

How to Set OKRs

Overview:

The basic process is as follows:



You can do all of this in one week and should not take longer than two weeks at most. Taking substantially longer usually means you're either using a waterfall method of doing too much planning and aligning before the quarter is under way, or you're wasting too much time on wordsmithing the OKRs.

It won't be easy, because you're making difficult decisions about where you are going and what success means, but the hard work you're putting in here is how you set your team up for success.

As you go through this process, you are likely to notice areas where your team needs more context, coaching, or development, and areas where you need to dive deeper into problems, stakeholders and customers, or strategic context.

You usually can't close these gaps immediately, so aim to get the best result with what you have.

Plan to invest in closing the gaps for the coming quarter. This will guide how you develop your team and yourself. If you continue this process over multiple quarters, you will build a strong team capable of a great deal of autonomy, and you will become a more capable manager ready for more responsibility.

Timeline:

Here's how to plan your week:

	What you'll do	Time Commitment
<i>Monday</i>	Write One Page Strategy and align with your team and stakeholders.	Prep: ½ hr (each) Meet: 1 hr (all) Follow-up: 2 hrs
<i>Tuesday</i>	Draft Objectives and Key Results using X's and Y's for baselines, targets, and dates.	Prep: ½ hr (each) Meet: 3 hrs (all)
<i>Wednesday</i>	Draft a High-Level Plan to deliver the Objectives and Key Results.	Work: 1-2 hrs (OKR owners & manager)
<i>Thursday</i>	Align with teams and dependencies on the plan and propose baselines and targets.	Meet: ½ hr (per team) Work: 1-2 hrs (OKR owners & manager)
<i>Friday</i>	Review plan and finalise Objectives and Key Results with baselines and targets.	Prep: ½ hr (manager) Meet: 2 hrs Work: 30 mins (manager)

Preparation

Equipment

You will need a meeting room or video conferencing facilities. Aim for either all in person or all virtual for every meeting, unless you know how to manage a hybrid environment (if so, please share your tips with me!).

You'll also need somewhere to write your strategies, plans and OKRs down. I recommend using your standard tools for this and sharing screens or documents in the meetings. Also have some notepaper, pens, a whiteboard or flipchart, and perhaps Post-Its and Dot stickers – or the equivalent on your preferred collaboration tool.

Resources

You will also need the following resources (feel free to distribute them to your team):

- **The OKR Guide** – read it in advance (it takes less than 30 minutes).
- **The OKR Cheat Sheet** – print it to refer to during the process.
- **The One Page Strategy** – read it in advance and use it to guide you on Monday.
- **The 1-2-4-All Method** – this will help you run the meetings.

People

As the **leader** of this team, it's critical that you are not only involved, but you own the process, guide discussions, and are responsible for the final decision. That is, even if you delegate some decisions, you fully buy into and support the decisions that are made, without caveats. This may mean you override some things, and it may feel a little like micromanagement at times, but setting OKRs affects what your team delivers for the whole quarter, and your most important job as manager is to **deliver results**.

Involve **your team**! Book their time as far in advance as you can. Negotiate to move things where needed so they can attend.

As the saying goes: "those who write it don't fight it". If you want your team's full buy-in and for them to act like owners and take initiative, involve them as co-creators, not just of the plans, but of the strategy and the OKRs too. Of course, you *can* set team OKRs by yourself (and it's always easier to do so, because there are fewer other opinions to consider), but don't expect them to go well!

What about larger teams?

If your direct reports include managers with their own teams reporting to them, just involve your direct reports, not the entire group. Ensure the managers allocate time each day to consult with their teams throughout, sharing what they have learnt and agreed, and getting their input on Plans and Targets. If the managers have specific senior direct reports that would be particularly valuable to include (typically,

If they are also setting OKRs for their teams, ask them to do so at the same time, because it's easier and faster to align at the same time than sequentially. If possible, schedule their strategy and OKR-setting meetings to follow yours, as this will give them additional context (you may also wish to attend parts or all of some of those meetings, where you will be the "senior input" described below), but combine the High-Level Plans and alignment meetings where you can.

