Axy OKR

Step-by-step Guide for Setting Up and Using Axy OKR

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Axy OKR

Axy OKR is the best tool to implement ***Objectives and Key Results*** methodology and management system into your organization.

Objectives and Key Results (OKRs) methodology is a widely spread strategy for goal setting within the best and high growth organizations. The purpose of OKRs is to connect company, team, and personal goals to measurable results while having all team members working together in one unified direction.

OKRs were first introduced and defined in Intel by Andy Groove. And nowadays OKRs are a fundamental piece for guiding organizations like Google, LinkedIn, Intel, Zynga, Sears, Oracle….

Objectives and Key Results: OKRs

An **Objective** represents **WHAT** you want to achieve. Objectives are **qualitative** goals. They have to be ambitious and set the direction and focus of the company, team or individual in a **period** of time. The objective has to be significant and action-oriented but challenging: the principle of inspiration.

The **Key Results** define **HOW** you are going to achieve that Objective. Key Results have to be specific, time-bound, and metric-driven; measurable and verifiable. They have to show the path to reach the objective.

The Objective is the desired outcome and the Key Results are the measurable steps or “pieces” required to achieve that outcome. It is necessary to define enough and relevant KRs that, when reached, produce the outcome. To produce the outcome when reached, it will be necessary to define the quantity and relevant KRs.

OKRs, to which we will refer frequently throughout this guide, are the set of objectives with its key results.

Let's see it with an example:

Objective:

- Improve Sales Team satisfaction

Key Results:

- Define Team Building Activities plan by April
- Coaching of key people in the Sales team by May

- Team building activities Q1 plan execution
- Employee Satisfaction Survey by mid-June: Employee Satisfaction Index >89%

This objective has been defined for the second quarter of the year (**Period**) and it has four Key Results, each of them with a **Due Date** and a **Target Result,** so therefore totally measurable.

OKRs have to enable the whole organization to work in the same direction (**Alignment**), with a common and clear target (**Focus**), easily measurable (**Tracking**) that motivates people to deliver the best of themselves. (**Stretching**).

Focus-Alignment-Tracking-Stretching are the characteristics of good OKRs and as John Doerr defined in his book *Measure what matters*, the **"Superpowers"** that OKRs provide to organizations

OKRs are driven and conveyed from the top-level of the organization: CEO or organization leader will set the **Company Goal**, normally for the year.

Alignment is key for organization success. By aligning OKRs, you can set **Top-Down** or ask for **Bottom-Up** objectives

Setting Top-Down objectives will ensure that the organization is totally aligned with Company Goals. And asking for Bottom-Up objectives will leverage the commitment, innovation, and knowledge of every person in your organization to reach your goals.

A good balance between both types of objectives is key for OKRs implementation success. A best practice is set at least 50%-60% of the objectives Top-Down.

In order to guarantee alignment in the organization, any sort of objective has to be related to the Company Goal in some way: it could be related directly to the Company Goal or it could be related to an upper Objective through a parent Key Result. Each objective in the organization has to be related and contribute to another objective through one of its key results.

In this way the whole organization will be aligned with the Company goal and the Main Objectives.

On the following pages, we will show you how to use Axy OKR to easily set and manage OKRs within your company or organization.

What is this guide about

This guide will show you how to:

- **Setup OKRs for the first time**, following a quick and easy wizard, that will help you define your Company Goal: the main OKRs at the company level, the periods in which you will focus your execution and the planning and wrap-up cycles.
- **Align the OKRs** definition and execution **for your organization**, setting Top-Down and Bottom-Up OKRs in a very easy manner thanks to the Tree view. We will explain these concepts later in detail.
- **Use Axy OKR** to manage the **planning, execution, and wrap-up** cycles for your OKRs.
- **Define Objectives and Key Results in detail**, to leverage all the functionalities of Axy OKR.
- **Analyze the OKRs** implementation, thanks to the **Axy OKR dashboards**
- **Administrate the settings** to customize Axy OKR for your own organization.

