

How to Review OKRs

Running Successful
OKR Reviews

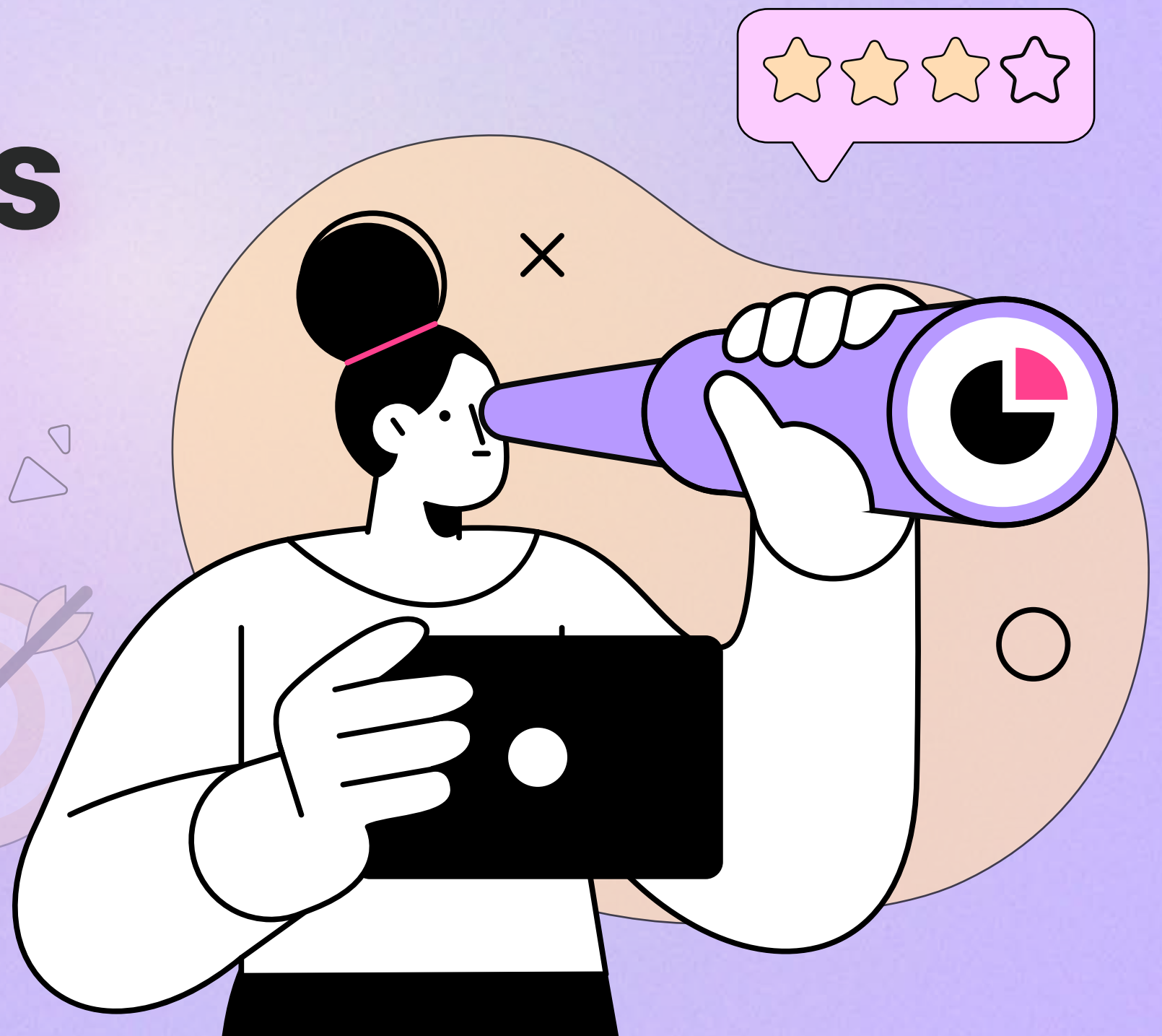


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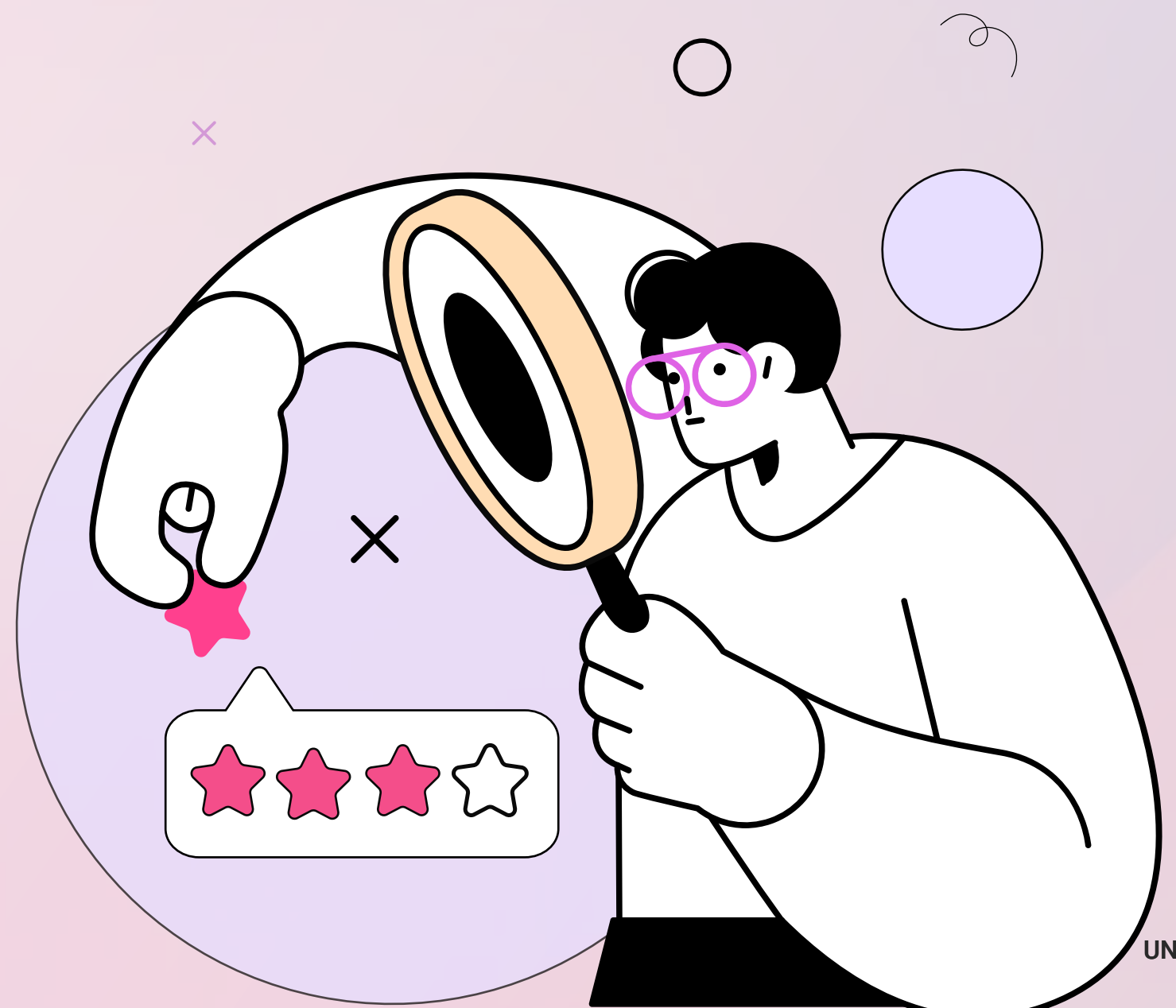


OKRs and Reviews

Reviewing OKRs is a crucial step of the OKR implementation process. Reviews and OKRs are inseparable terms, and when you launch an OKR program, you need to review it to understand what went wrong and what could have been better. Progress reviews are what add to the life of any OKR program.

An OKR review involves a meeting where the senior management meets to understand the status of the OKRs. One might assign a confidence score to the chances of attaining the Key Results (KRs) by the end of the quarter based on their status. The goal, however, is to

rate the OKRs. A strategy must be developed to improve the score of all the OKRs.



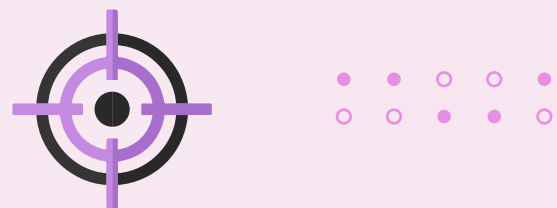
Making the Most of Your OKR Program

It is too easy to slip into the trap of “setting and forgetting” your goals when you start implementing OKRs in your company. You risk losing sight of your goals and operating in silos, detached from the broader picture. You’ll be more likely to stay on track and get the tremendous benefits of the OKR methodology if you incorporate processes into your OKR program that keeps your goals on top of mind and allows you to learn from your mistakes.

OKR reviews are the most incredible way to do this. Review meetings result in increased alignment, a more robust corporate culture, and more

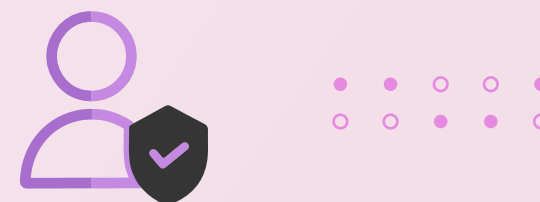
remarkable performance in the future with a careful eye on progress and a devoted learning and improvement approach. OKR review meetings can come into the picture in different forms. You can have a morning check-in with your team or meet for quarterly business reviews. They serve some primary motives, which are discussed below in detail.

Benefits of an OKR Review



Focus:

OKRs center around the company's mission and collective goals. Hence, if your employees are distracted, it will fail the entire motive behind implementing OKRs. It would help if you had regular communication through OKR check-ins to maintain the direction of your common goal. Your staff could struggle to progress towards their goals without regular OKR review meetings. Regular OKR progress reviews will enable you to spot any warning signals of difficulties your teams may be experiencing and addressing them quickly. Through these OKR check-ins, you can advise your teams on every OKR issue.



