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SAN DIEGO • 2023

Moving Beyond Strategic Alignment (The OKR Journey)

Your Guides:

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Agenda

- Introduction
- Defining and Structuring OKRs
- Aligning the Work
- Tracking Attainment
- Reporting
- Questions
- Additional Resources

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards

OKR Structure and Overview

Let Rego be your guide.

Strategic Alignment

Strong strategic frameworks that allow for quick shifts within well-defined strategic guardrails will be major differentiators for organizations.

- All work should be tied to an enterprise strategy, but this is nothing new. The focus here is on decomposing that strategy into measurable objectives that are specific to a line of business or department.
- We should be measuring benefits in business terms, monitored and tracked by business resources. PPM metrics remain important but target tactical project execution and are not designed to continuously revalidate the purpose behind our work.
- OKRs are more important than ever, with a growing focus on quantification and measurement against expectations (e.g., baseline, target, actual).
- As markets shift, a flexible strategic framework allows companies to pivot quickly, reallocating resources to the most valuable work.
- Capabilities that support the connection of these dots is becoming an important differentiator for major PPM platforms, especially as execution methodologies become more disparate.



Are you actively measuring alignment to strategies? If so, what are you using?

OKR Definition & Best Practice

- First, standardize SPMs terminology. Typically:
 - OKRs are elements of a strategic framework that support goal setting and management.
 - KPIs are specific measurements used to evaluate performance.
 - In that light, “Key Results” can be considered KPIs.
 - KPIs are almost always quantitative in nature. Whereas Key Results can be more flexible (e.g., implement a customer rewards program).
- Effective OKRs are collaboratively developed, well-communicated, visible, and linked as closely to the day-to-day work as possible.
- Define a cadence for objective setting as well as for measurement / check-ins.
- Depending upon the size and complexity of the organization, you may need to introduce multiple OKR levels that include Team or Organization-Driven Objectives.
- Key Results needs to be simple to measure and to communicate. (ROI, NPV, Payback can become over complicated)
- Use CRIB for Key Result setting: Clarity | Results Oriented | Important | Big.
- Aim for 70% attainment (John Doerr, Measure What Matters).

Example

Goal:

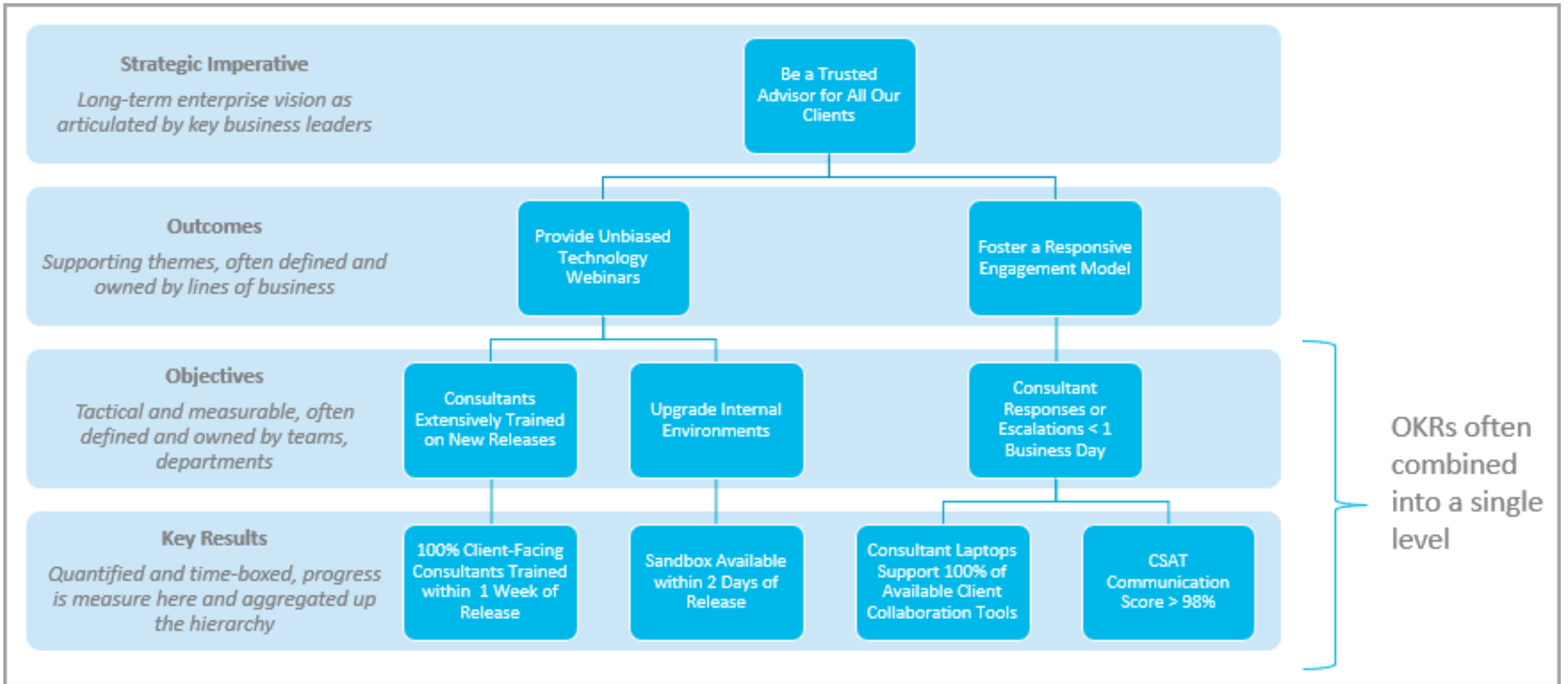
Become the preeminent destination country for elite soccer talent.