If you have a lot of direct reports, and you're concerned that the meetings will become unwieldy, allocate extra time or invite only a representative¹ subset of the more senior and influential team members and invest extra time (ideally with them) in bringing the others on board with what was discussed.

Context

You will also need:

- **To understand your business and how your work fits into it.** Spend the time in advance to discover this by reviewing your metrics, including those upstream and downstream from your work, as well as feedback from your stakeholders, dependencies, customers, and manager *on a regular basis*.
- **To know and be able to articulate your strategic context.** Your company or the group you're a part of has a strategy, even if it's not explicit. You should spend the time with your manager to understand it and be able to articulate it.
- **Clear expectations of you and your team from your manager and stakeholders.** You can get this by meeting with them and asking them, as well as sharing your own understanding of what they expect, and asking them for feedback.
- **To know your team and what level of direction and autonomy they need from you.** Some teams are ready for (and even need) high autonomy. Some need more constraints and direction to perform well. Know your team and what they need (which may differ from what they want).

This is "table stakes" for being a manager, so you're probably on top of these already, but it helps to be explicit about it and continuously work to upgrade yourself on each of these dimensions.

Getting Input

Beyond the general context above, it's a good idea to get input and buy-in from **your manager** and **key stakeholders** for the process before you start. Dedicate some of your regular 1-1 time² with each of them before, during, and after this week to ask for their input before you start, and feedback afterwards.

If you can't get on their calendars, email them quick summaries as you go, asking for their feedback. Aim to receive and process their input before committing to a direction by sharing your OKRs widely as "final".

¹ Be conscious of potential for bias or perceived bias here. Avoid creating a "representative group" that excludes minorities, even if unintentional – you may need to compensate for this by doing some intentional rebalancing. Also avoid excluding only one or two people – either exclude a substantial number or include everybody. It's better to have a slightly larger group than you would prefer than risk people feeling unvalued.

² You should be having regular 1-1 meetings with each of these people, as well as your direct reports. Aim for weekly with your direct reports, weekly or fortnightly with your manager, and at least monthly with each stakeholder – perhaps over a coffee or lunch.

Inviting them to attend as Guests

Consider inviting **your manager** and/or some **key stakeholders** for specific meetings or parts of the meetings to give their guidance and input directly to the team.

If you can, default to inviting them for more of the process rather than less. This sends a signal that their input is welcome and valued. They likely will not be able to attend all of it in any case, which then lets you guide them towards the specific input you want. Alternatively, they may send a delegate – if so, make sure you meet 1-1 with the delegate first too.

Here's a few options for how to engage them, starting from the least time commitment to the most.

Strategy Briefing

Invite them to give a short briefing and Q&A at the start of the **Strategy meeting** on Monday to help set the context.

This is particularly helpful for managing your key stakeholders, who then feel heard and valued – if you genuinely try your best to meet their expectations. Ask them to speak for 5-10 minutes; but allocate half an hour of extra meeting time per additional senior attendee. They tend to talk for longer than you expect, and sometimes provoke discussions you hadn't anticipated.

If you invite your manager at the same time, they may benefit from hearing your stakeholders in this context and can provide clarity where stakeholders may not be aligned with each other or with your manager's own interests. Give your manager the last word so they can set the context themselves.

Best for: teams which are in the "performing" phase of team development³; where there are no major alignment issues; and the team has a history of meeting expectations.

OKR Review

Invite them to participate in the first half hour of the **OKR finalisation meeting** on Friday to review your direction and give their input after you've done most of the work, but before you finalise everything. Prioritise your manager, because the OKRs you set to help you deliver results are their responsibility too.

Anticipate allocating extra time later in the day or early the following week to integrate their input, revise plans, and align again. That said, if they believe revision is needed, you'll need to allocate this time anyway, so better to get their input as early as you can, rather than finalise your OKRs and then have them intervene later.

Best for: teams in the storming and norming phases; with ambiguous management expectations, company strategy, or team charter; or where there is a risk of misalignment or missed expectations.