In this guide, **Salesforce admin** will find as well how to:

- **Install** Axy OKR in your Salesforce org.
- Assign app **profiles and permissions**
- Assign Axy OKR **licenses**
- Access to **app logs**

If you are installing for the first time Axy OKR, please go to Axy OKR Installation section

Starting Up with your OKRs

Company goal, Main Objectives, and Key Results

With Axy OKR you must first define the **Company Goal**. The Company Goal sets the direction for the year. It defines the whole organization's target.

Company goal will be split into the **Main (Company) Objectives**. You should define 2 to 5 main objectives for your organization to stick to as the company goal.

Main Objectives will also have to be defined for the year. Owners of these Main Objectives can be the CEO or his/her Directors or VPs.

First you have to define 2-5 **Key Results** for every Main Objective.

Then you have to think of the **Period** for OKRs execution and management. The quarter is the period that is most used. A quarter is short enough to ensure we maintain the focus on the objective and long enough to execute and to be reviewed several times.

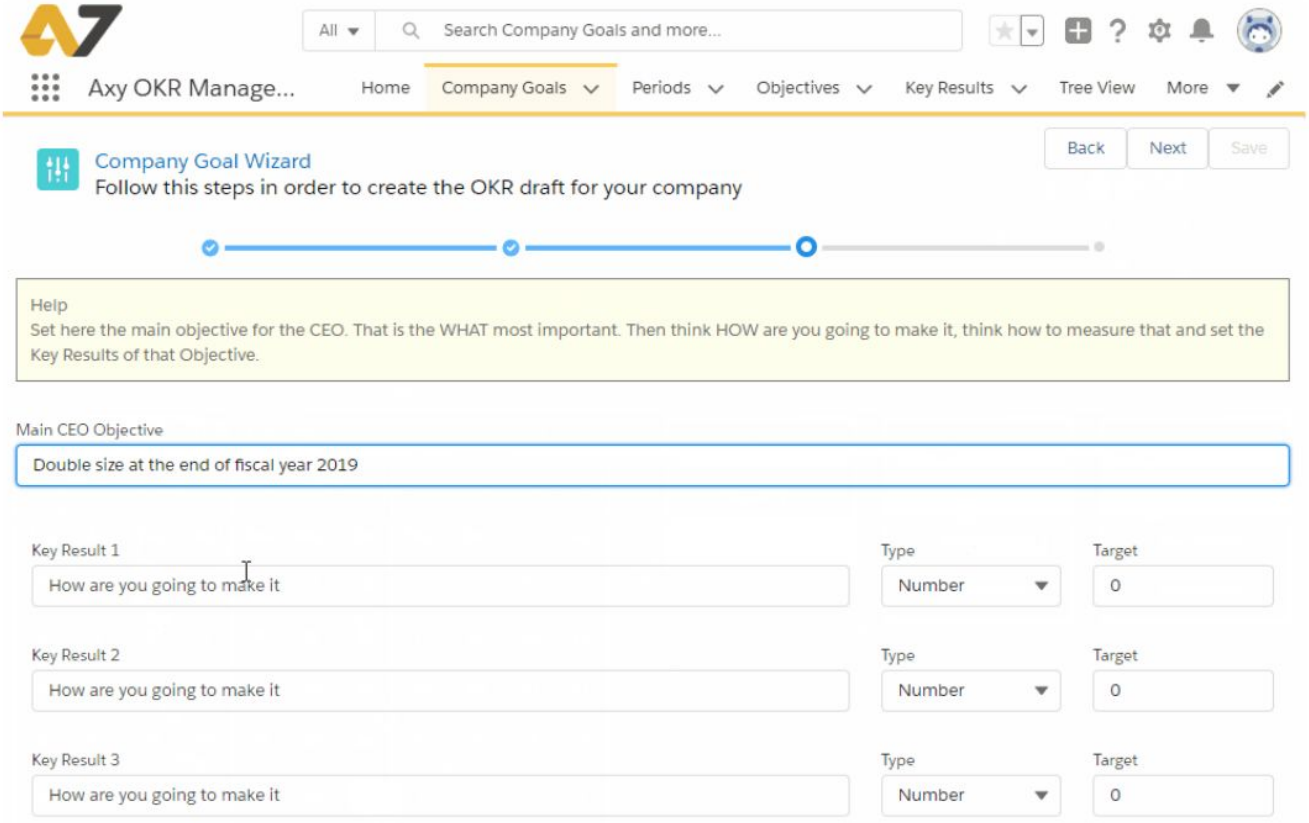
Axy OKR will also allow you to define the **Planning** and **Wrap-Up cycles. Planning cycle** is the number of days you will use to plan (define) the OKRs for the next period. **Wrap-Up cycle** is the number of days used to review and learn from OKR execution from the previous period.

