regoUniversity
SAN ANTONIO • 2026

Objectives and Key Results (OKRs) in Clarity

Your Guides:
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Agenda

OKR FOUNDATIONS

01 Introductions

02 What Has Changed in OKRs

03 Defining and Structuring OKRs

04 Pitfalls to Avoid

OKRs IN CLARITY

05 Aligning the Work

06 Tracking Attainment in Clarity

07 Use Cases

08 Reporting

09 Demonstration

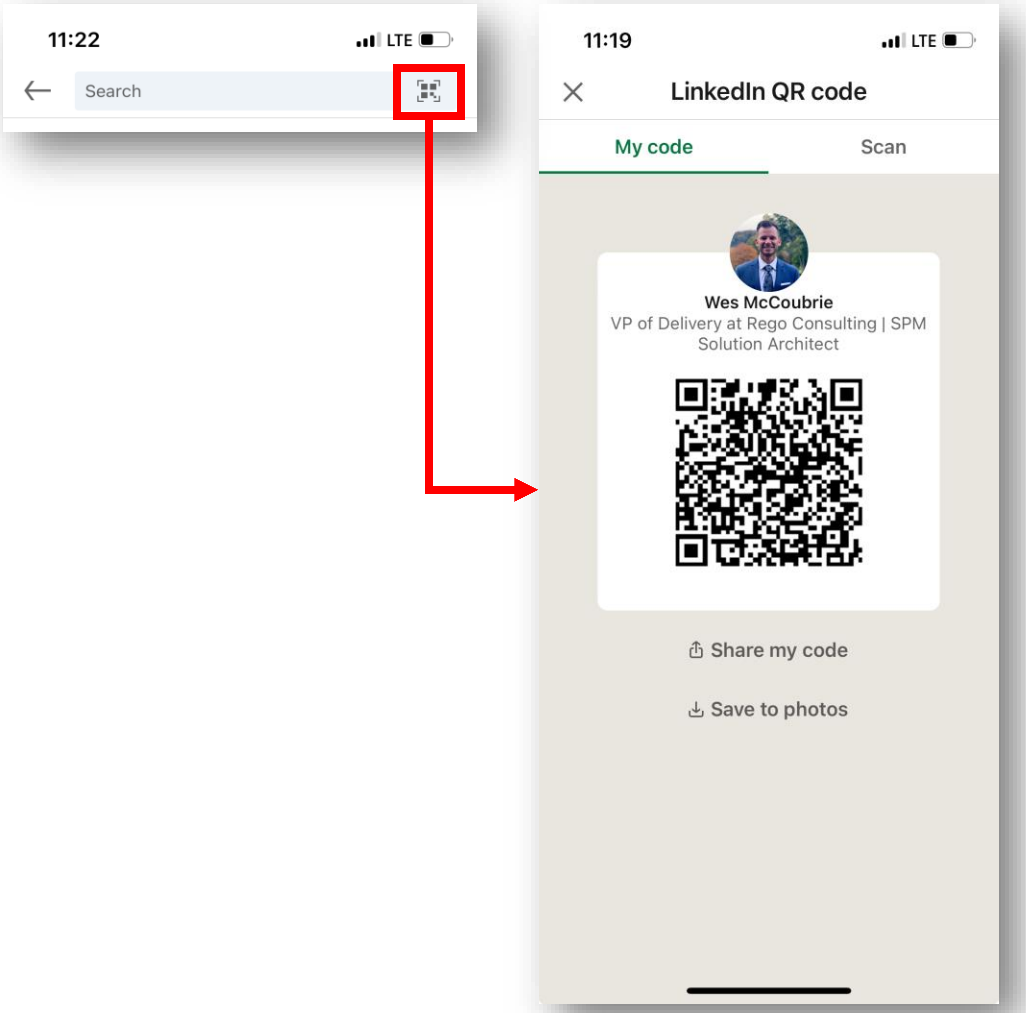
NEXT STEPS

10 Your First 90 Days

11 Questions and Resources

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Connect on LinkedIn



OKR Structure and Overview

Why Strategy Needs Measurable Objectives

Flexible frameworks are a differentiator

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

Decompose strategy into measurable objectives

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.

Measure benefits in business terms

Benefits should be monitored and tracked by business resources. PPM metrics remain important, but they target tactical project execution and are not designed to continuously revalidate the purpose behind our work.

Why OKRs Matter Now

Measurement expectations have risen

OKRs are more important than ever, with a growing focus on quantification and measurement against expectations (e.g., baseline, target, actual).

Flexibility enables faster reallocation

As markets shift, a flexible strategic framework allows companies to pivot quickly, reallocating resources to the most valuable work.

Connecting the dots differentiates platforms

The capability to connect these dots is becoming an important differentiator for major SPM platforms, especially as execution methodologies become more disparate.

Four Shifts Reshaping the OKR Conversation

What has changed in the OKR conversation since we last met…

Funding Outcomes

- Money moves to persistent teams, not projects
- The objective becomes the funding unit
- Business cases reframed around key results

AI Changes the Math

- Outcomes are probabilistic, not committed
- KRs shift toward adoption and learning rates
- Baselines reset faster than annual cycles

Fatigue and Backlash

- Cascade theater erodes credibility fast
- Quarterly cadence too slow for some sectors
- Programs collapse under their own volume

Outcomes Meet Dollars

- Attainment measured against spend and FTEs
- Value tracked past go-live, not at delivery
- Finance and the PMO share one scorecard

The center of gravity is moving from measuring delivery to justifying investment — which is where your Clarity data already lives.

AI Initiatives Are Breaking Traditional Key Results

Outcomes you cannot commit to in advance still have to be measured.

