TOOL 2

OKR Framework (Objectives & Key Results)

PURPOSE: *Link an individual's work to team and company objectives so they can see how their work matters and how success will be measured.*

Employee: *Enter name*	**Manager:** *Enter name*	**Quarter:** *e.g., Q2 2026*	**Review date:** *MM/DD/YYYY*

STRUCTURE

Objective: a qualitative, inspirational goal (the "why"). Key Results: three to five quantitative measures of success (the "what").

Set one to three individual objectives that support team goals, with three to five key results for each.

CASCADE: WHERE THIS WORK CONNECTS

Company objective	*Which company objective does this work serve?*
Department objective	*Which department objective does it support?*
Team objective	*Which team objective does it support?*

INDIVIDUAL OBJECTIVE 1

Objective	*Inspiring, qualitative goal*
Key Result 1	*Measurable outcome*
Key Result 2	*Measurable outcome*
Key Result 3	*Measurable outcome*

INDIVIDUAL OBJECTIVE 2 (OPTIONAL)

Objective	*Inspiring, qualitative goal*
Key Result 1	*Measurable outcome*
Key Result 2	*Measurable outcome*
Key Result 3	*Measurable outcome*

SETTING INDIVIDUAL OKRS

Work through these steps with the person, not for them.

- ☐ Start with team and company OKRs
- ☐ Ask: “How can this person contribute to these objectives?”
- ☐ Set 1–3 individual objectives that support team goals
- ☐ Define 3–5 key results for each objective
- ☐ Review progress quarterly

QUARTERLY PROGRESS REVIEW

Key result	Progress (%)	Notes / next step

EXAMPLE

Objective: Become the most customer-friendly onboarding experience in our industry.

Key Result 1: Reduce time-to-first-value from 14 days to 7 days. Key Result 2: Achieve a 90%+ customer satisfaction score for onboarding. Key Result 3: Decrease support tickets during the first 30 days by 40%.

> **Pro Tip:** OKRs should be ambitious. Achieving 70–80% is often considered success. If every key result lands at 100%, the bar was too low.