³ https://en.wikipedia.org/wiki/Tuckman's_stages_of_group_development

Full Participation

Invite them to participate as much as they can in all three team meetings – **Strategy, OKR drafting** and **OKR finalisation**. Again, prioritise your manager, though you're more likely to get full engagement from stakeholders in many cases.

Plan with them which parts they can attend and adapt your schedule around theirs to optimise their engagement and get the most value. Ask them to do the Strategy Briefing and OKR Review as described above if appropriate. For the rest of the time ask them to let you lead the meetings, and for them to observe and offer occasional intervention where they think it necessary or when you ask for their input.

Their participation will undoubtedly create more work and require more time - they will provide input and it will change your direction and need discussion. You may need to dedicate extra time after they leave to integrate their input and complete the work intended for each meeting. This can feel frustrating, but it is an efficient use of your and your teams' time, because you're able to make changes while the work is fresh in your minds and before you start working with the wrong priorities.

Best for: teams in the forming stage; when you as the manager are new to the team or to managing; when *your* manager is new to you or this team; if the company has recently changed strategy; or if your team is in need of a turnaround (if there is a history of significant misalignment or missed expectations in the near past, you are in a turnaround situation, whether you realise it or not!).

Pitfalls with Stakeholder Attendance

Align with your own manager before inviting your stakeholders, because your stakeholders are also their stakeholders. It may be advisable for your manager to attend with them, especially if that stakeholder is a peer of or senior to your manager.

Don't invite too many guests to attend, especially at the same time, or you are at risk of your meeting turning into their meeting. If this does happen, you'll need to re-assert the goal of the meeting, and ask them to refrain.

Sometimes they will seem to be misaligned and debate something important in front of your team. If this happens, and it's on-topic, let them go for a few minutes to see if they can resolve it quickly – this can be instructive and give you insights you won't normally get.

But them having an extended debate with your team as an audience isn't productive for them or for your team. Try to regain control of the meeting by observing that this seems to be a bigger discussion than expected, ask them to align 1-1 as soon as they can and let you know the outcome, but right now you would like to move forward anyway. You may need to adapt to their input later.

To minimise the risk of this happening, ask them to pre-brief you (and optionally, your manager) on what they will say so you can manage their expectations, and then prepare your team appropriately. If you sense any major misalignment, let them know what you're seeing and ask them to align, possibly involving your manager. You want any external attendees to have a good experience, not encounter unexpected resistance and debate with each other or with your team.

Detailed Day Plans

For each day, I'll give an introduction and a summary, tell you how to prepare, set out the meeting agenda, and summarise what you should have at the end and how to follow up. You can adapt, compress or expand this timeline to suit your needs, but if you want to fit it into a single week, I'll show you how.

The meeting format is based on the 1-2-4-all method⁴, which I've explained in a section at the back. I've used a team size of eight (including yourself), so you will need to adapt each meeting agenda to the size of your team, perhaps by adding or removing a round of breakouts. Try to mix the groups to maximise discussion.

The timing for each part is intentionally tight, and you may need to be flexible, but try to keep the timing tight so the conversation flows more easily into the larger groups. When people feel they have finished a conversation and then need to start it again with a larger group in the next step, it often takes a while to get started. The tight timing maintains momentum. Use a countdown timer and nominate a timekeeper to keep you on track.

A note on Strategy

I added the Align on Strategy step because so often, the process of drafting OKRs would get bogged down in debate. The reality was that the team didn't agree on what they were trying to do – they didn't have a strategy⁵.

If you do already have a clear strategy, this process can be quite smooth and may only take half an hour, unless you uncover unexpected misalignment (which happens more often than you might predict). At minimum, write down your team strategy using the **One Page Strategy** format, and have everyone review it before you proceed to Tuesday's work on drafting OKRs.

Occasionally, teams proceed to drafting OKRs without even reviewing their strategy (and even without having a strategy). The time gained is usually lost again, as drafting OKRs takes far longer. You end up creating and aligning on a strategy in the process, but it's hard to do this while you're setting OKRs.