WHY THE OLD PATTERN FAILS		WHAT TO WRITE INSTEAD
“Ship the model by Q3” is a task, not an outcome.	➡	Adoption: share of eligible users active weekly.
Accuracy targets set before a baseline exists.	➡	Quality: human-override rate trending down.
The value lands in somebody else’s key result.	➡	Deflection: hours or tickets removed per month.
Quarterly targets outlive their assumptions.	➡	Learning: count of validated experiments run.
Success measured at launch, not in production.	➡	Cost: inference spend per resolved case.

For AI work, set the key result on the behavior change you expect, not on the model you plan to ship.

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

Is your organization using Objectives and Key Results (OKRs)?

1. Yes, we use them across portfolios and projects.
2. Yes, some teams are using them.
3. No, but we are planning to leverage them.
4. No, our organization is not currently planning to use them.

How well are your projects aligned with your organization's strategic goals?

1. Completely aligned.
2. Partially aligned.
3. Minimally aligned.
4. Not aligned.

Goals vs. Key Performance Indicators (KPIs) vs. OKRs

	Goal	**KPI**	**OKR**
What it is	A desired outcome that describes where the organization wants to end up.	A standing measurement used to evaluate the ongoing health of a project or the business.	An objective paired with three to five key results that make it measurable.
Question it answers	Where are we trying to go?	How is performance trending right now?	How will we know when we have arrived?
Nature	Directional, and often qualitative.	Almost always quantitative, and tracked continuously.	Ambitious, time-boxed, and quantified.
Example	*Grow the business in the mid-market segment.*	*Monthly churn rate held at or below 2%.*	*Objective: win the mid-market. Key result: 25 new logos by Q4.*

Goals set the direction, KPIs monitor ongoing performance, and OKRs define measurable progress toward a goal over a set period.

Setting Effective OKRs

Developed collaboratively
Effective OKRs are built together, well communicated, and visible across the organization.

Layered to fit the organization
Depending on size and complexity, you may need multiple OKR levels, including team and organization-driven objectives.

Simple to measure
Key results must be easy to measure and to communicate. ROI, NPV, and payback can become over-complicated.

70% Target attainment for a healthy OKR (John Doerr, Measure What Matters)

CRIB *for setting key results*

C — Clarity
R — Results-oriented
I — Important
B — Big

FACTS *what good OKRs drive*

F — Focus
A — Alignment
C — Commitment
T — Tracking
S — Stretching

OKR Best Practices

- ✓ Limit OKRs: **3–5 objectives with 3–5 KRs each** to avoid dilution.
- ✓ Make OKRs **outcome-based, not task-based** (what was achieved, not what activities were completed).
- ✓ **Align vertically and horizontally** so team OKRs support organizational priorities and reduce silos.
- ✓ Review and **refresh OKRs regularly** — they're not "set and forget."
- ✓ Celebrate and share **progress and wins** to keep engagement high.
- ✓ Use OKRs as a **learning tool**, not just for performance evaluation.

Four Pitfalls That Kill OKR Programs

What goes wrong most often — and what to do instead

01	**Cascade Theater**	Every team restates the exec objective. Nobody owns a measurable outcome.	*Cascade key results, not objectives.*
02	**Key Results That Are Tasks**	“Launch the portal” carries no target. Attainment becomes percent complete.	*Name the number that has to move.*
03	**OKRs in Performance Reviews**	Targets are sandbagged immediately. Ambition leaves the process.	*Keep OKRs out of compensation.*
04	**Set and Forget**	Written once, never revisited. Data is stale by week three.	*A 30-minute check-in every month.*

None of these are tooling problems, but Clarity will faithfully scale whichever one you bring to it.

Example: OKR for Rego University

GOAL Deliver a Rego University that leaves attendees better equipped to run their own OKR programs.

OBJECTIVE Run a seamless conference that sends every attendee home with something they can use on Monday.

KEY RESULT #1

95% of event operations milestones on time.

Session scheduling, speaker readiness, and venue logistics all closed out before day one.

KEY RESULT #2

90%+ attendee satisfaction.

