OKR **Starter Kit**

Your Complete Guide to Getting Started with Objectives and Key Results

Turn strategy into measurable outcomes. Whether you're starting from scratch or refining your goal-setting process, this guide gives you everything you need.

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Turning Strategy Into Measurable Revenue

Introduction

This OKR Starter Kit is designed to help your organization turn strategy into measurable outcomes. Whether you're starting from scratch or refining your goal-setting process, this guide and templates will give you everything you need to implement OKRs successfully.

Part 1: Understanding OKRs in 10 Minutes

What Are OKRs?

OKRs stand for **Objectives and Key Results**. They are a goal-setting framework used by leading companies like Google, Intel, and Amazon to align teams, increase focus, and drive results.

> **OKRs have two components:**
>
> 1. **Objectives** – What you want to achieve (inspirational, directional, qualitative)
> 2. **Key Results** – How you'll measure success (specific, measurable, achievable, time-bound)

The OKR Formula

```
I will [OBJECTIVE] as measured by [KEY RESULT 1], [KEY RESULT 2], and [KEY RESULT 3]
```

OKRs vs. Goals vs. Tasks

Element	Description	Example
Objective	The big-picture outcome you want	"Become the market leader in customer experience"
Key Result	How you measure success (2-4 per objective)	"Improve NPS from 45 to 70"
Initiative/Task	The actual work to achieve KRs	"Implement 24/7 customer support"

Why OKRs Work

- **Focus:** 3-5 objectives keep the team laser-focused (vs. 50 random projects)

- **Alignment:** All teams work toward same company-level outcomes

- **Ambition:** Encourages 70% goals (achievable but stretch)

- **Transparency:** Everyone knows what matters and why

- **Agility:** Quarterly cycles allow rapid pivots based on learning

Part 2: The OKR Cycle (Quarterly Process)

Timeline Overview

Week 1-2: Planning

- Analyze last quarter's results

- Define company-level OKRs

- Teams draft their OKRs (bottom-up input)

Week 3-4: Alignment & Kickoff

- Finalize OKRs across all teams

- Ensure cascading alignment

- Launch with all-hands kickoff

Weeks 5-12: Execution

- Weekly 15-30 min check-ins per team

- Monthly cross-team reviews

- Adjust initiatives as needed

Week 13: Review & Retrospective

- Score results (0.0 to 1.0 scale)

- Celebrate wins and learn from misses

- Retrospective: Start/Stop/Continue

- Feed learnings into next quarter

Part 3: How to Write Great OKRs

Golden Rules

1. Objectives are qualitative, Key Results are quantitative

- ❌ Objective: "Improve conversion rate" (too measurable)
- ✅ Objective: "Become the easiest platform to use in our category"
- ✅ Key Result: "Improve conversion rate from 3% to 5%"

2. Aim for 70% achievement

- If you hit 100% of all OKRs, they're not ambitious enough
- If you hit <50%, they may be unrealistic or misaligned

3. 3-5 Objectives per quarter, 2-4 Key Results per Objective

- Too many = distraction
- Too few = missed opportunities

4. Key Results must be measurable & time-bound

- ❌ "Improve product quality"
- ✅ "Reduce critical bugs by 80% by Q2"

5. Avoid output-focused Key Results (focus on outcomes)

- ❌ KR: "Launch 5 new features"
- ✅ KR: "Increase DAU from 50K to 80K" (outcome of features)

4-Step OKR Writing Process

Step 1: Define Your Top 3-5 Priorities

Ask yourself:

- What's our biggest challenge?
- What will unlock the most growth?
- What's our competitive advantage to lean into?
- What will excite the team?

Step 2: Turn Each Priority into an Objective

Write in 3-5 words. Should inspire action.

Examples: "Dominate enterprise market," "Build customer loyalty," "Scale operations globally"

Step 3: Create 2-4 Key Results per Objective

For each, ask: "How will we know we've succeeded?"

- Must be measurable (can you track it weekly?)
- Must be time-bound (by end of quarter)
- Use metrics: revenue, %, user numbers, time saved, NPS, etc.

