has ended
- Frequency: once per cycle/OKR Team


### Input Factors

- Reports from Workpath Analytics
- Survey to capture employee perception

 in Workpath

 Previous step:  
End of the last  
OKR cycle

 Quarterly  
Business Review

 Next step:  
Share result  
with the  
Sponsor and  
the  
organization