⁴ Many of the agendas are based on the 1-2-4-all method from Liberating Structures: <https://www.liberatingstructures.com/1-1-2-4-all/>

⁵ This happened even when teams thought the strategy was obvious, when they had a strategy deck, when their manager had explained the strategy the week before, and so on. It's surprising how often teams don't actually have a strategy despite having a lot of things called "strategy".

Monday: Align on Strategy

Decide what the main challenges and opportunities are and how you're going to approach them.

Summary

Use the **1-2-4-All Method** (Pre-Written Ideas Variation) with the **One Page Strategy** to align on a strategy with your team. Then you will review it with your stakeholders and revise based on their input. At the end, you'll have a team strategy written on a single page, with your team and stakeholder's buy-in.

Preparation

1. Distribute the **One Page Strategy** guide to your team and ask them to read it.
2. Ask each person⁶ to draft a **One Page Strategy** for the team (not for their own work or for the whole company or some other group). Half an hour and half a page is ideal – much more is overdoing it.

Meeting Agenda – 1 hour

1. (25 mins) Use the **1-2-4-All Method** (Pre-Written Ideas Variation) to review each other's strategies
2. (20 mins) Open Discussion about the best way of seeing the challenge and the right strategy
3. (10 mins) Summarise and Conclude with a strategy or the steps to get there
4. (5 mins) Next Steps towards setting OKRs

Meeting Guide

The second half of the meeting is to align towards a result, because you need more than just ideas. If the open discussion doesn't seem to be constructive, or there's need for more exploration, run another round of 1-2-4-All instead, and finally capture the ideas and communicate next steps, then take the input and develop a single version independently to share later.

Open Discussion

Begin the open discussion by summarising what you've heard, emphasising consensus and trying to frame decisions into a few key points. Share your own insights and the additional context that will constrain or inform the strategy, as well as how you make decisions⁷. Aim to guide the group to converge on a single idea, or two or three variations with clear criterion to decide between them.

⁶ Do this yourself also, but don't share your version until the meeting itself. If you share it earlier, some team members may view your version as authoritative and modify their own to be more aligned with yours, and you'll miss out on their independent thinking.

⁷ For example, when the team favours pausing operations for 12 months to implement an ideal solution in one "big bang", but you prefer continuous operation, achieving "quick wins" every month over 18-24 months to build momentum and allow for course correction. Explaining how you make decisions, and coaching them to make decisions in the same way is part of your role as a manager.

Summarise and Conclude

If you are fortunate, you will be able to write up your conclusion, or the two options, on a shared screen live. If not, you may need to spend this time outlining your process for how you're going to take their input, and input from your manager and stakeholders and then decide on the strategy as best as you can.

Either way, be assertive and own the process of getting to a workable result by the end of the day.

Next steps

Explain what you will do next, what they should do next, and what they should expect going forward.

- Your process for reviewing the strategy with stakeholders and/or your manager
- What time you will send them your final draft (it should be *today*, even if parts remain undecided⁸)
- Reminder of the overall process and timeline for setting OKRs and what's coming next
- Their preparation for the next day (see Tuesday below)

Follow-up

Share your **Draft One Page Strategy** with your manager and stakeholders and ask for their feedback on each section (meet with them in person for fifteen minutes to half an hour if you can). Capture this feedback in some notes on the same document. Make any changes you need and send the updated document and a summary of the changes and the input that informed them to your team.

If there are major changes, you may need to consider how best to bring your team on board. You'll need to fully understand the reasoning for the feedback that prompted the changes, so you can share this additional context with your team.

Harsh reality: major changes at this stage are an indication that needed to have done more work to align with your manager and stakeholders in advance.

Results

You now have:

- A **Strategy** that you, your team, your manager, and your stakeholders are fairly aligned on.
- A team with an increased understanding of the **strategic context** and some different ways of looking at it and different approaches to addressing it.

⁸ If there are specific investigations or data required to decide some part of the strategy, try to complete them on the same day or during the week, before the OKRs are finalised. Sometimes these investigations can take weeks, in which case, it is part of your work for the quarter, rather than work you need to do before you start. The result may prompt a mid-quarter OKR revision, so manage your team's, manager's and stakeholders' expectations carefully. Your goal is to make progress even in ambiguity.