Accountability:

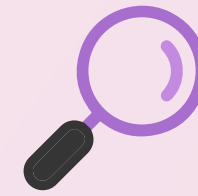
Individuals are held accountable through reviews, needing them to report on their progress and step up in areas where more work is needed. OKR check-ins ensure that there is transparent communication among the team members. Reviews provide the requisite add-on to this accountability, and that is structure. Due to the regular check-ins, employees are answerable to their managers and colleagues for the success of the OKRs. Accountability, thus, gets established.





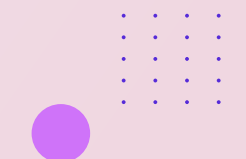
Autonomy:

When you constantly review your OKRs, you'll know what you're expected to contribute and how to make that contribution. This encourages you to take responsibility for your part and motivates you to carry the company forward without help. Review sessions guarantee everyone is on the same page and allow businesses to make necessary course corrections. From there, you and your team can confidently and independently move forward.



Transparency:

OKR reviews are not limited to the goal-setting process. It brings forward an opportunity to dissolve all the pre-existing boundaries within the company and bring about a level of transparency in how things are done. Everyone can thus see everyone else's progress, and with reviews, this becomes more attainable.

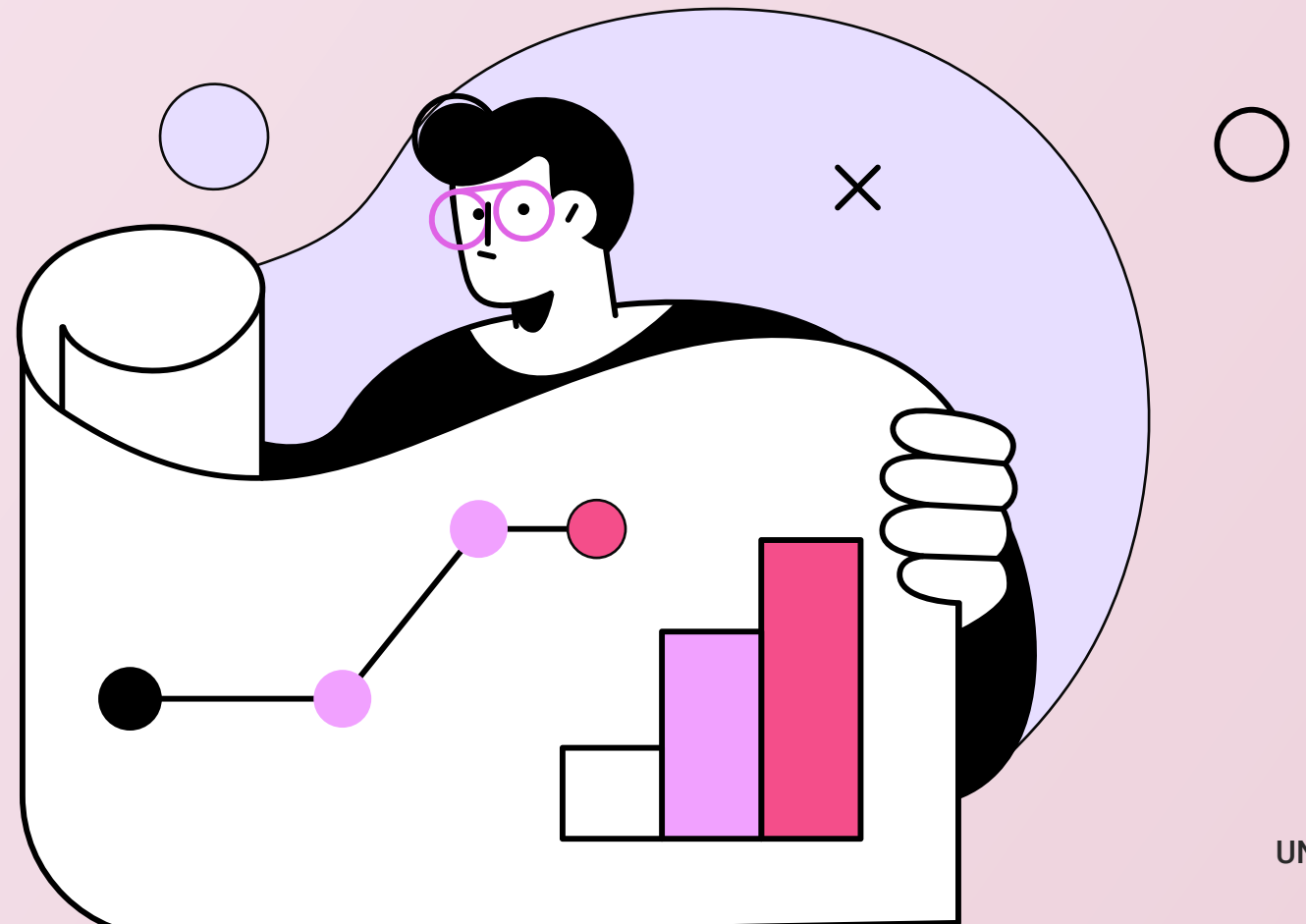


What is an OKR Progress Review?

