



Helping others maximize their potential through OKRs

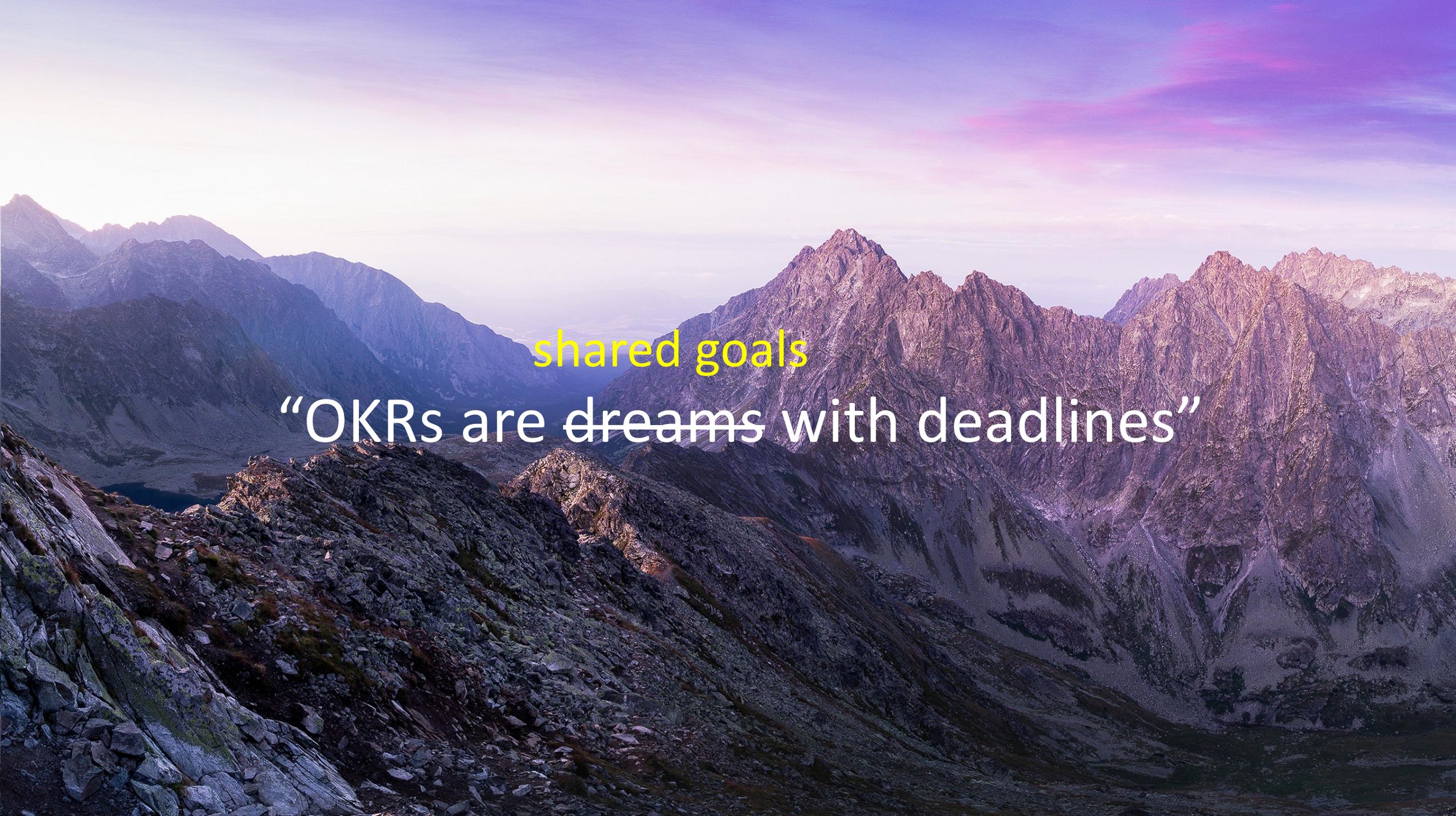
# Demystifying OKR Coaching

Mark Spitzer



A wide-angle photograph of a rugged mountain range under a dramatic sky. The sky transitions from a pale yellow near the horizon to deep purples and blues at the top. The mountains are dark and jagged, with some peaks catching the low light. In the foreground, a rocky, scree-covered slope leads down towards a valley. A small, dark lake is visible in the distance on the left side. The overall mood is serene and inspiring.

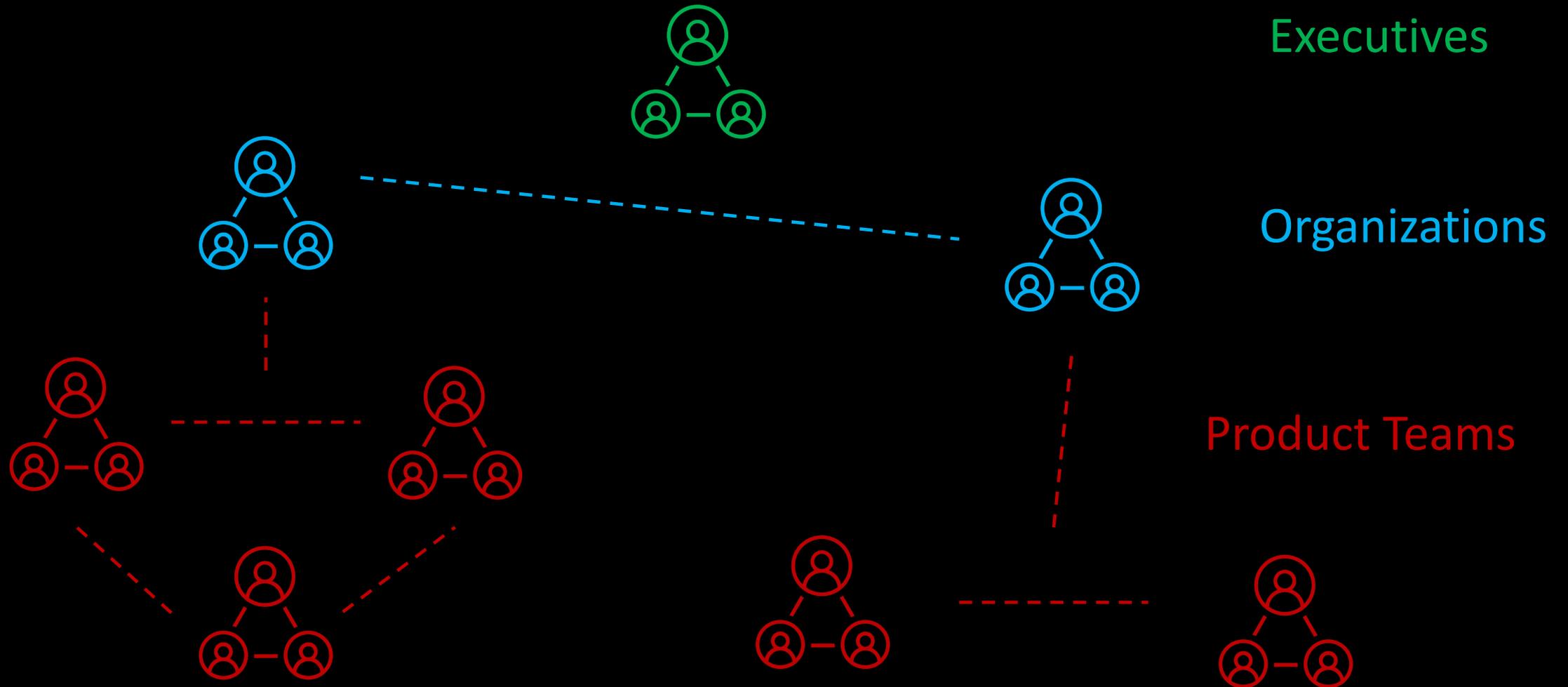
“OKRs are dreams with deadlines”



shared goals

“OKRs are ~~dreams~~ with deadlines”

