

An OKR (objectives and key results) is a collaborative goal-setting tool used by teams and individuals to set goals with measurable outcomes. Its structure allows you to focus and motivate your team, track progress, and create alignment to achieve an overall objective or project.

- **Objective:** describes where you want to go, with a clear direction - the 'where'.
- **Key results:** benchmarks that show progress, each with a metric attached. Typically 3-5 per objective - the 'what'.
- **Actions:** specific tasks that need to be carried out to drive the key results - the 'how'.

Use this template as a working document to record and keep track of the key deliverables for each stakeholder involved in working towards an overarching objective.

Objective 1 Close more sales/upsales	Deadline	Progress	Objective 2 Build culture of excellence to attract and retain talent	Deadline	Progress	Objective 3 Increase brand awareness and engagement	Deadline	Progress
Owner:			Owner:			Owner:		
Key result Increase number of SQLs by 20% by end of Q2			Key result Hire 25 new employees across sales, marketing and customer success			Key result Set up PR/comms calendar by end of Q1		
Action: Listen to BDR/SDR calls and give feedback			Action: Put competency framework in place			Action: Book meeting with key stakeholders		
Action: Review alternative CRM options			Action: Update LinkedIn company page			Action: Identify target media placements		
Action:			Action:			Action:		
Action:			Action:			Action:		
Key result Reach a 25% conversion rate on all leads			Key result Improve ENPS by 10% YoY			Key result Increase organic traffic by 25% QoQ		
Action: Put new customer needs analysis in place			Action: Carry out employee satisfaction survey			Action: Conduct SEO audit		
Action: Meet with sales managers to identify barriers to success			Action: Review exit interviews over the past 6 months			Action: Carry out keyword research		
Action: Agree post-meeting follow-up process with sales ops.			Action: Review employee incentive strategy			Action: Review competitor backlink profiles		
Action:			Action:			Action:		
Action:			Action:			Action:		
Key result Reduce churn by 33%			Key result Hire HR Director by close of Q3			Key result Improve social media engagement by 50% over next 6 months		
Action: Agree customer onboarding strategy and KPIs			Action: Put proposal to the board			Action: Hold brainstorming session with marketing team		
Action: Recruit 3 new AEs			Action: Brief executive recruitment agencies			Action: Agree budget for Facebook advertising		
Action: Increase upselling targets for AEs and CSMs			Action: Research salary expectations			Action: Review best/worst performing posts over last 3 months		
Action:			Action:			Action:		
Action:			Action:			Action:		