Step 4: Align & Cascade

- Company OKRs set the north star
- Team OKRs (support company OKRs)
- Individual OKRs (optional; support team OKRs)

Part 4: OKR Templates & Examples

Template 1: Company-Level OKR Template

```
COMPANY OKRs - Q [X] [YEAR]

OBJECTIVE 1: [Main goal for the company]

  Key Result 1: [Measurable outcome #1]
  Key Result 2: [Measurable outcome #2]
  Key Result 3: [Measurable outcome #3]

OBJECTIVE 2: [Main goal for the company]

  Key Result 1: [Measurable outcome #1]
  Key Result 2: [Measurable outcome #2]

OBJECTIVE 3: [Main goal for the company]

  Key Result 1: [Measurable outcome #1]
  Key Result 2: [Measurable outcome #2]
```

Template 2: Team-Level OKR Template

```
TEAM: [Team Name] | QUARTER: Q [X] [YEAR]
Aligned to Company OKR: [Which company objective(s)]

OBJECTIVE 1: [Team goal]
  Owner: [Name]

  Key Result 1: [Measurable outcome] (Current: X | Target: Y)
  Key Result 2: [Measurable outcome] (Current: X | Target: Y)

OBJECTIVE 2: [Team goal]
  Owner: [Name]

  Key Result 1: [Measurable outcome] (Current: X | Target: Y)

INITIATIVES to achieve KRs:
  - [Action 1] - Owner: [Name] - Deadline: [Date]
  - [Action 2] - Owner: [Name] - Deadline: [Date]
  - [Action 3] - Owner: [Name] - Deadline: [Date]

CONFIDENCE LEVEL: [70%/80%/90%] — why we believe we can achieve this
```

Template 3: OKR Check-in Template (Weekly/Monthly)

```
TEAM: [Name] | WEEK: [Date] | Progress Snapshot

OBJECTIVE 1: [Goal]
  KR 1: [Status: On Track / At Risk / Off Track]
          Baseline: X | Current: Y | Target: Z | Confidence: [%]
          Update: [What's happening, blockers, next steps]

  KR 2: [Status]
          Baseline: X | Current: Y | Target: Z | Confidence: [%]
          Update: [What's happening, blockers, next steps]

QUICK WINS THIS WEEK:
  - [Achievement 1]
  - [Achievement 2]

BLOCKERS:
  - [Issue 1 - Resolution by Date]
  - [Issue 2 - Resolution by Date]

CONFIDENCE LEVEL: [%] (Why we will/won't hit OKRs)
```

Part 5: Real-World OKR Examples

Example 1: B2B SaaS Company (Q1)

OBJECTIVE: Accelerate enterprise adoption

KR 1: Increase MRR from $500K to $750K (50% growth)

KR 2: Land 5 enterprise customers with $20K+ ARR each

KR 3: Improve enterprise NPS from 35 to 55

OBJECTIVE: Build a world-class product

KR 1: Reduce critical bugs by 85%

KR 2: Improve feature adoption from 30% to 60% for top 3 features

KR 3: Decrease page load time from 3s to under 1s

OBJECTIVE: Build a strong, aligned team

KR 1: Hire 8 new team members (bring us to 40 total)

KR 2: Achieve 90%+ employee engagement score

KR 3: Reduce voluntary turnover to below 5%

Example 2: Marketing Team (Q2)

Aligned to Company OKR: "Accelerate enterprise adoption"

OBJECTIVE: Generate 50 qualified enterprise leads

KR 1: Launch 4 targeted campaigns (ABM) to 200 enterprise prospects
KR 2: Improve enterprise lead quality (conversion to qualified: 25%+)
KR 3: Achieve 15% demo booking rate from leads

OBJECTIVE: Establish thought leadership

KR 1: Publish 2 case studies with measurable enterprise wins
KR 2: Achieve 500K impressions on LinkedIn from company content
KR 3: Secure 3 speaking slots at industry conferences

Example 3: Product Team (Q3)

Aligned to Company OKR: "Build a world-class product"

OBJECTIVE: Reduce customer churn from main competitor

KR 1: Build and launch feature parity on top 5 customer requests
KR 2: Improve time-to-value from 2 weeks to 3 days
KR 3: Increase product NPS from 42 to 58

OBJECTIVE: Improve data security and compliance

KR 1: Achieve SOC 2 Type II certification
KR 2: Resolve all P1/P2 security vulnerabilities
KR 3: Increase customer confidence score (security) from 6 to 9

Part 6: OKR Scoring & Evaluation

Scoring Scale (0.0 to 1.0)

After the quarter, score each Key Result:

- **1.0** = Achieved 100% of the target (or exceeded by 20%+)

- **0.7** = Achieved 70% of the target (sweet spot!)