# OKR Coaching Starts with Systems

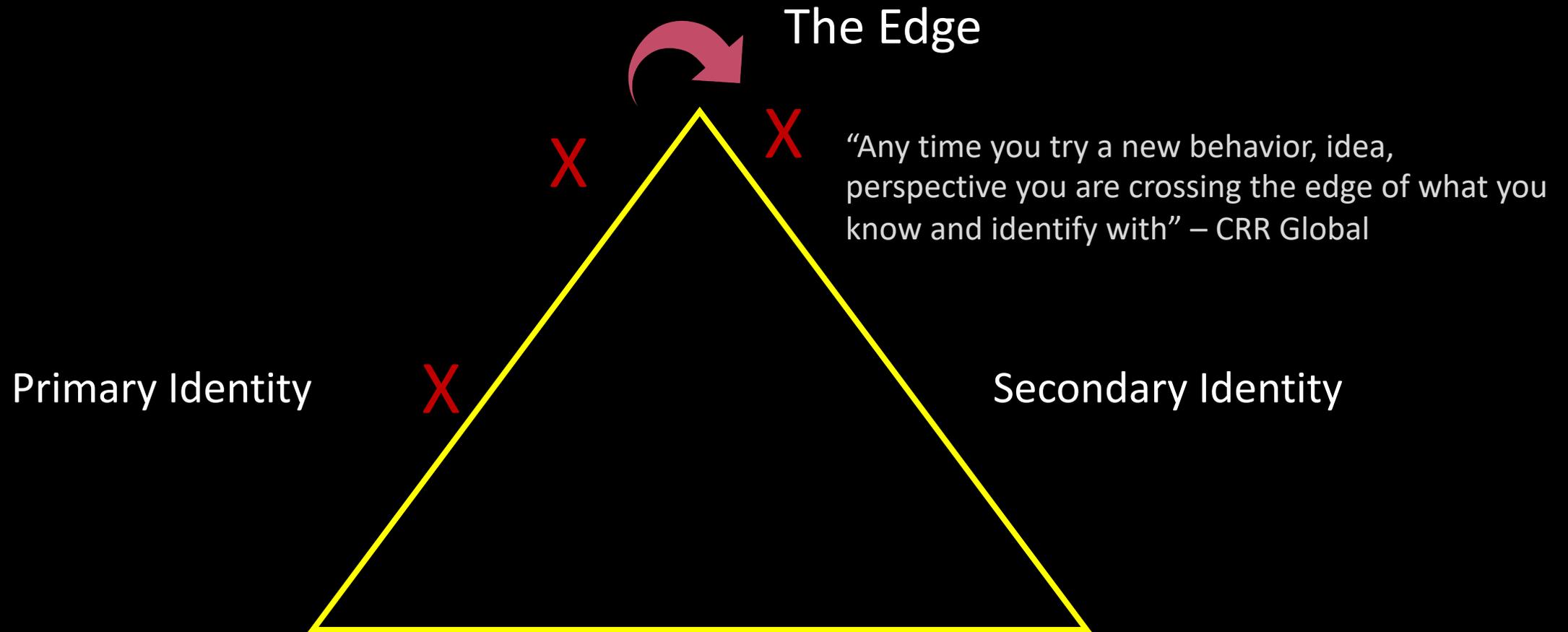


# What is a System?

- System is a group of people with a common purpose or identity
- Each voice is a voice of the system
- The system is the client
- The client is creative, resourceful, and whole

Warning: systems contain real *humans and relationships*

# Watch Out for Edges



# Coaching

- Future Focused
- Increase Awareness
- Support and Challenge
- Be Curious
- Acknowledge Progress
- Offer Power to Choose



# OKR Coaching Competencies

1. Discover the motivation for change
2. Explore the systemic impact
3. Support awareness and shift towards outcomes
4. Identify measures of success
5. Design methods of accountability
6. Find opportunities for frequent learning and decisions
7. Evaluate the OKR system health and improve

A person with a ponytail, wearing a teal long-sleeved shirt, black leggings, and climbing shoes, is climbing a large, textured rock face. The rock is light brown and has some yellow chalk marks. The background shows a desert landscape with snow patches on the ground and distant mountains under a clear blue sky.

# Discover the Motivation for Change

What's in it for you?

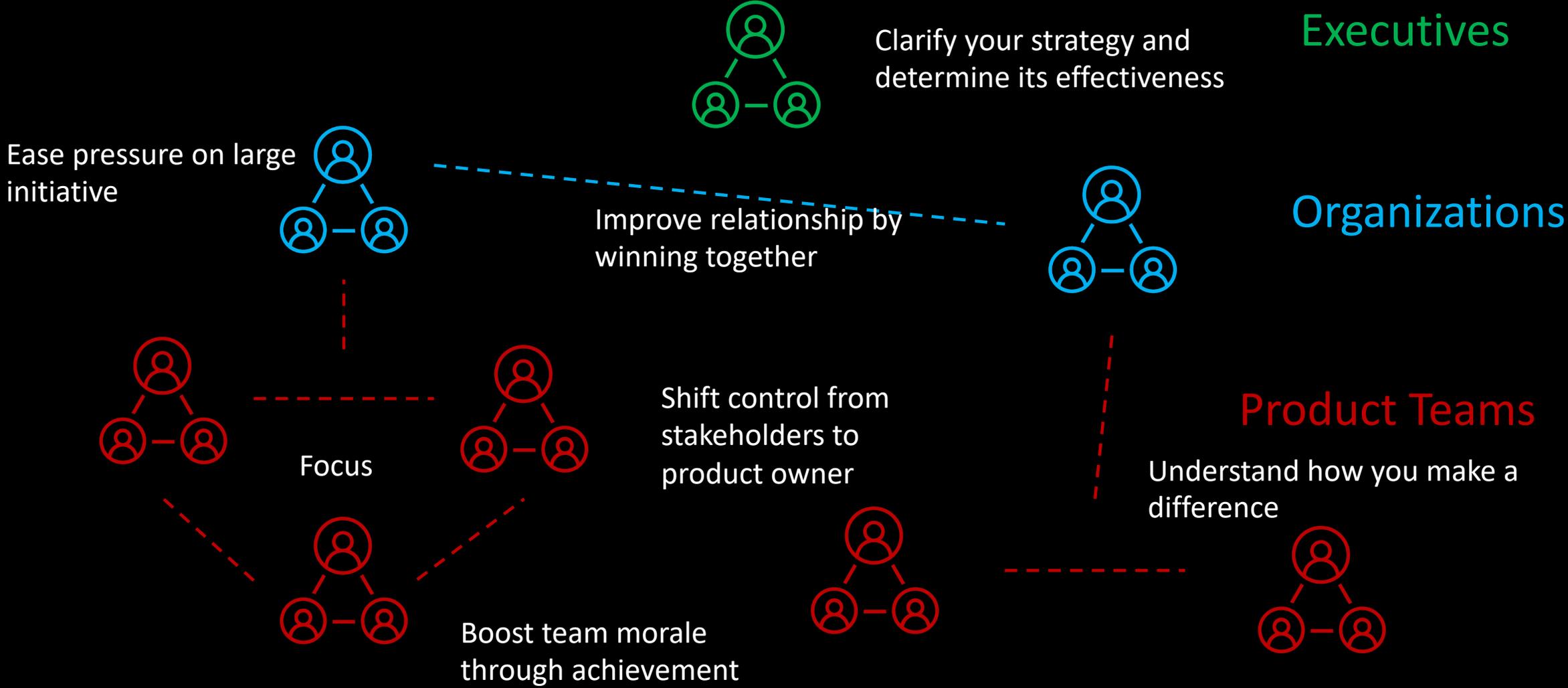


What benefits are you  
seeking from OKRs?

What's in it for you?