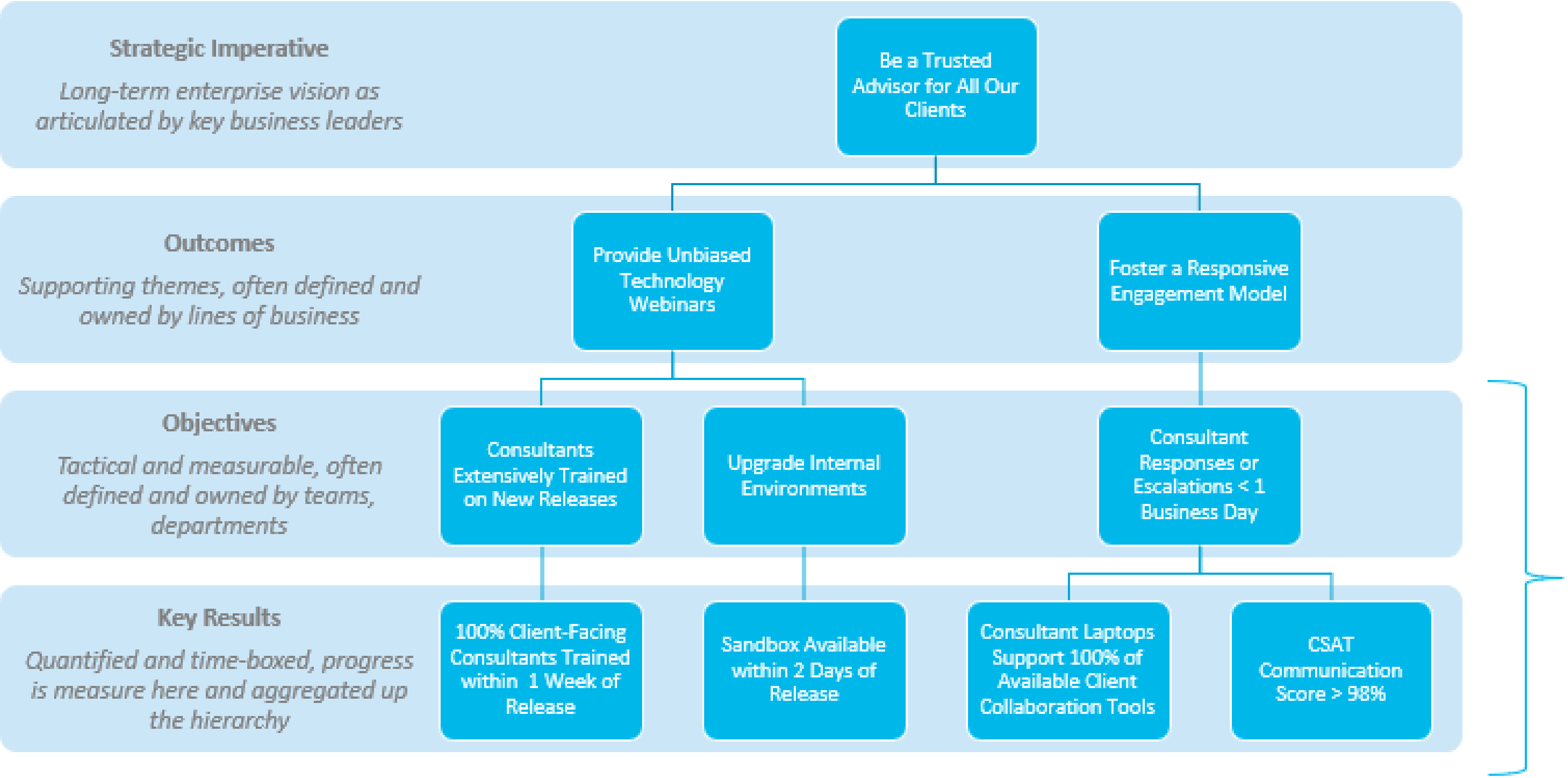
Measured through post-session surveys on content, speakers, and overall experience.

KEY RESULT #3

70% of attendees applying something new.

Measured by a follow-up survey 30 days after the conference.

Example Hierarchy



OKRs often combined into a single level

Aligning the Work

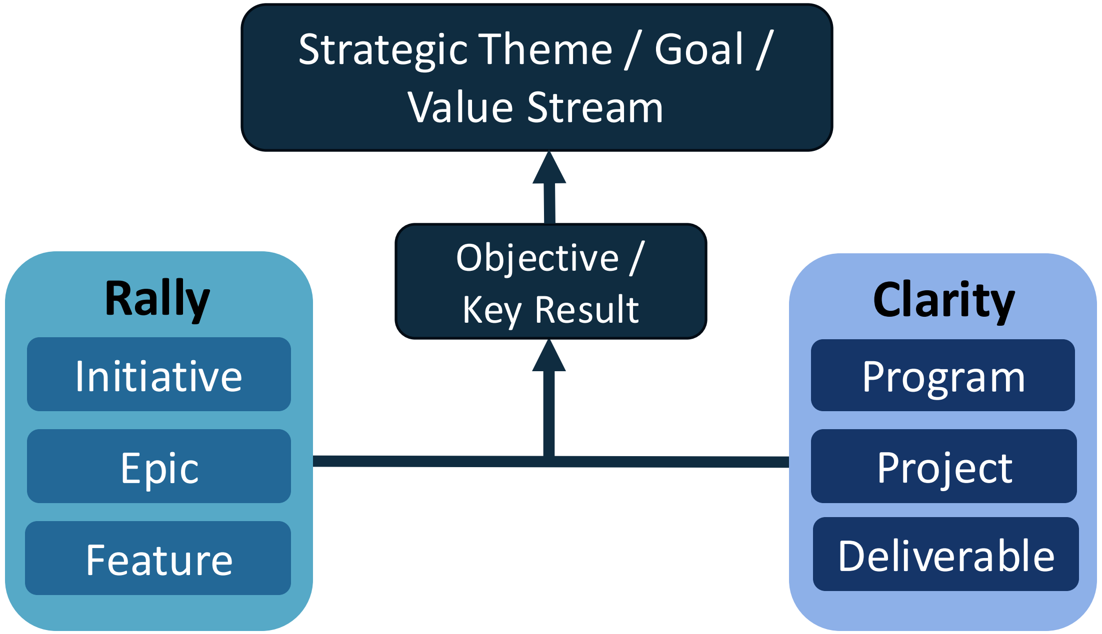
Strategy Framework – Aligned to Clarity PPM

OKRs Are Methodology-Agnostic

Work can be executed in Agile, SAFe, Waterfall, etc.

