Quick Reference – Objectives & Key Results (OKRs)

What is an OKR?

OKR stands for Objective & Key Result. OKRs is a goal setting framework that is used to track and measure progress towards objectives. This framework has become a standard for many organizations.

What is an Objective?

A statement with attainable, time based, and measurable targets that the enterprise seeks to meet in order to achieve a Goal.

What is a Key Result?

Key Results are measurable success criteria.

What is the relationship between Objective and Key Result?

An objective may have 1 or many Key Results associated with it.

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What is the relationship between Key Result & Metric?

Each key result is associated to a metric with assigned target and actual numeric values. The numeric values are tracked by percentage of completion toward achieving the final target value. Metrics can be reused across more than one key result.

What do I need to have in place before creating an OKR?

First, you need to have an Objective you plan to use for the OKR. You also need to have a metric you will use to measure the Key Result. Finally, you need to have one or more milestones defined which you will use to track progress against your Key Result.

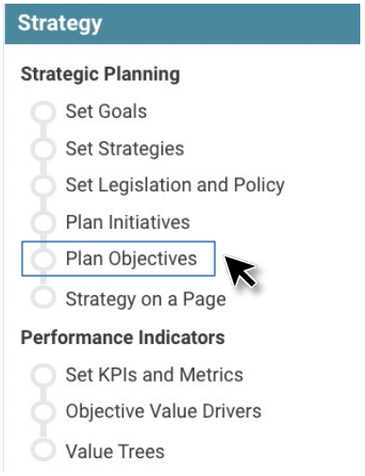
How do I create an Objective?

Click on ***'Plan Objectives'*** on the Strategy menu. You create an Objective, by clicking on the icon in the Objective tree structure.

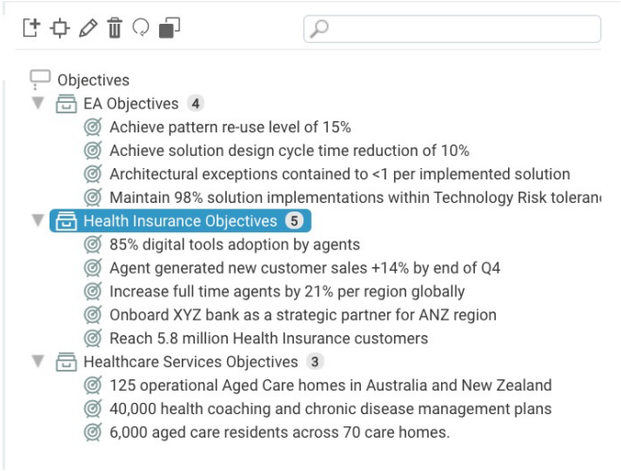
How do I add a Key Result?

Select the relevant Objective from the Objective tree structure. Click on the 'View' tab. Click on the 'Key Result' tab. Click the ***'Add Keyresult'*** button and complete the required fields.

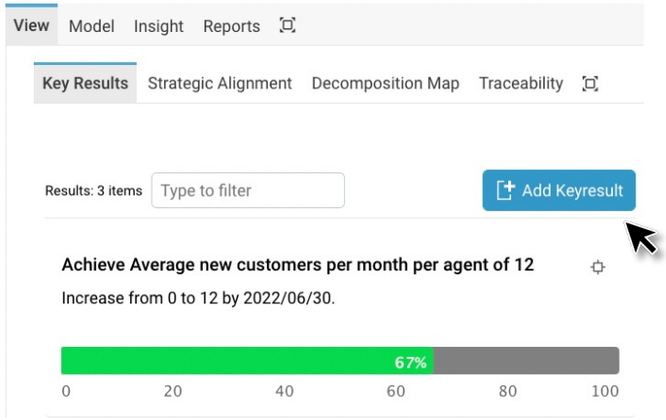
Click on 'Plan Objectives':



Create an Objective:



Add a Key Result:



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What is the minimum data set needed for the Key Result to display?