Tuesday: Draft Objectives and Key Results

Begin the process to set OKRs that define what you will achieve **this quarter** to implement your strategy.

Summary

You will use the 1-2-4-All Method to brainstorm **Objectives** for the next 3-12 months⁹, **Metrics and Milestones** to define success, and **Key Results** that you will deliver this quarter. At the end, you will have draft **OKRs** with X's and Y's for baselines, targets, and dates, and with owners allocated.

Preparation

1. Distribute the **OKR Guide** ask your team to read it, particularly **Selecting Metrics and Milestones**.
2. Distribute the current **One Page Strategy** to the team and ask them to re-read it.
3. Share the agenda for this meeting. If they prepare ideas for what can be done towards the strategy this quarter, it will be helpful – they can note them down and bring them along.
4. Print out a copy of the **OKR Cheat Sheet** for each person or distribute digitally.

Meeting Agenda – 3 hours

1. **Draft Objectives** (30 mins)
 - 1.1. (15 mins) Use the **1-2-4-All** method to brainstorm candidate Objectives for what you as a team will achieve in the next 3-12 months
 - 1.2. (10 mins) **Open Discussion** on the Objectives - what best aligned with the strategy
 - 1.3. (5 mins) **Clustering** and **dot voting** to narrow down on 1-3 Objectives

5 mins break
2. For each Objective, **Draft Key Results** (40 mins per Objective – up to 2 hours)
 - 2.1. (15 mins) **1-2-4-All** method to brainstorm Metrics and Milestones for that Objective
 - 2.2. (5 mins) **Clustering** and **dot voting** to narrow down on 2-5 Metrics and Milestones
 - 2.3. (10 mins) **Open Discussion** on how best to define success for this Objective this quarter¹⁰
 - 2.4. (5 mins) For each Metric or Milestone selected, draft a **Key Result**¹¹

5 mins break after each

⁹ Objectives can roll over quarter-to-quarter, so there's no need to constrain your Objectives to the current quarter.

¹⁰ Aim for more Metrics than Milestones, and for the selection of Key Results to make sense together.

¹¹ Use the formats in the OKR Cheat Sheet and X's and Y's as placeholders for baselines, targets, and dates

3. **Owners** (10 mins): Allocate an **Owner** per Objective¹²

4. **Next Steps** (15 mins): Delegate drafting and aligning on **High-Level Plan**

Meeting Guide

This meeting will be challenging. It begins to make the strategy you discussed concrete. There will be plenty of debate, and some of it may be passionate, because it influences the work of the whole team for the quarter, and there will be different views on what is feasible and what is unrealistic.

It will be hard to align no matter how much time you allocate, so use this meeting to create a straw man¹³ and get started and recognise that this is part of the process to align.

Large Teams

Some people with larger teams (or at company-wide level) split this meeting into up to five one-hour meetings – one for setting Objectives, one each for drafting the Key Results for each Objective, and then one to review all together. They involve only a subset of the team in some Objectives and develop Key Results in parallel.

While I wouldn't recommend splitting the meetings that much unless your team is particularly large and complex, if you do split them, try to get all the meetings done on the same day, two at most.

Objectives

Don't worry about finessing the Objective wording (yet). Just agree on the underlying Objective, where you're trying to get to. Refer to your strategy regularly – it's very easy to get distracted by smaller issues and immediate problems, so remind yourselves what you decided yesterday to create some focus.

The Objectives which are set, while they don't have metrics directly associated with them, are often the most critical parts of OKRs to get right, because they are the "elevator pitch" level summary of what you are doing this quarter and will be repeated frequently within the team and when talking to stakeholders.

It's therefore advisable for a manager to guide setting Objectives more closely than Key Results. It can even work well to draft them independently based on the strategy discussion on Monday and use this part of the meeting to gather feedback and make changes while keeping a clear direction.

Key Results

Commonly, you'll struggle with lagging metrics, where it's worth finding some leading indicators or inputs, and focusing on them, or accept that your only metric is lagging and estimate the impact instead.