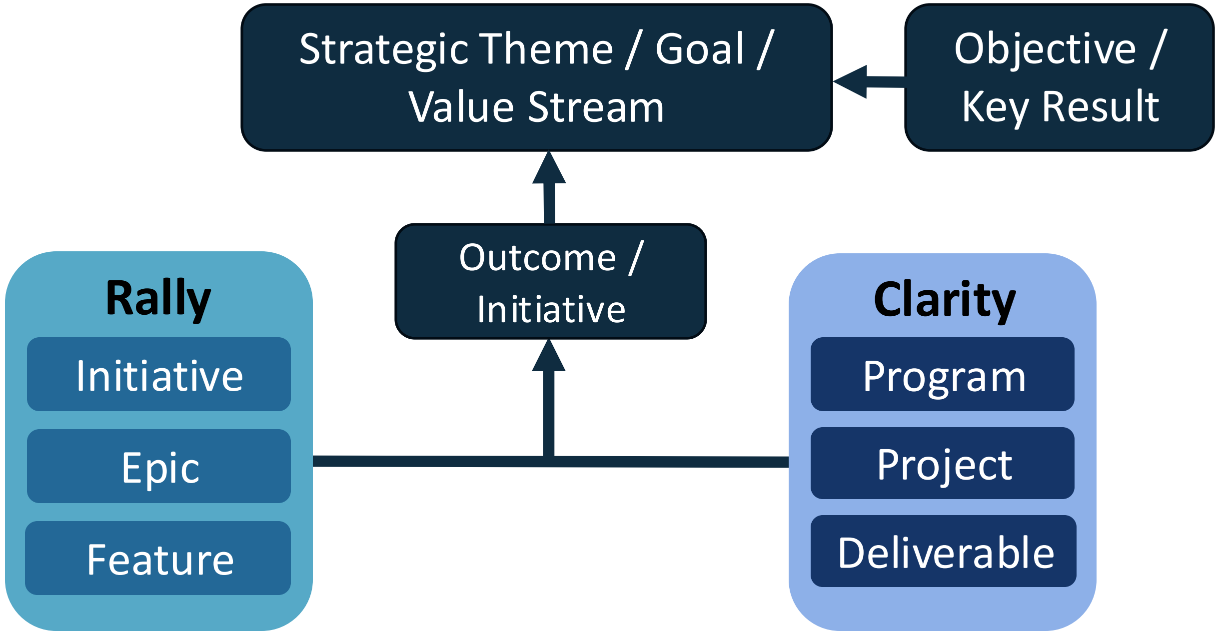
OPTION A

The work can be tied directly to the objective.



OPTION B

For larger and more complex organizations, work can be tied to an initiative or outcome.