Objective:

Win the World Cup.

- Key Result #1: Average scored goal rate of 2.0 throughout the tournament.
- Key Result #2: Average conceded goals rate of 0.5 throughout the tournament.
- Key Result #3: Ball possession rate of 75% or more.

Example Hierarchy

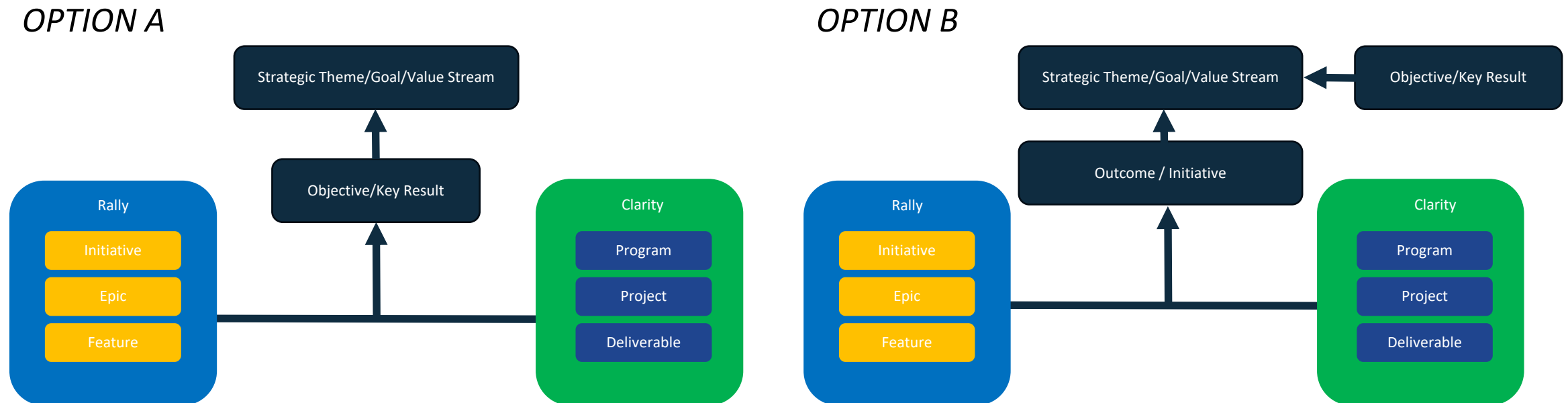


Aligning the Work

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OKRs are Methodology Agnostic

- Work can be executed in Agile, SAFe, Waterfall, etc.
- The work can be tied directly to the objective (Option A) or, for larger and more complex organizations, to an initiative or outcome (Option B).



