California State Government Playbook for   
Objectives and Key Results   
(OKRs) Program

Including lessons learned from the 2023 OKRs Pilot Program sponsored by

the California Government Operations Agency.



**Version History**

Version 1.0: January 2024

Introduction

This playbook builds on the success of the OKRs pilot program completed in 2023. It is intended for California State entities seeking to implement a new objectives and key results (OKRs) program or improve an existing OKRs program. Conducted to learn how OKRs could work in State government, the pilot included employee training, coaching, project management support, and a guided reflection session on progress made during the OKRs cycle from May 2023 to August 2023.

All five agencies and seven departments who completed an OKRs cycle during the pilot found implementing OKRs valuable. All 12 groups chose to proceed with their OKRs programs. Based on the pilot results, other agencies and departments will likely find OKRs to be a practical, effective approach for making measurable progress on critical goals.

Results-Oriented Management

OKRs are part of the State’s overarching results-oriented management (ROM) framework. ROM is a management approach that focuses on:

* Strengthening strategic planning, Key Performance Indicators (KPIs), and other accountability metrics,
* Strengthening data collection for decision-making,
* Strengthening ongoing evaluation and adjustments,
* Strengthening employee engagement, and
* Leveraging the framework of OKRs

ROM strategies support organizations in setting measurable goals, evaluating progress toward those goals, and achieving desired outcomes. ROM ties to the [State’s Leadership Competency Model](https://www.calhr.ca.gov/Training/Pages/competencies-leadership-model.aspx) in two specific areas:

* **Results-driven**: ​​Focuses efforts to efficiently *achieve measurable and customer-driven results* consistent with the organization's mission, goals, and objectives.
* **Vision and Strategic Thinking:** ​Supports, promotes, and ensures *alignment with the organization's vision and values*. Creates a compelling future state of the unit or organization. Understands how an organization must change in light of internal and external trends and influences.

Purpose of OKRs

OKRs can be a practical component of ROM. OKRs are a framework that helps to align priority goals, set objectives, and establish short-term measurable milestones that will be met to accomplish them. Further, OKRs provide clear targets for achieving transformational change to support the organization’s strategic plan or goals. OKRs center on outcomes (the desired change) rather than outputs (completed tasks). OKRs translate transformational strategic initiatives that typically run multiple years into quarterly milestones that can be used to measure progress in the near term.

Pyramid chart showing the purpose of OKRs.
Layer 1 (top, smallest): Mission (Timeless). Why do we exist? What services do we offer? Whom do we serve?
Layer 2: Vision (4 years). How do we picture ourselves in 4-8 years? What is the long-term impact we will make?
Layer 3: Strategic Goals (1 to 3 years). What are our high-level goals for the next 1-3 years to support our Vision? What are the mandates, EOs, etcetera?
Layer 4: Strategic Initiatives (Multiple months per year). How will we achieve our strategic goals? (Programs/projects/actions/etcetera)
Layer 5: Objectives and Key Results (3 to 6 months). Objective: What should we focus on improving now? Key Results: How do we know we've achieved the objective?
Layer 6 (bottom, largest): Action Plans lead to Tasks. What should we do/deliver to achieve the KR target? How should we break down and assign actions?

OKRs reinforce:

* Storytelling: describing the impact of the State’s work,
* Alignment with priorities and direction from the Administration,
* Practice setting short-term measurable and transformational goals, and
* Focusing on what matters most for the Californians and the State.

OKRs improve communication, focus, and alignment to drive better business results. OKRs do this by clearly defining goals, clarifying what’s important across the organization, and focusing on key results that deliver an objective.

John Doerr, a leading voice in the OKRs community who introduced OKRs to Google, described the four general benefits of OKRs in the 1990s:

* Discipline thinking (The significant goals will surface)
* Communicates accurately (Lets everyone know what’s important)
* Establishes indicators for measuring progress (Shows how far along you are)
* Focuses effort (Keeps organizations in step with each other).

Using the principles of OKRs and adapting the process to the State Government will increase accountability and lead to sustained program operations.