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

Tracking

Objectives Module: Then and Now

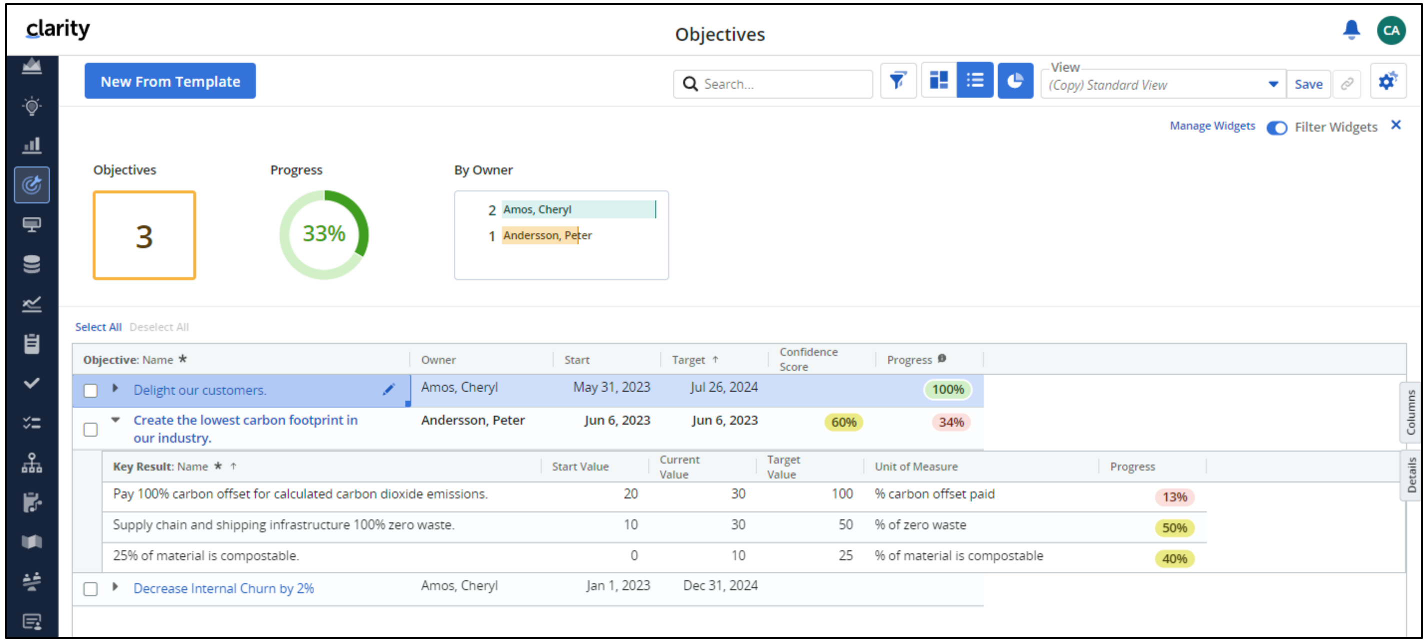
Objectives module

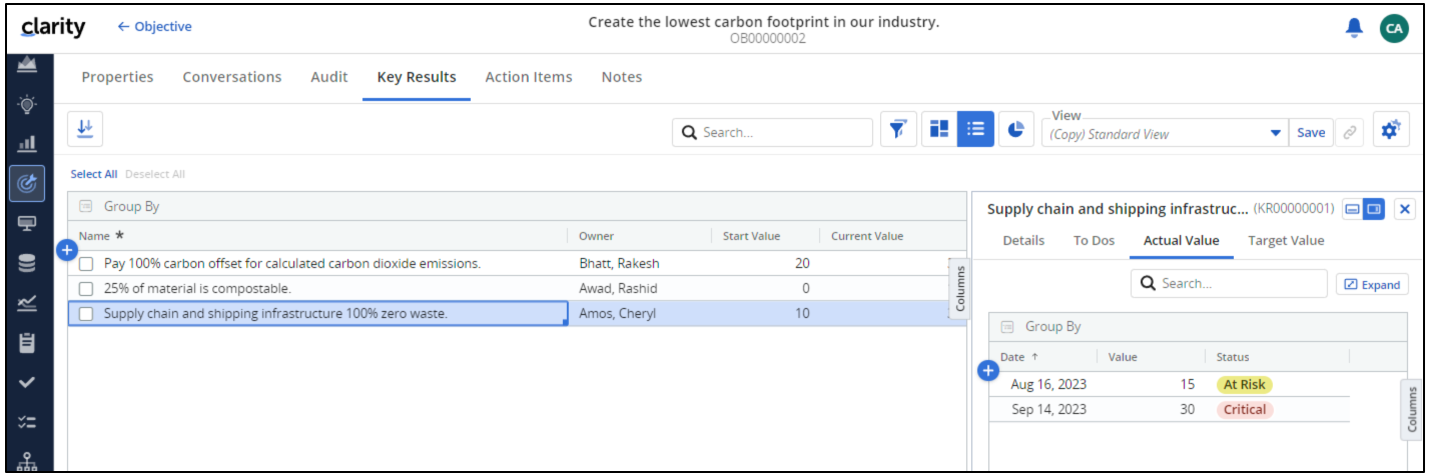
- Standalone module, outside the investment model
- Objective → Key Result → Target / Actual Value
- No financials, staffing, or roadmap links

Objective as an investment

- Full investment framework applies
- Financials, allocations, staffing, blueprints
- Rally still feeds KR actuals from Agile teams

Confirm object availability and migration path against your current Clarity release.





Which Pattern? Objective vs. Custom Investment

Use the Objective object

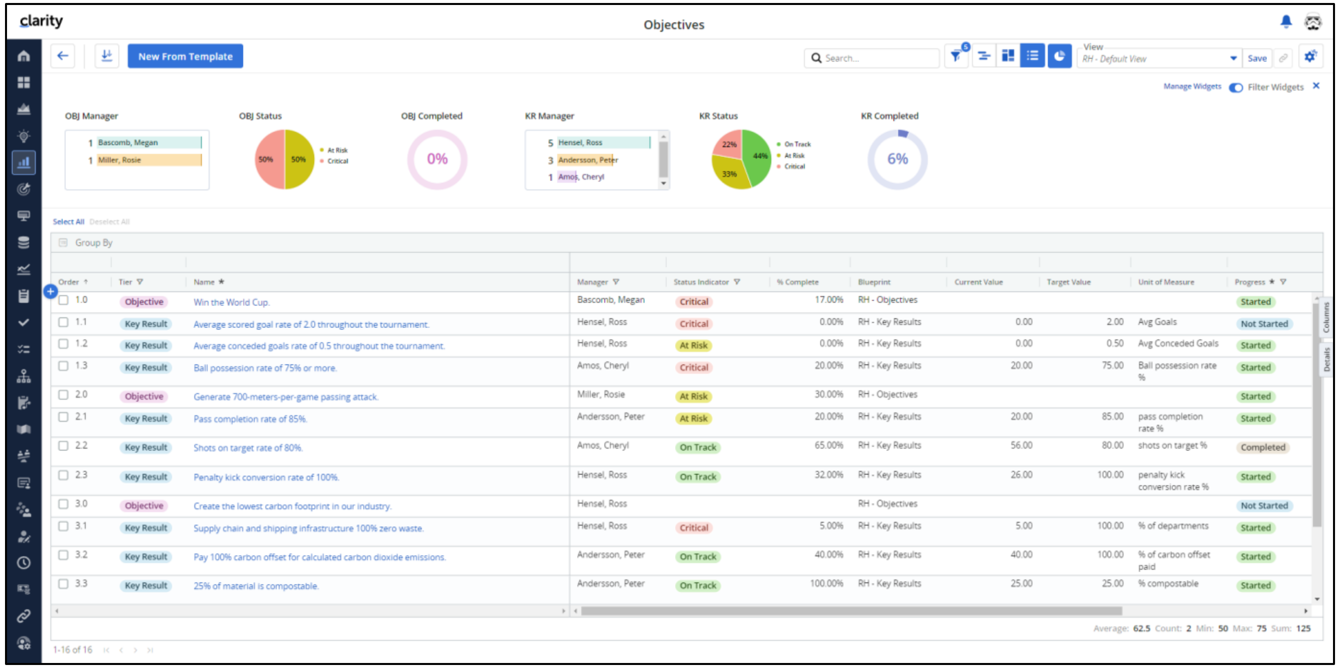
- Your release supports it
- You want financials, staffing, and roadmaps on OKRs