Axy OKR provides a **Wizard** that will guide you through 4 simple steps, to define your *Company Goal,* the *Period and Cycles,* the first *Main (Company) Objective* and Key *Results* to define the "how" and measure the achievement.

1. Navigate to ***Company Goal Wizard*** in ***Home*** tab
2. Click on ***New***
3. Define **Company Goal** and Company Goal **Period** to achieve it
4. Define OKRs **Period Frequency, Planning** and **Wrap-Up**
5. Define **Main OKRs** for the CEO or Main Manager
6. Review what you have defined and save

In our example:

- Company Goal: First one in market share in 2019
- Main Objective: Double size at the end of fiscal year 2019
    - Yearly objective
    - Period for OKRs: Quarter
    - Planning and Wrap-Up cycles: One week
- Key Result 1: Launch at least two new product releases
    - Type: Boolean
- Key Result 2: $57M revenue in 2019
    - Type: Currency
- Key Result 3: Increase employee satisfaction by 20%
    - Type: Percentage



Axy OKR will generate everything automatically and you can define other 1 or 2 Main Objectives and their related Key Results (Go to section Objectives to learn how to define them).

Important note: The ***Company Goal*** created with the ***Wizard*** is set as ***Not Public***, and the ***Main Objectives*** are set as ***Private***.

- As long as you maintain the Company Goal as Not Public, not any users will see that Company Goal.
- This behaviour is enforced in order to permit C Level users to define and agree the main OKRs prior to make them public to the rest of the organization.
- Once you are ready to start the OKR setting for the rest of the organization, change the Company Goal to Public and the Main Objectives to Not Private

Now you are ready to start with your OKRs planning cycle and for the alignment with your team.

Aligning your OKRs

Alignment is key for organization success. For aligning OKRs, as we have mentioned previously, you can set Top-Down or ask for Bottom-Up objectives.

A good balance between both types of objectives is key for OKRs implementation success. A best practice is set at least 50%-60% of the objectives Top-Down.

Top-Down Objectives

Top-Down objectives should be set at **company** and **team** levels:

- CEO/Organization leader set Top-Down objectives to their VPs
    - VPs set Top-Down objectives to their Managers
        - Managers set Top-Down objectives to their team members.

You can set Top-Down objectives defining the child objectives of one of your KRs and assigning them to your team.

Each of your KRs that you want to align Top-Down should have 2-5 Objectives for your team.

Let's see how to do it with Axy OKR:

1. Navigate to ***Objectives***
2. **Go to the objective** you want to set Top-Down
3. Navigate to ***Key Result*** tab in the Objective
4. Select one of the KRs and go to ***Child Objectives***
5. Define a ***New*** objective
6. **Assign** it to a person in your team

Repeat for every Objective you want to set Top-Down.

TIP: You can as well create a child objective directly from a Key Result using the ***Convert to Child Objective*** button.

A best practice is to leave the Key Results for the team. You know WHAT you want them to achieve and they know HOW to do it.

Bottom-Up Objectives

Your team will align their objectives, either defining their Bottom-Up OKRs or the KRs for the Objectives you have set Top-Down. Ask them to do it (Go to section Objectives to learn how to define them).

Each of the objectives of your team has to be related and contribute to one of your OKRs or other upper OKRs.

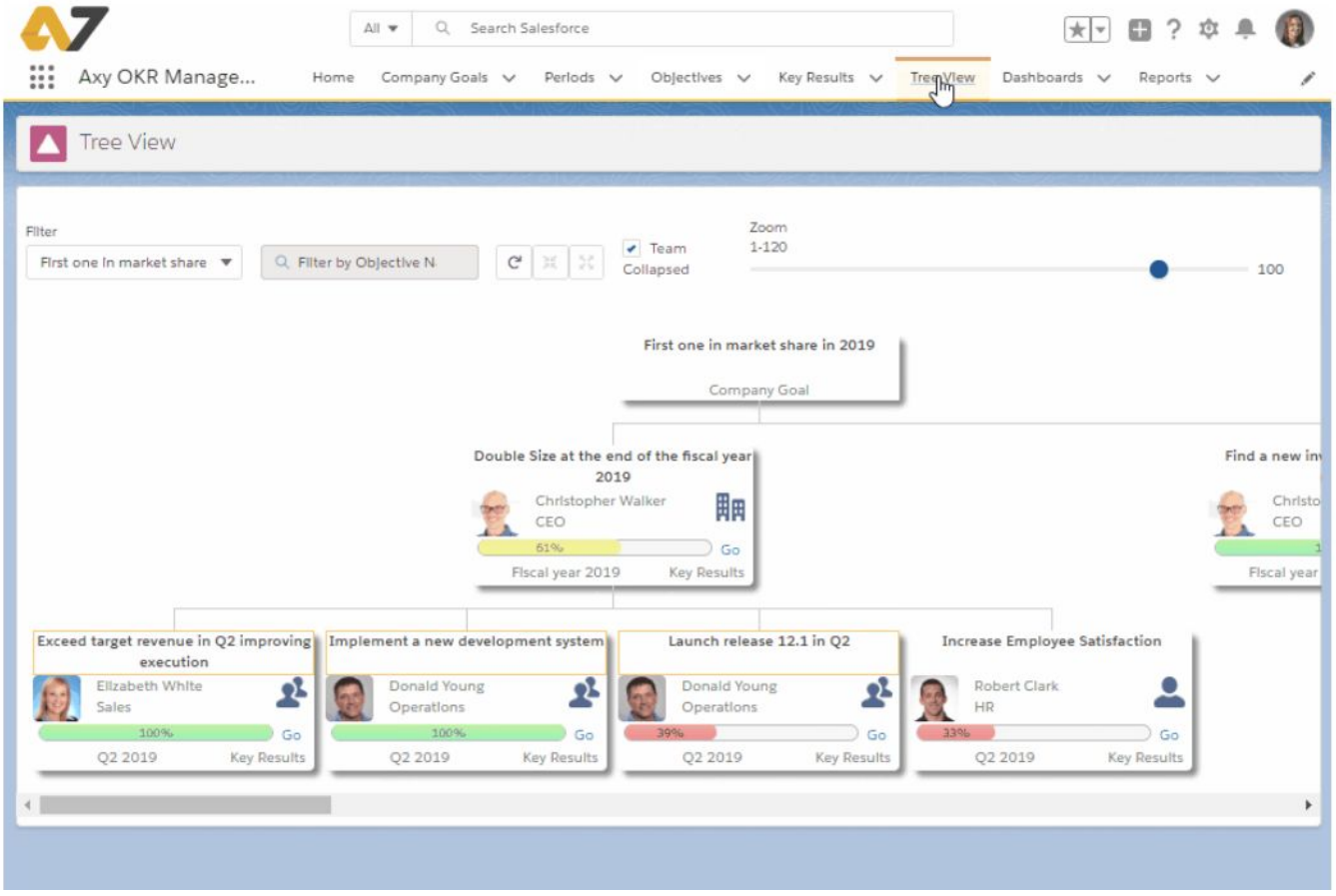
Alignment view

At this moment in the PLANNING of your OKRs for the year, the complete organization will see your company OKRs and can align their efforts towards them. (Be sure your company goal and the objectives that have already been set have the **PUBLIC switch** checked)

Then your team will continue setting down the objective through the different levels of your organization, following the same process.

This process of Bottom-Up and Top-Down objectives definition, performed sequentially at every level and by every team in the organization, will end with the complete alignment of everyone with the Company Goal and the main objectives.

Axy OKR has a powerful **Tree view** of the objectives, so anyone in the company can see the alignment of everyone else´s objectives.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Company Goals
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First one in market share
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Company Goal
Double Size at the end of the fiscal year 2019
Christopher Walker
CEO
61%
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Key Results
Find a new in
Christo
CEO
Fiscal year
Exceed target revenue in Q2 improving execution
Elizabeth White
Sales
100%
Go
Q2 2019
Key Results
Implement a new development system
Donald Young
Operations
100%
Go
Q2 2019
Key Results
Launch release 12.1 in Q2
Donald Young
Operations
39%
Go
Q2 2019
Key Results
Increase Employee Satisfaction
Robert Clark
HR
33%
Go
Q2 2019
Key Results

Using Axy OKR

Planning

The planning cycle for the Year

As we have said at the beginning, the first step is to **set up the OKRs for the company for the year:** the **Company Goal** and the **Main Objectives.** The Wizard that was previously described will guide you on how to achieve it. This is the first planning phase. To give an example, **at the C-Level** you will:

- Define Company Goal
- Set the Top-Down objectives, several or all Main Company Objectives to the C-level.
- The C-level team will define Key Results for those Main Objectives
- Ask them for Bottom-Up objectives. C-Level will discuss and set them.

Then **Planning will go down through the organization**:

- C-Level will set Top-Down and ask for Bottom-Up objectives.
- The same process will be followed by Managers with their teams
- Every individual will finally have their Top-Down objectives and set the Bottom-Up ones.

Period planning cycles

During the year you will have other planning cycles, one for each of the periods you have defined. Typically per quarter, you have to:

- Define the quarterly Objectives for the company
- Cascade Top-Down OKRs into the organization
- Ask for Bottom-Up OKRs
- Have team objectives discussions
- Approve objectives if needed by managers

In order to manage the progress of Planning cycle, Axy OKR provides the Planning Dashboard

Execution

Execution cycle starts automatically at the Period starting date.

What to do in the execution phase:

- Update manual type KRs (a suggestion is to do it weekly)
- Update Tasks in TODO type KRs
- Review KRs progress automated by bound reports (see *Tracking key results* to know about tracking Automation)
- Review **Objective progress** and **forecast** in the Stats tab (go to Objectives to see every detail)
    - Suggestion: Weekly/bi-weekly tracking of Objectives and KRs in order to take actions and understand the validity of the planned OKRs
- Execute, Execute, Execute!!

In order to manage the progress of Execution cycle, Axy OKR provides the Execution Dashboard

Wrap-Up

The wrap-up cycle starts automatically at the Period end date.

What to do in Wrap-Up cycle:

- Update the final result of every manual type OKRs, including the last tasks for the KRs based on tasks
- Sit down with your manager to **discuss** your progress on OKRs during the past period.
- Receive his/her **feedback**
- Think of and **review** the validity of the actions and key results that have been defined in order to reach the objective. Analyze whether obtaining the key results have actually contributed to the objective or not
- **Score** the objectives. Axy OKR will show you, as a guidance the **Achievement** and the **Progress %,** according to the KR actual results and the assigned weights. But you and your manager have to really score the Objective. This scoring is a number between 0 and 1:
    - 0.7 to 1.0 = green. (We delivered.)
    - 0.4 to 0.6 = yellow. (We made progress, but fell short of completion.)
    - 0.0 to 0.3 = red. (We failed to make real progress.)

- **Learn** from it to plan the following period

In order to manage the progress of Wrap-Up cycle, Axy OKR provides the Wrap-Up Dashboard

Objectives and Key Results in detail with Axy OKR

Objectives

Define an objective

An Objective represents WHAT you want to achieve. The Objective will also require defining HOW you are going to achieve that by creating Key Results.

In order to guarantee alignment in the organization, any objective has to be related to the Company Goal in some way:

- It can be related directly to the Company Goal, as with the Main Objectives
- It can be related to a parent Key Result

Relating a **child objective** to a **parent Key Result** means that your objective is aimed to contribute in some way to that OKR.

Objectives have **Level** and **Type**. The Level is implicitly detected from the parent relation. The Type could be **Company, Team or Individual**.

The Objective also needs to have a **Period** where it is supposed to be achieved

An objective is normally related to an upper-level Key Result. But it can be related as well to someone's key result at the same level, in his/her team or in other areas of the organization.

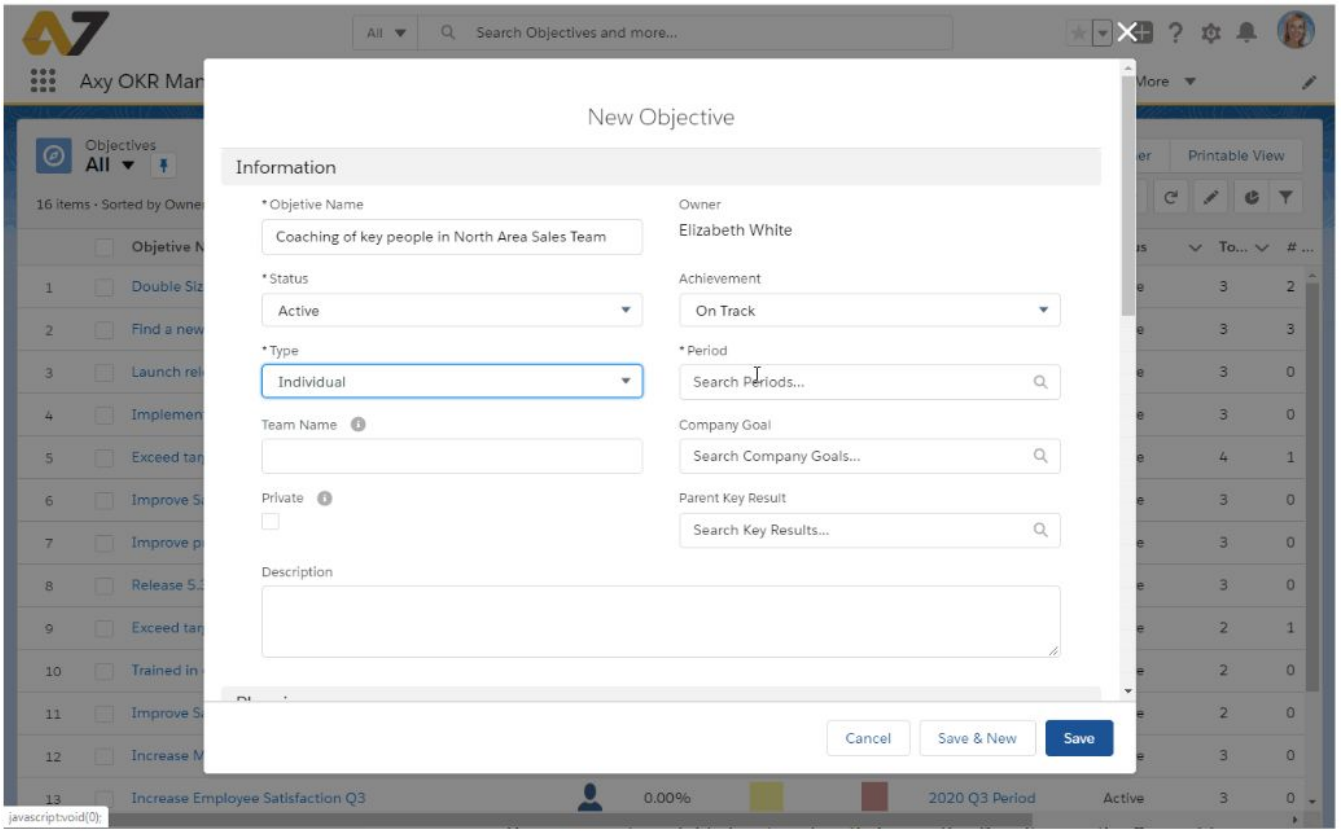
New Objective

Follow the next steps to define an Objective

1. Navigate to ***Objectives*** tab
2. Click on ***New***
3. Define **Objective Name, Status, Type, Period** and **Parent Key Result** to align
4. Decide **start** and **end dates** for your objective
5. Review what you have defined and save

