# OKRs Maturity Assessment for State of California Departments

**Use a 1-3 scale to score each of the 10 dimensions areas below to assess OKRs Program maturity:**

**1 = No Progress**

**2 = Some Progress**

**3 = Amazing**

| **Area** | **Explanation** | **Score 1** | **Score 3** | **Final Score  1-3** | **Action Items Score 1 – 2: next cycle improvement  Score 3: keep process** |
| --- | --- | --- | --- | --- | --- |
| **1 - Team Roles for OKRs Program** | **FOUR** roles are critical.   * **Key Result Champion** * **Executive Sponsor** * **OKRs Program Lead** * **OKRs Internal Coaches** | * Roles are not explicitly defined and filled to support the OKRs program. * Responsibility is assumed to be shared among many people. | * Team members have filled at least FOUR roles. * **Key Result Champion:** clearly defined with agreement on assigning 1 or 2 champions to each key result. * **Exec Sponsor:** defined and filled. * **OKRs Program/Project Lead:** 1-2 “key contacts” serve as point persons for the OKRs program. * **Internal OKRs Coach/es:** ensure success at each step of the cycle. |  |  |
| **2 - Level/s to set OKRs** | When creating OKRs, there is a tendency to assume setting OKRs at every level in the department/agency, even at the sub-team or individual contributor level, is ideal. However, OKRs are often ineffective when cascaded to all. | * OKRs must be defined at all levels (e.g., as defined by an org chart). * Individual contributors are required to set OKRs. | * OKRs are created for the top level (e.g., agency and/or department) priorities, often defined as transformational. * OKRs are defined at lower levels only for teams that opt-in and find value (not mandated). |  |  |
| **3 - Quarterly Key Results originate bottom-up and ALIGN to longer-term goals and priorities** | OKRs evolved from “Management by Objectives,” created by Peter Drucker in the 1950s. Drucker intended the MBO system for all managers to demonstrate how they contribute to organizational goals. Unfortunately, many organizations choose to mandate objectives from the top down. This can also occur with OKRs. OKRs are often more effective when most key results originate from team members. | * Most, if not all, objectives and key results originate from a mandate. * OKRs are created by copying and pasting mandates, limiting the critical thinking necessary for success with OKRs. | * Those doing the work are vital in **defining quarterly key results to support longer-term goals and priorities**. * Agencies and departments communicate their proposed OKRs up to higher levels to**align on measuring incremental progress to drive goals and priorities**. |  |  |
| **4 - Defining “Commit” and “Target”** | Organizations often conflate “commitments” and “aspirational” goals when defining key results. It is critical to adopt a standard so that team members define key results that reflect the level of progress that is: 1) primarily within their control (COMMIT) and 2) somewhat in their control (TARGET) to create alignment and manage expectations. | * All key results are written at a single level of progress without referencing whether the key result is written at a “commit” or “target” level. | * A standard approach is adopted and is understood throughout the organization. * Teams align on what is “mostly controllable” (commit) and “somewhat controllable” (target) when defining their OKRs. |  |  |
| **5 - Number of OKRs**  **“Less is More”** | OKRs are not designed to monitor all work. Instead, OKRs should focus on the most critical areas for near-term improvement. Remember the coaching mantra “Less is More.” Teams do best with <10 key results. | * Defining excessive OKRs. * Failing to distinguish OKRs from success metrics and must-do's. | * Teams create 1-3 objectives, each with 2-4 key results. * While there is no magic number, a process is in place that ensures OKRs are not attempting to capture all work. |  |  |
| **6 - OKRs Tracker** | OKRs are prone to the “set-it-and-forget-it” pitfall. Progress must be updated in a standardized system at an agreed-upon cadence. All three steps of the OKRs cycle should be captured in the tracker for visibility into status. | * OKRs are published in multiple systems and formats and updated at various cadences. | * All OKRs published in one location. * Tracker includes check-in columns (step 2) and reflect & reset columns to document step 3. * All key results champions easily access the tracker. |  |  |
| **7 - Aligning OKRs** | Getting work done requires collaboration across various functional areas, with groups banding together to solve issues of mutual concern. OKRs cannot be created in silos without input from dependent teams. Organizations that successfully employ OKRs build alignment into every facet of their OKRs program to better drive execution. | * OKRs are created by functional teams in silos. * There is no formal “alignment check” step when drafting OKRs. * Key results are copied and pasted to become objectives at lower levels. | * Groups proactively seek out other groups upon whom they depend or who depend on them for OKRs success to co-create dependent or shared OKRs. * Alignment checks take place when drafting OKRs. * Groups think about developing their own OKRs in the context of Agency/Department priorities rather than copying and pasting. |  |  |
| **The OKRs Cycle**  **8 - Step 1: Set & Align OKRs** | Objectives should include a clear explanation about why they are essential now. Key results must be measurable statements that define the achievement of each objective. | * Many objectives lack clarity about why they were selected. * Key results look more like output/tasks than outcomes/results. | * It is clear why each objective is crucial and how it connects to higher-level goals to motivate team members to drive the OKR forward. * Key results are outcome-driven. |  |  |
| **The OKRs Cycle**  **9 - Step 2: Check-In & Monitor** | The definition of OKRs includes “critical thinking framework and ***ongoing discipline***” that requires asking questions throughout the OKRs cycle, not just defining OKRs. Therefore, structured check-in processes must occur during the cycle. Each organization must find a check-in cadence that works for them; one that balances learning and execution with meeting time. | * OKRs suffer from the set-it-and-forget-it pitfall, with no structured check-in. * The check-in process is ad-hoc without a defined cadence. * Teams introduce too many meetings purely to discuss OKRs | * KR champions update a standard template at an agreed-upon cadence (e.g., bi-weekly) using a defined set of prompts such as 1) big win/big learn, 2) confidence score (e.g., **commit/target/risk**), 3) blockers, and 4) action items. * Check-in meetings are integrated into existing meetings and processes (for example, OKRs are part of an existing bi-weekly agile sprint meeting or included at an existing mid-quarter department all hands). |  |  |
| **The OKRs Cycle**  **10 - Step 3: Reflect & Reset** | While making measurable progress on key results is vital, successful teams document learnings for each , applying key result learnings to draft future OKRs. | * No formal mechanism for capturing learnings. | * **KR champions** present final results and learnings + recommend whether to keep, modify, or remove the key result. * **Internal OKRs coaches** capture and share specific wins and lessons learned with the larger organization. |  |  |