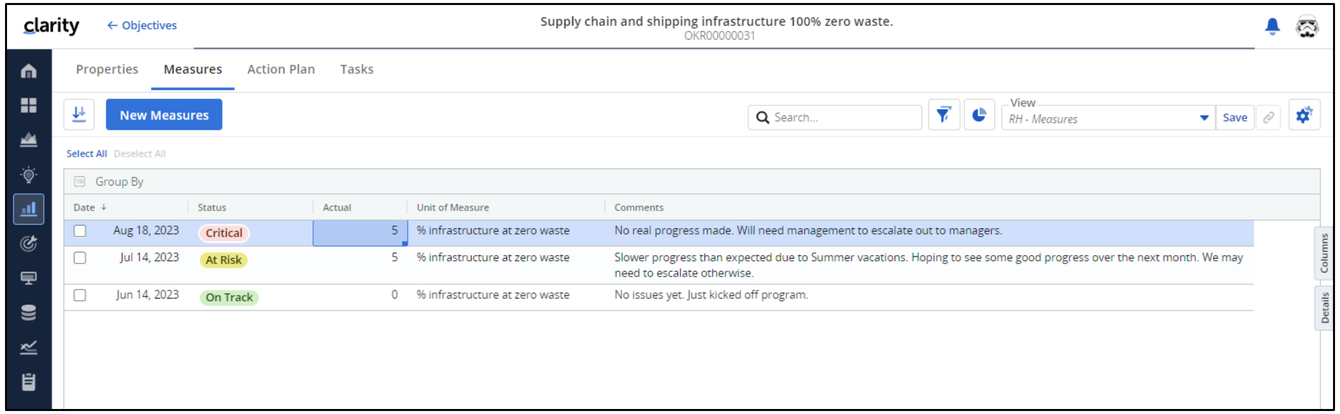
Use a custom investment

- Legacy release, or a heavily tailored OKR model
- Two tiers, with Measures and Actual Values below

If you are migrating

- Map custom attributes first, then move history
- Keep one source of truth per Key Result





Use Case: Cascading OKRs Across Six Portfolios

THE ORGANIZATION

$4B industrials manufacturer

6 portfolios

~900 active investments

Moving ownership of key results up to the portfolio level is what made mid-year re-allocation possible — the tooling only enabled it.

SITUATION

Strategy refreshed yearly in slide decks.
Status reported as percent complete.
No line of sight from PMO to exec goals.

OKR STRUCTURE

3 enterprise objectives, 12 key results.
KRs owned by portfolio managers, not PMs.
Quarterly check-in, annual objective reset.

IN CLARITY

Objectives as investments.
Investments linked via parent objective field.
Task and measure actuals feed KRs weekly.

TWO QUARTERS LATER

90 → 30 minutes for exec review

22% of spend re-allocated mid-year

2 objectives retired early

Use Case: Recovering a Failed OKR Rollout

Regional healthcare payer • Year one abandoned after two quarters • Relaunched with a narrower scope

WHAT WENT WRONG

40+ objectives cascaded to every team
Key results were restated task lists
OKR scores fed into performance reviews

THE RESET

Cut to 4 enterprise objectives, 14 KRs
Two levels of cascade only, no team OKRs
Formally decoupled from compensation

CLARITY CONFIGURATION

One Objective blueprint, six required fields
Investment-to-KR link enforced on save
Attainment auto-rolls from measure actuals

31% → 88%
KR update compliance in one year

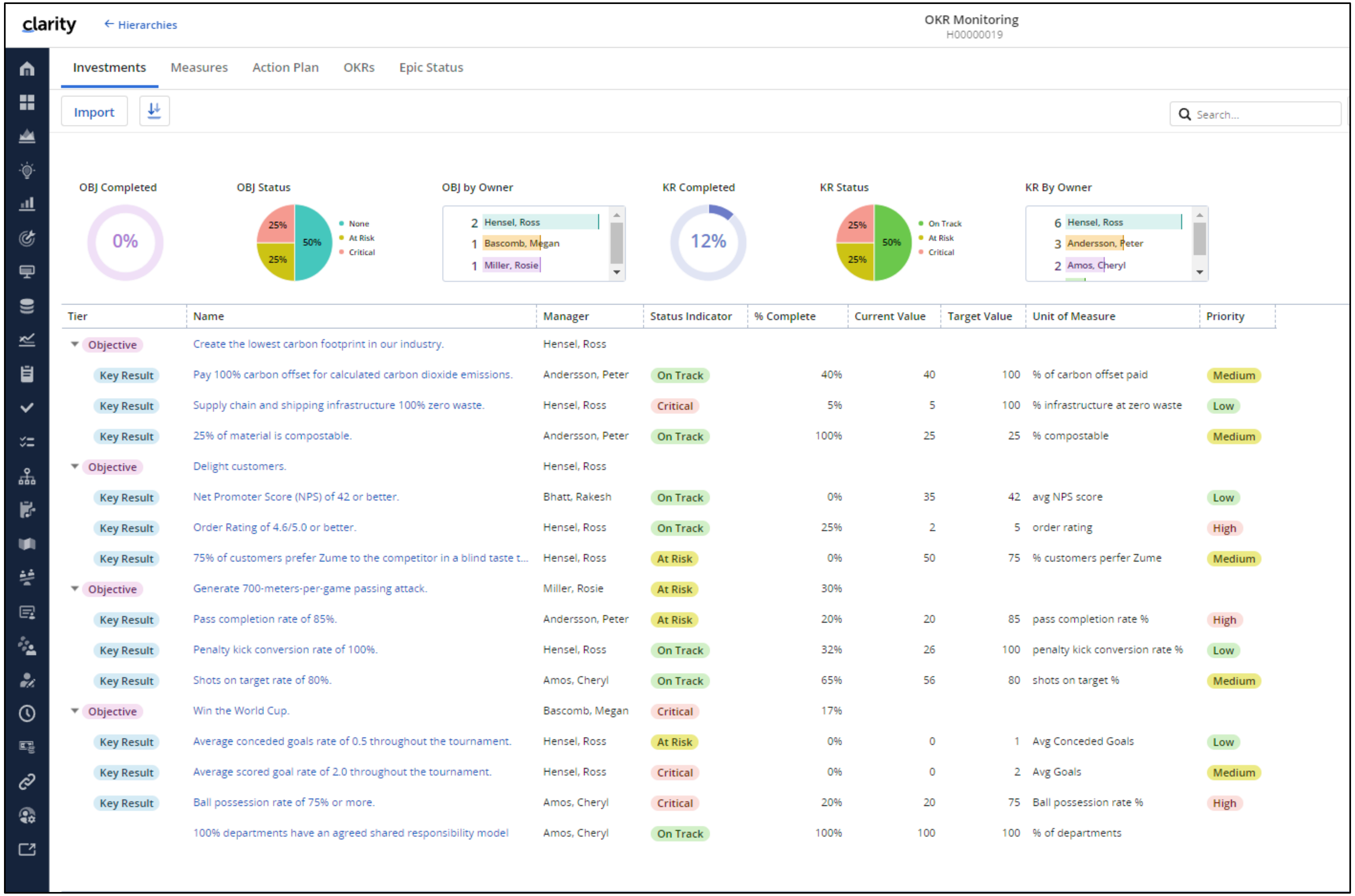
Three quarters
Objective count has stayed stable