¹² You can have owners per Key Result instead, but this often creates more complexity.

¹³ I often use the term "straw man" to describe this as a starting point that is created for the purpose of creating momentum. It is intended to be torn down and rebuilt later, but the fact of having it in the first place is what gets the process moving.

Don't get held back if you are not currently tracking a metric that you want to use in a Key Result. In most cases, you can set placeholders until you have the data, set a Key Result to measure the baseline and reduce or increase it by a given amount, or you can set an extra Key Result to get the baseline and set a target for that metric in the original Key Result.

Don't let these dilemmas hold you back. Finessing the perfect Key Result and having ideal metrics isn't the point. The point is to define the problem you want to solve, and how you'll know you've solved it, and the metrics and the Key Results are just a tool to help you communicate that.

Owners

In selecting owners, you will be guided by the work people are already doing, the specific skills they have, their interest and desire for more responsibility, and so on, and you'll need to consider the "business as usual" processes that are related to this objective as well. Sometimes that means the owner will be obvious and there is very little choice.

However, where there is a choice, use this as an opportunity to align your best people with your most important work. Make them responsible for the most important Objectives, and give them as much scope, resources and support as they need to ensure that they succeed. This isn't a time to fairly distribute ownership or make sure everyone has something – that is a recipe for mediocre results and slow growing teams.

If you have no suitable owners in your team, you are the owner (and you also must develop your team so you do have people who you can trust with this level of responsibility!).

Next Steps

Each owner is responsible for proposing final wording for their Objective and Key Results, proposing baseline, target, and dates for any placeholders, compiling the list of initiatives that are planned, and reviewing with relevant stakeholders and dependencies to gather input and commitments (or risks).

Agree with them how and when they will do this, and make sure they have the right meetings set up. You will combine their input into a single **High-Level Plan** and should be involved in their work closely.

Follow-up

Send your **Draft OKRs** with placeholders along with your **One Page Strategy** to your manager and stakeholders and ask for their feedback and guidance. Let them know that your team is working on a **High-Level Plan** and will fill in the placeholders as they go. If you need access to them or their teams to get input or commitment, ask them for their support when needed.

Results

You will now have draft or skeleton OKRs (number the Objectives and Key Results sequentially for ease of reference), and people responsible for leading them.

Wednesday & Thursday: Aligning on High Level Plan

Make a High-Level Plan to deliver the Objectives, and align with team, dependencies, and stakeholders.

Summary

You will draft a **High-Level Plan** by combining the work that the owners do to come up with the list of initiatives, resources, and timelines, and the input from relevant stakeholders and dependencies. You'll also identify and secure the resources needed to deliver the Objective – or list the risks.

This should not be seen as a blueprint for the quarter, nor a complete, final, or static document. It's a draft outline of how best to go about delivering the Objectives, and it will change over the course of the quarter. The purpose at this stage is to help you set the OKRs and align with dependencies and stakeholders.

Writing the High-Level Plan

List the Objectives and Key Results (with numbers) at the top of the page.

For each Objective, the owner should propose improved wording and baselines, targets, and dates as they develop the plan and review their parts with other teams. They should generate and collect ideas for initiatives to meet the Objectives (they could even use the **1-2-4-All Method** with the team to generate the initial list). You may need to initiate and lead some of these processes, especially if this is the first time the owner has done work like this.

I suggest a simple table for listing the regular processes you are responsible for and the initiatives that are proposed in priority order. Especially as the plan is being developed, keep the initiatives for each Objective in a separate table so individual owners can work on them separately, and combine into one table later.

