

Getting Started with OKRs Checklist

CHECKLIST

- Watch the OKRs deep dive feature walkthrough and read the job aids
- Familiarize with OKR method and approach
- Assemble your OKR Project Team
 - Who are the Project Owners, Executive Sponsors, Champions and Super Users in this process?
- Determine your OKR cycles and cadences
 - Setting Goals: Will your company goals be annual and when will they be kicked off (I.e. fiscal year start? Calendar year start?)? Will Teams and Individuals be creating quarterly OKRs?
 - Maintaining Goals: What is the expected check in cadence for goals? Weekly, bi-weekly, monthly or up to the individual? What is the expected check in template (i.e. what are they updating beyond their KR in the textbox?)
 - Closing Out Goals: What is the close out template and process? What reflections do you want to trigger? Will you have OKR retrospectives?
- Plan your Rollout (example questions below)
 - Do you intend to roll this out Company Wide or just to a subset or pilot group?
 - Will all departments be involved (i.e. mandatory) or just those that are interested (i.e. voluntary)?
 - Will all individuals also be required to have OKRs or will this just roll down to the team / department level?
 - Will goals be designed to be Stretch goals or Committed Goals (or a combination)?
 - What is your launch date?
 - When will you rollout training?
 - What meetings need to take place to make this happen and when? (tip: work backwards from your launch date)
- Rollout Communication and Training
 - Have your Company OKRs been communicated effectively?
 - Do people understand the "why" when it comes to OKRs and the need for them?
 - Are people familiar with the platform and how to use it?

- Are people comfortable attempting to write their OKRs for the quarter?
- Is there adequate training both in the platform and regarding the OKR approach, support material and channels available for Managers and Employees to troubleshoot or reach out to for support?
- Are your OKR Champions and Managers equipped to coach others on OKRs?