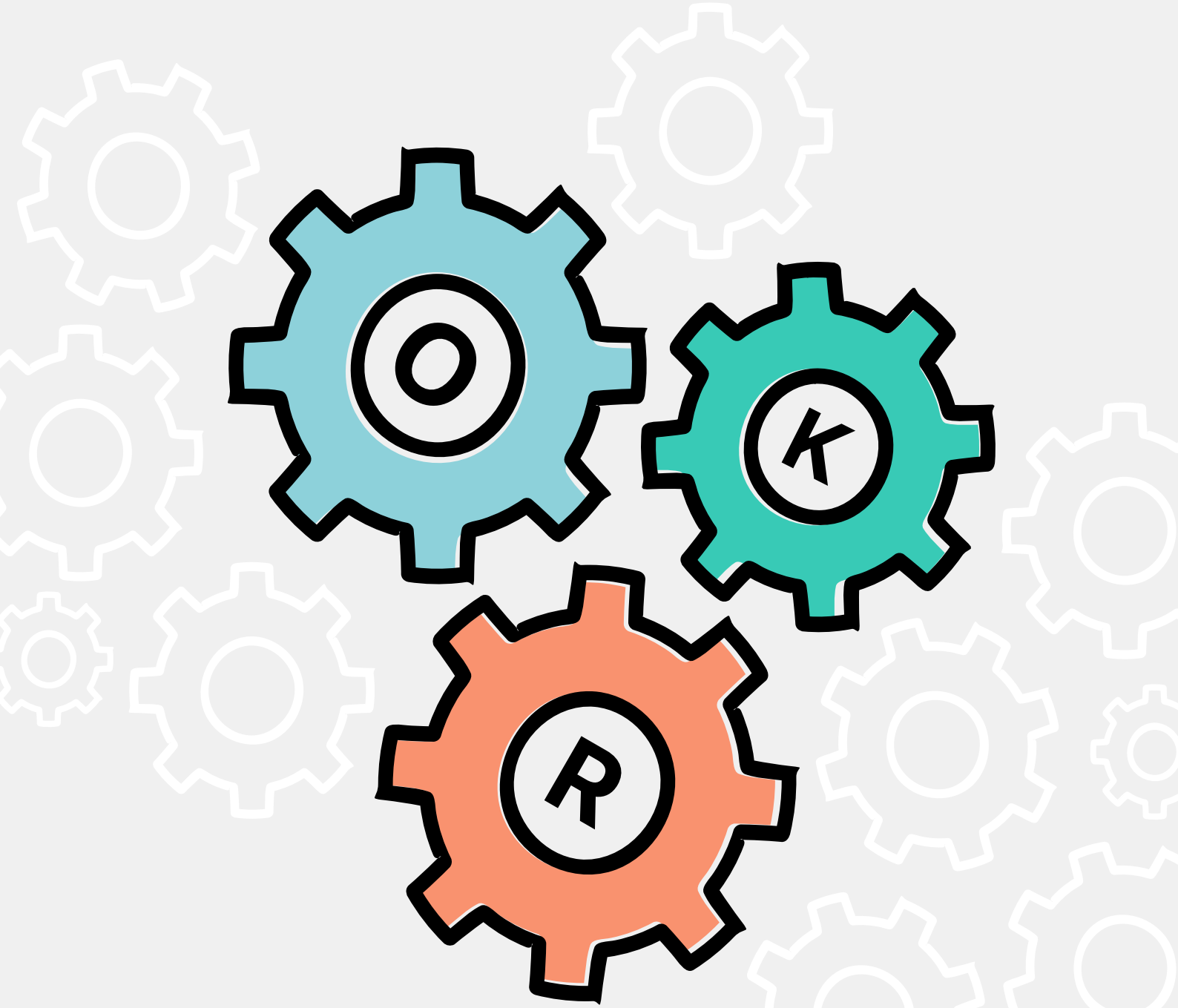
OKR IMPLEMENTATION HANDBOOK



perdoo

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Introduction

You'll need planning and coordination to successfully roll out OKR and Perdoo "to a T", so we've put together the important steps to save you time and make sure it's a success.

The handbook is divided into 5 sections with brief introductions of what you need to do, followed by a recommended read if you'd like to dig deeper into a topic. We've also added checklists at the end of each section to help you stay organized. This guide is based on our recommended four-week rollout of OKR and Perdoo, but that timeline is really down to you. Need a little more time? No sweat! Our proposal is flexible enough to adapt to your needs.

We look forward to supporting you to turn a great strategy into amazing results. Let's go!

Implementation timeline

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Prepare

Design your OKR program

To kick off your implementation, you'll first have to create a foundation that will guide the process throughout every quarter. This will ensure that people have guidelines to follow and the necessary support to make the transition much simpler. It's really important that the established process is governed and constantly reinforced by leadership and management.

Assign a program Ambassador

Introducing OKR into an organization will involve some change management since you'll be adjusting how people think and work.

The Ambassador is the person you'll choose to spearhead this change. Together with the support of leadership, they will manage the OKR program and act as the OKR expert within the company. Some of the Ambassador's responsibilities include:

- Leading the OKR implementation
- Creating processes and ensuring they're being followed
- Assisting teams to create/close OKRs
- Administrating the Perdoo software
- Coordinating with your Perdoo Coach for tutoring and mentoring sessions (when applicable)

Learn more about the Ambassador role.

Define participating Groups

Understanding which teams will participate in the OKR program is another decision you'll need to make at the beginning (and adapt later on as you learn). Groups let you organize your goals (as well as your people). Groups enable you to keep track of how certain areas of your business are performing. Create groups in Perdoo based on the teams that are critical for supporting the company strategy and therefore execute on a quarterly cadence through OKRs.