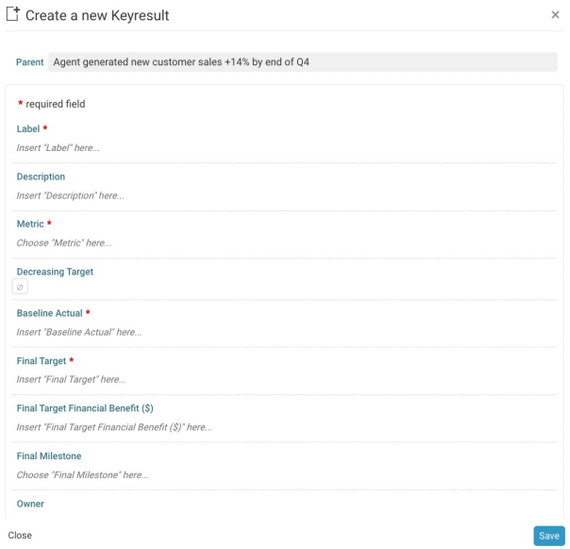
- Metric (For information on how to create a metric, see guide.
- Final target value
- Baseline actual value
- Decreasing target checkbox, if applicable (used as a target for Cost Minimization)
- Final Milestone

These attributes are added when creating a Key Result. These attributes are available for update on the Detail section of the Key Result.

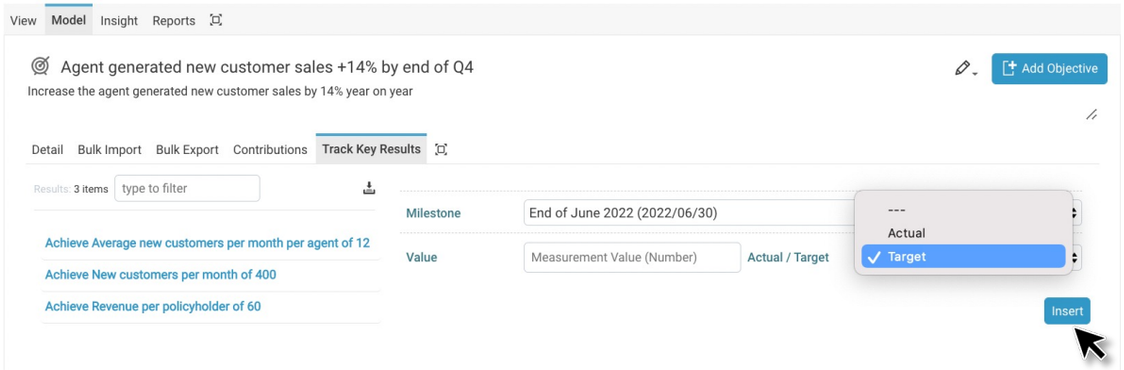
How do I set the target and actual values for key results?

1. On the Objectives page, click the **'Model'** tab.
2. Click on the ***'Track Key Results'*** tab.
3. Select a related milestone, which you plan to achieve the target value.
4. Enter a numeric value and select **'actual'** or **'target'**.
5. Click the ***'Insert'*** button to add the ***'actual'*** or ***'target'*** value associated to the Key Result.
6. The rows will add to the table beneath the ***'Insert'*** button.