**Key Terms**

| OKRs Cycle | The 3-step OKRs process of creating, monitoring, and resetting OKRs; also, the short, defined period where key results are monitored/accomplished—traditionally 3 months. |
| --- | --- |
| Objectives and Key Results | A critical thinking framework and ongoing discipline that seeks to ensure employees work together, focusing effort, to make measurable contributions. |
| Objective | A statement of a broad, qualitative goal. |
| Key Result (KR) | A statement that measures the achievement of a given objective. |
| Target | Identifies what can be achieved. The target is challenging but attainable (50% chance of achieving). |
| Commit | Identifies confidently what will be achieved with current resources (90%+ chance of achieving). |
| Output | Output is a task. Things we do and deliver on regularly. |
| Outcome | Outcomes are results. The value we create, the impact we make. |
| Action Plan | A project management tool includes the actions or tasks necessary to achieve a key result. |

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Overview of Objectives and Key Results (OKRs)

**OKRs Definition:** A critical thinking framework and ongoing discipline that fosters cross-collaboration and focuses effort to make measurable contributions. OKRs are action-oriented and drive transformation in the organization.

It is also worth knowing the definition of the two key terms “objective” and “key result.”

**Objective Definition:** A statement of a broad, qualitative goal. (What area of the organization do you want to focus on improving in the near term?)

**Key Result Definition:** A statement that measures the achievement of a given objective. (How will you know you have made progress – or achieved – the objective?)

Key results come in three distinct forms; all measured within the OKR cycle (typically a quarter):

1. Metric

The most common. These track quantitative outcomes designed to gauge success on your objectives and look like “Verb + metric + from X to Y.”

Example: Increase # of electric charger stations in district 1 from 100 to 150.

1. Milestone

A binary key result that represents an outcome, not just an output. Either the outcome occurred, or it did not.

Example: Permit approved to build housing units in Los Angeles County.

1. Baseline

Used when you cannot measure the baseline of your KR in a short time and need to focus on measuring and baselining it during the cycle.

Example: Measure average water consumption of 300 single family households in Sacramento.

Three fundamental OKRs questions:

Question 1 (to define the objective)

* Where do we want to focus to move the needle in the near term?
* Why? Why Now?
* How does this impact/benefit Californians?

Question 2 (to draft key results)

* At the end of the quarter, how will we know we have achieved the objective?
* What does (measurable / outcome-based) progress look like?

Question 3 (to refine key results and shift from output to outcome)

* What is the intended outcome of task X?
* If we complete task X, how have we made progress on the objective?

Establish Program Framework

While each organization or group setting OKRs should customize their OKRs program to make it work best given their unique needs, it is recommended to begin the OKRs program with the following approach based on the State’s pilot experience:

**Align on Why:** What do you hope to accomplish by implementing OKRs? And why now?

* Examples of unclear answers:
  + Google does OKRs and it seems like a best practice.
* Examples of clearly defined answers:
  + Shift our team from an output mindset to an outcome mindset.
  + Align strategy and priorities.
  + Beginning a business transformation effort.
  + Better coordination across divisions to achieve department goals.
  + Tell a story about the outcomes we have achieved for Californians.

Leadership at the top level of the organization should provide guidance for strategic initiatives and priorities to set the stage for OKRs. With this context, an OKRs Program Lead can facilitate translation of the guidance into short-term objectives. Additional detail on the OKRs Program Lead can be found on page 5.

**Decide Where in the Organization/Team to Set OKRs:** OKRs represent the few areas in the organization, the division, or the section where transformational change is desired. OKRs should not be set at an individual or small team level. Rather, set OKRs for a division, a section, or a specific program. Pilot OKRs within your organization to test out how to create, monitor and accomplish OKRs in one area of the organization first before setting OKRs across multiple divisions or across the organization. Doing this allows team members and the organization to become accustomed to the process and grow expertise.

