

A close-up photograph of a hand placing a wooden peg on top of a line of other wooden pegs. The hand is positioned at the top left, with the index finger and thumb carefully placing the peg. Below the hand, a row of five wooden pegs stands on a light-colored, textured surface. The background is a dark, out-of-focus blue-grey. The text 'WORKPATH' is overlaid on the left side in a bold, yellow, sans-serif font. Below it, the text 'Workflows around our features' is in a white, serif font. At the bottom left, 'OKR Phases Fact Sheets' is written in a smaller, white, sans-serif font.

**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




### Involved People

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



### 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: What is the added value for the (internal) customer?
7. Deriving Key Result: Measuring the promises in the Objective
8. Determining the responsibilities (ownership)
9. Brief Retro of the session
10. Official communication / announcement to the organization



### 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)






### Involved People

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



### 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: What is the added value for the (internal) customer?
7. Key Result derivation: Measuring the promises in the Objective
8. Initiatives derivation: What do we do to achieve the Key Result?
9. Definition of responsibilities (owners) for each OKR or KR (owners should sent out contribution requests to required teams after Drafting)
10. Identification of required contribution of other teams (alignment potential)



### 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 easy 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

# Check-in Meetings

## Why this is relevant?

Check-ins help teams to keep focus in achieving their goals by discussing progress, raising risks or blockers and sharing 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 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 how to prevent risks and solve blockers



### Suggested Procedures

Collaboration in a personal or remote meeting

1. Decide and schedule check-in meeting (as part of an existing team meeting)
2. Preparing Check-ins:
  - What did you work on?
  - What do you plan to work on next?
  - Any learnings, risks and blockers you want to share?
3. Update OKRs where applicable (including Confidence Level)
4. Sharing risks, insights and blockers
5. Define Action items and next steps to prevent risks and solve blocker



### 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



Check-in  
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 KRs, check the set hypotheses behind the OKRs and identify success drivers. OKRs 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




### Involved People

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



### 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.



### 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

- OKRs 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)



### Involved People

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



### 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.



### 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