There are 3 common ways to organize your groups:

1. **Functional.** These groups match your organization's structure and it's the most commonly used one (ie. Marketing, Sales, Finance, etc.).
2. **Cross-functional.** Distributes the workload based on specific topics the organization wishes to tackle. These could be groups that are formed to solve specific problems in the organization, or groups around specific products, etc.
3. **Hybrid.** This is a combination of the two options above.

Some organizations decide to gradually roll out OKR. They start with a few groups, collect feedback, make changes and then extend the program to the next set of groups. Other organizations roll out to all groups simultaneously. If you decide to do the latter, make sure not to rush the process and that you have a clear and solid roll-out plan to keep things organized.

Learn more about the groups.

Define cadences & timeframes

Defining how often you'll be creating goals both at company and team level is a basic step to any OKR program. This decision communicates how often you'd like people to deliver results. The standard structure is having annual company-level OKRs and quarterly team OKRs (to keep things agile), but this of course can be adapted to your organization's needs.

The idea is to work with a combination of cadences that interact with each other to create a rhythm of continuous and focused progress, so make sure to choose 2 cadences. You want to have high-level goals with a longer horizon that can only be accomplished by working toward smaller goals with a shorter horizon.

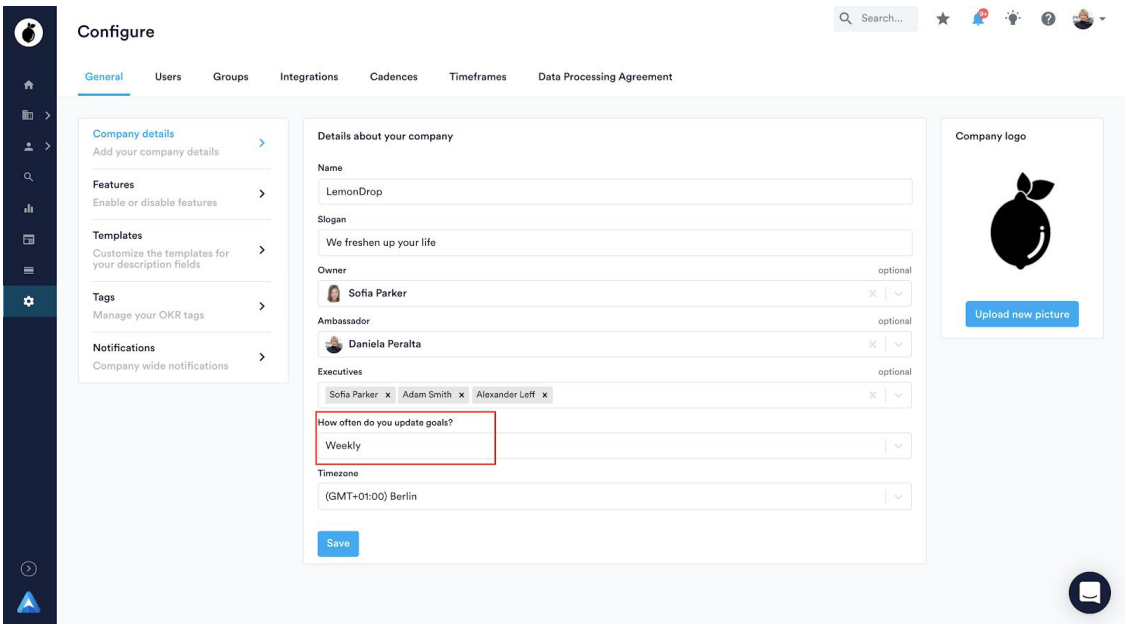
Once you've decided this, create Cadences & Timeframes in Perdoo.

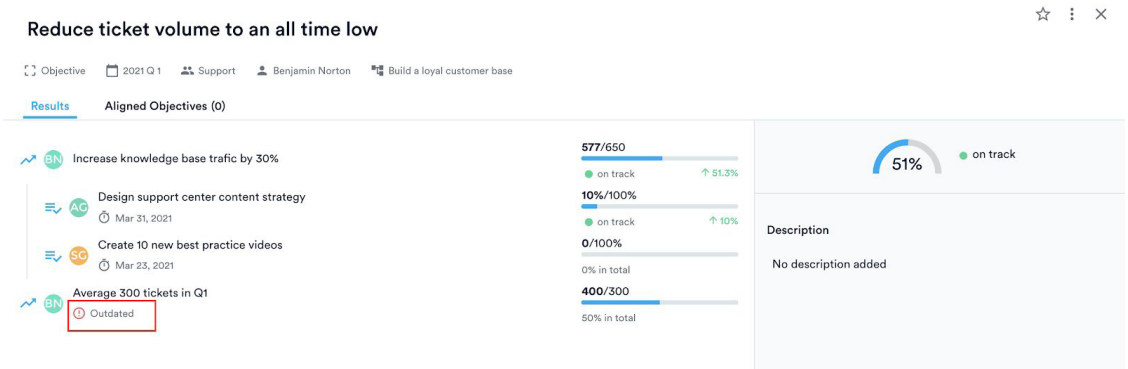
Learn more about cadences.

Check-in & progress review frequency

A well-designed OKR program provides clarity on what you expect and when you expect it to happen. A huge pitfall of new OKR programs is the "set it and forget it" mentality. People create goals but then never focus on actually achieving them, so more often than not, the execution fails. To ensure execution succeeds, clearly define a frequency at which people need to update progress on their goals, in Perdoo, Slack, MS Teams, or via the Perdoo mobile app. This cadence will need to be reinforced by the Ambassador, leadership and managers, especially at the beginning and until it becomes second nature. (More on this topic below: "Check-in on your goals regularly"). Progress on quarterly OKRs should be updated on a weekly basis (recommended), or no longer than every two weeks.