Strategy office
Owns the program now, not the PMO

Most failed OKR programs are scoped too wide rather than configured wrong, so fix the operating model before you touch the tool.

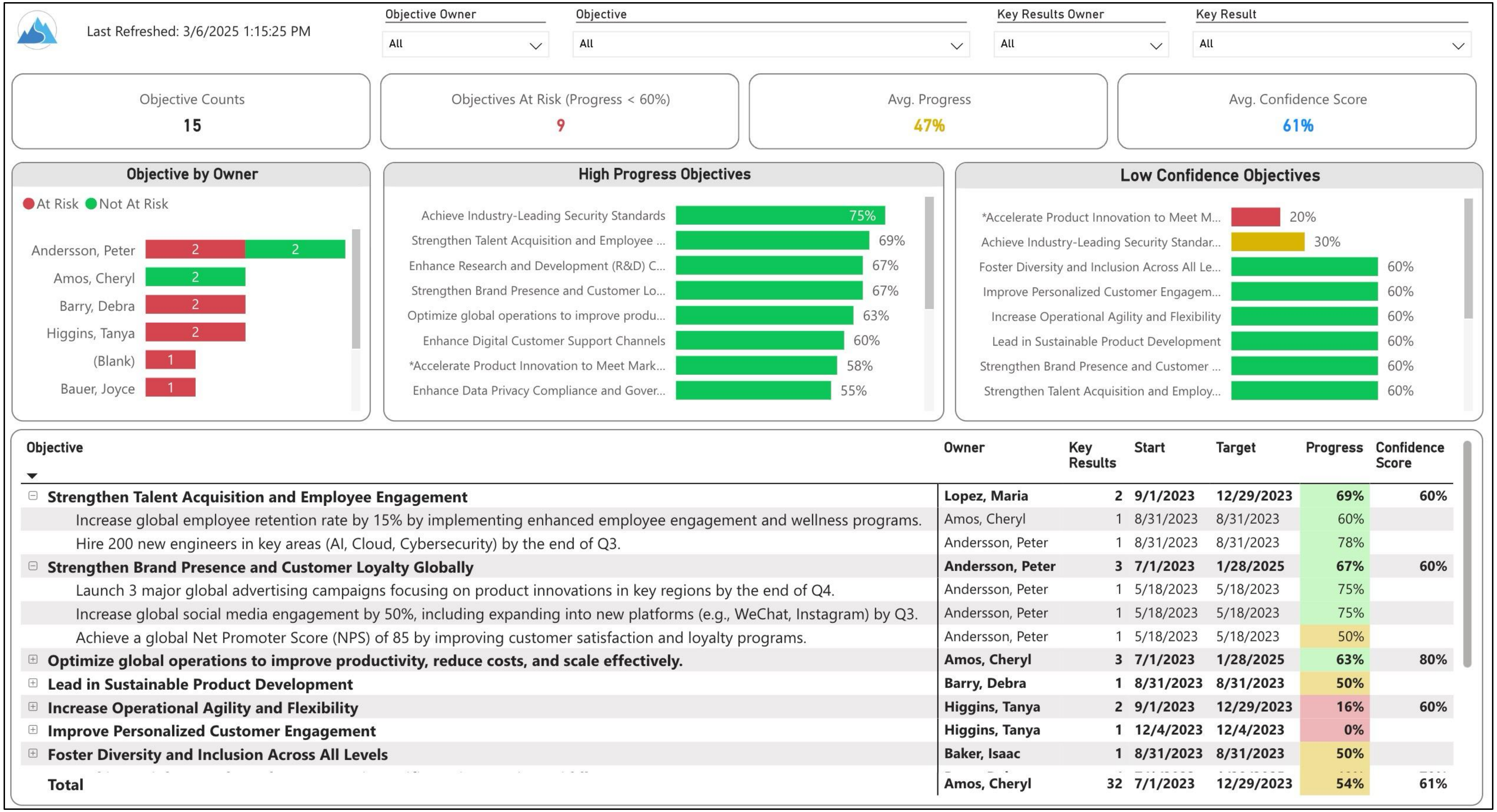
Reporting

Hierarchies



Tier	Name	Manager	Status Indicator	% Complete	Current Value	Target Value	Unit of Measure	Priority
Objective	Create the lowest carbon footprint in our industry.	Hensel, Ross						
Key Result	Pay 100% carbon offset for calculated carbon dioxide emissions.	Andersson, Peter	On Track	40%	40	100	% of carbon offset paid	Medium
Key Result	Supply chain and shipping infrastructure 100% zero waste.	Hensel, Ross	Critical	5%	5	100	% infrastructure at zero waste	Low
Key Result	25% of material is compostable.	Andersson, Peter	On Track	100%	25	25	% compostable	Medium
Objective	Delight customers.	Hensel, Ross						
Key Result	Net Promoter Score (NPS) of 42 or better.	Bhatt, Rakesh	On Track	0%	35	42	avg NPS score	Low
Key Result	Order Rating of 4.6/5.0 or better.	Hensel, Ross	On Track	25%	2	5	order rating	High
Key Result	75% of customers prefer Zume to the competitor in a blind taste t...	Hensel, Ross	At Risk	0%	50	75	% customers perfer Zume	Medium
Objective	Generate 700-meters-per-game passing attack.	Miller, Rosie	At Risk	30%				
Key Result	Pass completion rate of 85%.	Andersson, Peter	At Risk	20%	20	85	pass completion rate %	High
Key Result	Penalty kick conversion rate of 100%.	Hensel, Ross	On Track	32%	26	100	penalty kick conversion rate %	Low
Key Result	Shots on target rate of 80%.	Amos, Cheryl	On Track	65%	56	80	shots on target %	Medium
Objective	Win the World Cup.	Bascomb, Megan	Critical	17%				
Key Result	Average conceded goals rate of 0.5 throughout the tournament.	Hensel, Ross	At Risk	0%	0	1	Avg Conceded Goals	Low
Key Result	Average scored goal rate of 2.0 throughout the tournament.	Hensel, Ross	Critical	0%	0	2	Avg Goals	Medium
Key Result	Ball possession rate of 75% or more.	Amos, Cheryl	Critical	20%	20	75	Ball possession rate %	High
	100% departments have an agreed shared responsibility model	Amos, Cheryl	On Track	100%	100	100	% of departments	

PowerBI / Tableau

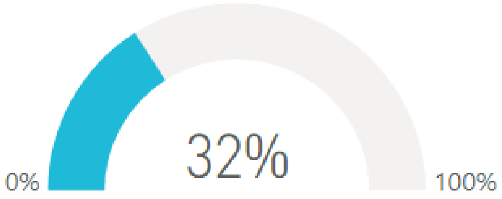


PowerBI / Tableau

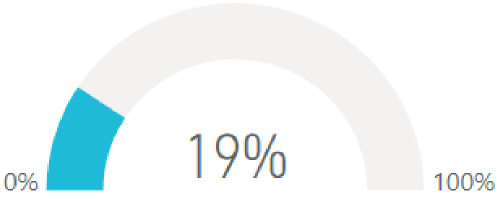
Strategic Theme

- Achieve Sustainable Growth
- Improve Customer focused Innovation
- Increase Executive Relevance
- Simplify Operations & Execution

Total % Complete of OKRs



% Complete of Epics



OKR	Strategic Theme	Value Stream	% Attainment
20% of Innovation Driven from Customer Specified Capabiities	Improve Customer focused Innovation	Clarity	25%
Broader Enterprise Adoption	Achieve Sustainable Growth	Clarity	25%