# Motivations Vary Based on Context

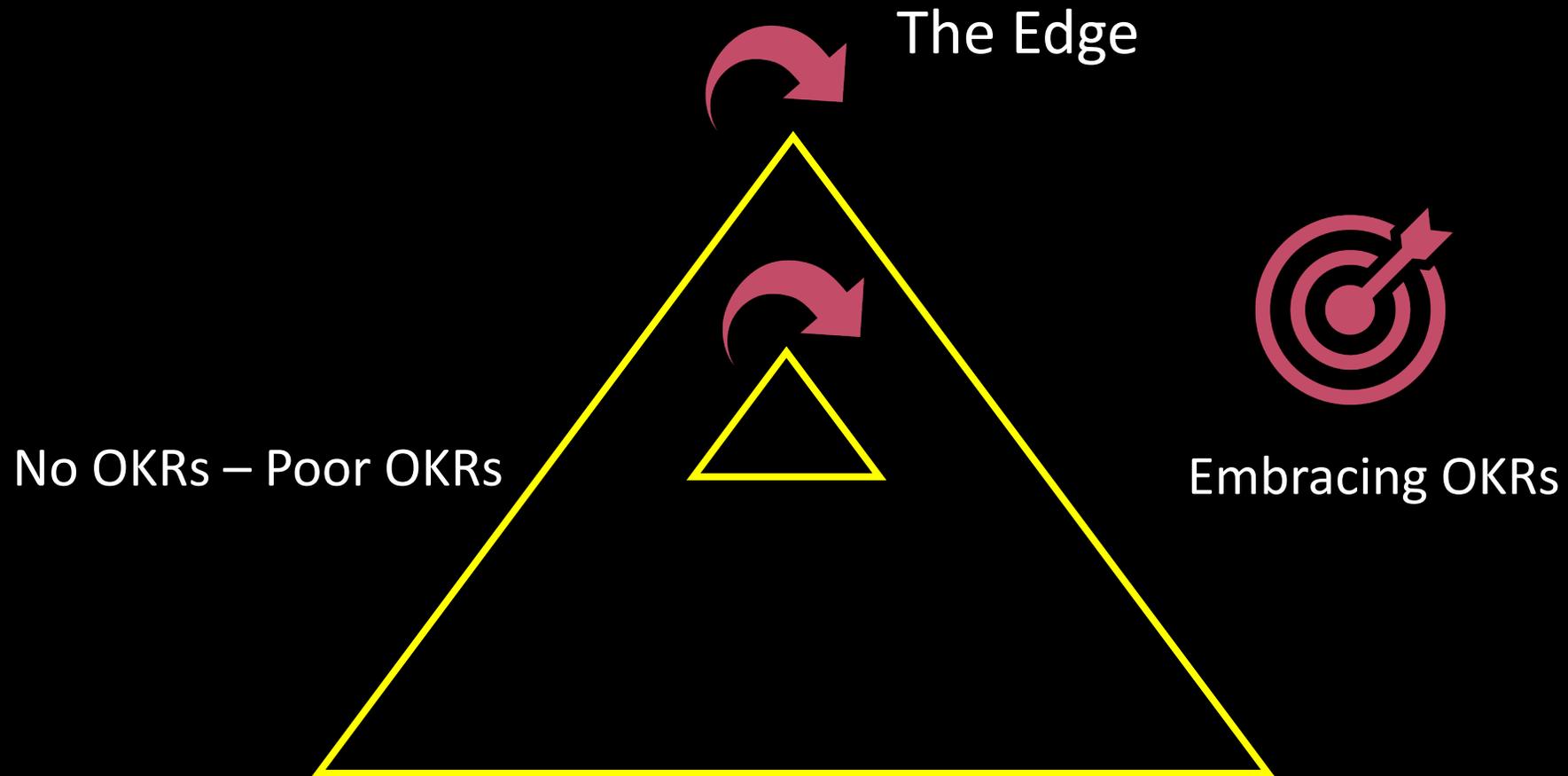


# Motivation May Be Discovered

It may not be clear initially or change from what was originally stated



# Once One Person Cross the Edge...



A photograph of two hikers standing on a rocky mountain peak. The hiker on the right is wearing a red jacket and blue jeans, with a large black backpack. The hiker on the left is wearing a grey jacket and dark pants, also with a backpack. Both hikers have their right arms raised in a celebratory gesture. The background shows a vast mountain range under a blue sky with scattered white clouds.

# Coaching Quality OKRs

What does good look like? How do you get there?

# OKR by Example

Starts with a  
verb

Short, clear,  
memorable



Make Digital Payments More Convenient

Quantifiable,  
evidence, outcome-  
oriented



- 80% Reduction in Time to Complete Payment
- Double the Number of Auto-Pay Enrollments

# Evaluating the Objective



Limiting

- Compound (list of things)
- Includes What or How
- Quantitative
- Out of Bounds



Helpful

- Focused
- Concise
- Representative
- Qualitative



Awesome!

- Helpful+
- Inspirational
- Memorable



## Strategies to Cross Edges

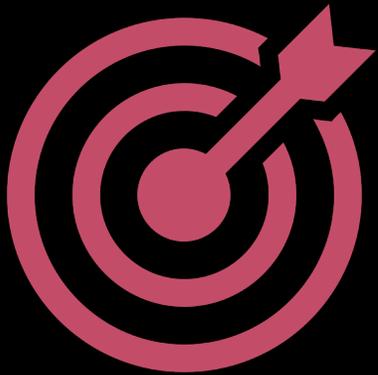
1. Kiss them over the edge (champion)
2. Kick them over the edge (challenge)
3. Prohibit the secondary (deny)



Reduce mainframe usage cost, save user rework time, improve claim processing speed and reduce failures by **modernizing claim processing infrastructure**.

Sounds like a great opportunity to improve the user experience.  
How exciting!

Look at all the benefits.  
Which is most  
important?



1 Reduce mainframe usage cost, save user rework time, improve claim processing speed and reduce failures by modernizing claim processing infrastructure. 2 3 4

How might you  
summarize this?

# Evaluating the Objective



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# After Coaching



Modernize the claim processing infrastructure



- Reduce Worklist Rework Time by 50%
- Reduce Number of Claim Rejection by 50%
- Reduce Mainframe Usage by 50%

# Evaluating the Objective



Limiting

- Compound (list of things)
- Includes What or How
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Awesome!

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# Evaluating Key Results



Limiting

- Qualitative
- Compound
- **Output**
- Lagging (e.g., binary)
- Hard to Attribute
- Unmeasurable



Helpful

- Quantitative
- Atomic
- Outcome Focused
- Impactful
- Attributable
- Measurable Infrequently