Configure this update frequency in Perdoo. This will trigger an automatic email reminder to everyone who leads a goal and hasn't Checked-in to update it. It will also mark goals that haven't been updated in this timeframe as "outdated" so both the Ambassador and managers can take necessary action.





In addition to having a defined frequency on when to update goal progress in Perdoo, you'll need to reinforce execution by also defining how often you'd like to review progress on goals at all levels. Consider the following:

- When and how often should teams discuss progress on their OKRs? (Don't create new meetings, use existing ones.)
- When will leadership meet to discuss the health of the execution of the active quarter? (We recommend monthly.)
- When will progress on Company OKRs be reviewed? (We recommend quarterly, with results shared with the entire organization.)

Learn more on defining a frequency to update your goals and review progress.

Document your process

Once you've decided how your OKR process will look, make sure you document and communicate it so that everyone in the organization knows what's expected.

Your process should include:

- By when should OKRs be approved and added to Perdoo (every quarter)
- Check-in frequency in Perdoo
- Progress review frequency
- By when should OKRs be closed once the quarter ends

Download a template:

Preparation checklist

- [ ] Appoint an Ambassador
- [ ] Define participating Groups
- [ ] Define cadences & timeframes
- [ ] Check-in & progress review frequency
- [ ] Document your process

Introduce

Announce OKR + Perdoo to your organization

Alongside your planning phase you'll have to announce the decision to work with OKR at the company. Change means modifying your habits and people naturally resist this, so good communication is necessary to motivate them to step outside of their comfort zone. This is your chance to explain the value that OKR will bring to the organization and the individuals. Most organizations send an official email announcing this followed by an All Hands meeting to dive deeper into the topic, communicate the rollout plan, and answer any questions.

Your communication should include the following:

1. **Benefits of OKR.**
   Explain **WHY** OKR and **HOW** it will help the company transform. Describe the benefits OKR will bring to both the company **AND** individuals, for example, alignment and transparency.

2. **Explanation of Perdoo.**
   People need to know about the tool that will support this change. Make a brief introduction (example below) and share this video.

   "Perdoo's software allows us to easily manage and track our OKRs and KPIs. Perdoo's mission is to help organizations turn their strategies into results. Over the past 6 years they've helped hundreds of organizations like ours."

3. **An introduction to the Ambassador and how they'll support the program.**

4. **Next steps and deadlines.**

   Share training dates and deadlines for when everyone needs to create their OKRs (the process document you developed in the Design your OKR program section)

Learn more about why it's important to announce OKR & Perdoo.

Introduction checklist

- [ ] Draft email announcement of Perdoo and OKR
- [ ] Communication approved and sent from the CEO's email
- [ ] Schedule an All Hands meeting to follow up on the email announcement

Train

Learn about the OKR methodology and how to use Perdoo

Now that you've prepared and announced OKR & Perdoo to your organization, you need to start putting down some dates to kick-off your program. The first thing to define is when and how you'll train your employees on OKR and Perdoo. OKR is a new language. Let's make sure that everyone's speaking that same language to avoid confusion. The most popular format is online training because it's more scalable and cost effective, but some organizations opt for internal workshops. We've seen both methods work really well, and the good news is that Perdoo provides you with free and paid resources to support your needs:

OKR methodology

The Ultimate Guide to OKR

Everything you need to know about KPIs, Objectives, Key Results, and Initiatives.

Learn more

OKR Crash Course

An unmatched overview of OKR and KPIs in 12 minutes.

Watch video

OKR 101 online training (most popular)

Perdoo Premium customers, get a 50% discount on our online course, and Perdoo coaching customers get the course for free! It helps anyone interested in OKR to become outcome-oriented and master the OKR framework in minutes, not months.

What's included:

- 13 videos of original learning content
- 5 sections of science-backed goal-setting tips
- 4 quizzes to put new learnings to the test
- A certificate of completion for each user

Visit course

Coaching packages

Need extra support? You can work 1:1 with a coach who specializes in the OKR framework. They'll guide you through a successful implementation and ensure that your program follows the best practices.

Learn more

Perdoo

Introduction to Perdoo

Video overview of the Perdoo platform in 4 minutes.

Watch video

Reading material for Leadership

In addition to the standard OKR and Perdoo training, we recommend that leadership also goes through the following reading material, to support the creation of a comprehensive Roadmap to success.

1. Put strategy first, OKR second
2. The ultimate guide to KPIs
3. The growth handbook for CEOs
4. The ultimate guide to OKR

Training checklist

- [ ] Send eBooks to leadership
- [ ] Prepare OKR & Perdoo training materials (buy online access or develop internal curriculum)
- [ ] Determine training deadline for executives, managers and team members
- [ ] Train executives on OKR & Perdoo
- [ ] Train managers on OKR & Perdoo
- [ ] Train team members on OKR & Perdoo

Create

Leadership

A good Roadmap begins with an Ultimate Goal, followed by Strategic Pillars, KPIs, and finally Company OKRs. All of these elements will provide enough context so that people focus on what matters most.

Ultimate Goal, Strategic Pillars & KPIs

Many organizations are implementing OKR in order to improve alignment across their organization. They want to make sure everyone is pulling in the same direction. But for OKR to boost alignment, you first need to get your strategy in place.

