

objectives and key results

A WORKBOOK



have you visualized your objective?

Focusing on the importance of visual representation, this workbook will encourage you to think more visually about your goals and do the bits and pieces of great goal-setting habits as a team, collaboratively.

This guide compliments the other OKRs resources that 7Geese offers (*listed on the right*) and provides actionable next steps that will help ground your objective planning and aligning processes in your areas of responsibility.

Guiding you through objective creation in a visual process, this workbook will empower the representation of your goals. It will also focus your impacts on why, not just what.

Learn more about objectives, tasks, projects, and the OKRs methodology:

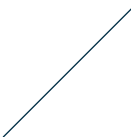
practical guide to getting started
<http://bit.ly/7GeeseOKRsGuide>

your first cycle with objectives
<http://bit.ly/OKRs1stCycleGuide>

Alright, OKRs! Now what?! FAQ
<http://bit.ly/OKRsFAQeGuide>

task prioritization, project planning, and objective examples guide
<http://bit.ly/AdvancedOKRsGuide>





workbook: visualizing your objectives

Objectives help us focus our projects and initiatives on specific, measurable aspects of success. But what happens when they become too task-driven, or overly complex? Stagnant, disconnected objectives.

Utilize the power of visual representation and an open mind to focus your energy on keeping objectives simple. Simplicity makes this easy. Easy means it takes less time to make it a habit.

OVERVIEW

It's time to move beyond just words on a screen. This workbook will help you envision achievement, 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.

Learn more about the details that can help you create a rockstar objective that isn't task-driven.

Brainstorm how to align objectives better as a team.

SUPPLIES NEEDED

an open mind: stay collaborative, fresh, and open to new ideas and ways of thinking

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



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

Role: _____

Areas of responsibility:

Pick 3 themes from your areas of responsibility: _____

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

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

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

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



HERE'S AN EXAMPLE TO GUIDE YOU

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

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

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?

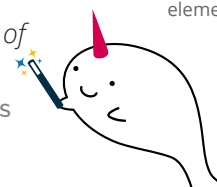
? *Doesn't matter whether it's an intrinsic motivation (personal growth or development of a new skill) or extrinsic motivation (something you're doing for the team because it's part of your role). Understanding what motivates you to achieve will help guide your action plan.*

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 life-size or 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





action-plan for progress updates: visualize when you could check-in and what to share

1. What major milestones accompany your key results and projects that would be helpful to share with your team? Why these moments and not others?

2. What types of updates wouldn't be included?

? It's also important to think about what steps wouldn't be included so you don't doubt you're on the right track with communicating the right things.

3. Does your objective impact the success or objectives of someone else on the team? How do you plan to communicate your expectations to your team members?



progress updates: what are some sample check-ins for both on and off track statuses?

1. Create a check-in for your objective for both on and off track statuses.

ON TRACK

OFF TRACK

2. Jot down some ideas about why you think these check-ins follow best practices (hints are located below if you need some help).

? *Great check-ins include: updates that are the sum of all tasks related to completing a key result; they incorporate next steps and key stakeholders to move things forward; communicate where the rest of your team can stay updated, but not be a step-by-step duplication of these granular to-do's; They don't duplicate what's been documented in other task-oriented products. Instead, they focus on where the project is at and who should be notified that is impacted by its status.*

NARWHAL TIPS



NEXT: last bits of advice and key takeaways for success

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.

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