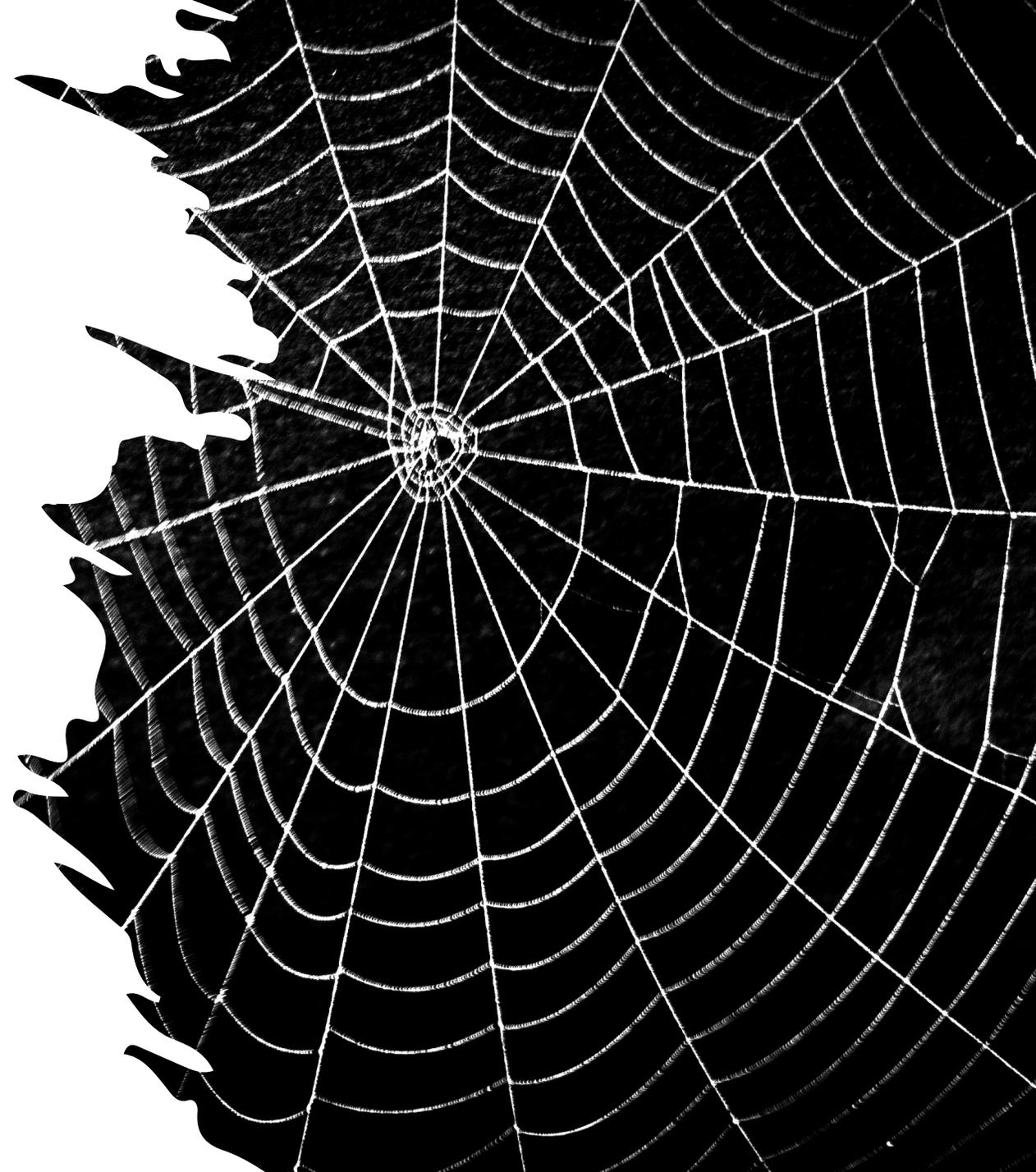


Awesome!

- Helpful+
- Leading (frequent)
- Includes Baseline
- Ambitious

**“The build trap is when organizations become stuck measuring their success by outputs rather than outcomes. It's when they focus more on shipping and developing features rather than on the actual value those things produce.”**

-Melissa Perri



# OKRs Are Not Your Backlog



Make digital payments more convenient

OKR (Why)



80% reduction in time to complete payment

Double the # of accounts enrolled in Auto Pay



Add PayPal support



...



Save and Remember Payment Info



Offer discount for Auto Pay users



Prompt for Auto Pay during purchase

Backlog Items (What)

# Output OKR



## Integrate Connect Broadcast API into Program Offers



- Broadcast integration enabled in program view
- Enable Feedback API integration for tracking customer/dealer actions
- Implement metrics for tracking the success of program insights/leads

# Start Where You Are



- What problems are you solving?
- How would you know this work was successful?
- What would be a "big win"?

It is quite common that we have ongoing initiatives and commitments that will not change.

Now

Next

Later

Outcomes

Help people determine which marketing promotions are most effective



Features

Implement metrics for tracking the success of program insights/leads



Broadcast integration enabled in program view

Enable Feedback API integration for tracking customer/dealer actions

# Outcome Version



Integrate Connect Broadcast API into Program Offers



- Increase actionable insights by 20%
- Reduce time to make promotion adjustments in half

# Evaluating Key Results



Limiting

- Qualitative
- Compound
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Helpful

- Quantitative
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Awesome!

- Helpful+
- Leading (frequent)
- Includes Baseline
- **Ambitious**

# How Ambitious?





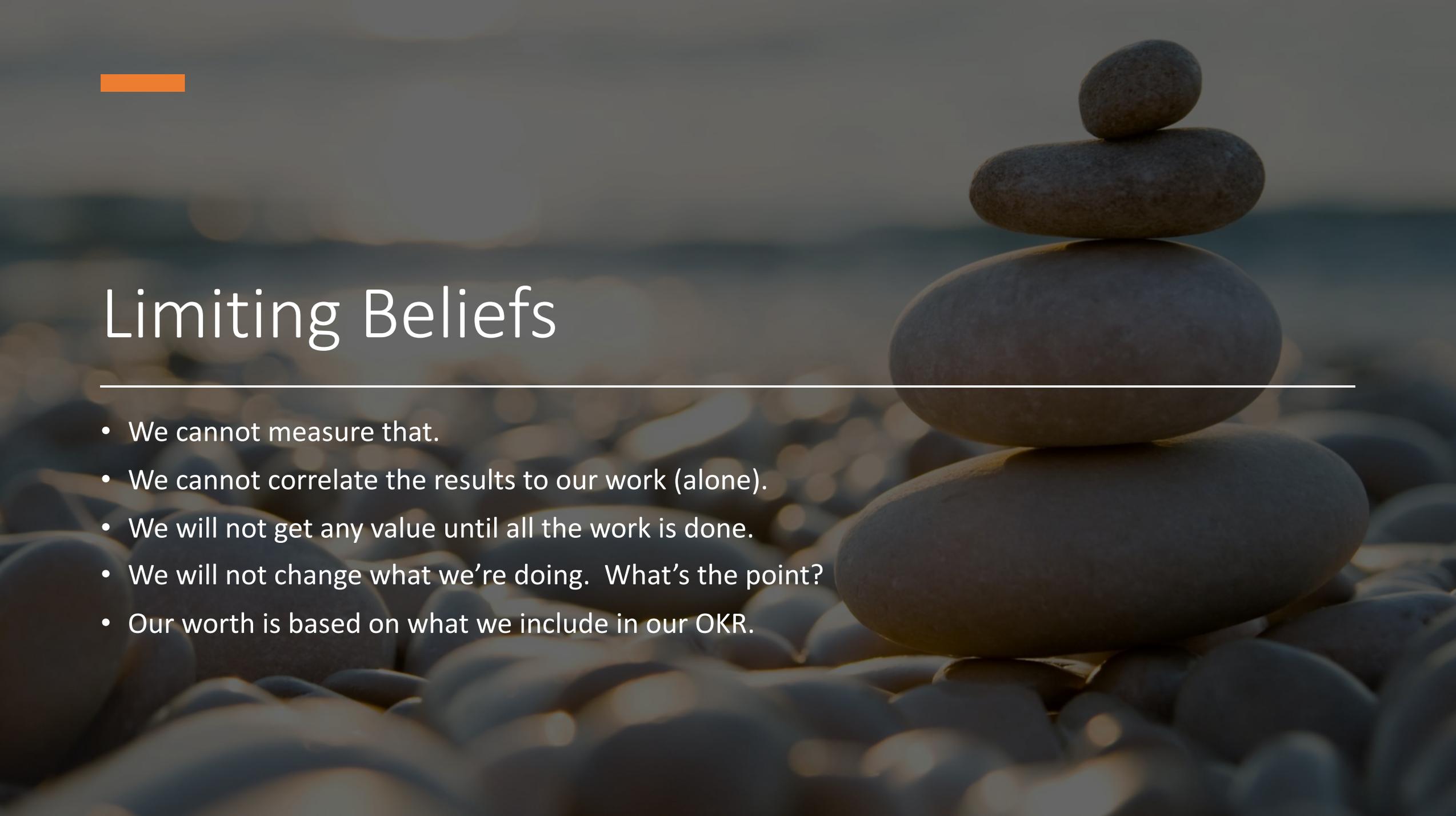
# Other Challenges

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# What's Most Challenging about OKRs?