Distinguish between OKRs, accountability metrics, and must do tasks when considering where to set OKRs. Remember, OKRs are about targeted transformation in alignment with organizational goals. Assess existing KPIs and strategic initiatives as context for OKRs.

**OKRs are not everything: Reserve OKRs for high-impact initiatives that are on a compressed timeframe.** OKRs are not meant to be a complete list of every work activity the team plans to work on for the quarter. OKRs should not represent 100% of work activities. These are “key” result, not “all results.” While it may vary across teams, expect to spend 50-80% of your time working on activities that are clearly connected to your OKRs. In some cases, a team such as the Legal department may only create one OKR and dedicate 10-20% of their efforts to achieving this OKR. This is to be expected in teams that are more “reactive” than “proactive” when it comes to planning. To ensure a disciplined approach, we create OKRs only for the most critical areas for measurable improvement in the near term.

**Number of OKRs:** Remember the OKRs mantra “less is more.” Aim for, at most, three objectives, with no more than three key results for each objective when getting started. This will help ensure OKRs reflect a focus on the most important areas to make an impact in the short term.

**OKRs Cycle Duration:** Start by creating OKRs that span a specified period. A short timeframe, such as a three-month quarter, helps break down longer term goals into shorter-term progress markers. The feedback from the State’s pilot program was that the short duration of the OKRs cycle was one of the primary benefits, creating alignment, focus, and accountability.

**Key Results specify “Commit” and “Target”**[[1]](#footnote-2)**:** For each KR, specify two levels of achievement:

1. Target: what we hope to achieve, difficult but attainable (50% chance of achieving) **and**
2. Commit: what we are quite confident we can achieve with current resources (90%+ chance).

Creating these two levels of achievement helps clarify what is likely possible and what might be possible.

Fill Program Roles

There are six roles critical to success with OKRs at the department and agency level. It is critical to understand each role and who will fill each of these roles. Consider creating a RACI (responsible, accountable, consulted, informed) chart for your OKRs program once the roles have been assigned.

**The OKRs Program Lead** is the foundational role that must be filled in an OKRs rollout; we advise filling this role first. In practice, defining two program leads, where possible, is better than one. Having a partner enables dialog that will drive continuous improvement.

While there are five distinct roles required to support an OKRs program at the agency or department level, a given person will often play several roles. For example, an OKRs Program Lead often serves as an internal OKRs coach and may even play the role of KR Champion from time to time.

Role 1: Executive Sponsor

The executive sponsor is the head of the given department or agency adopting OKRs. As with any change management program, an OKRs program will have little chance of success without support from leadership. The executive sponsor must clearly communicate why their department or agency is adopting OKRs and incorporate OKRs into leadership presentations and management meetings.

Responsibilities of executive sponsors include:

* Communicate why the department or agency is implementing OKRs.
* Help gather objectives for OKRs drafting workshop(s).
* Ensure the Objective (and Why/Impact/…) is written effectively.
* Serve as a sponsor for the Objective and an escalation point for KR Champions.
* Participate in some (or part of) OKRs development workshops.
* Affirm commitment to the OKRs program (e.g., secure resources, incorporate into leadership practices, make opening remarks at OKRs trainings, etc.).

Role 2: Program Lead

A **leader in the executive office** often serves as the program lead to help kick off the OKRs program. Consider also including a **mid-level manager or direct report to an executive** to take on the role of OKRs program co-lead. This role is also well suited for managers with a year or more tenure within their agency or department.

OKRs program leads must be great communicators and possess general knowledge of the organization’s history and structure. This role can require a serious commitment for the first month or two when the focus is on program development and training workshops. However, the OKRs program lead role is generally not a full-time job. Rather, it is one of three to five key responsibilities. Once the OKRs program is up and running, an OKRs program lead should plan for four to eight hours a week near the beginning and end of each OKRs cycle but just an hour or two per week during the middle of the cycle. Division Chiefs, Senior Advisors, Project Managers often make excellent OKRs program leads.

Two OKRs program leads are recommended. In cases where only one person is in this role, that one person may become dependent on OKRs experts outside their team or grow frustrated that they do not have an in-house colleague to help optimize the program. While two program leads are better than one, it is not clear based on the pilot program whether a third program lead will be beneficial.