Generally, an OKR progress review is characterized by a short meeting where the senior-level management meets and looks at the progress of the OKRs. Based on the status of the OKR, a confidence score is given to the OKR. This confidence score defines how likely OKR must be achieved at the end of the set cadence.

However, these OKR progress reviews are not just limited to reporting the status of the

key results. These reviews also involve strategizing a plan to improve the confidence score of the OKRs.

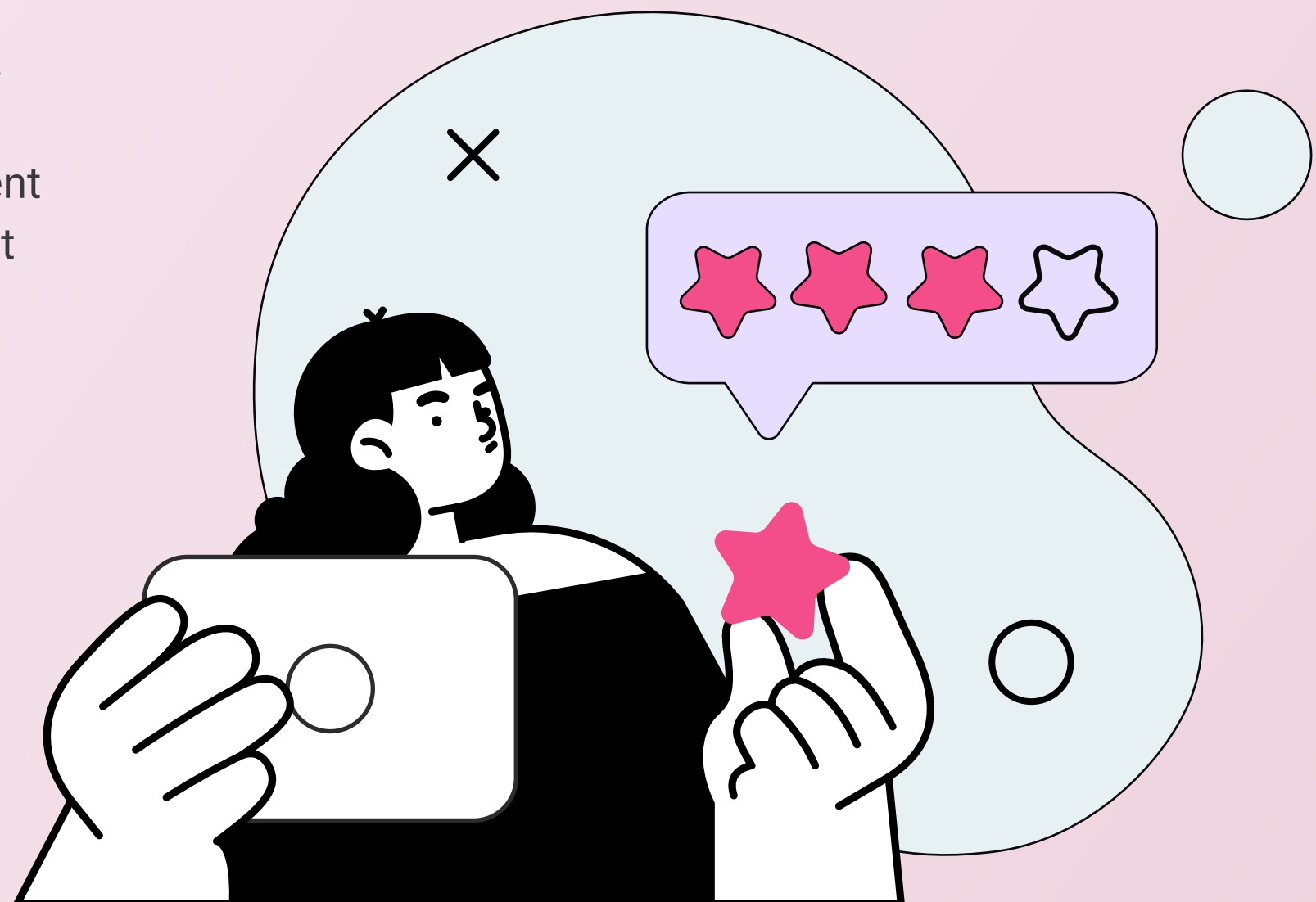


Know When to Review OKRs

It is essential to understand the needs of an organization and decide when to conduct the OKR progress reviews. You must have all the necessary resources before you plan for an OKR review. It would help if you now considered a timeline for conducting these reviews and ensured the entire process could run smoothly.

Using reviews can help in improving engagement within the organization. Research suggests that

employees are more engaged and, thus, more productive when they often receive feedback from their bosses.



According to Gallup*, “Employees who receive daily feedback from their managers are three times more likely to be engaged than those who receive input once a year or less.”

We propose organizing departmental or organizational review meetings to match your existing organizational planning cycle. Meetings should be scheduled at the very least to assist OKR formation and closure.

On the other hand, more intermediate checkpoints are recommended to ensure progress towards your objectives (Os). This way, you’ll be able to spot any possible roadblocks before they become significant issues. In the case of smaller teams, it

is ideal to conduct weekly reviews. Only then can managers and leaders stick to the deadlines, making it visible to the top management how their teams progress on their objectives and key results.