Digital Product Management Customer Reference	Increase Executive Relevance	Clarity	10%
Enable Field & Partners on Digital Product Management	Increase Executive Relevance	Clarity	50%
Increase Modern UX Adoption	Achieve Sustainable Growth	Clarity	20%
Product Quality - Drive engineering efficiency – reduce customer defects by 20%,	Simplify Operations & Execution	Clarity	10%
Product Quality - increase defect fix velocity by 20%,	Simplify Operations & Execution	Clarity	10%
Value Delivery of Integrated Offerings	Increase Executive Relevance	Clarity	10%

Epic	Type	Delivery Timeframe	Plan Est	Actual	% Done	Agile State	Strategic Theme	OKR
Channels for Custom Investments	Epic	2020 Q3	20	10	50%	Building	Improve Customer focused Innovation	20% of Innovation Driven from Customer Specified Capabiities
Living Status report	Epic	2020 Q3	20	20	100%	Complete	Improve Customer focused Innovation	20% of Innovation Driven from Customer Specified Capabiities
Benefit Plans - all Investments	Epic	2020 Q3	90	10	11%	Building	Achieve Sustainable Growth	Broader Enterprise Adoption
Provide the Ability to create new Modules	Epic	2020 Q3	80	10	13%	Building	Achieve Sustainable Growth	Broader Enterprise Adoption
Hours / FTE / Days Support Everywhere	Epic	2020 Q3	10	2	20%	Building	Achieve Sustainable Growth	Increase Modern UX Adoption
Staffing Workspace - Support Mixed Bookings, CIT, Days + TSV Costs	Epic	2020 Q3	90	10	11%	Building	Achieve Sustainable Growth	Increase Modern UX Adoption
Roadmap Integration to Rally	Enabler	2020 Q4	40	0	0%	Planning	Increase Executive Relevance	Value Delivery of Integrated Offerings
Roadmap Multi-select Import Improvement	Epic	2020 Q3	10	5	50%	Building	Increase Executive Relevance	Value Delivery of Integrated Offerings

Demonstration

Your First 90 Days

What to do when you get back to the office on Monday

DAYS 1–30

Agree on the terminology

- Standardize terminology: objective, key result, KPI
- Inventory the objectives that already exist
- Pick one portfolio as the pilot, not the whole org

DAYS 31–60

Draft the objectives in Clarity

- Draft 3–5 objectives with named owners
- Configure the blueprint and required fields
- Link existing investments to key results

DAYS 61–90

Run the first review cycle

- Run the first monthly check-in
- Publish one attainment view to executives
- Retire or rewrite the key results that did not work

Start with one portfolio for one quarter. A narrow pilot that reports real attainment is worth more than an enterprise rollout that reports nothing.

Questions?

Survey

Please take a few moments to fill out the class survey.

Your feedback is extremely important for future events.

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