If you are aligning work to strategies, are you using one of these approaches?

Tracking

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Objectives Module

- Out-of-the-box module.
- Three-tiered system with Objectives as the parent object, Key Results as a subobject and Actual and Target Values as a subobject of Key Results.
- Allows direct connection with Rally for updates from Agile teams.
- Nested grid allows visibility into Objectives and Key Results in a single view.

The screenshot shows the Clarity Objectives dashboard. At the top, there's a 'New From Template' button and a search bar. Below that, a summary section displays 'Objectives: 3', 'Progress: 33%', and 'By Owner: 2 Amos, Cheryl; 1 Andersson, Peter'. The main table lists objectives with columns for Name, Owner, Start, Target, Confidence Score, and Progress.

Objective: Name *	Owner	Start	Target	Confidence Score	Progress
Delight our customers.	Amos, Cheryl	May 31, 2023	Jul 26, 2024	100%	100%
Create the lowest carbon footprint in our industry.	Andersson, Peter	Jun 6, 2023	Jun 6, 2023	60%	34%

Below the objectives table, there's a 'Key Results' section with columns for Name, Start Value, Current Value, Target Value, Unit of Measure, and Progress.

Key Result: Name *	Start Value	Current Value	Target Value	Unit of Measure	Progress
Pay 100% carbon offset for calculated carbon dioxide emissions.	20	30	100	% carbon offset paid	13%
Supply chain and shipping infrastructure 100% zero waste.	10	30	50	% of zero waste	50%
25% of material is compostable.	0	10	25	% of material is compostable	40%

The screenshot shows the Clarity Key Results view for the objective 'Create the lowest carbon footprint in our industry'. The top navigation bar includes 'Properties', 'Conversations', 'Audit', 'Key Results', 'Action Items', and 'Notes'. The main table lists key results with columns for Name, Owner, Start Value, and Current Value.

