

OKR Planner (Objectives & Key Results)

OKRs help align goals across teams and organisations by linking ambitious objectives to measurable results. This planner ensures focus, accountability, and progress towards the outcomes that matter most.

1. Purpose of This Tool

- ☐ Align individual, team, and organisational goals.
- ☐ Translate strategy into measurable and trackable outcomes.
- ☐ Encourage ambition balanced with accountability.
- ☐ Maintain transparency across departments and teams.
- ☐ Build focus and momentum through quarterly review cycles.

Tip: OKRs are not tasks — they describe *what* you aim to achieve and *how* you will measure success.

2. OKR Structure Overview

Element	Description	Example
Objective	The high-level goal that defines <i>what</i> you want to achieve.	“Improve customer satisfaction and loyalty.”
Key Results	The measurable indicators showing <i>how</i> success will be demonstrated.	“Increase NPS from 65 to 80,” “Reduce support response time by 20%.”
Initiatives / Actions	The activities that will help achieve the Key Results.	“Launch new feedback process,” “Upgrade support software.”

- ☐ Keep objectives inspiring and key results quantifiable.

Tip: Objectives should stretch capability without being unrealistic.

3. Objective Planning Table

Objective Description Owner Timeframe Priority (High / Medium / Low)

- ☐ Define three to five clear objectives per team or individual per quarter.
- ☐ Ensure each objective supports wider organisational priorities.

Tip: Fewer, focused objectives achieve more than many vague ones.

4. Key Results Tracker

Objective Key Result Baseline Target Progress (%) Status (R / A / G)

- ☐ Each objective should have two to four key results.
- ☐ Use quantitative measures wherever possible.

Tip: Green shows success, amber signals risk, red needs action.

5. Initiatives and Actions

Objective Initiative Owner Start Date Due Date Outcome Measure

- ☐ Define the key actions required to achieve each key result.
- ☐ Assign ownership and deadlines to maintain accountability.

Tip: Actions are not the OKRs themselves — they are how you deliver them.

6. Alignment Mapping

Organisational Objective	Team Objective	Individual Objective	Alignment (Full / Partial / None)	Notes
-------------------------------------	---------------------------	---------------------------------	--	--------------

- ☐ Ensure every team and personal OKR links upward to business priorities.
- ☐ Adjust or remove objectives that do not contribute directly to strategic goals.

Tip: Perfect alignment ensures that everyone's effort drives the same outcomes.

7. Quarterly Review Summary

Objective Key Result Achievement (%) Lessons Learned Next Steps

- ☐ Review progress every quarter with open discussion.
- ☐ Identify learning, celebrate wins, and reset objectives for the next cycle.

Tip: OKRs are designed for agility, not permanence — review and adapt regularly.

8. Scoring Guide

Achievement (%)	Rating	Description
0–40	Missed	Limited progress — needs re-evaluation.
41–70	Partial	Good progress — continue refining approach.
71–100	Achieved	Objective met — celebrate and embed learning.
100+	Exceeded	Stretch performance — explore new targets.

- ☐ Use scoring consistently to benchmark improvement across cycles.
- ☐ Discuss results openly without blame to encourage learning.

Tip: The goal is growth, not perfection.

9. Reflection Questions

- ☐ Which objectives delivered the greatest impact this quarter?
- ☐ Which key results need rethinking for the next cycle?
- ☐ What helped or hindered progress most?
- ☐ How well aligned were team and individual OKRs?
- ☐ What did we learn that can improve next quarter's performance?

Tip: Reflection converts OKRs from a reporting tool into a continuous improvement system.

10. Next Quarter Planning

Carry-Over Objective	Adjusted Key Result	New Objective	Reason for Change	Owner
-------------------------	------------------------	------------------	----------------------	-------

- ☐ Carry forward only unfinished objectives that remain strategically relevant.
- ☐ Introduce new ones based on lessons learned or shifting priorities.

Tip: Each cycle should reflect current strategy, not old habits.

How to Use This Planner

Use this planner quarterly at both team and individual levels. Begin by defining three to five ambitious objectives, then break them down into measurable results and actionable initiatives. Review progress monthly and refresh OKRs each quarter. When used consistently, this tool ensures alignment, clarity, and measurable progress across the organisation.

Notes