Responsibilities of OKRs program leads include:

* Review OKRs materials, including this playbook and all resources.
* Facilitate adoption of a standard OKRs tracker.
* Attend OKRs coaching sessions.
* Facilitate OKRs training workshops (e.g., send workshop invites, compile objectives to be used at training workshops, refer to CalHR OKR training)
* Ensure supporting OKRs materials are available.

Role 3: Key Results (KR) Champion

The Key Result Champion is the individual accountable for “leading” a given KR. Responsibilities of KR Champions include:

* Ensure KR and its action plan are written effectively and on track.
* Define and interact with contributors (action item owners) and stakeholders.
* Manage/update KR/Action Plan in tracker, keep stakeholders informed.
* Update progress and confidence at internal check-in meetings.
* Answer questions, provide reporting, escalate to Executive Sponsor (if needed).

Best Practices:

* One individual should champion at most 2-3 KRs per cycle.
* When useful to drive collaboration, consider 2 KR Champions for a single KR
  + For highly dependent KRs, consider naming a co-KR champion from that dependent team in addition to a KR champion from your team.
* KR Champion may be a contributor to KR Action Plan.

Role 4: Key Results (KR) Supporters

KR supporting team members work together to impact key results but are not responsible for owning a key result. OKRs are most effective when team members participate in the creation of OKRs even if they are not accountable for KRs. Team members apply critical thinking to continuously connect their work to the bigger picture. They know how their work helps impact OKRs and/or contributes to keeping success metrics on track. For example, team members may only participate in the development of OKRs for the organization and not take an active role in monitoring KRs throughout the cycle.

Responsibilities of team members include:

* Participate in drafting OKRs.
* Help refine key results, especially when aligning on target and commit levels of progress.
* Apply OKRs critical thinking to connect work to the bigger picture.

Role 5: Internal Coach

During the State’s pilot, OKRs.com provided OKRs coaching during the cycle. External coaching from the OKRs.com team provided guidance during the cycle and helped KR champions talk through challenges, roadblocks and share successes. This role is critical for an OKRs program, and organizations interested in building such a program should consider building this skill within the organization for long-term sustainability.

As noted earlier, OKRs Program Leads will often take on the role of Internal OKRs Coach as well. However, it may be useful to have more Internal OKRs Coaches, depending on the number of workers involved in your OKRs program. Good communicators with broad management consulting skills (e.g., Agile coaches and seasoned managers) often make excellent internal OKRs coaches.

Responsibilities of internal OKRs coaches include:

* Participate and provide support at OKRs training workshops.
* Guide the development of OKRs to ensure they are specific, measurable, achievable, relevant, and time-bound (SMART).
* Ensure successful completion of the OKRs cycle by asking questions to help refine OKRs.
* Prepare for and lead regular internal OKRs check-ins.
* Facilitate reflect and reset sessions at the end of each cycle.
* Lead workshops to train other internal OKRs coaches.

Conduct Training Workshops

The Internal Coach and Program Lead work together to hold OKRs training workshops with the identified team members who will inform the OKRs. Here are a few resources.

1. **OKRs 101 – Introduction to OKRs**

This training includes an overview of the basic theory of OKRs and will be offered beginning in Spring 2024 through [Cal Learns](https://calhr.geniussis.com/PublicWelcome.aspx).

1. **OKRs Internal 101 and Reflect and Reset – KR Champion Training PowerPoints**

This training is intended for KR champions and is especially vital for those who are new to the KR champion role. These can be modified and tailored for the audience. Link to these PowerPoints are here: [OKRs 101 Training Workshop](https://www.calhr.ca.gov/Training/Documents/OKRs%20101%20Training%20Workshop%20Deck%20final.pptx); [OKRs 102 KR Champion Workshop](https://www.calhr.ca.gov/Training/Documents/OKRs%20102%20KR%20Champion%20Workshop%20final.pptx)

To see an example of supporting materials, refer to the training slide deck and sample OKRs tracker worksheet in the resources section of this document.