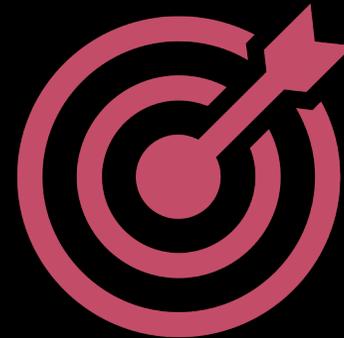
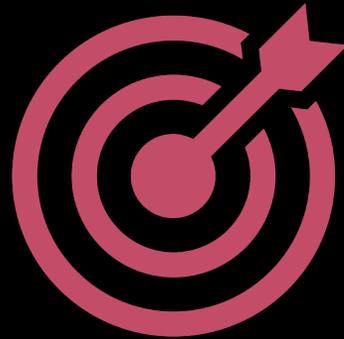
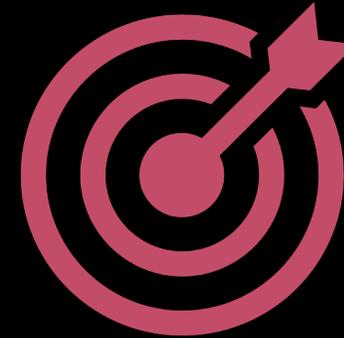
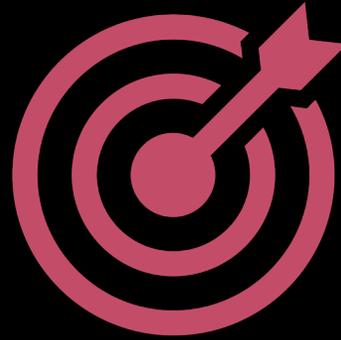
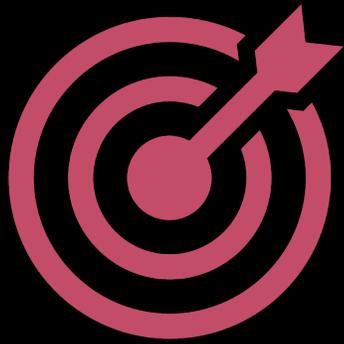


# Limiting Beliefs

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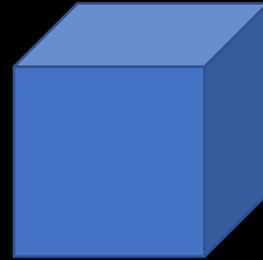
- We cannot measure that.
- We cannot correlate the results to our work (alone).
- We will not get any value until all the work is done.
- We will not change what we're doing. What's the point?
- Our worth is based on what we include in our OKR.

# Challenge #1 – Too Many Objectives



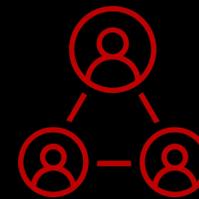
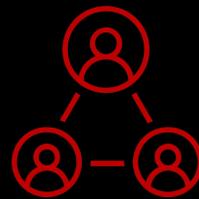
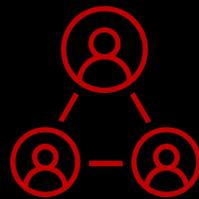
# How Many OKRs?

One shared by all teams?



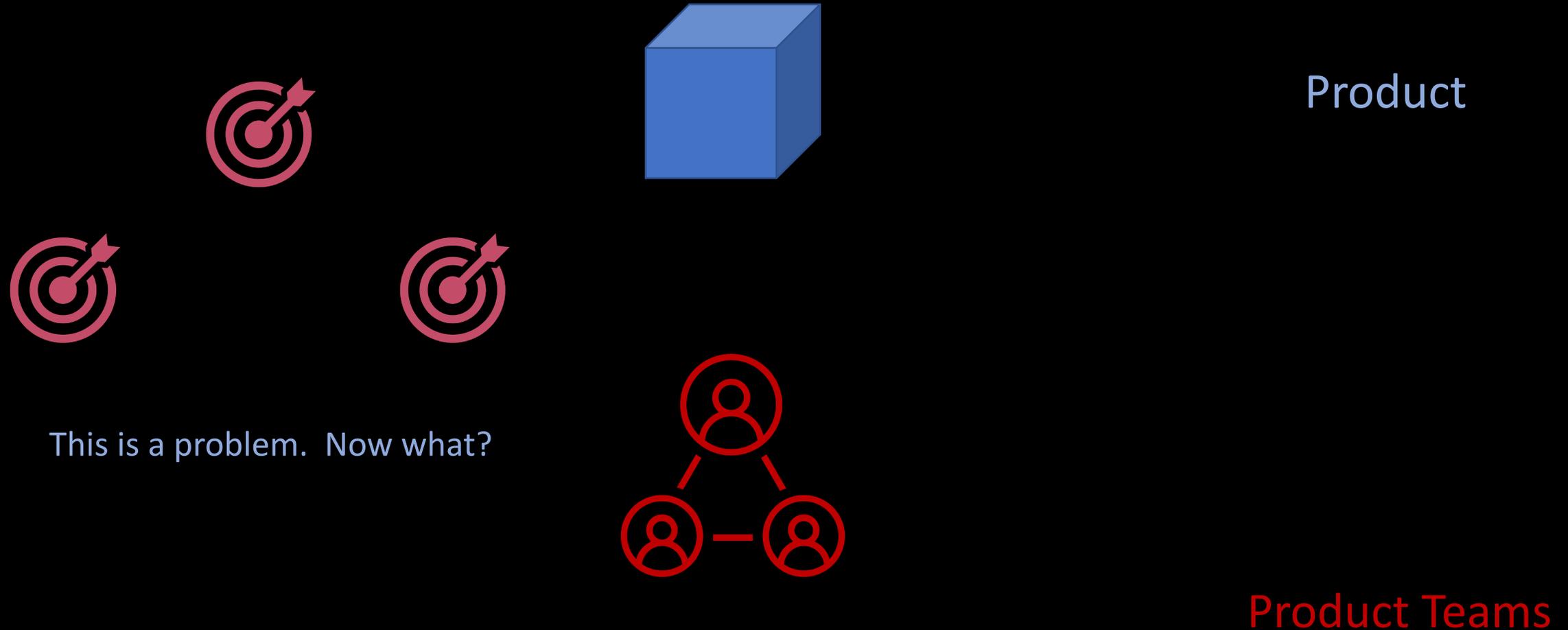
Product

One for each team?



Product Teams

# Not More Than One Per Team



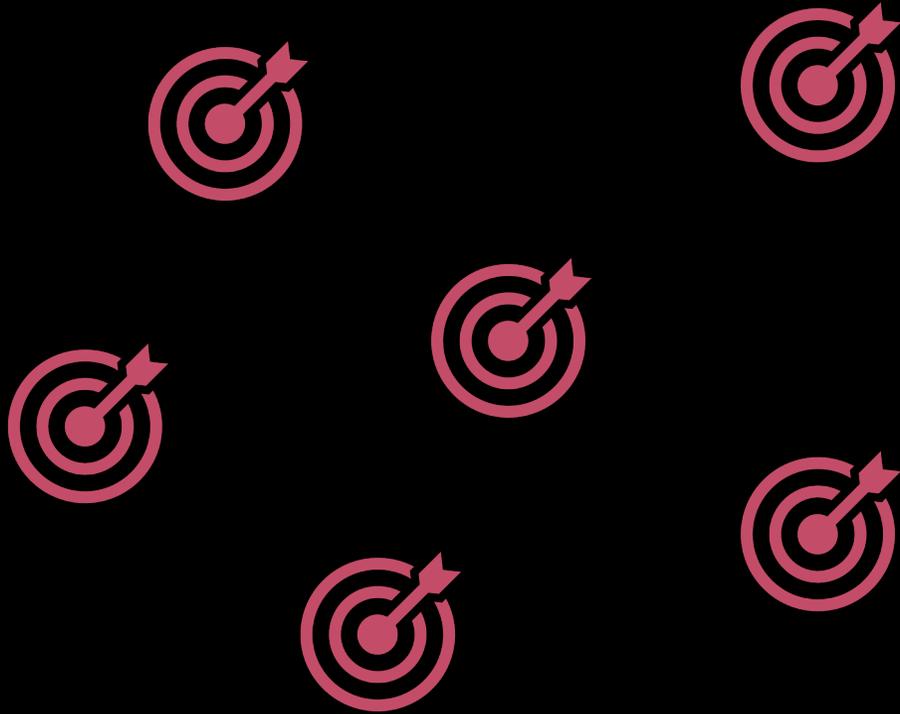


# What's Driving Multiple?

- Do they think each piece of work needs an OKR? (worth or accounting)
- Do they not have focus and are spread across a few different things? (no strategy; disjointed)
- Are they viewing things in a way that misses the commonality between them?
- Maybe it's for a large organization and over one year.

Ask neutral questions. Hold your ideas lightly.