Example Tables

In a team with 96 person weeks available, the tables may look like this:

PROCESS	EFFORT	NOTE
User Support	26 pw	2 people dedicated to user support, rotating through the team weekly
Maintenance	13 pw	Estimate of maintenance effort for existing products
Interviewing	1 pw	1 interview each per week plus debrief = approx. 1 pw of effort
Total	40 pw	96-40 = 56 pw remaining for initiatives

INITIATIVE	OKR	EFFORT	DEPENDENCY	ETA	RISK	NOTE
This	1.1, 1.2	16 pw	None	-	Low	Have done this before, needs Designer
That	1.3, 1.4	6 pw	Team X - Y	TBC	Medium	Team X may not finish Y by end July
More (Pt 1)	2.1, 2.2, 3.1	24 pw (of 40)	Partner API	July 20	High	Won't finish this quarter
Further	3.1, 3.3	10 pw	None	-	Medium	Some technical risk, needs Tech Lead
Total		56 pw				
More (Pt 2)	2.1, 2.2, 3.1	16 pw (of 40)	Part 1	-		Remainder of work from More Part 1
Also	1.4, 1.5	18 pw	None	-		Lower priority than More
Besides	2.3	28 pw	None	-		Stakeholder Z has concerns

The line under “Total” on the initiatives table shows the capacity you have this quarter. Initiatives “below the line” may be important but are not going to get done this quarter unless something changes.

In this example, I’ve included one initiative (“More”) which was too large to fit in the quarter, so gets split between quarters. I’ve also included a dependency on Team X, which that team has yet to commit to supporting, so left the ETA as “TBC”.

You should set this up however works best for your situation, which may take a few iterations. Don’t worry about perfecting the format, just use the document to drive the conversations you need.

Descriptions

Describe what each initiative is in a sentence or two in notes underneath the table. No need to go into detail, just enough so the reader knows what you mean, so that you can align dependencies. More detailed plans, designs, requirements, assessments, and so on may be necessary, but they can be part of the work for the quarter rather than part of this high-level plan.

For each description, also state the anticipated impact this will have, and which Key Result(s) this will affect. For example: if you improve the self-serve help documentation, you may eliminate many of the simpler support requests, so you could say that you anticipate this reducing the number of support requests from 200/wk to 120/wk, and saving 20% of support team effort. This may directly relate to the Key Results, or it may be an input that would help one or more of them – state your reasoning.

Expectation Management

If there are expectations that stakeholders have that will not be met, it can be very helpful to mention these explicitly in a dedicated section. Missed expectations are much easier to manage at the start of the quarter rather than at the end of the quarter!

Aligning Guide

As you align with others, you’re going to be tempted to overcomplicate the plan. Try to avoid this, because many of the details will be better worked out through the quarter. What you’re looking for while aligning is not a robust contractual commitment, but in principle agreement on the following:

<i>Team</i>	<i>Dependencies</i>	<i>Stakeholders</i>
Is this realistic? Are these the right initiatives? What are our main dependencies? What baselines, targets, and dates should we set in our Key Results?	Will you deliver what we need? By when? Got any better ideas? How can we help you support us?	Do you agree with this approach? Are we prioritising correctly? Got any better ideas? Can you help with ...?

Do this by having them review the plans and asking them these questions explicitly. Multiple rounds may be needed, perhaps involving multiple people together to solve problems. If other teams are going through this process at the same time, they are also having these same conversations, and you are likely a stakeholder for your dependencies – so the reviews may be mutual.

Getting The Best From Your Stakeholders

Your stakeholders want you to succeed, because that helps them succeed. Often, they will have access to influence and resources you lack. Part of your aim in this process is to help them apply their influence and resources to help you help them best. Find out from your team and dependencies what is holding you back from delivering what your stakeholders want, and present this as a request for their help. For example:

- Can you help us get two more people so we can deliver this initiative that is below the line?
- Can you help Team X prioritise the work we depend on? They aren't planning to do it this quarter.
- Can you agree with other Stakeholder Y which is more important between these two requests? We can only do one of them.

Proposing Baselines, Targets and Dates

It's best if the Owners can collect input on these and propose something that the team believes is realistic, yet ambitious. Sometimes as a manager you will need to push for more ambitious targets, and other times for more conservative targets. Sometimes you won't know. Some Key Results will be more contentious than others, and for some, the actual targets matter more than for others. Use judgement.