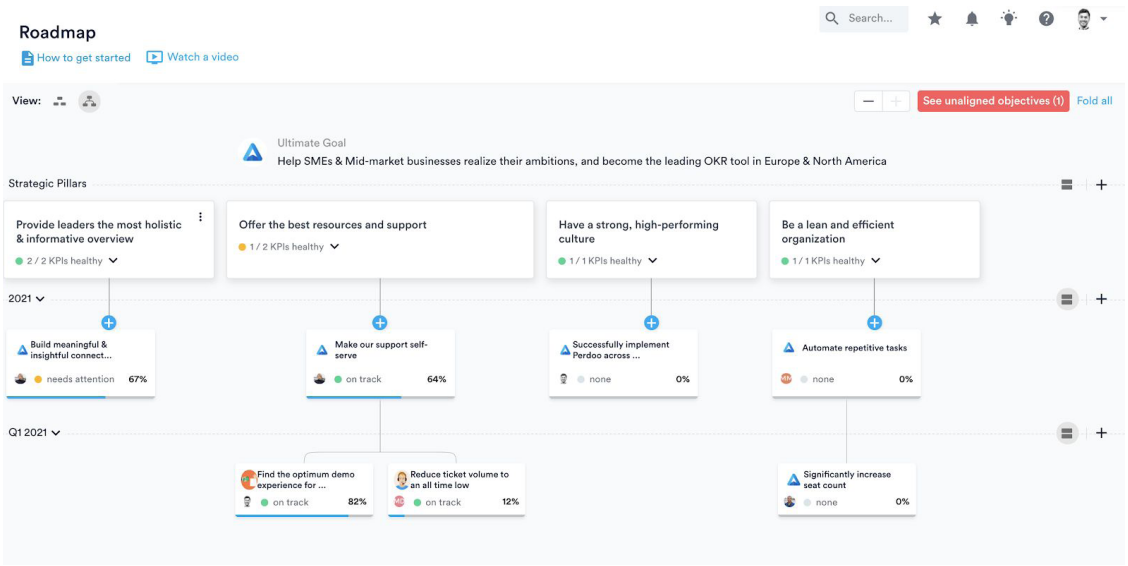
Strategy matters because each organization has finite resources and faces competition. To win over the competition you first need to decide which battle(s) you want to fight and what winning looks like.

Your strategy (ie, your Ultimate Goal and Strategic Pillars) will serve as the foundation that will inspire all the KPIs and OKRs that your organization will be working on. That's why it's so important to track your strategy and goals in the same place: it enables everyone to see the bigger picture and if what they're doing is aligned with it.

To set your strategy, leadership needs to:

- **Define the Ultimate Goal.** The Ultimate Goal is a combination of your mission and vision, which defines the purpose of your organization and for whom you're fulfilling this purpose.
- **Define Strategic Pillars.** Strategic Pillars express how you'll differentiate in the market, why customers will choose you over competitors.
- **Define KPIs.** Your strategy is practically eternal, so the success of a Strategic Pillar is measured through KPIs. With your Strategic Pillars set up, you'll need to decide how you'll measure their success. Which KPIs will you use to monitor each Strategic Pillar on an ongoing basis?

Leadership will need to dedicate time to discuss and decide on the strategy, so schedule a couple of sessions to ensure they allocate enough time to make these decisions. Once defined, start populating your Roadmap by adding the Ultimate Goal, Strategic Pillars, and KPIs.



Learn more about adding Strategic Pillars in Perdoo.

Company OKRs

Company OKRs narrow down the scope of your strategy translating it into smaller, actionable steps. Strategy is ongoing and the options for making it a reality are unlimited. Company OKRs simply reduce the options and make execution concrete and directed. They express the results you need to achieve within a year to continue to move forward.

Company OKRs:

- Should be high-level enough so that they can be influenced by the majority of your teams. If only one team will drive it, then it's likely a team level OKR.
- Break the status quo and help the company evolve.

As soon as they're ready, add Company OKRs to Perdoo before moving on to Group OKRs.

Learn more about Company OKRs.

Groups

Once your strategy is in place and has been communicated to the organization, your full attention will shift to the different groups (teams or departments) in your organization. By looking at the strategy and annual Company OKRs, it'll be the groups' turn to define their KPIs and formulate quarterly OKRs.

Group KPIs

Teams and departments will always have to organize their work between business as usual and OKRs, therefore you need visibility on both KPIs and OKRs to keep everything in perspective. KPIs or Key Performance Indicators, help you measure the health of your business as usual, while OKRs help you transform the business. Once they're tracked together in one tool, you get full transparency on the priorities of each area of your business.

When selecting KPIs for a group, map out their core responsibilities and then decide what KPI will help you measure that more effectively. You can check our OKR & KPI library for inspiration.

When ready, ask team leads/managers to add their KPIs to Perdoo.

Learn more about KPIs vs. OKRs.