# Options for Reducing Objectives



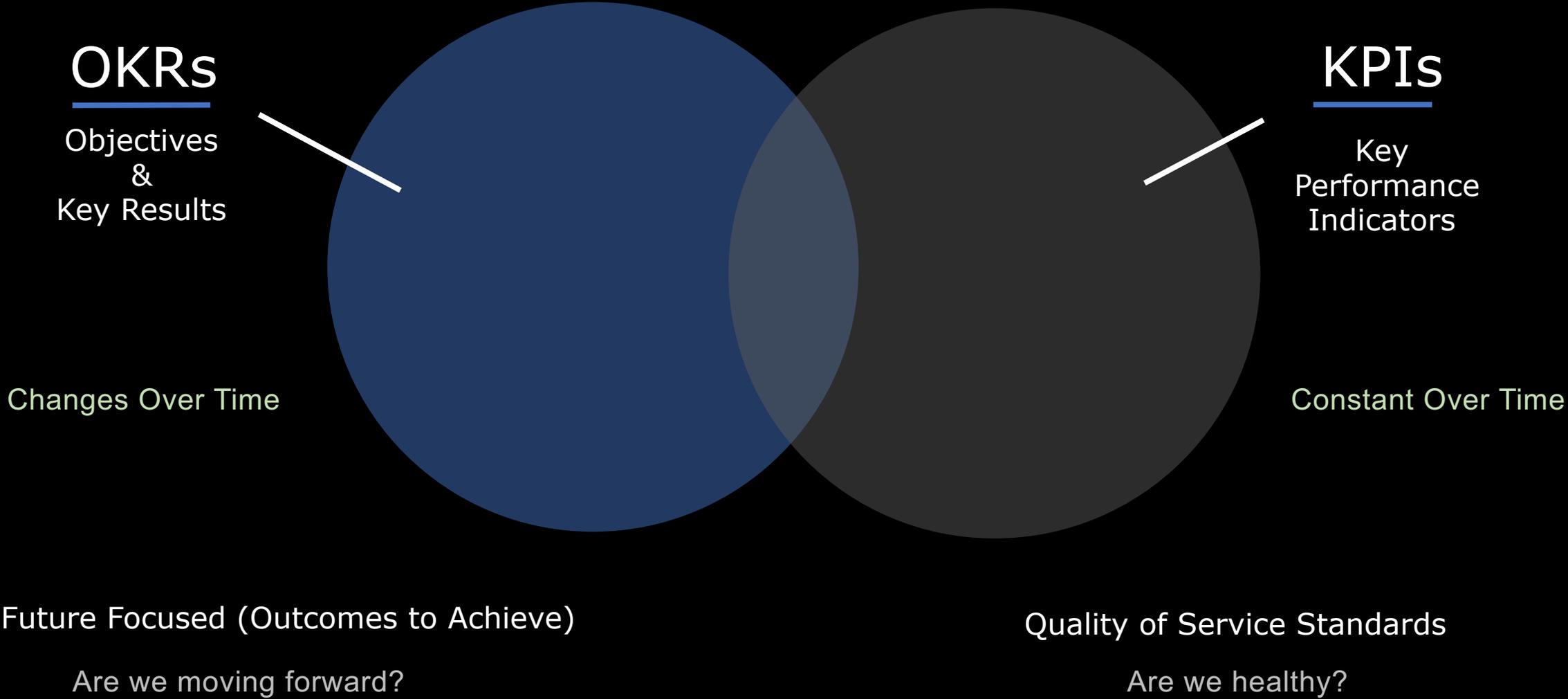
**Scarcity** - If you knew you could only accomplish one, which would it be?

**Perspective** – Which of these would your \_\_\_\_\_ say is most important?

**Reframe** – How are these related?

**Rank** – How would you order these by importance?

# Challenge #2 – Confusing OKRs with KPIs



# Consider Magnitude

## Monitor Health through KPIs



Only big deficiencies in the health of KPIs may warrant enough attention and effort to become an OKR

It's common to confuse OKRs with KPIs.



# Sustain and Grow

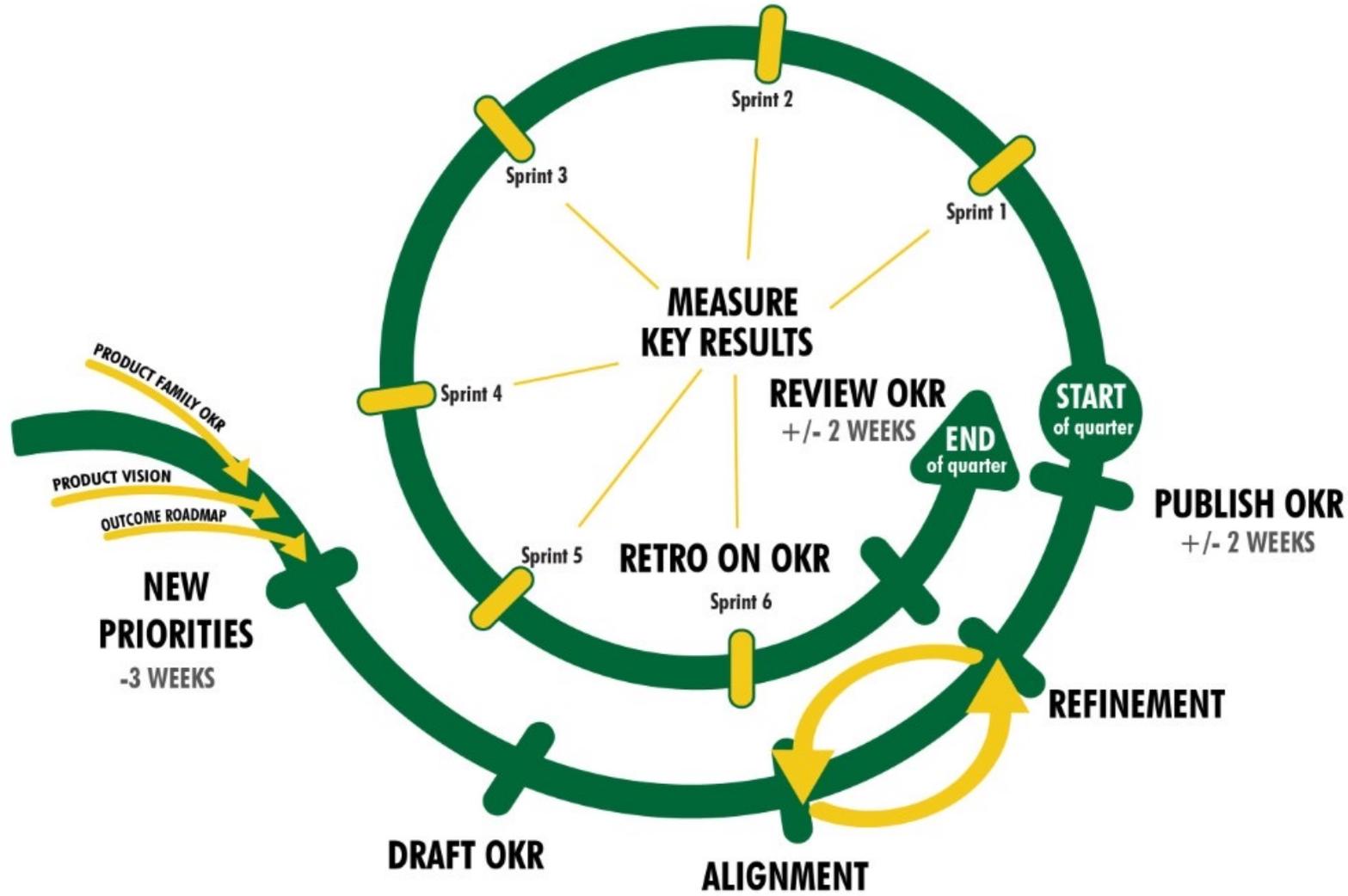
Develop Good Habits and Overcome  
Challenges



What tooling  
do you use to  
support OKRs?



# OKR CYCLE



## OKR LEVELS



## OKR CADENCES



# Integrate OKRs with Planning



Make digital payments more convenient

OKR (Why)



80% reduction in time to complete payment

Double the # of accounts enrolled in Auto Pay



Add PayPal support



...