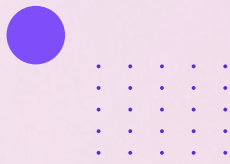
When using goal tracking software, like Unlock:OKR, alerts, and notifications help you stay up to date on your account activity. Alerts are reminders of expected KR updates, objectives, and planning updates. They remind you to take the necessary action on the O and the KR to avoid any last-minute delays. Notifications are all in-application actions taken by the other users of the system.

Such actions involve accepting or declining a KR assignment, deleting any objective, or notifying

any activity undertaken by other users, where the logged-in user is also a part of an OKR.

Note

- Executives should ensure their OKRs are closed at least two weeks before the end of the quarter.
- Department heads should close out OKRs one week before the end of the quarter.
- Team leaders must ensure that OKRs are closed off two days before the end of the quarter.



When it is time to meet and discuss OKRs, these reminders ensure that all data is current and complete across the organization.

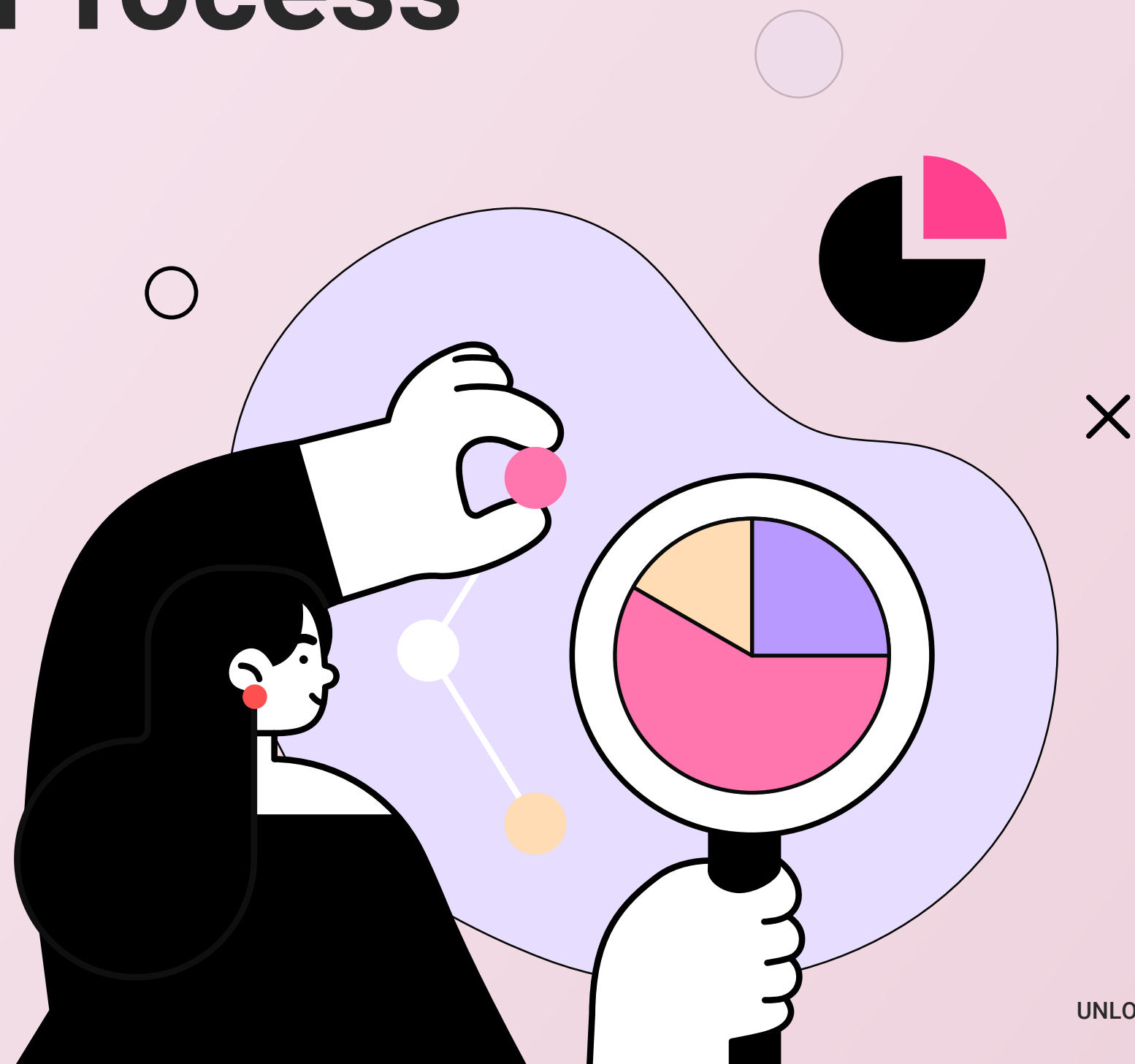


Reviewing OKRs:

A Multifaceted Process

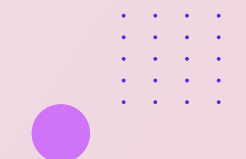
Many teams have difficulty conducting successful goal review sessions. This is because gathering the data needed to judge the progress of the OKRs is challenging, and compiling it into a usable shape takes time. Beyond the time-consuming preparation, meetings can quickly descend into haphazard working sessions that fail to move you closer to your objectives.