1. **OKRs 103 – Internal OKRs Coaches**

Upon completion of 1-2 OKRs cycles, if your organization decides to expand the use of OKRs inside the organization, it will be essential to identify a group of internal OKRs coaches to sustain the program.

A “train-the-trainer” (TTT) approach is highly recommended. TTT workshops are advanced OKRs training that run 3-5 hours and can be delivered in-person or remotely. Ideally, groups should include 12-15 participants, with a maximum of 20 per training cohort. Trainees should come from multiple divisions and units to optimize learning across groups. Similarly, trainees may come from other organizations also.

The OKRs Cycle

The OKRs cycle consists of three steps:

1. **Create OKRs** prior to the beginning of the cycle.
2. **Check in and monitor** progress on the key results during the cycle.
3. **Reflect** on achievements/progress on the objectives **and reset** the key results (and objectives as needed).

The default cycle duration is one quarter (three months) and begins once the OKRs have been drafted and finalized. Objectives will tend to be consistent for several cycles though they do change from time to time. Key results almost always change and the decision for if and how to change each key result is part of the third step, reflect and reset.

The following section contains a summary of each of the three steps including the goal of that step, participants, expected time commitment, recommended preparation, supporting materials, and tips for avoiding common pitfalls.

Step 1: Create OKRs

**Goal of Step One:** Create a set of OKRs to publish for the upcoming cycle.

**Preparation:** Leadership should have met before step one to guide objectives. This will make the drafting process effective. These objectives should come from the organization’s leadership. Concurrently, leadership may need to consider necessary change management efforts.

**Participants:** OKRs Program Lead(s), Executive Sponsor, and typically Deputy Directors and Mid-level Managers.

**Sessions and Duration**:

1. Draft OKRs - 90-120 minutes
2. Refine OKRs - 60-120 minutes
3. Finalize OKRs – 30 – 45 minutes (if necessary)

**Supporting Materials:** Consider starting with a quick refresh on OKRs using OKRs 101 Training Deck and OKR Drafting Hand-out. Or, if everyone has already completed the OKRs 101 training, begin drafting OKRs.

Tips for Step 1: Avoiding Common Pitfalls

* To avoid the common pitfall, defining ***too many*** OKRs, focus on 1-2 (at most 3) objectives.
* To avoid the common pitfall, writing key results as a list of tasks -- measuring ***output not outcomes,*** remind team members to distinguish between key results, success metrics, and tasks/must-do-its.
* To avoid the common pitfall, failing to define ***why the objective is important and why*** ***now***, take time to align on 1) why progress on each objective is important now and 2)how each objective benefits Californians.

**Time Commitment:** As a guideline, expect to spend roughly 8 hours the first time you develop your OKRs. Once you have experience using OKRs for a couple quarters, a team may need just 2-3 hours to create a set of OKRs for the next quarter.

If your team’s OKRs are highly dependent on other teams, you may want to spend more time drafting and refining OKRs to ensure they are aligned across teams. Be sure to jointly define KRs that depend on or impact other teams to ensure mutual understanding about what progress looks like BEFORE considering your KR set for the cycle.

Consider the following the process defined in the OKRs drafting handout:

1. One session to get started drafting OKRs.
2. About a week later, conduct a follow-up session to refine OKRs.
3. A third or fourth session may be necessary to finalize OKRs. This step ends once you publish all OKRs to a shared location—your OKRs Tracker.

Drafting OKRs

Use the OKRs Drafting Handout (shown below) to follow a step-by-step approach:

* + - 1. Objective:
* What should we focus on in the coming months to make measurable improvement?
* A qualitative sentence beginning with a strong verb e.g. “Accelerate,” “Drive,” “Grow.”
* Write 1-2, max 3; timeframe can go beyond first cycle.
* The objective is typically related to a business transformation effort.

1. Focus area or Administration/Agency/Department Goal:

[if applicable]

* 1-2 sentences on how this Objective supports an overarching focus area, goal or strategic plan.