Save and Remember Payment Info



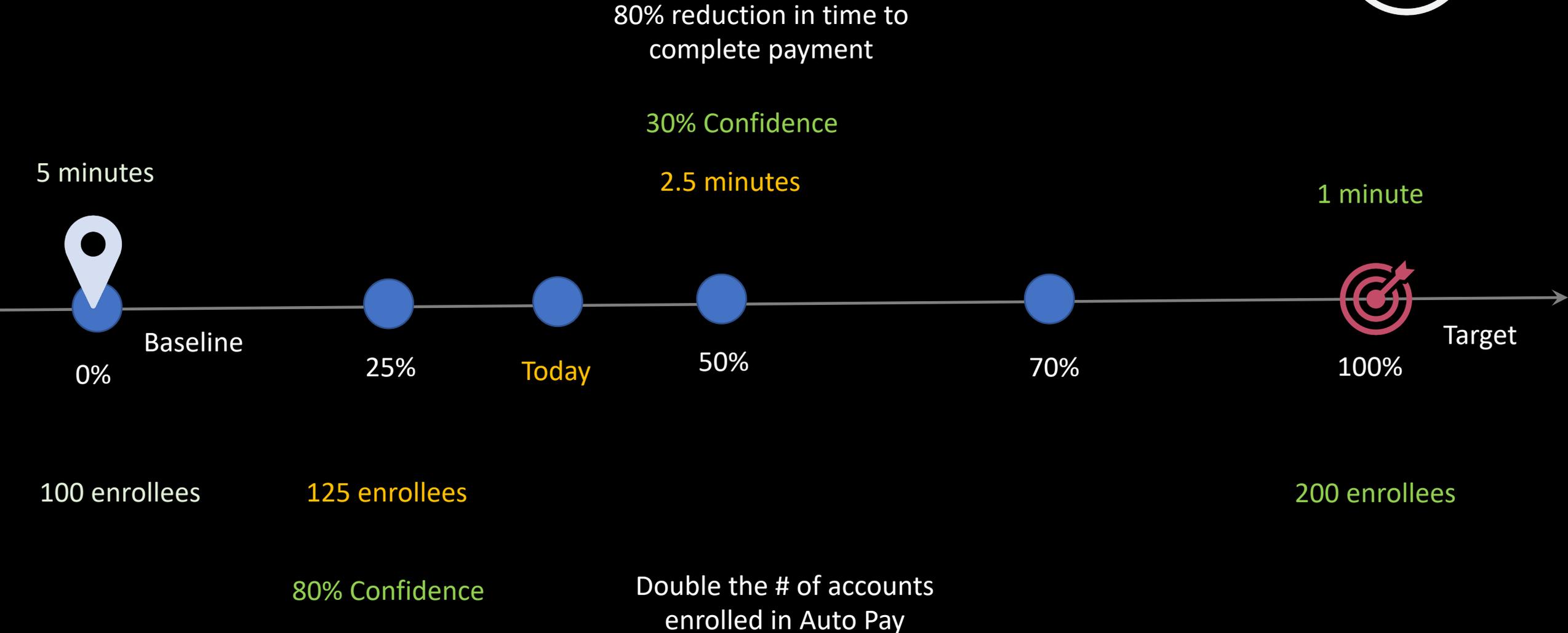
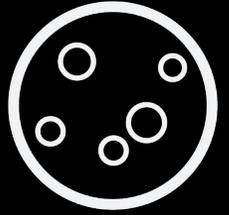
Offer discount for Auto Pay users



Prompt for Auto Pay during purchase

Backlog Items (What)

# Measure and Reflect Regularly



# Making Decisions Based on Data



Make digital payments more convenient

OKR (Why)



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Save and Remember Payment Info



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Backlog Items (What)

# Evaluating Progress



Crawl

You have OKRs, but they are not used to affect how you work.



Walk

Your OKRs are slightly impactful. There is a modest affect on the way you work.



Run

Your have meaningful OKRs. They are integrated into the team and used intermittently.



Fly

Your OKRs are ambitious and meaningful. Work is centered around achieving them.