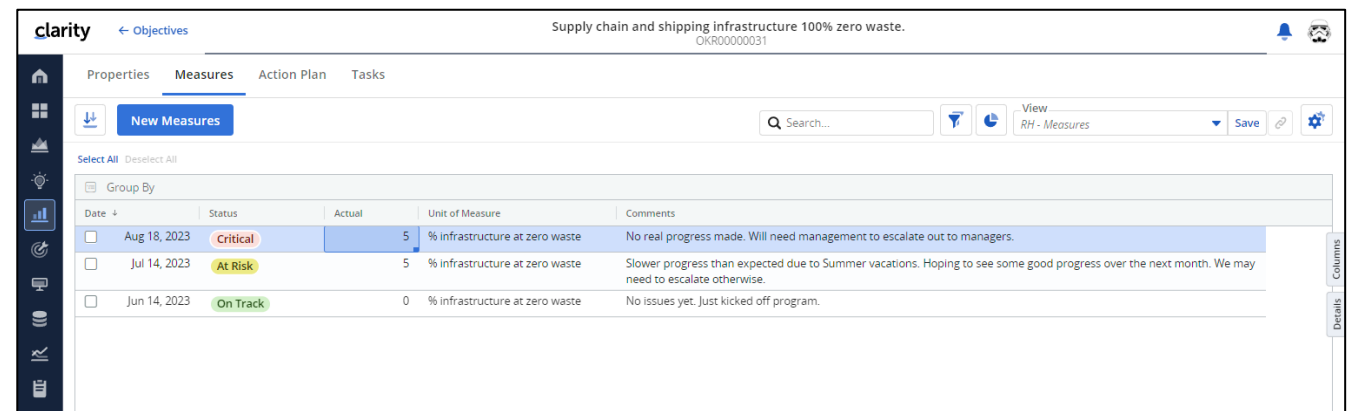
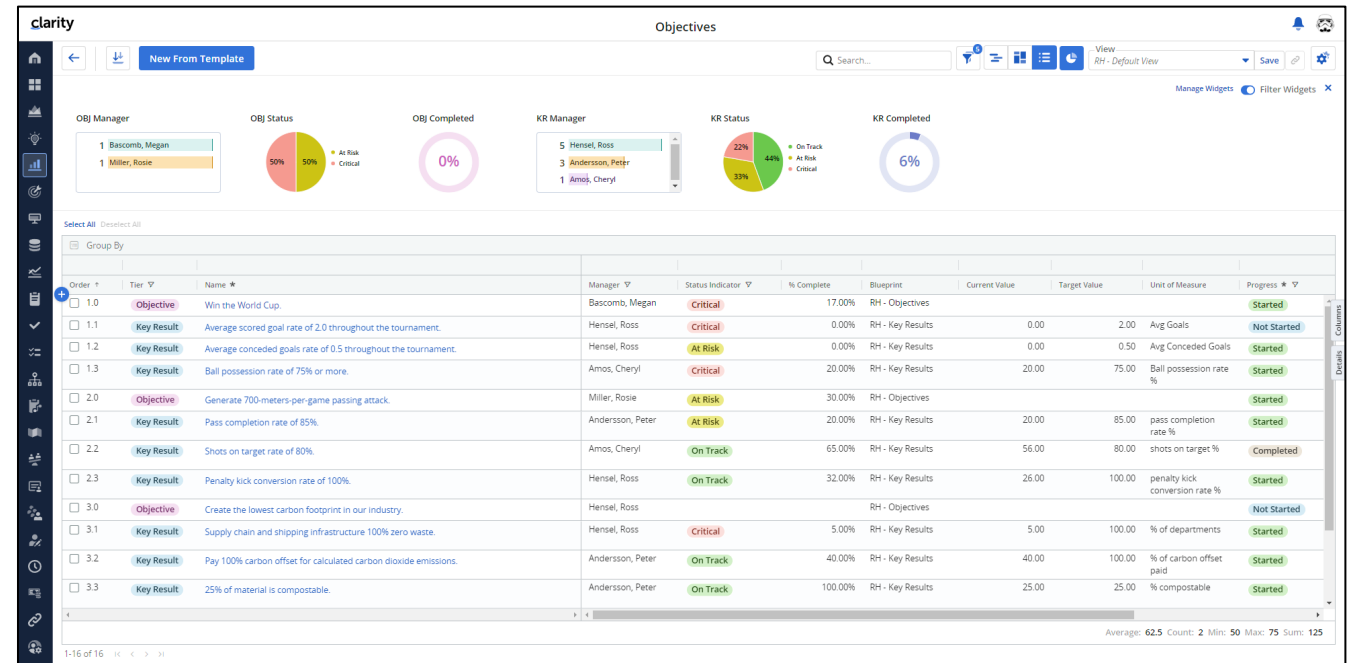
Name *	Owner	Start Value	Current Value
Pay 100% carbon offset for calculated carbon dioxide emissions.	Bhatt, Rakesh	20	
25% of material is compostable.	Awad, Rashid	0	
Supply chain and shipping infrastructure 100% zero waste.	Amos, Cheryl	10	

On the right, there's a detailed view for the key result 'Supply chain and shipping infrastructure 100% zero waste...'. It shows a table with columns for Date, Value, and Status.

