

objectives and key results

A WORKBOOK



workbook: creating your objectives



This workbook will encourage you to think more visually about your goals and create great goal-setting habits.

This guide compliments the practical getting started with OKRs that 7Geese offers. It provides actionable next steps for creating a stellar first objective.

OVERVIEW

This workbook will guide you through what it means to enact your areas of responsibility and make focused objectives and key results.

OBJECTIVES

Learn how visual representation can be a powerful tool in your goal-setting toolbox.

Create rockstar objectives that aren't task-driven.

SUPPLIES NEEDED

an open mind: stay collaborative and open to new ideas.

writing utensil! Pen—write down and iterate, don't erase!



THIS WORKBOOK IS INTENDED
TO BE PRINTED

Need a getting started refresher?

practical guide to getting started:
<http://bit.ly/GetStartedWithObjs>





define you: your role, areas of responsibility, supporting key themes, etc.

Role: _____

List key KPIs / targets that relate to your projects or areas of responsibility:

Areas of responsibility:

Pick 3 themes from your areas of responsibility: _____



HERE'S AN EXAMPLE TO GUIDE YOU

How do you measure success when it comes to your areas of responsibility:

Role: Director, Customer Engagement

Area's of responsibility: Customer support and learning, brand management, customer experience,

Themes: learning, branding, engagement

Measures of success: our learning center is effective, engagement is providing continuous and effective value, we have a consistent brand throughout the website and all communications

Jot down starting points for objectives that incorporate how you'd measure success:

OKR starting points: Provide a stellar customer support experience (*effective learning center*) All users feel supported throughout their journey with 7Geese and beyond (*effective engagement*), Streamline brand management processes (*branding*)

Supporting Projects: Building a community, creating resource guides, creating a copy style guide, creating brand guidelines, engagement campaigns

List some supporting projects that will help you accomplish your starting points:

KPIs / Targets: Reduce churn, renewals, upsells, NPS, health score...

NEXT: pick one starting point objective, focus it



focusing on one objective: defining what motivates you and the objective purpose

1. Select one “starting point” from your list on the previous page. In bullet form, list some reasons why you want to achieve *this objective* in particular?

2. What will motivate you throughout the next few months to make it happen?

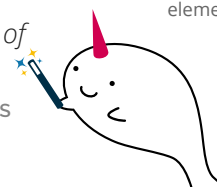
? *Doesn't matter whether it's an intrinsic motivation (personal growth or development of a new skill) or extrinsic motivation (something you're doing for the team because it's part of your role). Understanding what motivates you to achieve will help guide your action plan.*

3. What resources will you need to make your objective animated (animated means having accomplished part of, or all of your objective)?

? *Jot down both tangible resources (products, items) and intangible (coaching, skill development in X). Our brains have pictorial superiority when it comes to processing information. Imagery gives life-like qualities to your objective. In this case, imagery is in the form of resources you're envisioning yourself using or developing to make your objective achievable.*

Abstract words and measures convolute a clear visual path to achievement. Vividly picturing your objective means you have to be specific. Specificity creates a solid concept of what represents the “end.” The more specific you are, the harder it is to fight the feeling of knowing you'll achieve the completion that you've just visualized.

NARWHAL TIPS



NEXT: adding more visual elements to animate your obj.



adding visual elements to your objective: picturing what success looks like

1. How big is your goal? Is it revolutionary like creating a new technology product or industry? Or, smaller, focused on improving something existing like putting internal processes in place to scale your team?

2. What colors or textures best symbolize how you'll feel when you've achieved your objective or started making progress? Why those colors?

? *Colors are directly tied to emotion and meaning, so connect with a color that makes you feel successful and accomplished.*

3. Objectives are made up of distinct tasks and projects that are completed along the way. How many different actions are you going to have to take before you can measure success? What meetings or other team members are going to need to be involved?

? *It's also important to realize what will have to be let go of to move forward. Setting includes not only the steps along the way, but the resources and physical surrounding in which you are most productive.*

"But, Narwhal! this isn't OKRs at all! Why does this matter?"

Visualizing these four aspects of your objective will create a starting point that helps you see success, not set something and let it sit stagnant because you have no visual understanding of what happens next or when you've hit a milestone in success.

NEXT: transform your visuals into an actual objective

NARWHAL TIPS





creating unique, focused core values: brainstorming what's important

1. Bring it all together now.

Objective: _____ Associated colour: _____

Size of your obj.: _____ Obj. theme: _____

Resources needed to succeed: _____

What projects would help you achieve your objectives: _____

How are you going to measure success of these projects? (How will you know if your objective has succeeded)

2. Transform your measures of success into key result sentences (no more than 3) and add how you'll measure them (numeric, percentage, \$, or milestone)

KR 1: _____ Measurement type: _____

KR 2: _____ Measurement type: _____

KR 3: _____ Measurement type: _____

You're more likely to check-in to an objective and not run into stagnancy issues if the obj. uses concise language, follows a target-driven model (focuses on improvement language, or where you want to end up to define success), and keep your key results outcome driven (focus on your end result, the "finish line.")

NEXT: how would you check-in and track progress for this obj.

NARWHAL TIPS



one last piece of advice... be sure to always know the answer to, “can I realistically commit to all of this?”

Realistic commitments are important, even in stretch goals that are meant to challenge you. Without proper resources or time dedication to get things done, you can't start to elevate your productivity. Elevating your objectives requires mapping tasks to projects, and projects to measures of success in a realistic way that best suites your existing work-flows.

To help you along the way keep in mind these four key tips:

- 1. If you find yourself duplicating a comment somewhere, take a step back.** Reflect on the most appropriate comments for tracking this type of update and alter your other notes accordingly in other places to not duplicate updates.
- 2. Visualization is key.** If you're looking to elevate your work-flows, visualize your steps prior to taking them. This will help keep you focused on performing the right actions, in the right places
- 3. Keep your objectives simple.** Focus and simplicity is they key. Don't add complex numbers to your key results. Objectives are for communicating impact and keeping everyone updated. If you have to sit down and do hours of math to check-in, break down your goal some more.
- 4. Focus on sharing what you would want to know from someone else.** If you're worried about over-sharing or under-sharing, focus on giving the same amount of information that you'd like to know about if it was someone else checking-in. Alternatively, set up expectations for when updates should regularly occur at the beginning of your cycle.

ready to get started with objectives and key results?

schedule time to chat with us today!

<http://info.7geese.com/get-a-demo/>



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