- **0.5** = Achieved 50% of the target (mid-range)

- **0.3** = Achieved 30% of the target (underperformed)

- **0.0** = Achieved 0% of the target (missed completely)

Scoring Example

```
KR: "Increase MRR from $500K to $750K"
  Achieved: $700K
  Percentage: ($700K - $500K) / ($750K - $500K) = 80%
  Score: 0.8
```

Healthy Score Targets

- **Team Average:** 0.6 to 0.7 (shows ambition)

- **Company Average:** 0.65 to 0.75

- **Trend:** Each quarter should improve as processes get tighter

Part 7: Common OKR Mistakes to Avoid

Mistake	Impact	Fix
Too many OKRs (10+)	Lack of focus; dilutes effort	Limit to 3-5 per entity
OKRs tied to tasks (outputs)	Measures busy-ness, not impact	Focus on outcomes (KRs) not activities
Vague Key Results ("improve X")	Can't measure; hard to align	Make measurable: % gain, $ amount, time reduction
Top-down only	Low buy-in from teams	50/50 top-down + bottom-up input
No weekly check-ins	Problems hide until end of quarter	Weekly 15-min standup per team
Zero fails	OKRs are too safe	Aim for 0.6-0.7 avg; if 100%, reset higher
Too ambitious without support	Team burnout; demoralization	Include needed resources/time in planning
Ignoring mid-quarter pivots	Can't adapt to market changes	Built in flexibility; adjust if conditions change

Part 8: Your 30-60-90 Day Implementation Plan

Week 1-2: Foundation Phase

Activities:

- ☐ Read this entire starter kit

- ☐ Identify your top 3-5 company priorities for next quarter

- ☐ Conduct stakeholder interviews (leadership, top performers, customers)

- ☐ Set a quarterly review date (e.g., last Friday of each quarter)

- ☐ Choose your OKR tracking tool (Google Sheets, Coda, Lattice, etc.)

Output: Draft company OKRs (to be finalized)

Week 3-4: Bottom-Up Input

Activities:

☐ Share draft company OKRs with all teams

☐ Ask each team: "What are your top 3 priorities that ladder up?"

☐ Teams submit draft OKRs to leadership

☐ Facilitate 1-1s to align and consolidate

Output: Full company + team OKRs (draft)

Week 5-6: Alignment & Kickoff

Activities:

☐ Review all OKRs for cascading alignment

☐ Resolve conflicts (e.g., competing priorities)

☐ Conduct all-hands kickoff presentation

☐ Set up calendar reminders for weekly check-ins

Output: Finalized OKRs; launched and celebrated

Week 7-12: Execution & Weekly Check-ins

Activities:

☐ **Weekly (15-30 min per team):** Review KR progress; identify blockers

☐ **Monthly (60 min):** Cross-team sync; share learnings

☐ **Mid-quarter (optional):** Assess if any OKRs need mid-course correction

☐ Celebrate small wins; maintain momentum

Output: Real-time visibility into progress; early blocker resolution

Week 13: End-of-Quarter Review & Retrospective

Activities:

- ☐ Score all OKRs (use 0.0-1.0 scale)

- ☐ Document learnings: What worked? What didn't?

- ☐ Conduct team retrospectives (Start/Stop/Continue)

- ☐ All-hands celebration: share wins, lessons, company health

- ☐ Conduct one-on-one feedback with team leads

Output: Scored OKRs; retrospective insights; team morale boost

Part 9: Measuring Success

Leading Indicators That OKRs Are Working

- ✅ **Team engagement:** Teams can articulate OKRs without prompting

- ✅ **Alignment:** 80%+ of team OKRs clearly support company OKRs

- ✅ **Focus:** 70%+ of week's work is on OKR initiatives (vs. random requests)

- ✅ **Predictability:** Quarterly score improves (e.g., 0.5 → 0.65 → 0.75)

- ✅ **Speed:** Decision-making accelerates ("Does this ladder to our OKRs?")