1. Why? Why Now?:

* Why: 1-2 sentences to educate staff why the objective is important?
* Why now: 1-2 sentences to motivate staff, create urgency.
* Note: Discussion on why? and why now? can be iterative and circular coming back to redefine the objective.

1. Impact to Californians: [if not an Internal Objective]

* 1-2 sentences on how your objective will impact the people of California.
* Think about the “story” behind what we are trying to achieve.
* **Internal objectives** could be about your department’s people/culture e.g., engagement, trust, teamwork.

1. Key Results (as measured by…)

* How will we know we’ve achieved the objective by end of this OKR cycle (typically a quarter)?
* Make them outcome-based and ideally write as a metric “increase metric A from X to Y”
* Write 2-3 KRs per Objective, max 4 as exception; keep the total # of KRs under 10
* KR 1:
* KR 2:
* KR 3:
  1. Write each KR as a “Target” with a “Commit” next to it.
* **Target** = What we aim for; difficult but attainable, somewhat controllable; 50% confidence
* **Commit** = What we expect to achieve. Mostly in our control; 90% confidence

**Example KR: Increase access to clean water from 10M people to 15M people | Commit: 12M**

**Target** (50% chance of achievement)

* Beyond what we expect to achieve
* Difficult but attainable; somewhat in our control
* E.g. Target: 15M people

**Commit** (90% chance of achievement)

* What we expect to achieve
* Mostly in our control and within existing resources
* E.g. for people’s access to clean water:
* Baseline: 10M people, Commit: 12M people
  1. Use these 3 KR types (all should be outcome-based)
* Metric e.g. Increase # of electric charger stations from X to Y
* Milestone e.g. Permit approved to build units in Los Angeles
* Baseline e.g. Measure avg water consumption of 300 single family households
  1. Convert tasks to outcomes when refining
* What is the intended outcome of task X?
* We are doing task X to achieve what measurable outcome?

When you begin to describe Key Results for an Objective, you often end up with a list of tasks. This is fine.

**Ask these fundamental questions when drafting OKRs:**

1. Fundamental Objective Questions:

* Where do we want to focus to move the needle in this OKR cycle (typically a quarter)?
* Why? Why Now?

1. Fundamental Key Result Questions:

* At the end of the cycle, how will we know we have achieved the objective?
* What does (measurable / outcome-based) success look like?

1. Fundamental Task-to-KR Questions:

* What is the intended outcome of task X?
* We are doing task X to achieve what measurable outcome?

Writing Tips

**Three key characteristics of effective Objectives:**

* + - 1. Does your Objective really reflect the top priority for the near term?
      2. Does the Objective resonate with the team?
      3. Is the Objective in sync with the department’s mission and our longer-term strategy? If not, is that OK?

**Tips for writing effective Objectives:**

Be specific about your priority and focus area.

Start with a strong verb and use inspirational wording.

Make it qualitative (move numbers to KRs).

Educate with Why, motivate with Why Now.

Write only one sentence.

**Tips for writing effective Key Results:**

1. “Key” not “all”: Is the key result just “business as usual” or is it a “key” result.
2. SMART: Specific, Measurable, Achievable, Relevant, Time-bound.
3. RACI: Specify the KR Champion (Accountable), contributors (Responsible) and stakeholders.
4. Outcome-based: Key results are results/outcomes, not tasks or projects.
5. Clear: Use plain language with only standard acronyms to avoid ambiguity.
6. Bottom-Up: Most key results originate from the team.
7. Achievement Level: Write as a target (50% confident), specify a commit (90% confident).
8. Break-down the KR into segments and only include the portion which can be achieved by the end of the current cycle. Add the remaining segments to the next cycle at that time.

Step 2: Check-In & Monitor

**Goal of Step 2:** Ensure OKRs are kept front and center. Share wins and learnings. Report on KR progress and any roadblocks.

OKR check-ins play a critical role in ensuring that teams stay focused on their objectives, remain adaptable to changes, and foster a culture of transparency and accountability.

