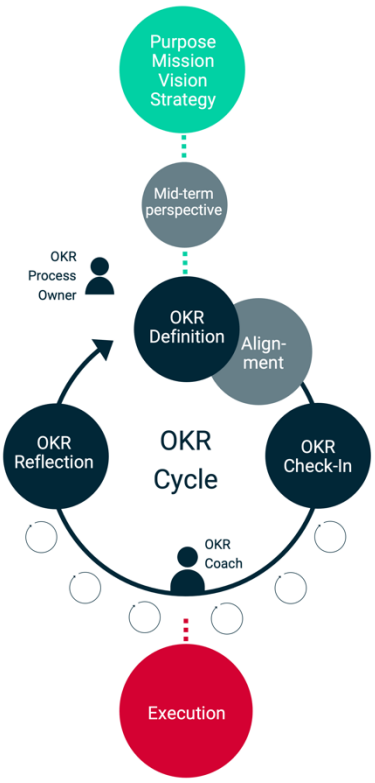
OKR Reflection – Look back to learn how to look forward



OKRs is not just a different way of defining goals – it is also a new way of working with goals. OKRs are built around a cyclical model that provides iterative learning opportunities for individuals, teams and the whole organization.

One crucial part of this iterative process is the OKR Reflection at the end of the cycle. These dedicated time-boxes allow teams to reflect on what they have achieved, what they have learned along the way and define necessary actions to improve the next OKR cycle and get them and the whole organization closer towards achieving their goals!

The goals of the OKR Reflection are as follows:

- Reflect on the achieved results (in the OKR Sets)
- Reflect on the collaboration throughout the OKR cycle and the OKR process
- Discuss different perspectives in your team (organization) and create a shared understanding
- Identify patterns and reasons why for impediments and obstacles
- Discuss process improvements and necessary adjustments
- Define concrete action items going forward

On the next pages, you will find tips and good practices for facilitating this process with a team as well as an exemplary agenda and layout for an OKR Reflection workshop taken from our experience with teams around the globe throughout different industries and company sizes.

We value your feedback!

This is a living document to support OKR Coaches and Practitioners around the world. So, if you have any comments, please write us at hello@okrs-at-the-center.com.

PREPARATION

As with all OKR events and workshops, preparation is key to make the most out of the time of your OKR Reflection.

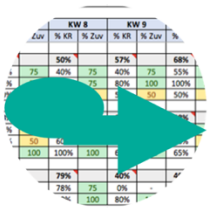
- *It is tempting to shorten the OKR Reflection (or even leave it out entirely) – especially at the beginning when OKRs might feel like an additional time investment. However, that will significantly slow down your learning process and improvement when working with OKRs. Creating a designated space for reflection is crucial to also get the most out of the time you invest during the cycle and transfer your learnings into the next one.*

- *Schedule the next OKR Reflection already at the beginning of the OKR cycle to make sure everyone can accommodate and prepare for it.*
  Tip: Use a morning timeslot, if possible, for better engagement and energy.

- *Update the Key Results in your OKR tool (or spreadsheet) and gather other relevant information needed for the reflection beforehand.*

- Make it engaging: Prepare and use collaboration boards (if the OKR Reflection is done remote) or white boards, flipcharts or alike (if done on-site) and send all necessary information and needed preparation to the participants in advance.

What is important to cover in an OKR Reflection:



Focus on results (Review) and collaboration (Retro)



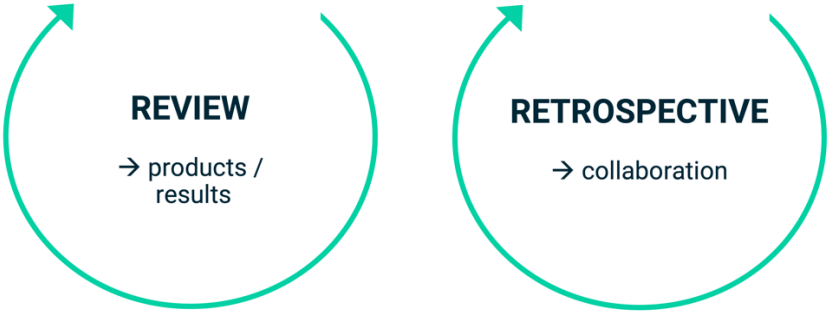
Look for emerging patterns in your analysis



Discuss the possible reasons why behind the issues

OKR Review and OKR Retrospective:

Similar to the events in a Scrum process, every OKR Reflection should consist of two parts – the **Review** to reflect on the actual results and the **Retrospective** focusing on the collaboration and OKR process.



Some teams like to discuss each part in a separate meeting. However, merging both into one workshop with designated timeboxes for each part is also a good option.

Look for emerging patterns in your analysis

At the end of the OKR cycle, you have gathered a lot of data and experience you can analyze and discuss in the OKR Reflection. And while details - for example when looking at the wording in the OKR Sets - are important too, don't forget to leave some room for discussing the bigger picture.

Take a step back to zoom out

In the exemplary structure described below you will find questions to incorporate in the workshop to help team members zoom out and focus on the bigger picture for each part of the OKR Reflection.

Discuss the possible reasons why behind the issues

As with all reflection formats you might end up with many different identified impedements or challenges and it is tempting to just move on from there and try to find "quick fixes" for the next cycle.

However, to really solve the underlying issues – and not just act on the symptoms – it is worth spending some time in your OKR Reflection to discuss the *reasons why*.

Let's look at a simplified example: You identified that you "did not have enough time to complete the necessary initiatives for the OKR Set".

Now ask yourself (or your team): Did we really simply not HAVE enough time?

Or was the problem that you had many last-minute projects coming in that ate up the time you planned for this OKR Set? Or was the ownership not clear upfront and you "wasted" time until someone took the lead? Or did you underestimate the scope of the OKR Sets and need to be more careful next time? Or something completely different?

Then ask WHY again: So, for example, if the ownership wasn't clear from the beginning – WHY did you not discuss this in the OKR Definition (or at least the first Check-in)? What kept you from assigning clear responsibilities for the underlying initiatives etc.?

The goal here is to go deep (enough) to be able to detect what the ACTUAL problem is and then try to find improvement points.

Good practice:

There is a fine line between getting deep (enough) into the reasons why – and loosing yourself in overanalyzing, a blame game or philosophical discussions that will not bring any further value to the team right now. Some things you can try to avoid that:

- Have an OKR Coach (or facilitator) guide the team through the process
- Pick only the ONE most important impediment or challenge of the last cycle in each OKR Reflection for a deep-dive discussion
- Timebox the discussion!
- Make sure to ALWAYS cover concrete action items at the end (at least answer the question: what is one thing you can do right now to improve the situation in the next cycle?)

OKRs as part of the organizational system:

Since goals live at the center of your organizational system and are connected to all the elements (like structures, leadership and alike), they also serve as a mirror for ways of working in your organization and make impediments visible. It is easy to "blame" OKRs for obstacles you uncover, instead of addressing the real issues. So, make sure to also reflect on which issues ACTUALLY have something to do with the way you work with goals (OKRs) and can be improved as part of the OKR process – and which are more related to other organizational elements.

So, coming back to the example mentioned above:

Maybe, setting clear Objective Owners (and responsibilities) will improve the achievement of the OKRs in the next cycle. But maybe, the underlying issue is more a structural one, since it is unclear if and how OKR Sets are prioritized over last-minute projects in general and whether the leadership supports that as well. This might be a topic that needs to be addressed outside the OKR Reflection with a different audience.

Reflect on OKRs as part of the organizational system as well



Make it actionable

Never leave an OKR Reflection without concrete action items for the team on how to improve the process for the next cycle and how to address current impediments.

If you stumble upon big issues that cannot be resolved quickly – at least decide on the next important step, a small experiment, divide responsibilities or decide whom the issue needs to be addressed to!

Summarize action items

You can already note down action items during the discussions, but at least at the end make sure you summarize next important steps to address the issues and improve in the future. And do that as concisely as possible.

Tip: Use a “what, who, when” structure or alike to commit to precise action items.

EXEMPLARY AGENDA FOR AN OKR REFLECTION WORKSHOP

Of course, there are many great ways to structure and facilitate reflection formats – and we would like to invite you to be creative and mix things up for the teams you are working with. Below you find one example that has proven to bring good value in a two-hour timebox you can get started with:

Agenda for an OKR Reflection workshop (combining Review and Retrospective)

The combined format consists of the following parts:

1) Setting the scene
2) OKR Review
3) OKR Retrospective
4) Wrap up and close

1) SETTING THE SCENE

After a check-in activity, do a quick walk through of the agenda for the workshop and also ask participants what is important for this OKR event today.

The goal here: You want to give everyone time to fully arrive in the workshop, get comfortable and be really present and focused on the goals for the next two hours.

2) OKR REVIEW

When everyone is on board and the goals for the workshop are clear, reflect on the results of the last OKR cycle, but keep in mind:

An OKR Review is not just another OKR Check-In (so reflecting on a particular moment in time), but a reflection of the ENTIRE OKR cycle as well. Of course, you will look at the status Quo of your Key Results – but don't forget the bigger picture!

Helpful questions for the OKR Review:

Zoom into the details (for example):

- What are the end points of the Key Results now at the end of the OKR Cycle (e.g. exact numbers of each Key Result and tracked overall achievement of the OKR Set in your OKR tool)?
- What were the main challenges towards achieving this particular Key Result?
- Which initiative mainly brought the Key Result(s) forward?

Zoom out to the bigger picture (for example):

- When you look at the results of all Key Results – and everything else we discussed so far – how would you rate the level of achievement for the Objective?
- How happy are you with the overall result for this OKR cycle?
- When you look at all OKR Sets together – which common patterns do you see?
- When we go through the major challenges – which ones had the biggest impact?
- When you compare the biggest achievements of the OKR cycle and the numbers in the OKR Sets – what do you realize?

Dependent on the amount of OKR Sets this part might take more or less time. When you work within a 2 hour timeframe, try to keep it to 30-40 min. maximum nevertheless.

Good practices for the OKR Review part:

- *Numbers are key when looking at Key Results – but combine them with an emotional perspective to get the full picture. E.g. ask the team: The numbers say, the KR / OKR is achieved by 95 % - but what does your gut tell you, did you really achieve the change you were after with this OKR Set?*

- *Keep it short: E.g. each Objective Owner can prepare for this part by already updating the Key Results and noting down challenges and necessary context before the workshop they can concisely present in a couple of minutes.*

- *Keep it simple: If you have an OKR tool, sharing the results on a screen is sufficient to go through them – but have collaboration or white boards ready to note down challenges / important topics and action items during and at the end of the discussion.*

- *Keep the focus:* Oftentimes, when discussing the results of the OKR cycle, teams already get into the OKR process and collaboration (HOW). That is great input for the second part for the workshop – but not the focus right now. Make sure you take notes, but try to guide the team back to looking at the results (WHAT) first.

Celebrating success

Many teams have a hard time really creating space to celebrate success. That does not mean that you do not look at what went wrong and how you can improve – but giving dedicated space to the achievements can help to stay motivated to continue, achieve a common understanding what HAS actually worked well (even in difficult times) and what the team can be proud of. Often teams do not even realize how far they have already come before discussing that!

Good practice:

- *Start with the achievements – and then move into the challenges and impediments. E.g. facilitate a quick exercise where each team member writes down the biggest achievement in the last OKR cycle from his / her perspective and discuss the result together.*

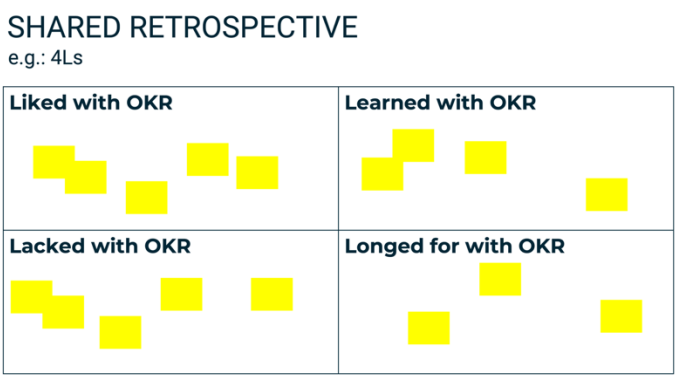
3) OKR RETROSPECTIVE

Once you have finalized the learnings and action items from the OKR Review, move on to the reflection of the OKR process and collaboration. For this part, (shortened) retrospective formats as practiced in agile teams are very useful.

A typical Agile Retrospective is structured into 5 parts:

1) Set the stage
2) Gather data
3) Generate insight
4) Decide what to do
5) Close the retrospective

Especially, when teams are not used to regular retrospectives, use the setting the stage part to discuss the goal of this (any) Retrospective and choose an easy format to gather the data, e.g. an adaptation of the "4L" format:



Helpful questions for the OKR Retrospective:

Zoom into the details (for example):

- What went well in the OKR Definition / the Check-Ins etc. during this OKR cycle?
- What was challenging, when tracking the Key Results?
- When looking at the scope of the OKR Sets – did you overall set to big / too small / too fuzzy etc. goals in the last cycle?
- How did you communicate around OKRs in your team? What did you notice?

Zoom out to the bigger picture (for example):

- What has proven to be the most impactful improvement in the last OKR cycle?
- When you look at the collaboration throughout the entire OKR cycle – what went really well? What was difficult?
- When you look at the major challenges – which one(s) had the biggest impact?
- When you compare the achievements of the OKR cycle with the reflections on the process and collaboration - what do you realize?

Make it actionable *(for example):*

- What can you learn from that experience?
- What is one thing you can do to improve that in the next OKR cycle?

Good practices for the OKR Retrospective part:

- *Oftentimes a quick break between the OKR Review and OKR Retrospective is a good idea – it naturally divides the two parts and also gives the participants a minute to recharge. Intense reflection processes do need a lot of energy!*

- To adapt the typical agile Retrospective format into a combined two-hour OKR Reflection format, focus on gathering data and then only pick one or two topics to further discuss to generate insights and commit to action items.

- Or choose a topic for the entire Retrospective. For example, when you decided to address the issue of unclear roles and responsibilities in the last OKR Reflection (by naming OKR Owners, further defining the OKR Coach responsibilities or alike), reflect particularly on this topic. You can always add a couple minutes at the end of the Retrospective to ask for other relevant topics or action items beyond this one before closing the workshop.

Get inspired for your Retrospectives:

There are many great resources out there on Retrospectives, here are two to get you started:

Online source: Retromat: https://retromat.org/

Book: E. Derby / D. Larsen: Agile Retrospectives: Making Good Teams Great

Do you have Agile Coaches, Scrum Masters or other facilitators in your organization? Ask them for input or (co-)facilitation.

4) WRAP UP AND CLOSE

At the end of the OKR Reflection, summarize the learnings from the last OKR cycle and collect final action items before closing the workshop with a Check Out exercise.

Good practice:

- *This is the end of the OKR cycle – and the beginning of the new one. So, make sure to go through an overview of the next steps (dates for OKR Definition, changes in the overall the process or OKR structure and alike) before you close the workshop.*
- *Store the learnings / action items from the OKR Reflection in a team folder / channel or alike – and make sure the look at them when defining OKRs for the next cycle.*

Leave on a high note:

Reflections can be challenging and discussing roadblocks, reasons why and possible improvements might bring the participants into a negative focus. So, make sure to leave the workshop on a high note, e.g. with a question in the Check Out referring to "one thing the participants liked about this workshop / the collaboration in this team" or "what they are looking forward to in the next OKR cycle".

Happy Reflecting!

Exemplary agenda for an OKR Reflection format combining OKR Review and OKR Retrospective

Timebox: 2 hours

Timebox	Module	Details	Goal
0:00- 0:15	Set the scene	• Facilitate a quick Check-In exercise • Walk through agenda for the workshop • Define the goals and what is important for today	Give everyone time to arrive in the workshop, get comfortable and focused on the goals for the next two hours
0:15- 1:00	OKR Review	• What has been the biggest achievement in this OKR cycle? (exercise / discussion 10 min) • Walk through each OKR Set, share some context for the result, discuss challenges and possible improvement points (30 min) • Conclusion and action items (5 min)	Reflect on the achieved results – in detail and bigger picture, discuss different perspectives, challenges and formulate action items for the next cycle
1:00- 1:45	OKR Retro-spective	• What has been the biggest achievement in this OKR cycle? (10 min) • Walk through each OKR Set, share some context for the result, discuss challenges and possible improvement points (25min) • Pick 1-2 topics for deeper discussion (15 min) • Conclusion and action items (5 min)	Reflect on the OKR process and the collaboration around the OKR Sets, discuss challenges and formulate process improvements for the next cycle
1:45- 2:00	Wrap Up and Close	• Summarize the workshop and collect final learnings and action items • Answer open questions • Facilitate a quick Check Out exercise	Summarize the learnings from the last OKR cycle and action items for the next one and close the workshop

Further resources:

More resources from OKRs AT THE CENTER (Check-In Guide, OKR System Design Template and much more) can be found here:
https://okrs-at-the-center.com/resources/

Check out our book "OKRs AT THE CENTER: How to use goals to drive ongoing change in your organization" at https://okrs-at-the-center.com/book/.

OKR Community:

You would like to join our international OKR Practitioner community to discuss with and learn from others? Join our remote meetup group:
https://www.meetup.com/de-DE/OKR-Remote-English/

OKR Coach Curriculum:

Interested to enrich your OKR knowledge with a systemic perspective and tools to even better support your peers in the OKR process to get the most out of it?

Check out our new hands-on OKR Coach Curriculum:
https://okrs-at-the-center.com/academy/okrcoach/

We value your feedback!

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