But you need not worry. Follow these tricks fall prey to the traps.



✔ Dos

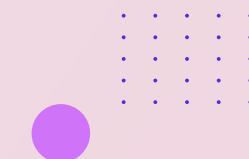
- Decide on a particular time frame and try to stick to it for better results.
 - The focus should be on the outcomes that can be measured and not on the process.
 - Review all the data trends and focus on their context.
 - Improve the feedback mechanism and try to make it a two-way process.
 - Reflect on your actions and then acknowledge the things that could have been better and those that went wrong.
 - Celebrate your wins!
- Try to remove the roadblocks that hamper your success in one way or the other.
 - Make minor changes in the OKRs based on what you have learned.
 - Encourage your manager and peers to provide constructive comments.



⊗ Don'ts

- Getting too involved in understanding the process that you get side-tracked by it.
- Spending much time making lists of tasks you need to accomplish to achieve your objectives and key results.
- Treating OKR progress reviews as your regular performance reviews.
- Making feedback a one-way traffic.
- Creating confusion and panicking on realizing that you face roadblocks in achieving your key results.

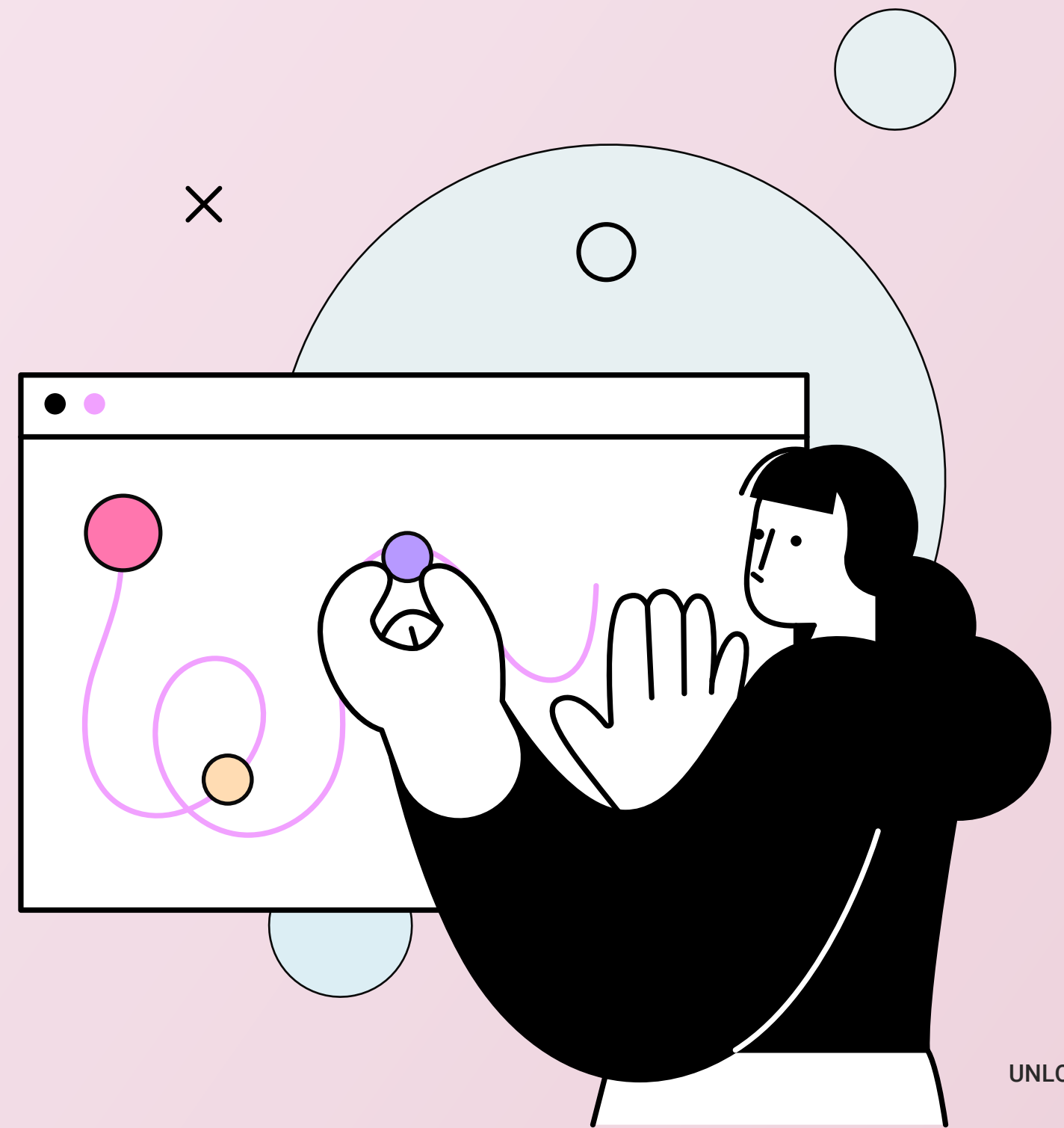
- Using the meetings to discuss trivial matters within the company or to demean anyone for not being able to achieve their share of OKRs.