Check-ins should be held biweekly to maximize the team’s attention to OKRs. However, check-ins may be only 15 minutes.

* The Internal Coach leads check-in meetings using the OKRs action plan tracker (additional details and link can be found on page 14).
* Each week, KR champions update the tracker with a projected status of the KR—at risk of attaining commit, on track to attain commit, on track to attain target.
* The Internal Coach uses the tracker to facilitate the meeting.

**Preparation:** KR Champions use the OKRs tracker to report:

1. The confidence level of achieving the KR at each check-in (at risk of attaining commit, on track to attain commit, on track to attain target).
2. Whether the progress on their KR should be escalated to discussion with the larger team. For example, was there a big win, a learning, a blocker?
3. The final status and level of achievement of a given KR at end of the cycle (“No Progress”, “Commit”, or “Target”).

KR Champions update the following in the tracker:

* Update check-in date.
* Insert Actual KR progress.
* Choose confidence level (Risk/Commit/Target) from the drop-down. The “risk” confidence level indicates that there is a risk of not even achieving the KR’s “commit.”
* Insert comments to provide updates on:
  + Status/progress of KR and achievements made since last check-in.
  + Risks, blockers, or big wins that explain changes in confidence.
* Insert columns as appropriate for additional check-ins during the cycle.

For the Action Plan, update the percent complete and status, and insert details/comments (as needed). If the data is not available to measure progress for a key result, use various techniques, such as sampling, surveys, estimations, etc., to come up with a number. If defining and gathering the data to report this metric will likely take more than a month, consider writing a baseline key result. For the next cycle, think about which metrics are needed to baseline ahead of time for the beginning of the next cycle.

***Note***: To add comments, right-click on the cell (where you enter KR progress and confidence) => insert a comment

***Tip***: Write detailed comments – especially when there is a change in progress/confidence – so that at the end of the cycle, you could reflect and recall what had happened

**Participants:** All KR Champions join check-ins that are held during the cycle. Ideally, the Internal Coach facilitates these meetings. OKR Program Leads typically join these sessions and maybe facilitators if needed.

**Duration**: 15-30 minutes

**Supporting Materials:** Your OKRs Tracker ensures you document progress and notes from check-in sessions in a single place. You can request a sample tracker by contacting [INFO@UnleashingLeaders.com](mailto:INFO@UnleashingLeaders.com). The sample OKRs tracker has three tabs—one for OKRs, another to track KR progress and updates, and the action plan tab to track tasks associated with each KR.

**Tips for Step 2: Avoiding Common Pitfalls**

Pitfalls

* Zero OKRs review means “Set-it-and-forget-it.”
* Additional “OKR-specific” meetings/processes.
* Check-in calls take too much time (updating tracker, discussing risks/issues, etc.).
* Lack of clarity about who is accountable for updating key results.

Solutions:

* Integrate OKRs into existing team meetings.
* Schedule all check-ins in advance to block calendars and make it a priority to attend.
* Update tracker BEFORE check-ins, schedule ad-hoc subject-specific calls with appropriate team members.
* KR Champions update progress and serve as point person for each KR.

If a target is missed, do not edit the KR. Instead, add a comment and explain why/what happened, and continue your work to the best of your ability; the goal is learning!

**Tracking and Monitoring OKRs**: Start by getting familiar with the Sample OKRs Tracker. Be sure you have all OKRs in a single, shared location that you can refer to when conducting check-ins. During each check-in call, each KR Champion presents the progress on KR and its Action Plan, achievements made, updated confidence level, issues, risks, blockers, lessons learned, etc. Please note that the KR champions should update the OKRs tracker before each check-in.

Step 3: Reflect & Reset

At the end of the cycle, conduct a workshop to reflect on the whole cycle, review the KR progress and discuss the topics below:

* Lessons learned,
* Success stories,
* Impact to Californians,
* Improvement ideas,
* What worked and what needs to change.

Then reset the OKRs for the next cycle (e.g., may keep one objective but update its KRs).