# Progress May Vary



Crawl



Walk



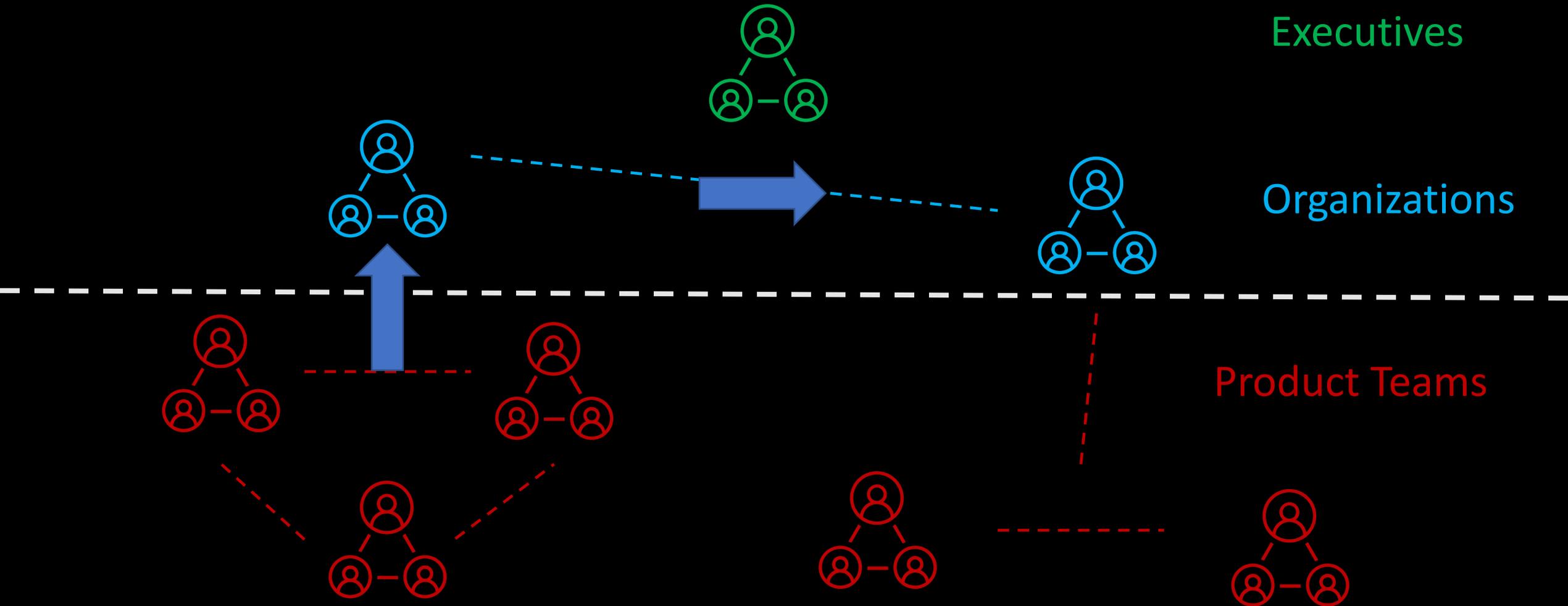
Run



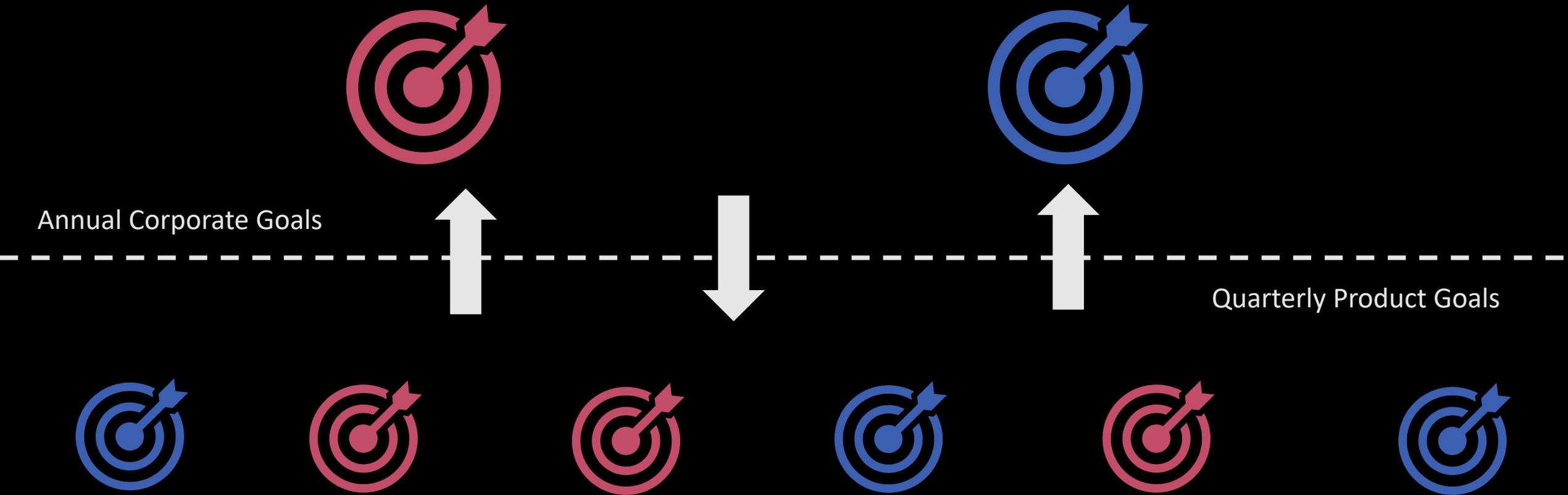
Fly

<b>Ambition</b>	Key results offer credit for goals the team is sure to hit.	Key results are slight stretch. Team confident they can achieve.	Stakeholders keenly interested in target results. Team has moderate confidence.	Key results support significant growth. Team 50% confident.
<b>Planning</b>	OKRs retrofit from team's existing plans and work.	Product backlogs are influenced by the OKRs.	OKRs are used to generate product backlogs	Product backlogs are updated each sprint based on progress on key results.
<b>Focus</b>	One or more OKRs exist and are understood by the team.	Team looks at OKRs at least once before they are due.	OKRs reviewed monthly to check for progress.	Sprint goals defined to support OKRs.
<b>Accountability</b>	OKRs shared publicly after creation. Team unclear of connection to work.	Team sees how they can influence key results. Results shared publicly at the end.	Team shows progress against OKRs half of the sprints.	Team shows progress against OKRs each sprint.
<b>Learning</b>	Set it and forget it. No learning.	Review quarterly and incorporate learning next OKR.	Reflects and acts on learning monthly.	Learning from results to make decisions each sprint.

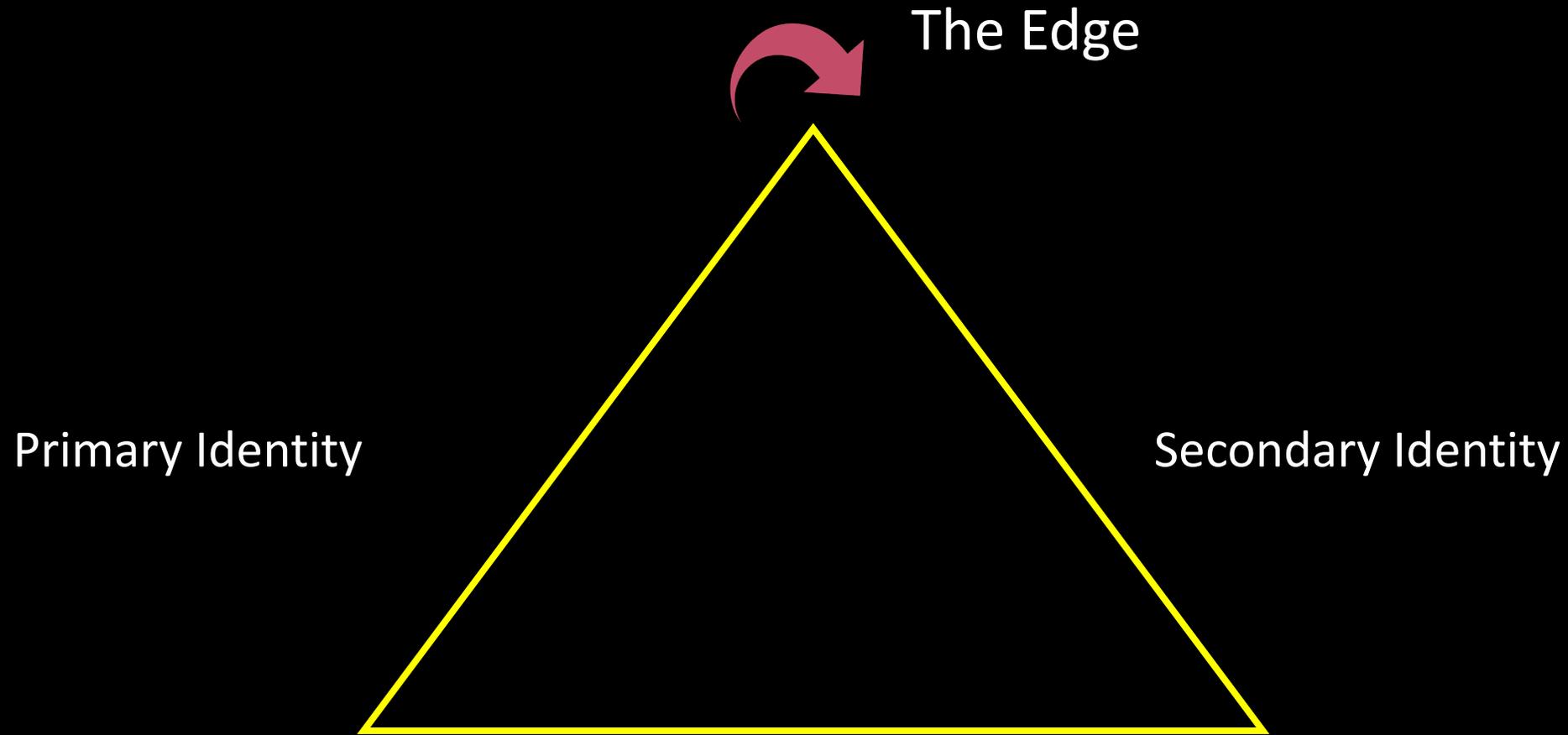
# Expand Within and Across Systems



# Bi-Directional Alignment



# Expanding Uncovers More Edges



# OKRs are a Team Game

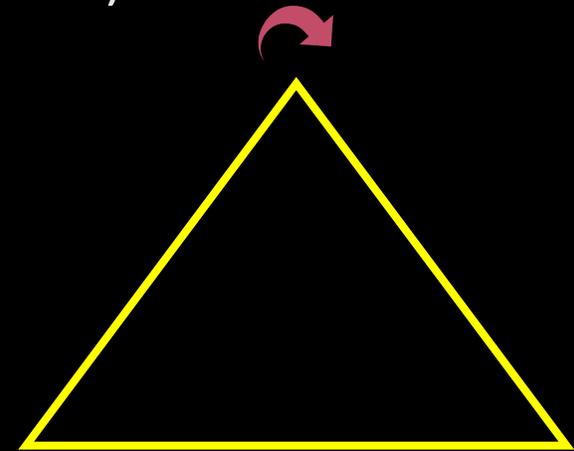
Separate individual performance  
reviews and compensation from OKRs

Use CFRs, instead



# Crossing Edges with OKRs

- OKRs require thoughtful change management
- Sustainability (make these their own; don't just tell them; ask them what they notice; create space for peers, supervisors, etc. to notice and contribute)
- Making things safe (remove evaluation of team, individual; nothing punitive; not tied to compensation; be curious; listen)
- Creating energy and excitement (visualization, future focused)
- Create confidence (normalize, acknowledge success)



# Want to Learn More?



Mapping the Path to Outcomes



Download the OKR Evaluation Guide (a.k.a. Limiting, Helpful, Awesome)



Dreams with Deadlines Podcast (Gtmhub)

## Spitzer Coaching

Helping thinkers think. They are creative, resourceful, and whole.