Date	Value	Status
Aug 16, 2023	15	At Risk
Sep 14, 2023	30	Critical

Custom Investment

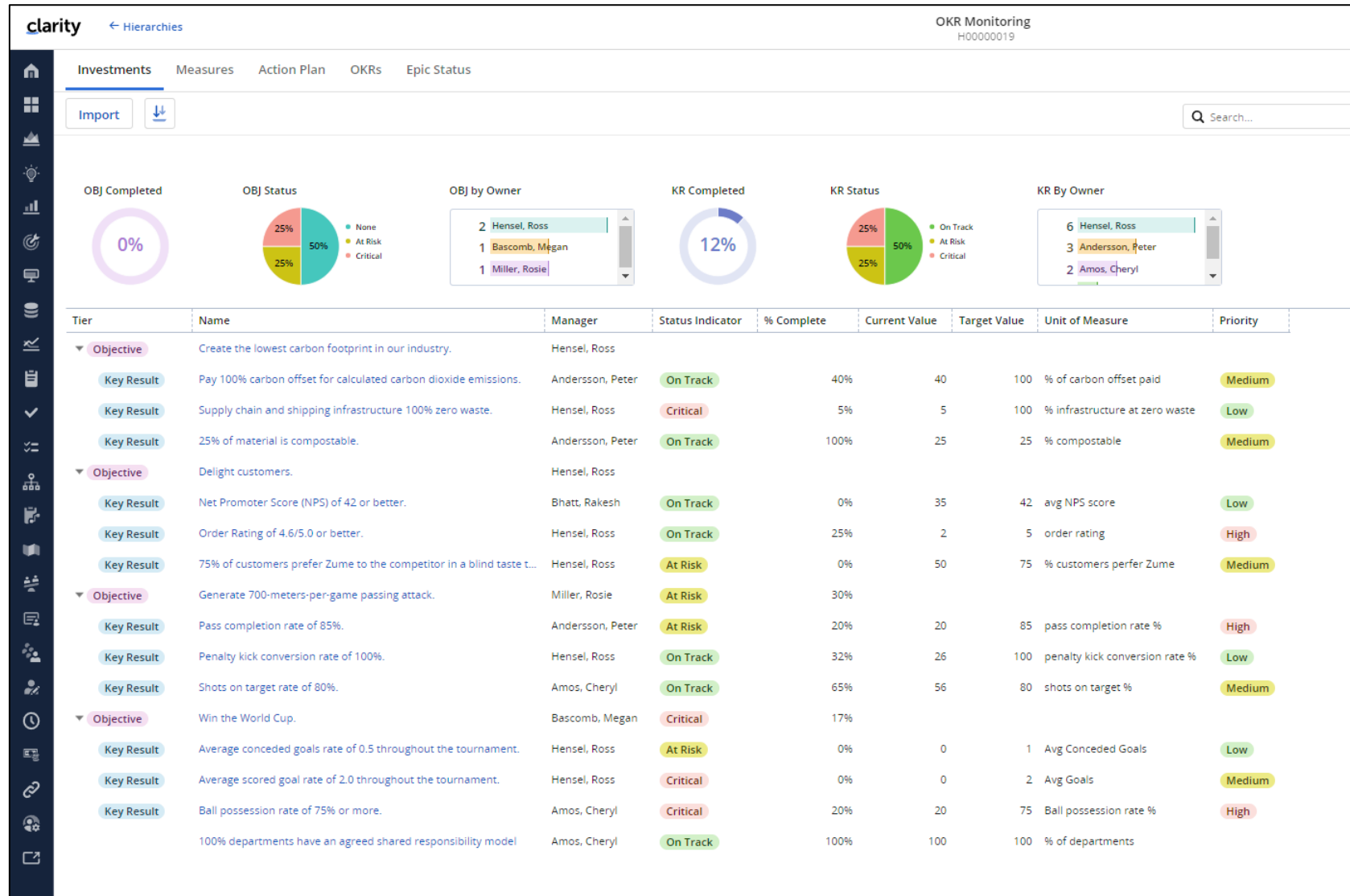
- Usually, a two-tier system of Objectives and Key Results at the custom investment level and Measures/Actual Values at the sub-object level.
- Great if you want to pair with any OOTB investment object like Tasks, Risks, or Issues.
- Associate projects to Objectives or Key Results using the parent field or a custom attribute variation.