- ✅ **Retention:** Turnover decreases; engagement scores improve

Key Metrics to Track Over Time

Metric	Baseline	Target (by Q4)
Avg OKR Score	-	0.65-0.75
% OKRs on track mid-quarter	-	70%+
% Team engagement with OKRs	-	85%+
Decision speed (ideas to launch)	-	Reduce by 30%
Voluntary turnover	-	Reduce by 20%

Part 10: Quick Reference Checklists

Pre-Quarter Planning Checklist

- ☐ Review last quarter's results (wins & misses)

- ☐ Conduct customer/stakeholder interviews

- ☐ Analyze competitive landscape

- ☐ Identify top 3-5 company priorities

- ☐ Draft company OKRs (3-5 objectives, 2-4 KRs each)

- ☐ Socialize with leadership; gather feedback

- ☐ Finalize company OKRs

- ☐ Brief all teams on company OKRs

- ☐ Teams draft their OKRs (bottom-up)

- ☐ Conduct alignment 1-1s

- ☐ Finalize all OKRs

Weekly Check-In Checklist

- ☐ KR Status: On track / At risk / Off track

- ☐ Current progress vs. target

- ☐ Blockers & resolutions (owner + date)

- ☐ Quick wins from the week

- ☐ Confidence level (will we hit KRs?)

- ☐ Any mid-quarter adjustments needed?

End-of-Quarter Review Checklist

- ☐ Score all OKRs (0.0-1.0)

- ☐ Document root causes (hits & misses)

- ☐ Conduct team retrospectives

- ☐ Identify top 3 learnings for next quarter

- ☐ Share results in all-hands

- ☐ Celebrate wins (team morale)

☐ Conduct 1-1 feedback with leads

☐ Archive OKRs for future reference

Part 11: Tools & Resources

OKR Tracking Tools

- **Google Sheets** (Free, simple)
- **Coda** (Free, collaborative)
- **Lattice** (Enterprise OKR software)
- **15Five** (Performance management + OKRs)
- **Ally** (OKR + 1-on-1 feedback)

OKR Documentation Tools

- **Notion** (Store OKRs + company wiki)
- **Confluence** (Team wikis)
- **Google Docs** (Quick drafting)

Books & Further Learning

- *Measure What Matters* by John Doerr (OKR bible)
- *Radical Focus* by Christina Wodtke (Practical OKR guide)
- *The Four Disciplines of Execution* by McChesney, Covey, Hubbard

Free Resources

- YouTube: John Doerr on OKRs
- Whatmatters.com (Free OKR education)
- TalentCulture's OKR training
- Product-led SaaS: OKR playbooks

Part 12: Next Steps: Getting Coaching Support

When to Bring in OKR Consulting

You might benefit from expert guidance if:

- ✅ First time implementing OKRs in your organization

- ✅ Previous OKR efforts failed; trying again

- ✅ Scaling from 10 to 50+ employees (alignment gets complex)

- ✅ Teams are misaligned on what matters most

- ✅ Leadership team doesn't have a unified vision

What an OKR Coach Can Help With

1. Kickoff Workshop (2-4 hours)

- Facilitate company OKR definition

- Train teams on OKR methodology

- Q&A on real-world examples

2. OKR Planning Support (Ongoing)

- Review draft OKRs for quality

- Coach on Key Result writing

- Ensure cascading alignment

3. Check-in Facilitation (Monthly)

- Guide weekly team check-ins

- Help problem-solve blockers

- Keep cadence tight

4. Quarter-End Reviews (Quarterly)

- Facilitate scoring conversations

- Extract learnings & insights

- Plan next quarter

5. Culture & Adoption (Ongoing)

- Build OKR mindset in organization

- Celebrate wins & learnings

- Sustain momentum long-term

Ready to Get Started?

You now have everything you need to implement OKRs:

- ✅ **Understanding:** What OKRs are and why they work

- ✅ **Process:** How to run a quarterly OKR cycle

- ✅ **Templates:** Ready-to-use OKR formats

- ✅ **Examples:** Real examples from different industries

- ✅ **Plan:** A 30-60-90 day rollout roadmap

- ✅ **Checklist:** Step-by-step execution checklists

Your First Action

Pick your **top 3-5 company priorities** for next quarter and draft 1-2 sentences for each. This is your starting point.

BOOK YOUR FREE OKR CLARITY CALL

Visit: **https://calendly.com/exceed-sk/15-minutes**

In 30 minutes, we'll:

- Review your current situation & goals

- Diagnose your biggest strategy challenge

- Create a clear roadmap for success

- Answer all your OKR questions

About beFoQuSed by Exceed

beFoQuSed by Exceed is an OKR consulting firm helping B2B SaaS companies, scale-ups, and teams turn strategy into measurable results. We've worked with 50+ companies to implement OKRs, improve alignment, and drive revenue growth.

Let's talk about your strategy.

Book now: https://calendly.com/exceed-sk/15-minutes

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