My recommendation is to set targets that will motivate the best work on the right problems, rather than fussing too much about making accurate projections. This means that you (and your own management) cannot use these targets as proxies for performance assessments, because this will cause a different approach to target-setting, and hence not motivate the best work (and ironically, deliver worse results).

Follow-up

Whatever high-level plan you end up with at the end of these two days, send it around to your team at the end of it and ask them to read it. Summarise any dependencies, and the commitments or risks or ongoing conversations you have in an email to your stakeholders and dependencies, so the full state is clear. Review the complete high-level plan with your own manager, because while there's plenty of room to adjust it as the quarter progresses, now is the best time to do so. Review the proposed OKRs with targets with your stakeholders and manager, and get their input.

Results

You now have draft **High-Level Plan** and proposed **OKRs**. You're doing great!

Friday: Finalise Objectives and Key Results

Home stretch – you're now finalising your OKRs!

Summary

Review the **High-Level Plan** and proposed **OKRs** with your team. Use the **1-2-4-All Method** to identify issues for discussion and debate. Use **clustering** and **dot-voting** to prioritise them, then discuss and debate them one by one.

Preparation

1. Review the **High-Level Plan** and proposed final **OKRs** and make your own edits based on your judgement and input from your manager and stakeholders.

You are responsible for the results your team delivers, so you need to be confident in the plan and OKRs. That doesn't mean you dictate everything. Make compromises to maximise team buy-in and motivation, and only override them where you think it's a critical mistake. There is plenty of opportunity for course-correction through the quarter, and it's often better to let people learn through experience.

2. Distribute the **High-Level Plan** and proposed final **OKRs** to your team, and ask them to review in detail, and take note of their concerns to bring to the meeting. It can help to allocate an extra 10 minutes into the start of the meeting for people to read – otherwise someone will not have read it!

Meeting Agenda – 2 hours

1. (15 mins) Use the **1-2-4-All** method to come up with specific concerns to discuss – I recommend using Post-It notes or a similar online tool, and writing one concern per note
2. (5 mins) **Clustering** and **dot voting** to prioritise topics
3. (30 mins) Use 6 **Time-boxes** of 5 minutes to discuss each topic in order, asking at the end of each one if the group is happy to move on to the next one, or wants to use another timebox
4. (5 mins) **Capture and summarise** changes and take note of actions needed to re-align with stakeholders and dependencies

10 mins break

Repeat 1-4

Meeting Guide

This meeting can be very smooth if everyone has been sufficiently involved in the process so far. More often, there are a few topics which will consume most of the time and attention. Occasionally, they will present a risk of derailing the whole process.

You are likely to be aware of these issues up-front from the work you've done during the week. Try to have informal 1-1 conversations with the people with the biggest concerns and who will be most vocal. Listen to their concerns generously, and then ask for their help to come up with solutions that fit in your constraints. Sometimes this will trigger some immediate re-working, but often it's enough to explicitly acknowledge their concern at the start of the meeting and ask for their help to resolve it during the quarter and add that to your plan as an initiative or risk.

Objectives

When the objective wording is being debated, guide the team to something short, inspiring and memorable, and push hard to avoid complex sentences with many clauses. The objectives should read like a newspaper headline (remember them?), so aim for 10 words or less, and keep them simple.

Key Results

Now is the time to make them unambiguous. Ask questions that highlight any ambiguity by asking how to differentiate between a good result and a bad result that isn't clear from the key result as written. This may trigger more revisions and even some investigation to find the right metrics, so take that as an action for after the meeting, as it shouldn't be so contentious.

Owners

By this stage, the owners realise that there's a lot of work ahead of them, so re-assure them that you're also an owner, but you still want them to have the opportunity to lead.

Next Steps

You'll likely have some loose ends to tie up, so make sure you capture the actions, whether these are deciding the specific metric or wording, doing an investigation to finalise a target, or reviewing a change with a stakeholder.

Follow-up

Before you announce the "final OKRs" to your team, run them by your manager and stakeholders one last time, and check in again with your dependencies to confirm their commitment. Finish off the last few actions, and then get started on working on these OKRs as soon as you can. You've created some momentum, so capitalise on it by turning it into action.