



# Choosing an OKR Solution

5 must-have capabilities for planning, tracking, and measuring Objectives and Key Results successfully

## Introduction

Pioneered by Intel in the 1970s, Objectives and Key Results (OKRs) were designed to help people set challenging, ambitious goals with measurable results.

Since then, OKRs have become the go-to goal management framework at companies like Google, ING Bank, and Walmart, helping them drive significant growth and innovation – such as Chrome and Android at Google – across the globe.

As more companies are making the project to product shift and scaling Agile throughout their organization, OKRs are playing an essential role in the success of a company's transformation journey.

**In our view, the power of OKRs is its focus on driving outcomes geared towards creating customer value.**

To operationalize that power, you need an OKR solution that will enable you to plan, track progress, and measure success alongside the execution of work, ensuring all parts of the enterprise can align to goals without stepping outside of your value delivery platform.



## What you'll get from this guide

In this guide, you'll discover the five must-have capabilities you need in an OKR solution. You'll also learn how Planview's OKR solution gives you a clear line of sight into all connected work – from the Portfolio to the teams – enabling you to foster an outcome-based approach to strategy and delivery, all within a single solution.

**Read on to find out.**



# What to look for in an OKR solution

## 5 MUST-HAVE CAPABILITIES

OKR software is a category of tools that has emerged as the framework has grown in popularity. If you're looking to choose an OKR solution to use within your organization, here are five criteria you should consider.



## 1 Enables visibility of OKRs

The primary reason for using any OKR solution is to have greater visibility into OKRs. What does this mean exactly? Visibility, for the modern knowledge worker, means not having to dig information out of various tools: **A centralized place to create, visualize, store, and track OKRs.**

Between email, Slack, execution tools, and documentation tools, your teams already have enough tools to check on a daily basis in order to stay in the know. Adding a separate OKR software to the stack, if it's useful, might be worth the effort, but if it's just another place where information goes to die, it might not be.

The ideal solution will either work well alongside the tools your teams already use, or will be a feature included in your team's primary execution tools. For example, if your teams already uses Kanban boards to plan, track, and measure their work, then the ideal solution would be able to integrate with their Kanban boards.

## 2 Supports bi-directional goal setting

Agile thinker Stephen Bungay is quoted as saying, *“The more alignment you have, the more autonomy you can grant.”* Alignment from the top-down, as well as across the organization, is one of the primary benefits of the OKRs framework.

This type of alignment occurs when goal setting is bi-directional: When leaders can set goals for teams, and teams can share their goals with leaders. **Bi-directional goal setting fosters autonomy across the business.** Leaders can show teams where to go, but let them determine how to get there by allowing them to best balance short-term objectives with long-term strategy.

The ideal OKR solution will allow for bi-directional goal setting.



### 3 Provides a clear line of sight into all connected work

Aligning goals during a planning session is one thing, but staying aligned during a PI is another thing entirely. Without the right tool to manage the entire objective hierarchy, it can feel nearly impossible to maintain alignment between long-term portfolio objectives, mid-term program objectives, and short-term team objectives.

A good OKR solution will show how objectives are connected across the objective hierarchy to provide a line of sight across, up and down the organization. **An ideal solution will also show how the work items related to each objective are connected**, so that teams and their leaders have a clear line of sight into all connected work.

## 4 Shows shared objectives and interdependencies

Bi-directional visibility (top-down and bottom-up) is important for aligning teams with long-term strategic goals. But horizontal synchronization is just as important, especially for teams that work closely together, share resources, or who have shared objectives.

When setting OKRs, teams are often advised to focus on goals that they can control alone. Lean-Agile teams are structured to be cross-functional and therefore self-sufficient, and typically aim to set OKRs that they can achieve without external dependencies (where possible).

While limiting interdependencies is an important aspect of scaling, there's a fine line between limiting dependencies and creating silos. In every organization, **there is 'white space' between teams that needs to be addressed in order to achieve true organizational agility.**

Enabling visibility into shared objectives and interdependencies is how companies can manage that white space. The ideal OKR solution will allow teams to see what other teams are doing, especially those that require vertical and horizontal synchronization.



## 5 Is easy to use

Finally, like with any software, it's critical that any tool you introduce to your teams is not only useful, but easy to use. The right OKR solution will make it **easy to create, connect, score, and modify Objectives and Key Results**. Introducing a new tool specifically for OKRs can work well for your organization, as long as it is user-friendly and plays nicely with your existing tech stack.

## Why Planview

Whether you want to adopt the OKR framework or expand your use of it, the OKR capabilities in the Planview® platform can help maintain clarity and focus on what needs to be achieved – and get it done.



### **Develop outcome-driven planning by defining objectives**

Traditional work planning methods tend to incentivize the creation of outputs instead of the achievement of outcomes. Leveraging Objectives and Key Results can help to facilitate a shift toward outcome-driven planning, by helping to connect the dots between long-term strategy and short-term goals.

The OKRs framework encourages teams to think critically about not only what they hope to achieve, but how their work contributes to larger program and organizational strategy. Fostering a culture that leverages OKRs, and investing in software that keeps them top of mind, will help keep the organization aligned from top to bottom and side to side.



### **Define and track success with leading and lagging key results**

Traditional measures of success (KPIs) are often lagging indicators. They tend to encourage a focus on outputs (a quantified measure of what happened), rather than outcomes (the desired result). Measuring both OKRs and KPIs can provide a more complete picture of your organization's progress, while helping to guide decision-making sooner than by measuring KPIs alone.



### **Drive work based on the desired outcomes**

If your teams define Objectives and Key Results in one tool, but manage and execute their work in another, it can be difficult to maintain focus on the desired outcomes.

By keeping Objectives and Key Results front and center, Planview LeanKit's OKR capabilities help organizations prioritize work and achieve results that reflect the business and customer success criteria they seek to achieve.



### **Align strategic priorities from the enterprise to the team**

Maintaining alignment throughout the objective hierarchy is critical to achieving strategic goals. Planview LeanKit allows leaders to guide the direction of their teams according to strategic priorities, while letting the teams determine how to get there.

Want to see Planview's OKR capabilities in action?

[WATCH THE ON-DEMAND DEMO NOW](#)

# Take the Next Step



## OKRs in the Planview Platform

The Objectives and Key Results (OKRs) capabilities within Planview LeanKit™, which are part of the Planview Agile Program Management solution, can help your organization foster an outcome-based approach to strategy and delivery and establish clear line of sight into connected work, from the Portfolio to the teams, all within a single solution.

To learn more about why we've added OKR capabilities to the Planview platform, read this blog post:

[blog.planview.com/talking-okrs-with-planviews-cpo-patrick-tickle/](https://blog.planview.com/talking-okrs-with-planviews-cpo-patrick-tickle/)



## Planview's Agile Project Management Solution

Whether you want to coordinate and facilitate Program Increment (PI) or Quarterly planning, launch and manage teams of teams or Agile Release Trains (ARTs), and/or connect and consolidate disparate Agile teams, Planview's Agile Program Management solution brings everything together inside highly configurable program boards.

Give your Agile teams a way to visualize, plan, coordinate, and deliver your organization's biggest initiatives quickly, effectively, and with clear insight into the value delivered. To learn more about the Planview solution for Agile Program Management, watch a product demo:

[Planview.info/APM-demo-on-demand](https://planview.info/APM-demo-on-demand)