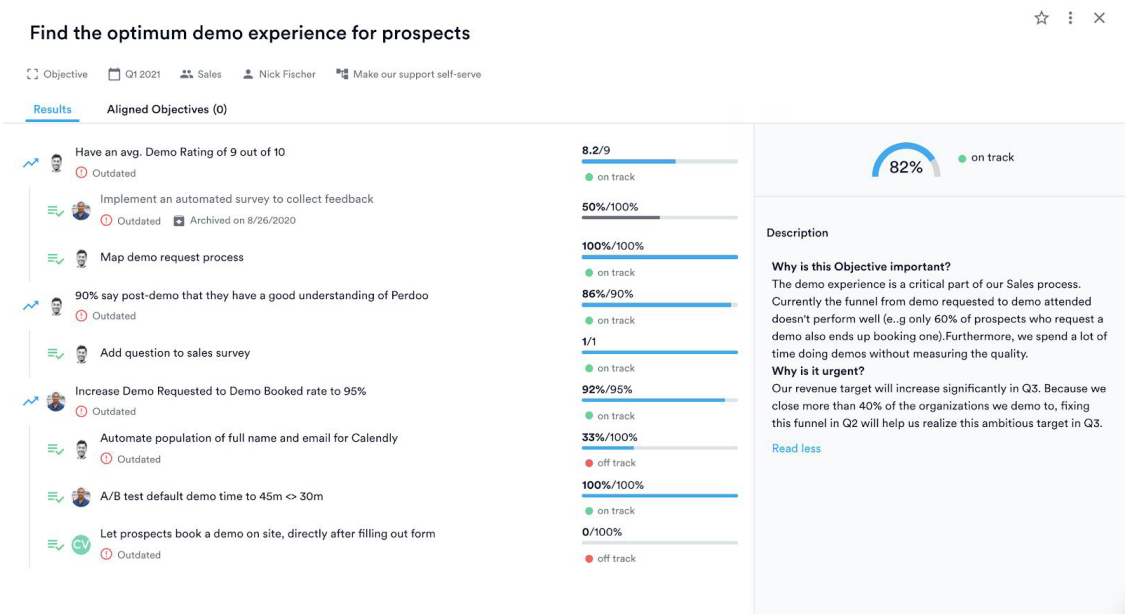
Group OKRs

Contrary to Company OKRs, Group OKRs communicate how a team or department will help the company achieve its annual goals. Group OKRs are typically delivered in a quarter and put the group's work into the context of the impact they create in the business. Quarterly OKRs is where all the action happens, so they have a more agile and dynamic nature. In addition to Objectives and Key Results, Group OKRs are usually supported by Initiatives, which are all the things you'll be **doing** in order to achieve your Key Results.

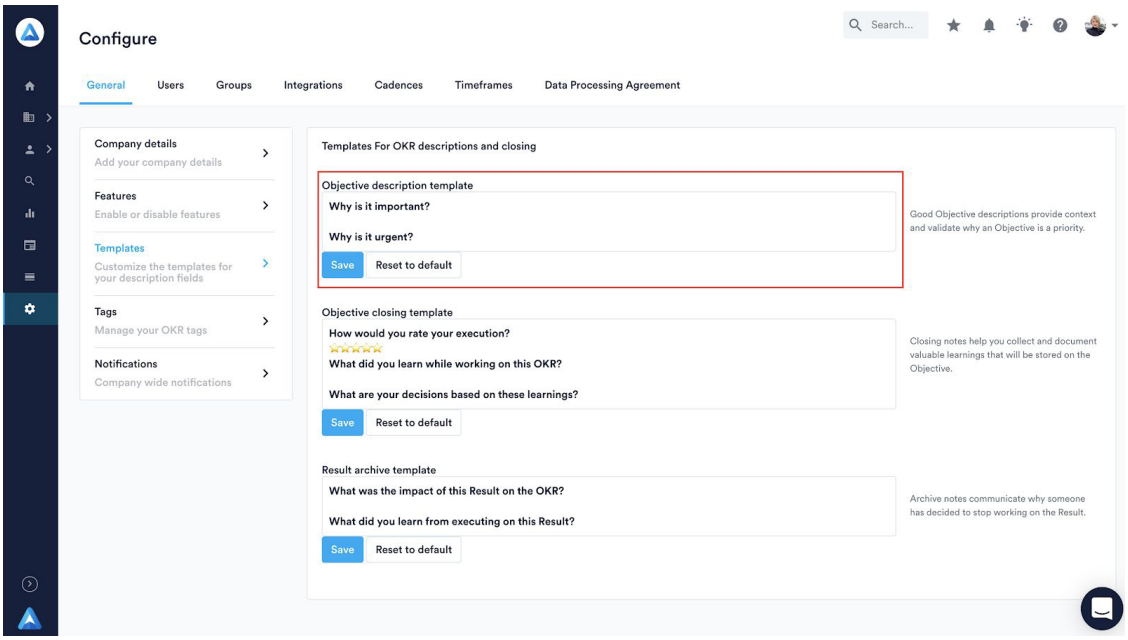
During the first few cycles of your OKR program, it's important to check that teams are scheduling time to define OKRs and KPIs. Participate in their meetings to guide them through the process and share questions that can help them start discussions needed to decide on what to focus on. Many feel lost at the beginning (it's okay!), so a guiding hand will be more than welcome.

When defining OKRs, it's best practice to answer the following: "Why is this important? Why is this urgent?". These questions will give you more perspective as to whether or not you have the right priorities in place. It will also help others understand what you've decided to prioritize and why.

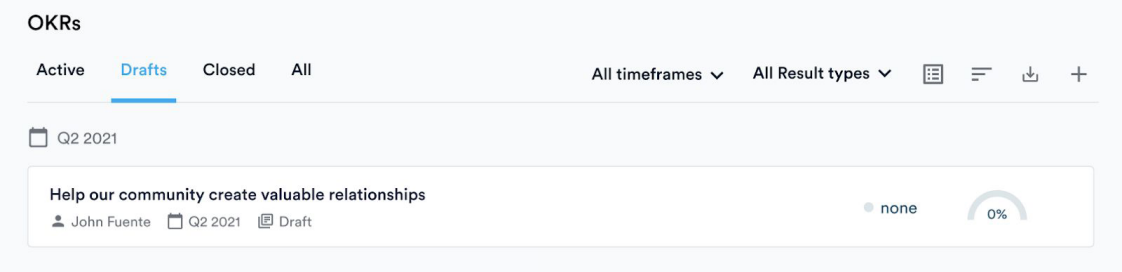
When creating OKRs, the OKR template in Perdoo will automatically prompt people to answer these questions in the description section. After saving, the notes will be visible in the Objective page.