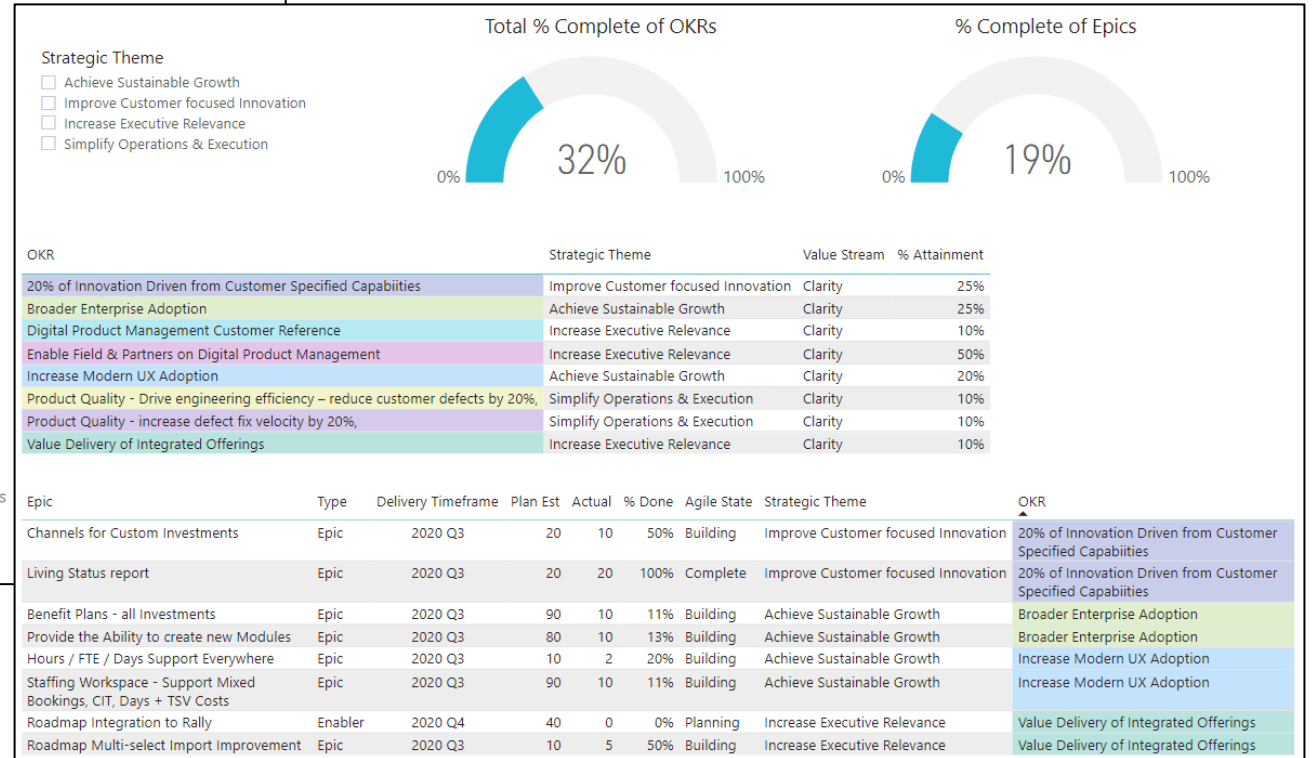
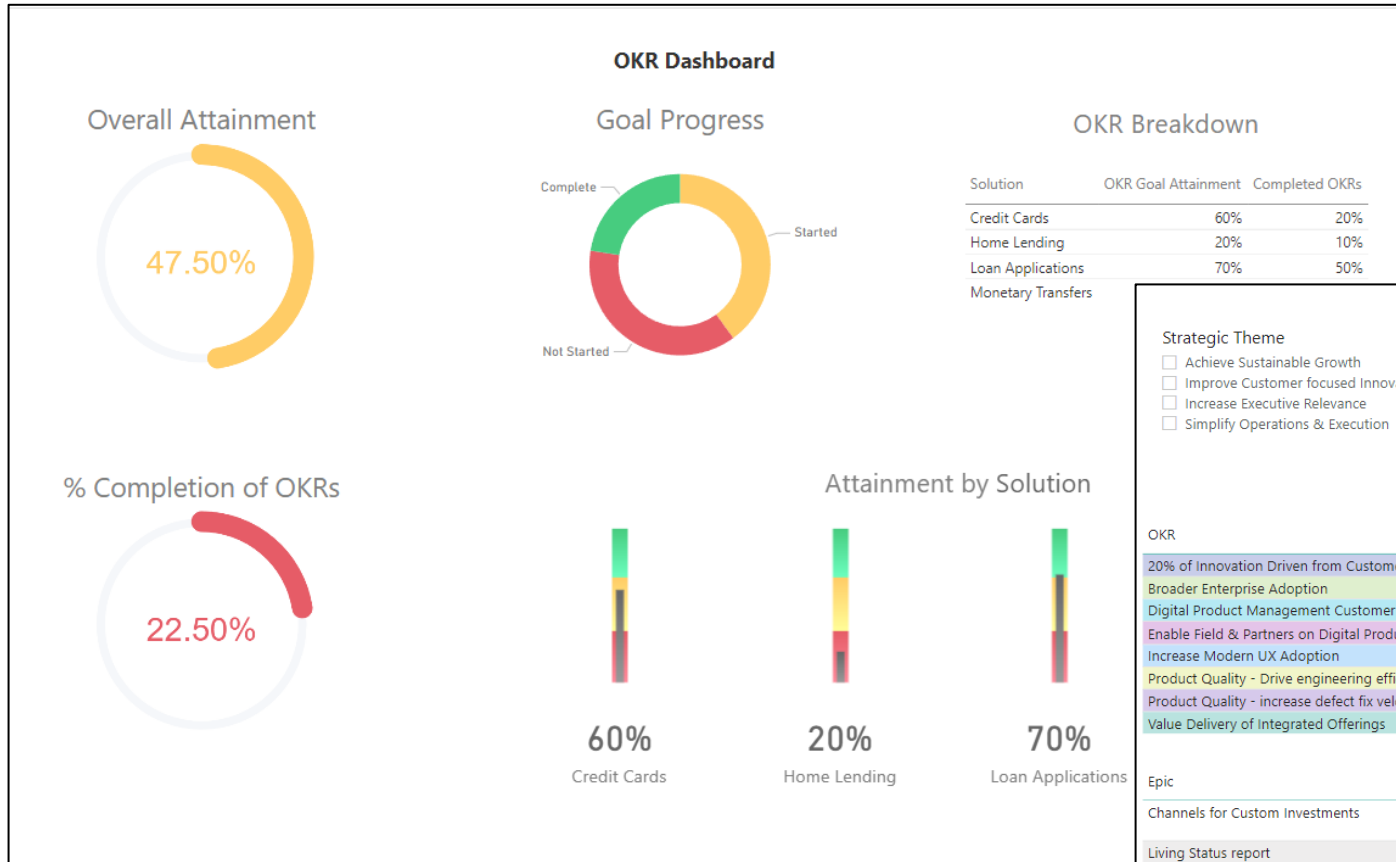
Reporting

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Hierarchies



PowerBI/Tableau



Questions?



Additional Resources

- Rego Whitepapers:
 - [Measuring Value with OKRs](#)
 - [Leveraging OKRs Using Clarity Hierarchies](#)
- Broadcom:
 - Objectives and Key Results in Agile at Scale.pdf
 - [Clarity Cookbook: Objectives and Key Results \(OKRs\)](#)
- Books:
 - Measure What Matters: How Google, Bono, and the Gates Foundation Rock the World with OKRs - John Doerr
 - Moving the Needle with Lean OKRs – Bart Den Haak

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