**Goal:** Communicate final progress, celebrate wins, classify each KR as “keep, modify, or remove,” and capture learnings to apply to the next cycle’s OKRs. Bonus: end this step with a first cut at draft OKRs to inform Step 1 of the next cycle. Most of your objectives will probably stay the same, but your KRs will likely change. Some KRs will simply be extended into the next quarter. Other KRs may be removed entirely if they were completed or determined to not be worth pursuing.

**Preparation:** KR Champions should complete the Reflect and Reset Training [OKRs 102 KR Champion Workshop](https://www.calhr.ca.gov/Training/Documents/OKRs%20102%20KR%20Champion%20Workshop%20final.pptx). The OKRs Program Lead should ensure KR Champions take 10-20 minutes to update their KR prior to the live session. KR Champions should know what “keep,” “modify,” and remove” mean.

**Participants:** All KR Champions should join, as each KR will be discussed before closing the cycle. OKR Program Leads typically join these sessions. The Internal Coach facilitates.

Duration: 45-90 minutes.

**Tips for Step 3**: Avoiding Common Pitfalls

Pitfalls

* Skipping this step entirely.
* Meeting gets off track and goes on forever.
* Discussing only final KR progress and work completed.

Solutions

* Conduct the session and provide preparation for KR champions.
* 5-10 min discussion per KR; classify each as Keep, Modify, or Remove.
* Emphasize wins and learnings, not just “final KR progress.”

At the end of the cycle, it should be quite easy to score your OKRs. During the State Pilot, for example, people often spend just 5-10 minutes scoring and reflecting on their OKRs at the end of the quarter.

Finally, complete the maturity assessment to evaluate how the cycle went and discuss the approach (including lessons learned) for the next cycle. Consider taking 30 minutes near the end of your first OKRs cycle to complete a self-rating to score your team on each of the 10 dimensions. Be sure to include OKRs Program Leads and KR Champions. KR Supporting Team members may also be part of this assessment. If the Executive Sponsor has other priorities and cannot join the assessment, it may be best to brief them on plans for improving the OKRs program based on learnings from the assessment.

Resources

In this section, you will find links to resources useful for launching and sustaining your OKRs program. Each resource has a link that will open the resource and a brief description and recommendations for how and when to use it.

Training Materials

#### OKRs Training Slide Deck

This includes PowerPoint presentation for internal training and reflect and reset meeting that can be used as part of an OKRs Training Program. [OKRs 101 Training Workshop](https://www.calhr.ca.gov/Training/Documents/OKRs%20101%20Training%20Workshop%20Deck%20final.pptx); [OKRs 102 KR Champion Workshop](https://www.calhr.ca.gov/Training/Documents/OKRs%20102%20KR%20Champion%20Workshop%20final.pptx)

#### OKRs Drafting Handout

You can use the OKR drafting handout on page 10.

#### OKRs Sample Tracker

You can request a sample tracker by contacting [INFO@UnleashingLeaders.com](mailto:INFO@UnleashingLeaders.com). During the pilot program, all 12 teams used this sample tracker; however, several teams have opted to make some adjustments to the tracker. For example, removing the worksheet for action planning or using other project management tools.

#### PDF Preview of The OKRs Field Book

This is simply a PDF preview that includes the Introduction and Chapter One of The OKRs Field Book by Ben Lamorte. It has been made public for anyone to read at <https://okrs.com/>.

#### OKRs Maturity Assessment

This [maturity assessment template link](https://www.calhr.ca.gov/Training/Documents/OKRs_Maturity_Assessment%20Final.docx) is intended for use at the end of the OKR cycle to assess what is working well and where there are opportunities for improvement.

1. Note: To succeed with OKRs, specific questions must be answered before launch. In The OKRs Field Book, the answers to these questions are referred to as “deployment parameters.” We are using the term “guidelines.” For further analysis of these guidelines or “deployment parameters,” refer to Chapter 3 of The OKRs Field Book. [↑](#footnote-ref-2)