You can also customize the questions if needed:



Once the first draft of OKRs is ready, team leads/managers should add OKRs to their corresponding Group in Perdoo, mark the Objective as “draft” to make people aware it’s still pending approval.



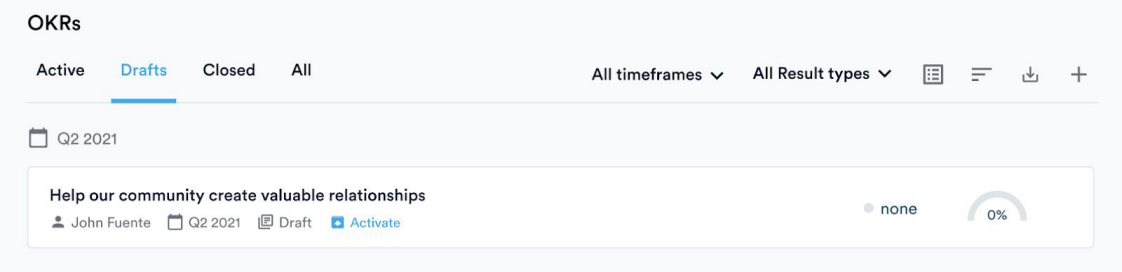
Learn more about Group OKRs.

Identify interdependencies

Once priorities have been identified at the group level, set up a meeting where all team managers present their team OKRs. The purpose of this meeting will be to create alignment of course, but also to identify if there are any overlaps or interdependencies between groups. Time and resources are limited, so it's important to openly communicate with other teams to ensure that they also have the capacity to contribute to others OKRs. During the meeting, allocate resources where possible or find alternatives if these are limited.

Managers approve OKRs

To ensure there's both vertical and horizontal alignment, we encourage team leads to discuss their OKRs with their direct managers to guarantee all parties are on board with the defined priorities for the quarter. Once OKRs are approved, the OKR lead can simply "activate" the OKR to indicate the OKR is ready and final.



Creation checklist

- [ ] Schedule workshops for executives to discuss and define Strategic Pillars, create Company OKRs & define KPIs (you might need 2 sessions)
- [ ] Schedule call with Perdoo coach (when applicable) & executives to review Strategic Pillars, Company OKRs & KPIs
- [ ] Schedule All Hands meeting to introduce Strategic Pillars, Company OKRs & KPIs to the organization
- [ ] Define and communicate deadlines for teams to define OKRs & KPIs, and add them to Perdoo
- [ ] Schedule calls with team leads and Perdoo coach (when applicable) to review Group OKRs
- [ ] Participate in teams' KPI & OKR meetings
- [ ] Monitor progress on the creation of team OKRs to stick to your deadlines
- [ ] Schedule meetings with team leads/managers to discuss and resolve interdependencies
- [ ] Team OKRs are reviewed and approved by the Managers

Launch

Execution

When strategy has been defined, KPIs & OKRs have been created and added to Perdoo, it's time to get the ball rolling. Execution officially begins. The focus shifts to ensuring people adhere to the established process and continue to progress week by week.

Check-in on your goals regularly

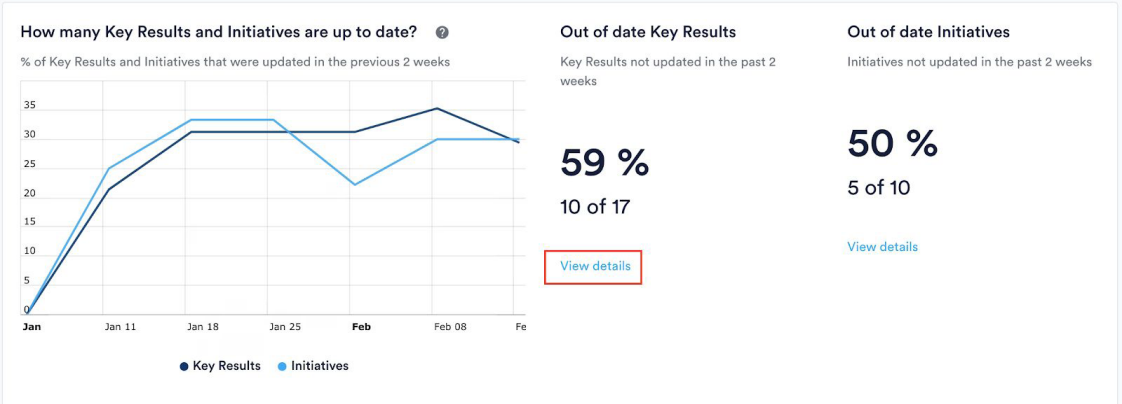
Our data shows that employees who regularly updated progress on their goals achieved on average 2 times more of those goals. Other research also shows that progressing towards a goal significantly boosts joy and motivation.

Encourage teams to use Perdoo's Check-in feature to update all of their responsibilities from a single page. This will make things more efficient for them and will also keep everything up to date to keep managers informed on progress.

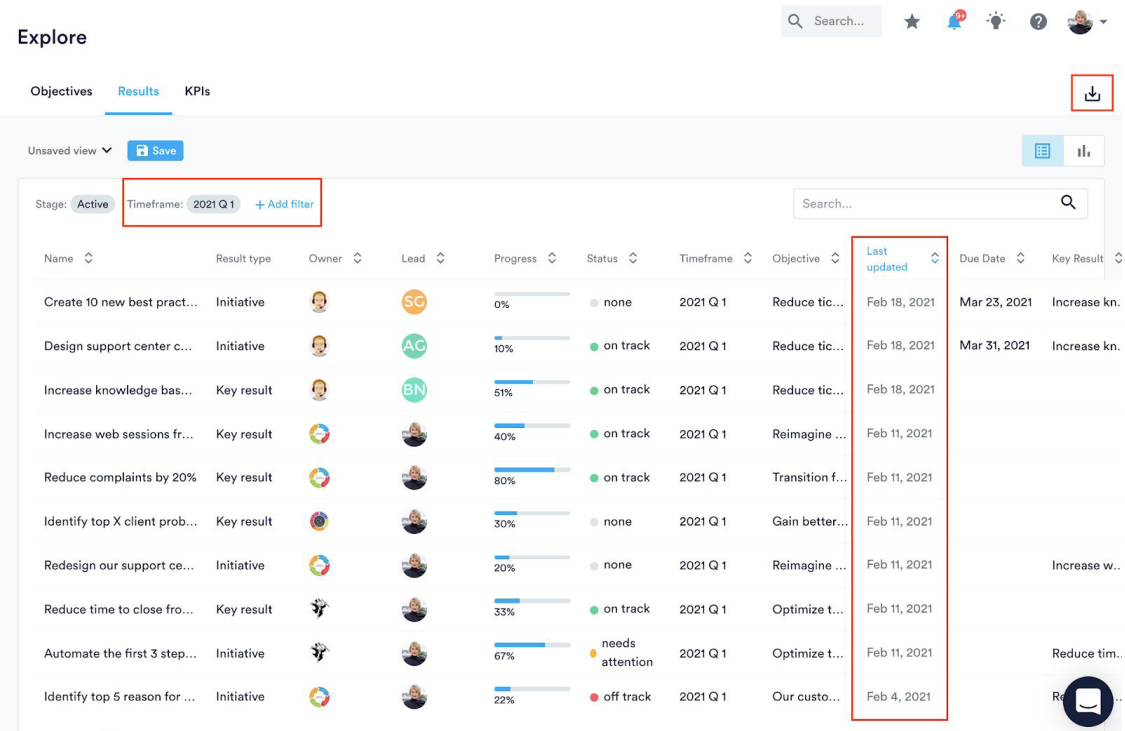
If you use Slack or Microsoft Teams, you can easily Check-in without ever leaving these tools. Find out more about these integrations here.

Keeping goals updated on a (bi-)weekly basis, will ensure that your execution remains healthy and will therefore increase your chances of success. Enforcing this practice during the first 3 months of your rollout, will help you create the habit needed to increase the adoption of both Perdoo and the methodology.

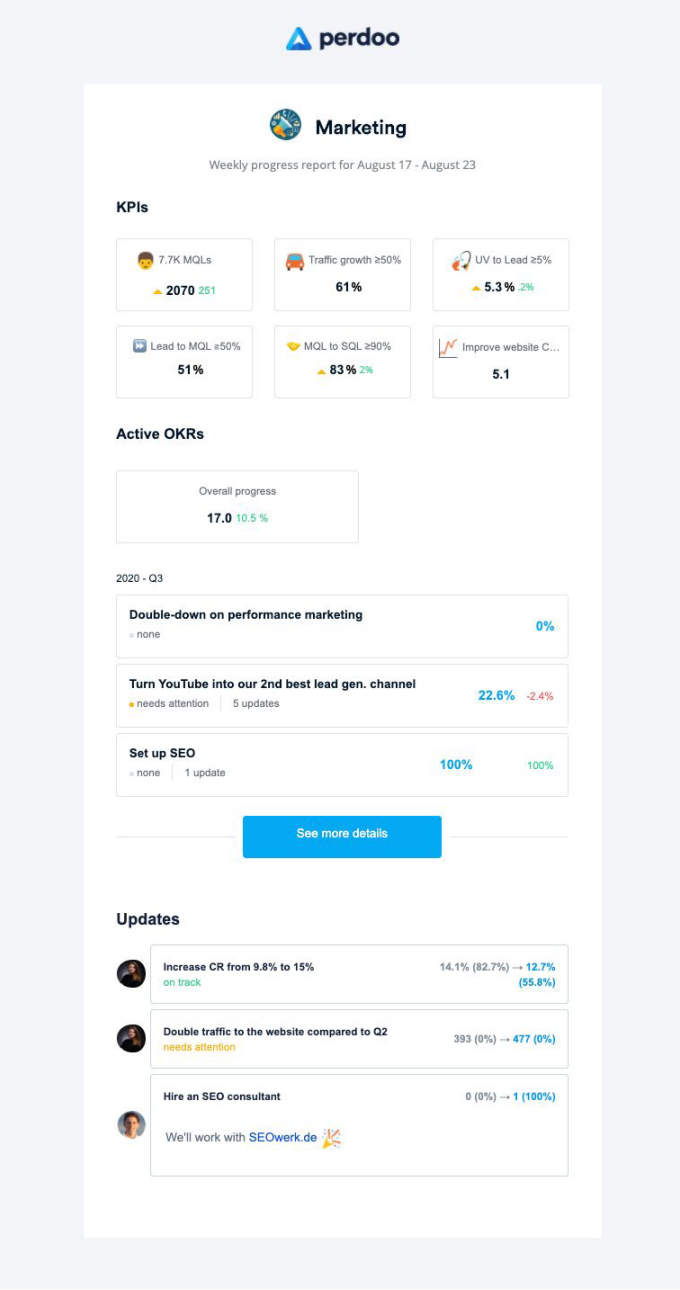
Use the Engagement report to monitor outdated goals.



You can also use the Results tab in Explore to view when a Result was last updated. You can “Add filters” to find the goals that you care about, save that view, visualize the results on the Charts View, and export a CSV file if you’d like to dig into the data even more.



In addition, group members and anyone who has bookmarked a group, can monitor progress with the Weekly Progress Report, when enabled. This report offers an actionable snapshot of the health of the group's KPIs, plus progress on Objectives and a summary of updates in the past week.

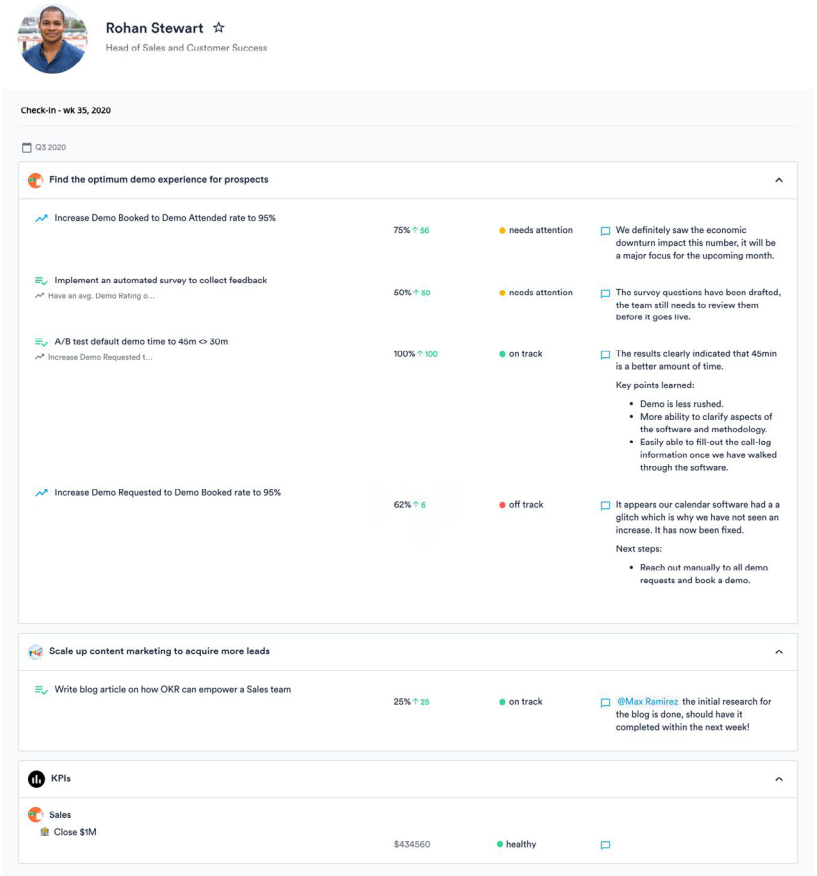


Learn more about the importance of keeping goals up to date.

Use 1:1s to stay on top of progress

One of the biggest challenges of an OKR program is ensuring people stay on top of their goals and that goals are kept up to date. That is why we highly recommend that managers frequently review progress on team OKRs, and that they discuss responsibilities with their direct reports during 1:1s.

We've made it easy for managers to stay on top of this by adding a list of their direct reports to their home screen. From there, they can monitor whether or not their direct reports have submitted their weekly Check-ins. During their 1:1s, they can go to the person's personal profile and then pull up the Check-in report to facilitate the conversation. By doing this, managers not only stay informed on how things are developing but they also create accountability and communicate expectations.



Learn more on how 1:1s can help your people achieve their goals.

Quarterly All Hands meeting

Scheduling quarterly All Hands meetings has several purposes:

- Keep everyone informed on Company OKR progress
- Share learnings and achievements during the quarter (per team)
- Share focus for the next quarter (per team)
- Set expectations and create accountability
- Recognize achievements!

Quarterly All Hands meetings will also help you to continue to motivate your team and show them how their hard work is paying off. It will enforce alignment but most importantly, will continue to give every employee purpose and take pride in their hard work.

Learn more on quarterly All Hands meetings.

Launch checklist (3-6 months)

- [ ] Ambassador weekly check: have all goals been updated?
- [ ] Ambassador monthly check: are managers discussing goals during 1:1s?
- [ ] Ambassador schedules meetings to assist teams that are struggling

Conclusion

To conclude, having a well-defined plan to roll out your OKR program will make all the difference in how successful you are. Take your time. Don't rush the process! Structuring your OKR program, documenting the process and communicating it will set the stage for the following months. This is the most important part because it'll be your foundation, and if a foundation isn't solid, the building typically collapses.

In the months following the rollout, you'll need to monitor how the process is working and adjust as necessary. Ask for feedback. Most importantly, you'll have to ensure everyone is following the process until it becomes second nature. It's important to keep a learning mentality — nobody gets OKRs right the first time. Creating OKRs won't be perfect at the beginning, but it's something that will improve over time. To start, pay more attention to re-enforcing the process and once that's solidified, you can focus on improving the quality of the OKRs. Persistence and curiosity matter when improving the process.

Implementation checklist

Prepare

- [ ] Appoint an Ambassador?
- [ ] Define participating Groups
- [ ] Define cadences & timeframes
- [ ] Check-in & progress review frequency
- [ ] Document your process

Introduce

- [ ] Draft email announcement of Perdoo and OKR
- [ ] Communication approved and sent from the CEO's email
- [ ] Schedule an All Hands meeting to follow up on the email announcement

Training

- [ ] Send eBooks to leadership
- [ ] Prepare OKR & Perdoo training materials (buy online access or develop internal curriculum)
- [ ] Determine training deadline for executives, managers and team members
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