OKR Reviews: Types

While we don't believe having meetings when you don't need them is valuable, we feel structuring business, team, and 1:1 meetings and reviews using OKRs can greatly aid communication and direction.

One of the most significant benefits of employing the objective and key result structure is the transparency of the OKR framework. This goal-setting technique ensures that no team works in isolation and that everyone works toward the company's most essential objectives. Productive OKR check-ins and OKR meetings are a part of the process.

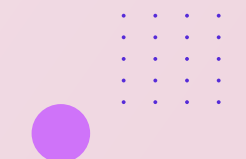


Weekly Reviews

Weekly meetings designed around the team's objectives and significant results are recommended as a best practice for team meetings. First, conduct an OKR check-in with each team member before the meeting to ensure everyone is on track. This should be done early in the week. For instance, every Monday, let everyone update their OKRs and meet on Tuesday to discuss them.

Have your team review goals they're having trouble with first to make the most of your time during the meeting. Taking care of any at-risk or behind-the-curve objectives prioritizes the most critical tasks. You must discuss the overall

progress of the team during the weekly meetings. Discuss the check-ins made throughout the previous week. This will help identify what is moving progress and what is not if numerous targets have had "nothing new to report" check-ins.



Monthly Reviews

Monthly OKR reviews tend to take a more formal tone, and stakeholders from leadership, teams, and departments may be present. These meetings should focus on assessing the OKRs at risk or the ones that are lagging while focusing on blockers and what measures may be taken to correct the OKR's trajectory. Plan before these meetings, so employees have enough time for preparation. OKRs should be updated with commentary before the meeting, and everyone should be ready to talk about the at-risk or behind OKRs.

End-of-Quarter/End-of-Cycle Reviews

After the quarter or the cycle, reviewing how individuals, teams, and the firm met their objectives is critical.

Here are some OKR questions to consider:

- How successfully did I accomplish my objectives?
- Were my objectives in sync with those of my company?
- Did I get all the dependencies?
- Were there any unexpected changes in the middle of the quarter? If so, how come?

You must evaluate your progress against the goals you have set for yourself when an OKR

cycle ends. Now, score yourself anywhere between 0.0 to 1.0. While scoring the goals, you should consider the type of OKR, i.e., if it was committed or aspirational.

If you are an individual working towards achieving the OKRs, review your progress and share everything with your manager. However, you must have a one-on-one session with all your team members if you manage a team. You should also score all the OKRs and give a reason to your team member for giving a low or a high score.

Recommendations for Reviewing OKRs at Different Levels

Different stakeholders play different roles in reviewing the OKRs. You need to understand how an employee at every level contributes to the OKR reviews.



Executives

They must regularly facilitate strategic meetings with department leaders to examine the progress of the OKRs at all levels of the organization. They must keep the vision and the mission statement in mind for every action taken.

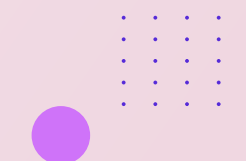
Team Managers

Team managers must take a quick overview of the OKR progress of all the individuals contributing towards the goals as a part of the team.

Department Heads

During business reviews, preside over tactical review meetings with team managers and communicate the department's OKR status to the leadership team. They must have access to a snapshot of everything that has taken place from the beginning of the OKR cycle till now. Departmental heads must understand the reasons for any delay that is taking place.

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Ways to Run Successful

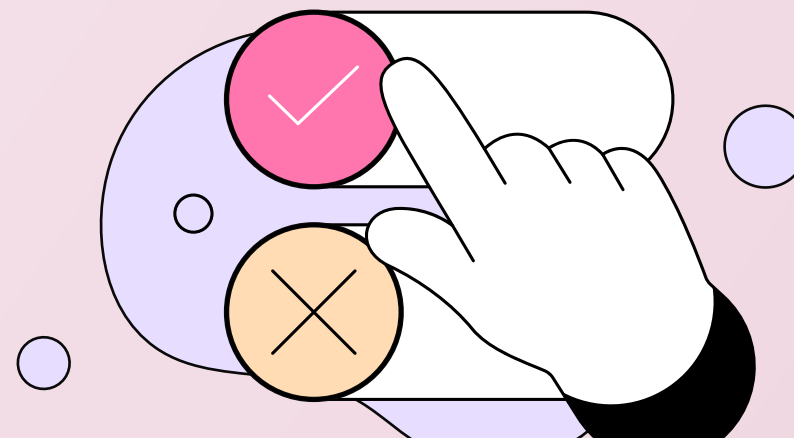
OKR Team Reviews

It would be best if you first went through any goals with which your team has trouble. Focusing on high-priority work while addressing at-risk or behind-the-curve objectives helps you stay on track. It will be evident what is and isn't moving ahead if there aren't any new check-ins.

It's also crucial to reflect on what's going well and rejoice in small victories. Determine what events or activities aided in the accomplishment of those goals. See if you can apply what you've learned to any of your goals behind or at risk.