Create Key Result with required fields:



Enter target & actual values for each Milestone and click 'Insert' button:



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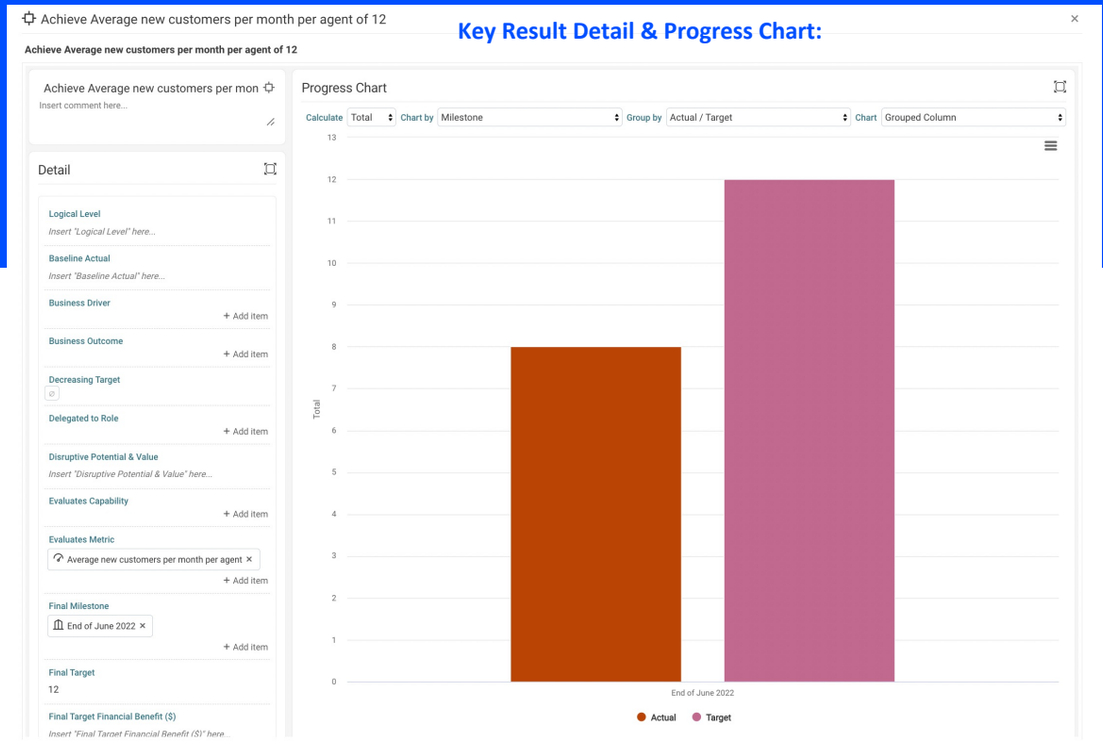
Is there a way to compare target to actual values?

Yes. Click on the inspector icon next to the Key Result. A bar graph will display with a bar for actual and target values for each milestone.

Click on Inspector Icon next to Key Result:

Key Result Detail & Progress Chart:



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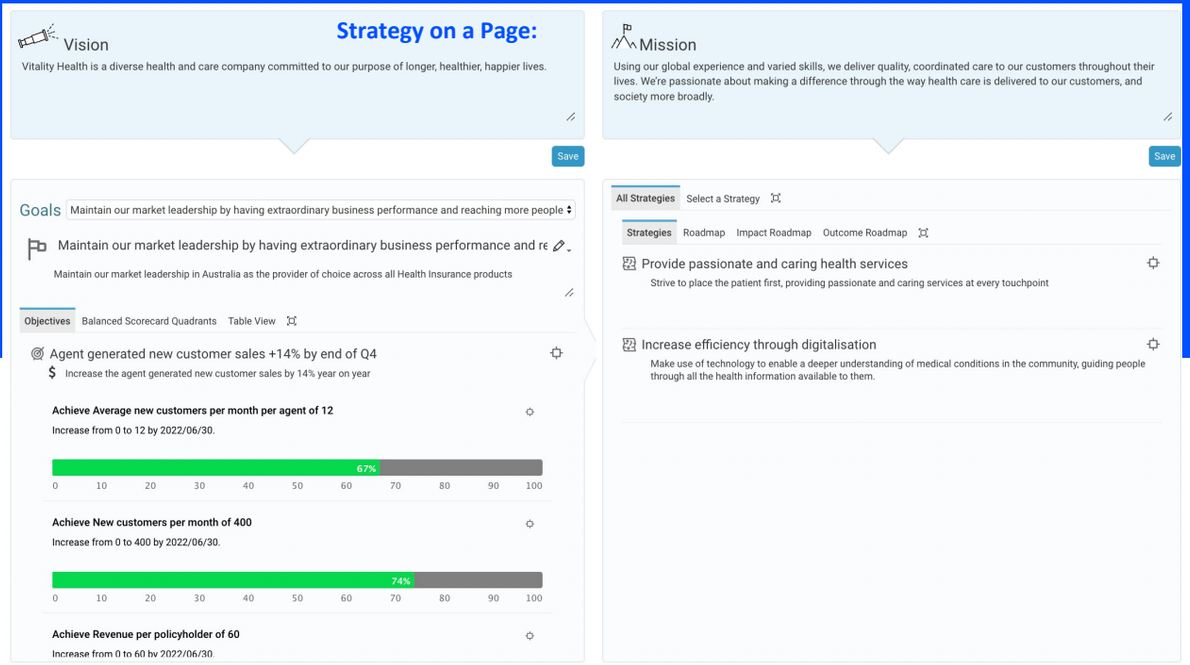
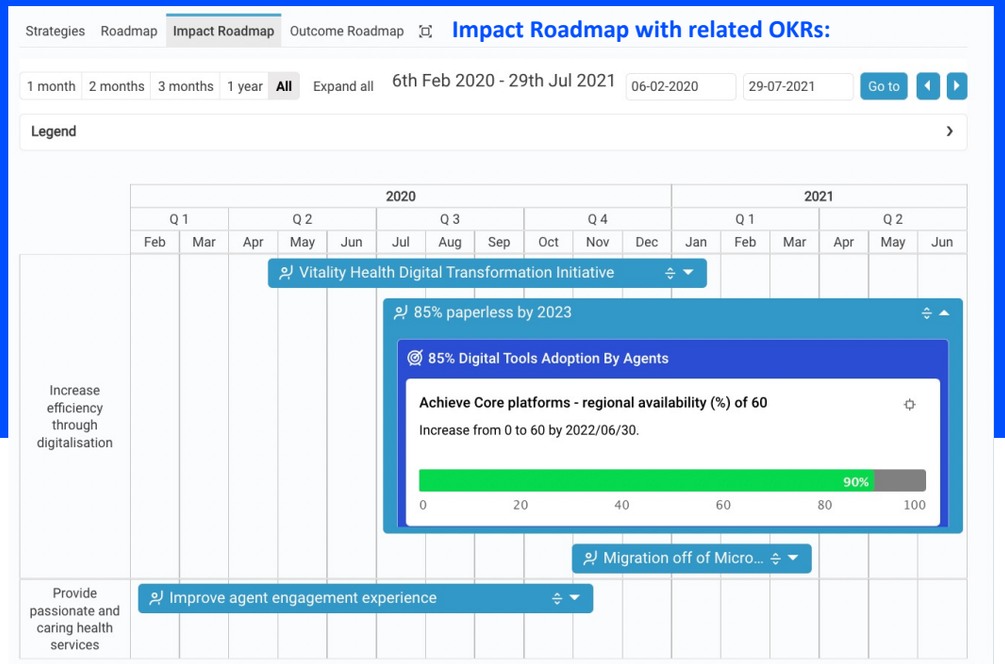
Which views in Jalapeno can I see OKRs?

- **Objectives associated to Goals on Strategy on a Page**
- **Associated to an Initiative on the Impact Roadmap. See Guide.**
- **Inspect an Objective by clicking on the inspector icon next to the Objective.**
- **Inspect a Key Results by clicking on the inspector icon next to the Key Result**
- **On the Console, click on Org Unit. The next screen contains OKRs.**

Strategy on a Page:



Impact Roadmap with related OKRs: