

# GETTING STARTED WITH TEAM METRICS

A guide to get your team aligned around common goals so you can measure and understand your progress.



# WHY?



**Whether you are using data all the time or just getting started, getting your team aligned around metrics can help you improve team health and happiness, drive growth and make your product more successful.** To get started, we recommend using the OKR methodology to set your team goals and to learn what are the most important things to track.

Companies like Intel and Google, as well as countless smaller companies, use the OKR (Objective-Key-Result) process to ensure that everyone understands their own individual contribution to the success of the company and to help their teams focus on the most effective actions to move the needle for the whole organization.

## EXTRA CREDIT:

Watch this video of Rick Klau, Partner at Google Ventures, explaining Google's OKR methodology.



[How Google sets OKRs](#)

*“Goal setting is important for several reasons. First, it helps the company focus, not on 50 goals, but on the top 5 or so goals that are critical to the company’s success. By going through the process of brainstorming and writing goals, we are assured that the major goals will surface. That’s good discipline.*”

*Goal setting also helps with accountability and coordination between teams. We know what we need to accomplish, when it needs to be accomplished, who is going to own it, and how we are going to work together to get it done.*

*When done right, goal setting is a very powerful tool. Every team member in the company can link their goals to the corporate goals, knowing that their work is having a direct impact on the success of the company.”*

-John Doerr, Kleiner Perkins Caufield & Byers, instigated the OKR process at Intel & Google

# GETTING STARTED

## **What's an Objective?**

An Objective, as it relates to the OKR methodology, is what you want to accomplish in a given period. It is a qualitative, aspirational, and motivating goal. And it should be big enough to make you just a little uncomfortable.

## **What are Key Results?**

Key results are the measurable, quantifiable metrics that indicate whether you've achieved your Objective. They should be limited in number, have a deadline for their completion, and only your team should be responsible for their completion.

## **Company-wide OKRs**

If your company has not set company-wide goals, the OKR process can help to define what the most important collective goal should be for your organization. It should reflect your product's maturity, your level of market penetration and the overall mission of the company. Make sure to determine which key results will indicate success.

## **Team OKRs**

Your team metrics need to support your company goals, so the first step will always be getting a clear picture of what your organization wants to achieve as a whole. In some cases, your company may already define its mission and goals. Ask your leadership team to give you quarterly goals if they are not implementing OKRs or goals & supporting metrics across the company.

Take the goals your company has established for the next quarter and evaluate how your team can best support these objectives. Use this framework to determine your team's priorities and how to best measure your success.



# MEETING 1: OBJECTIVES

In your first meeting, you'll establish Objectives. These should be big goals, qualitative and motivating, and full team participation is critical.

## **What you'll need:**

Make sure you've got at least 60 minutes uninterrupted in a room big enough for everyone to join the conversation. If your department is quite large, break this into smaller groups, such as team leads in one meeting to determine departmental objectives and smaller teams on their own. You'll also need a small pad of post-its and a marker for each participant.

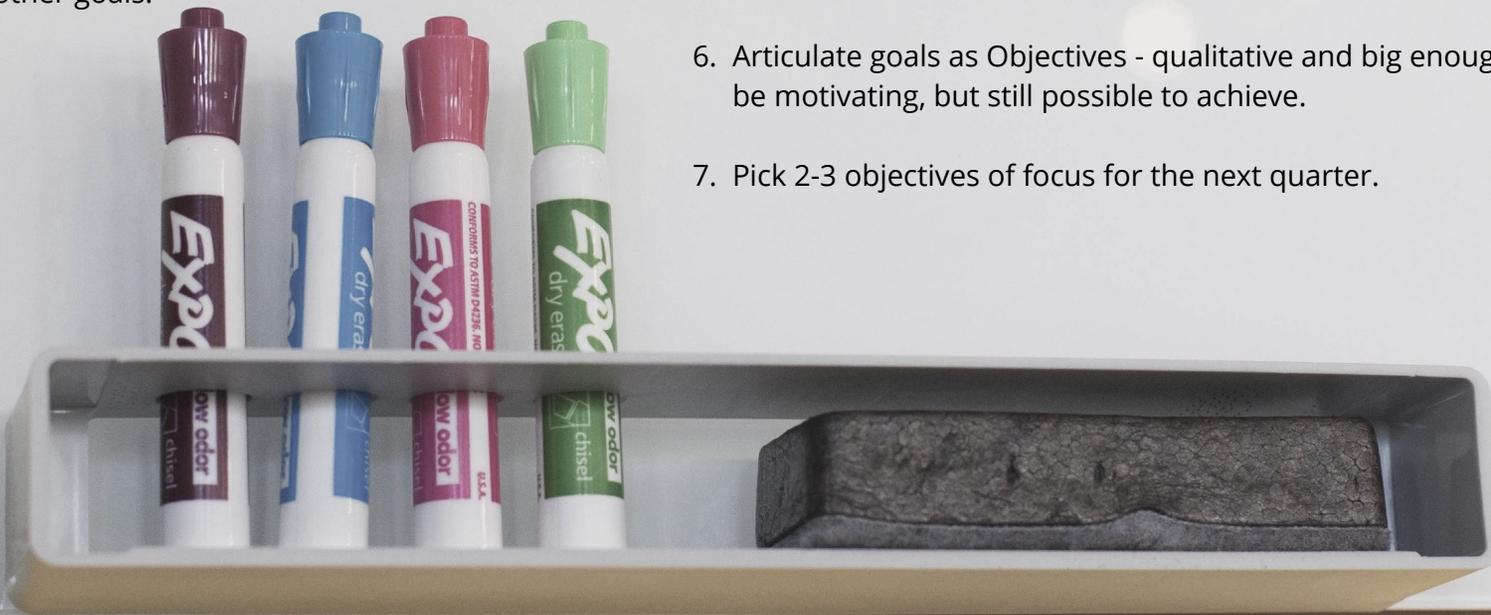
## **Setting the scene:**

If your company has already chosen its overarching goals for the quarter or year, focus on one at a time. If it hasn't, remind the team of where you are as a company and what goals might be most vital to the business at this stage.

For example, your company's Objective might be to become the market leader in your industry. So your Team Objectives might be something like, "Be the most talked about solution in our space" (Marketing Goal); "Increase the addictiveness of our product" (Product Goal), or "Improve the delight of our customers" (Success Goal).

**Take these steps with your team:**

1. Pass out post-it notes and markers to each person. Don't worry about everyone having different colors. Just be sure that each person has at least 10 post-its and a big, bold marker for writing.
2. For each of the broader company goals, set a timer for 5 minutes and ask everyone to write their ideas of how the team can best add value to the success of company objectives. One idea per post-it.
3. When the time is up, have each person read their Objective ideas out loud and place them on a board. If ideas are repeated, just add a +1 to the original.
4. If your company has multiple organizational Objectives, repeat this process for each.
5. Now it's time to narrow down your options. Start by filtering out any goals that are secondary or exist to support other goals.



6. Articulate goals as Objectives - qualitative and big enough to be motivating, but still possible to achieve.
7. Pick 2-3 objectives of focus for the next quarter.

**See the full agenda here.**

**EXTRA CREDIT:**

Find a visible place in the office to list your team's objectives, so that they are consistently reminded of why their work matters and what they should be focused on for the quarter.

# MEETING 2: RESULTS

In your second meeting, you'll decide which Key Results will indicate that you're meeting your Objectives.

**Remember:**

Key results must always be numerical, so you can track them quantifiably. Don't use general or subjective actions as key results.

**Track metrics that indicate success of the Objectives.**

For example, if your team chose "Improve code quality" as an Objective, you might track "Number of escaped bugs," "Number of bug-related customer complaints," and "Team confidence in our release." Or if your team chose "be the most talked about solution in our space" as an Objective, you might track "number of press articles," "number of backlinks to our site," and "number of mentions on twitter."

Then set targets for each of these metrics, such as a substantial decrease in escaped bugs compared to previous releases, or a big increase in press mentions compared to last quarter.

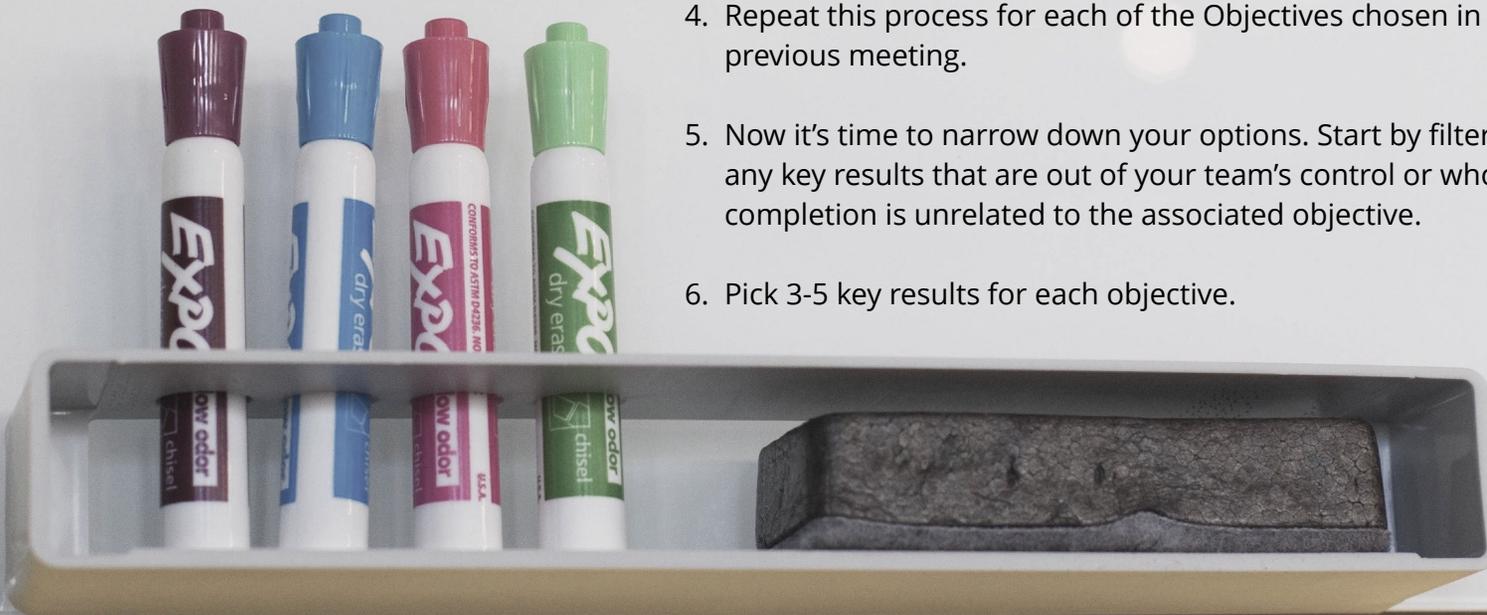
For each of these Key Results, you should set a goal that is ambitious but possible; typically a 60-70% success rate is appropriate. If you are consistently hitting 100% of your Key Results targets, you should make them more aggressive next time around.

### What you'll need:

Again, make sure you've got 60 minutes uninterrupted in a room big enough for everyone to join the conversation. You'll want your post-its and markers for each participant again as well.

### Take these steps with your team:

1. Remind your team of the 2-3 Objectives chosen in the last meeting, writing each on the board.
2. Set a timer for 3 minutes. Pick one of the chosen objectives and have everyone write down ideas for the key results that signify success in meeting that objective. Keep in mind that Key Results must be quantifiable, time-bound, within your team's control and whose completion directly signifies the achievement of the objective in mind.
3. When the time is up, have each person read their Key Result ideas out loud and place them on a board. If ideas are repeated, just add a +1 to the original and move on.
4. Repeat this process for each of the Objectives chosen in the previous meeting.
5. Now it's time to narrow down your options. Start by filtering out any key results that are out of your team's control or whose completion is unrelated to the associated objective.
6. Pick 3-5 key results for each objective.



**See the full agenda here.**

#### EXTRA CREDIT:

Assign the responsibility of tracking each metric to an individual team member. Make it their job to find and report the relevant data to the rest of the team or use a data sharing tool like [Notion](#). Their sense of ownership will keep them engaged and motivated.

# MEETING 3: INDIVIDUAL OKRS

In your third meeting, you'll be reviewing your team's individual goals and metrics.

The next step of this process is for your team to individually create 2-3 objectives for the quarter. **Because your team has already completed this process as a group, they should be empowered to take the same approach on their own.**

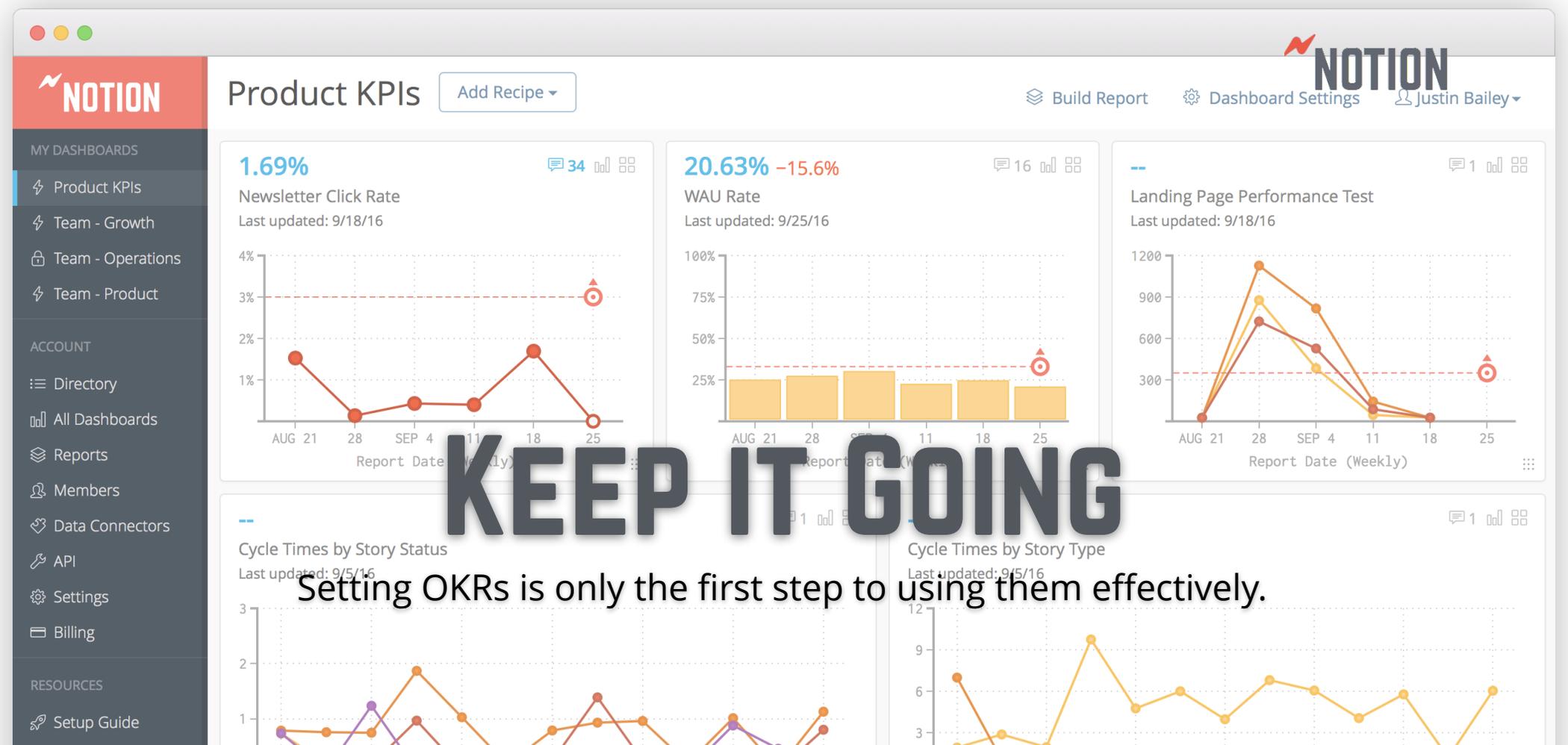
Meet with each individual team member to review their chosen OKRs to ensure they're properly motivating, but within the realm of feasibility.

**Next, schedule a group meeting for each team member to share their personal objectives and how they plan to track their own success.** Doing this in a group setting can be intimidating for some, but transparency is critical to the success of OKRs. Individual team members should feel supported and encouraged by the team to achieve their personal objectives.

## EXTRA CREDIT:

Help individual team members identify gaps in their skills or experience that may serve as obstacles in achieving their objectives.

Together, create a plan to get additional training or education to get them closer to their goals. This could mean pairing them with a mentor at work, allocating time to take an online course, or finding projects that provide additional experience.



The OKR methodology is most successful at motivating your team when you incorporate consistent evaluations of whether you're on track to meet your goals and discussions of how to improve performance. As a team leader, you can help your team members stay on track with both collective and individual OKRs.

Transparency and regular check ins are critical to the OKR process, so consider exposing metrics on a dashboard or other data sharing tool, like [Notion](#).

Having this ready insight into how you're tracking towards Key Results makes it easier to lend a helping hand when a metric seems to be headed in the wrong direction. Schedule regular conversations with the team to give them the support they need to move the needle.

Remember, OKRs are iterative, and will change on a regular basis. Meet more of your goals by evaluating the metrics you track each period to make sure your results support your objectives.

# GETTING STARTED WITH TEAM METRICS

## MEETING AGENDAS

Use these customizable agendas to share and run your metrics-setting meetings, so you can start using OKRs to empower teams with goal-driven progress.

**Meeting 1**

**Meeting 2**

**Meeting 3**

## MEETING 1: SETTING TEAM OBJECTIVES

In this 1-hour meeting, you will set the objectives for the team. Prepare by writing your company objectives in the agenda, having sticky notes and pens on hand, and setting a timer for each section.

- 1. What are OKRs? (10 minutes)**
- 2. What are our team Objectives? (45-50 minutes)**
  - A. Identify broad goals (15 minutes)**
  - B. Filter out goals that support other goals (15-20 minutes)**
  - C. Articulate goals as Objectives that are ambitious but possible in the next quarter (5 minutes)**
  - D. Pick 2-3 goals to focus on (10 minutes)**

## 1. What are OKRs? (10 minutes)

In this section of the meeting, we'll talk about the purpose of setting Objectives and Key Results at our organization.

First, let's look at what OKRs are and why they will be valuable for us.

OKR is an acronym for:

**Objective**  
+  
**Key Results**

Your team Objective is the high-level goal you're setting based on company goals. Most companies set goals on a quarterly or yearly basis. Contributing to the achievement of these goals should inform how your team chooses its Objectives and provide the framework for choosing the metrics that matter most to your team.

**Completing your team Objective should be the best way for your team to contribute to broader company goals.**

For example, your company's primary goal might be to become the market leader in your industry. So your Team Objectives might be something like, "Be the most talked about solution in our space" (Marketing Goal); "Increase our user base" (Growth Goal); "Increase the addictiveness of our product" (Product Goal); or "Make our customers absolutely love us" (Success Goal).

An **Objective** is qualitative, motivating and big enough to be a little scary. Also it should fit into the following formulas:

**Description** - By achieving [the Objective], we/I will [result that furthers company goals]

**Alignment** - [The Objective] meets our company goal of [x]

**Key Results** are measurable indicators of activities you perform to achieve the objective. They must be:

- Measurable
- Accountable
- Indicate success of Objective directly (i.e. if you track a metric, there aren't a number of other possible causes for the metric's goal being met)
- Numerically based, so you can track them in a quantified way

## 1. What are OKRs? (continued)

Our company has set the following goals for the quarter: (these should come from our CEO or company leaders). The optimal number of company-wide objectives is 2-4.

- Objective 1 \_\_\_\_\_
- Objective 2 \_\_\_\_\_
- Objective 3 \_\_\_\_\_
- Objective 4 \_\_\_\_\_

## 2. What are our team Objectives?

Next, we'll set our team goals with the following steps. Remember, these are stretch goals, but should be conceivably accomplishable.

1. Identify broad goals
2. Filter out goals that support other goals
3. Articulate goals as Objectives that are ambitious but possible in the next quarter
4. Pick 2-3 goals to focus on

## 2. What are our team Objectives?

### Identify broad goals (15 minutes):

1. Write your company's mission and quarterly goals on a whiteboard or share a document.
3. Brainstorm about what goals your team owns that are in support of these goals, and are possible, if not probable, to complete in a quarter.
4. Give each team member a pad of sticky notes. Each team member should write 3-8 suggested goals on the sticky notes.
6. After 10 minutes, have your team put the sticky notes on a whiteboard or wall and read out all the ideas.
8. Objectives should articulate top-level goals. Try to avoid naming "tactics" (ways to achieve a goal).

In the brainstorming session, don't try to filter or rule out goals. This will take place in the next step.

### Filter Goals that support other goals (15-20 minutes):

Group the goals that are connected to the same idea or general goal.

**At this stage, identify any goals that are really subordinate to another goal.**

For example, if the goal is to create a feature that increases retention, and another goal is to test if the feature increases retention, building the feature is the top-level goal. In turn, both may be subsets of another goal, "Increase Retention" that your organization has set company-wide.

Team members should explain their thinking about the goal they suggested and allow others to weigh in:

- Is the goal broad enough to be an objective? I.e. is this a tactic or the main goal of the team itself?
- Is the goal attainable, measurable, ambitious and owned by the team?
- Is the goal a priority for the next quarter?
- Are there dependencies that the goal requires that aren't in place?

**You should also eliminate any goals that your team can't completely own.**

If aspects of the goal are dependent on the work of another team, narrow down the idea to just the component that your team can control.

### 3. Define Objectives from the top-level goals that remain. (5 minutes)

**Description** - By achieving [objective], we/I will [result that furthers company goals]

**Alignment** - [Objective] meets our company goal of [x]

## 1. What are OKRs? (10 minutes)

OKR is an acronym for:

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+  
Key Results

Your team Objective is the high-level goal you're setting based on company goals. Most companies set goals on a quarterly or yearly basis. Contributing to the achievement of these goals should inform how your team chooses its Objectives and provide the framework for choosing the metrics that matter most to your team. Completing your team Objective should be the best way for your team to contribute to broader company goals.

For example, your company's primary goal might be to become the market leader in your industry. So your Team Objectives might be something like, "Be the most talked about solution in our space" (Marketing Goal); "Increase our user base" (Growth Goal); "Increase the addictiveness of our product" (Product Goal); or "Make our customers absolutely love us" (Success Goal).

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- Measurable
- Accountable
- Indicate success of Objective directly (i.e. if you track a metric, there aren't a number of other possible causes for the metric's goal being met)
- Numerically based, so you can track them in a quantified way

Our company has set the following goals for the quarter: (these should come from your CEO or company leaders)

- Objective 1 \_\_\_\_\_
- Objective 2 \_\_\_\_\_
- Objective 3 \_\_\_\_\_
- Objective 4 \_\_\_\_\_

## 4. Choose your Objectives

In the last step of this meeting, you will choose 2-5 goals for your team to focus on. Choosing 2-5 goals doesn't mean you can't work on other goals, but you should agree that achieving these Objectives will be your team's priority.



**Success!** You've set your Objectives for the quarter!

### Follow up:

After the meeting, send your team a summary of the Objectives you decided on as well as the full list of ideas generated so they can be used to help set Individual OKRs.

**Add these Objectives to the [Key Results Meeting Agenda](#)**, which you can include when you remind teammates about the Key Results Meeting, coming up next.

**We recommend trying to contain your Objective and Key Results meetings within one week so your team stays current on the Objectives they've made.** If you have multiple teams, make sure Objectives and Key Results are transparent through a dashboard or other sharing tool.

Each quarter when you return to the process, you'll be able to refine and improve your goal-setting based on the success of the Objective and Key Results you discovered in your last quarter.

In the next meeting, you will choose the Key Results that you will track to measure the success of each Objective, and begin to use this process to set your Individual OKRs.

## MEETING 2: TRACKING KEY RESULTS

In this 1-hour meeting, you will set the Key Results (metrics) that measure the success of your Objectives. Prepare by writing your Team Objectives in the agenda, having sticky notes and pens on hand, and setting a timer for each section.

- 1. Review OKR process (5 minutes)**
- 2. Review Your Team Objectives (5 minutes)**
- 3. Setting Key Results**
  - A. Brainstorm (10-15 minutes):**
  - B. Filter (10 minutes):**
  - C. Prioritize (5-10 minutes):**
  - D. Choose 2-3 Key Results for each Objective (5-10 minutes):**

## 1. Review OKR process

Objective  
+  
Key Results

**An Objective is the high-level goal you're setting for a quarter that advances the organization's total goals.** Team goals are guided by your organization's company-wide Objectives, which should articulate goals that support the company's larger mission. Most companies have existing goals in support of their mission, and these can inform the team metric building process.

Your team Objectives should fit into the following formulas:

**Description** - By achieving [objective], we/I will [result that furthers company goals]

**Alignment** - [Objective] meets our company goal of [x]

**Key Results are measurable indicators of activities you perform to achieve the objective.** They must be:

- Measurable
- Accountable
- Indicative of the success of the Objective directly (i.e. if you track a metric, there wouldn't be a number of other possible causes for the metric's goal being met)
- Numerically based, so you can track them in a quantified way

## 2. Review Your Objectives

In the last meeting, you established your team's Objectives.

**These are the Objectives we set:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Write these Objectives on a whiteboard or share in a document.

Review each one to make sure everyone understands the goal and clarify the goal if necessary.

## 3. Setting Key Results

### A) Brainstorm (10-15 minutes):

For each objective, brainstorm for 5 minutes with the team on which metrics you could track that would indicate the objective is successful.

### B) Filter (10 minutes):

Filter metrics by eliminating any that:

- You can't directly affect
- Don't directly indicate success of the Objective
- Could indicate the success of something else
- Are not numerically measurable
- Don't have a clear way for you to get the data

### C) Prioritize (5-10 minutes):

Choose the metrics that best help you understand if your Objective is being met.

For example, if your team's objective was "Grow our user base", some sample Key Results might be:

- Increase WAU to X
- Increase site traffic to X unique visitors/week
- Increase signup to trial conversion to X%
- Increase Trial to Paid conversion to X%

### D) Choose 2-3 Key Results for each Objective (10 minutes):

You should track the number in your Key Result on a regular basis. Assign one team member to own the tracking and recording of each of your Key Results. You can use [Notion](#) to create a shareable visualization of your data to keep your process front-of-mind and transparent.

Keep a record of other indicators from your brainstorm session that will help you to see if you're on track. Even if these aren't your team's Key Results, they can inform individual Objectives and Key Results.

## MEETING 3: SETTING INDIVIDUAL OKRS

In this meeting, each team member will set individual OKRs. This step is optional, but having metrics to help individuals support the goals of your team can give each team member a sense of contribution and accomplishment, as well as a way to track whether their efforts are supporting overall goals.

We recommend working one-on-one to set your individual OKRs, either each member with the team leader, or in pairs among the team.

- 1. Write down your Team's OKRs or view your Notion dashboard or shared team OKR document.**
- 2. Brainstorm about what goals you might have on an individual basis that will contribute to the success of the team goal**
- 3. Once you've created 2-3 Objectives, create the Key Results that track the success of your goals.**

## Your contribution is key.

Now that your team has established its OKRs, it's time to create the Individual OKRs that will help you track your contribution to the team's success.

To set Individual OKRs, you can use a similar process to the Team OKR-setting process.

**1. Write down your Team's OKRs or view your [Notion](#) dashboard or shared team OKR document.**

**2. Brainstorm about what goals you might have on an individual basis that will contribute to the success of the team goal.** Get ideas from the brainstorm doc from your team OKR meeting.

For example, if your team has a goal to "Build a new feature to connect Slack to our product," you might have an individual goal of "build the front-end interface for our Slack integration." If your team's goal is "Increase signups by 20%," one of your goals might be, "Create landing pages specific to different user journeys."

**Your Individual Objectives should fit into the following formulas:**

Description - By achieving [objective], we/I will [result that furthers team goals]

Alignment - [Objective] meets our team goal of [x]

**3. Once you've created 2-3 Objectives, create the Key Results that track the success of your goals.**

Brainstorm on which metrics you could use to accomplish this goal. It helps to review them with a team leader or teammate to get feedback and make sure you're aligned with team Objectives.

Filter metrics by eliminating any that:

- You can't directly affect
- Don't directly indicate success of the Objective
- Could indicate the success of something else
- Are not numerically measurable
- Don't have a clear way for you to get the data

Set the metrics you are going to track and identify the targets for these goals. You can set these up to track and visualize in [Notion](#) or you can use another tracking form like a spreadsheet.

**Typical OKRs reflect a goal that you'll only be able to accomplish 60-70% of if you are working at a typical rate.**

If you find you're easily able to accomplish the goal by the end of the quarter, you aren't being ambitious enough. If you can't get even halfway there, adjust your expectations for the next round and take a moment to consider what prevented you from achieving your target.

OKRs are meant to increase transparency on a team, so expose your OKRs along with your teammates' on a shared dashboard or other method of collaboration.

**That's it!** Track your Key Results throughout the quarter to make sure you're on track, and use these results to keep aligned. Start setting your new Team and Individual OKRs again at the end of the quarter.