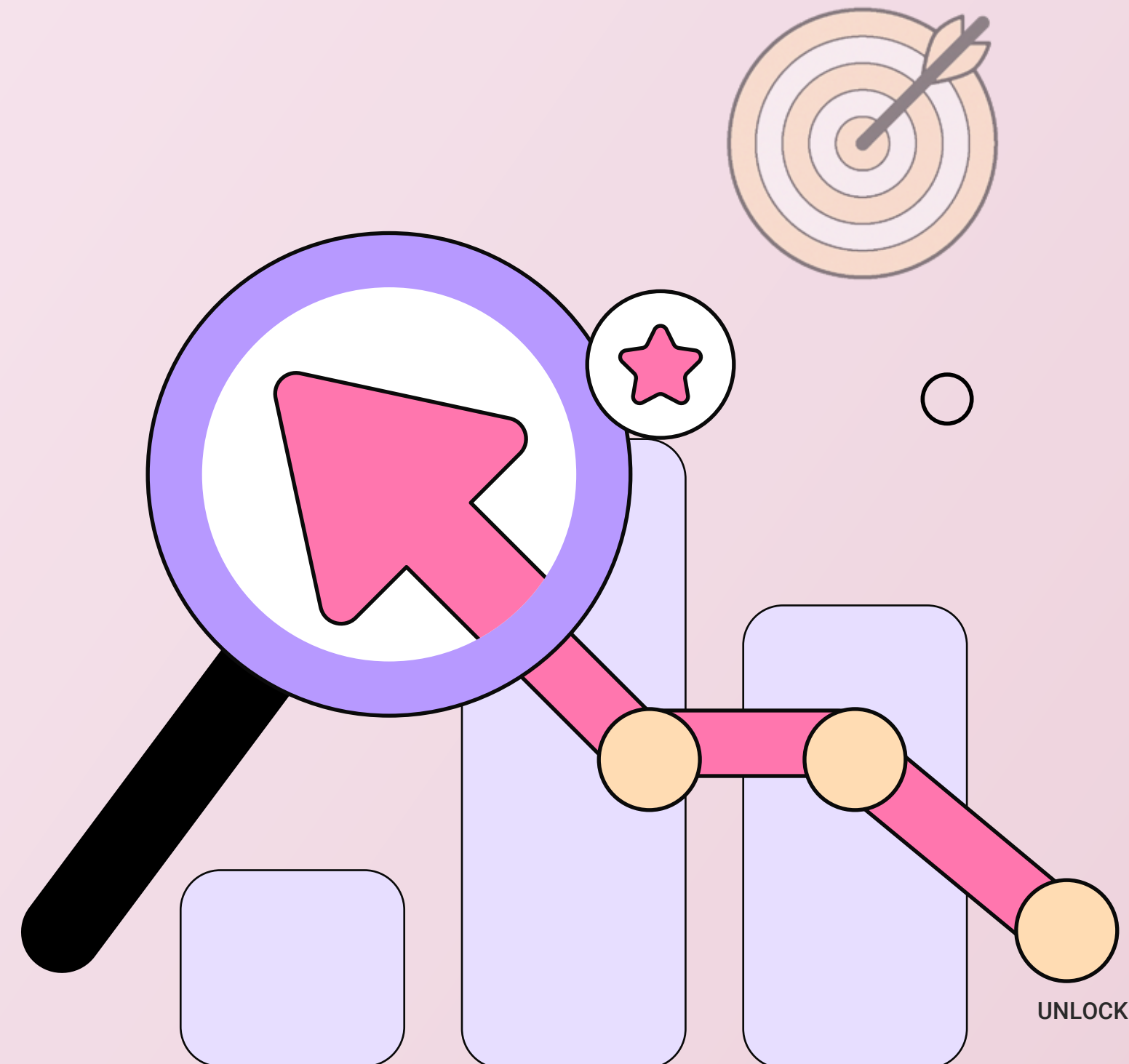
The next step is to reconsider your strategy for at-risk goals. The OKR methodology encourages you to be flexible, making changes as needed. Look to the owners of the objectives, and they can help you identify any roadblocks.

Finally, take a few minutes to review the action items prioritized during the coming week or month. This will assist everyone in staying focused until the next time you have a meeting.



Moving Closer to Achieving OKR Mastery

Continuous feedback from employees to teams and from teams to senior leadership is critical to achieving OKR success and increasing openness. Progress should be reported regularly, usually determined at the start of the year. This can be accomplished by establishing a rhythm that works for your company and team, scheduling meetings and reviews at the start of the year or quarter, communicating planning cadence, and setting objectives. When using [Unlock:OKR tool](#), think of Check-ins as a weekly scrum meeting. This feature of the tool enables you to record your updates week-on-week.




About

Unlock:OKR

Unlock:OKR, a funded enterprise B2B company, is the industry leader in OKRs and goal management. Our mission at Unlock:OKR is to enable teams to focus, align, and execute their strategic goals using the OKR framework and create a culture of transparency and agility.

The product, a goal management solution, is easy to use and supports the OKR framework used by popular tech companies like Google and LinkedIn. Unlock:OKR embeds itself in users' daily workflow with rich integrations and provides intelligent insights to identify and address goals that might be at risk before it's too late. Unlock:OKR has received positive customer feedback and is trusted by global brands like Cherwell & Alcon. Headquartered in New Jersey, Unlock:OKR has been named one of the fastest-growing companies.



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