In our example:

- Objective Name: Coaching of key people in North Area Sales Team
- Status: Active
- Type: Individual
- Period: 2020 Q3 Period
- Parent Key Result: Coaching of key people in the Sales team Q3

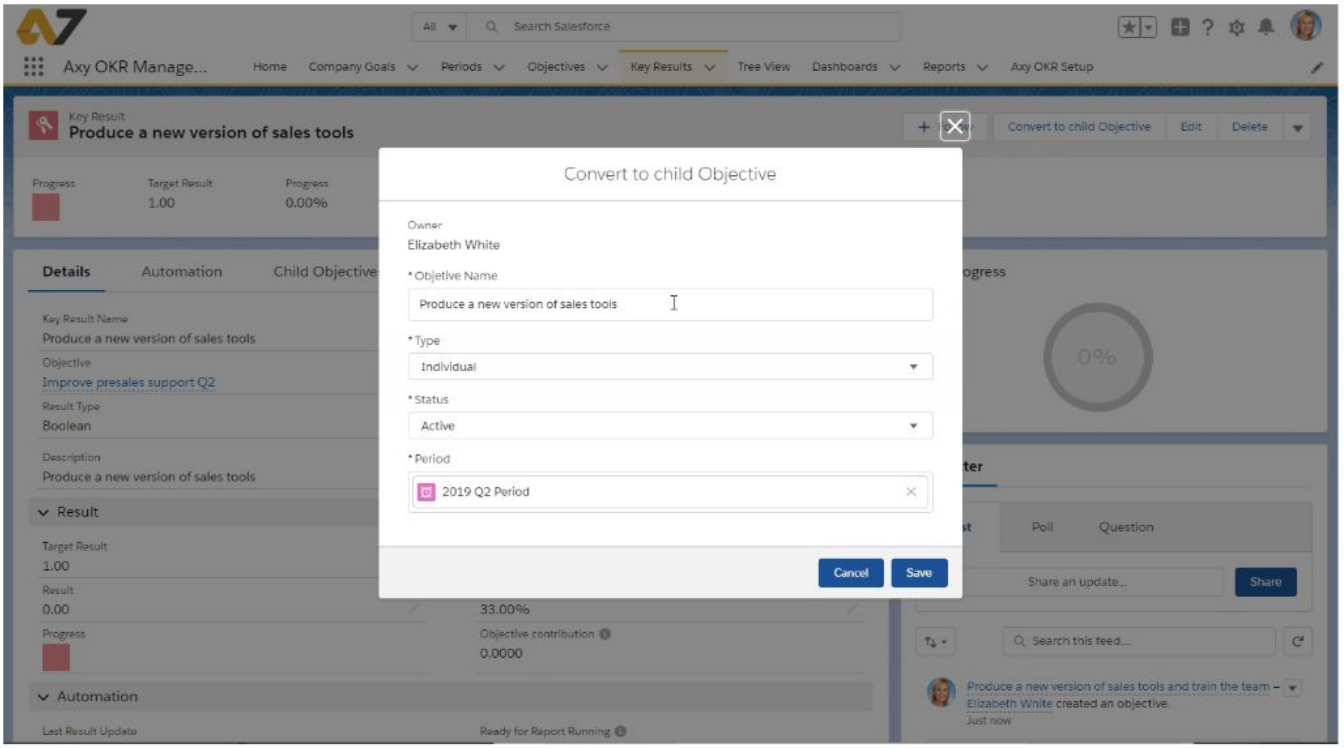


Convert a Key Result into an Objective

You can create a child objective directly from a Key Result using the ***Convert to Child Objective*** button. This is a fantastic way to contribute and directly align your objectives with the OKRs of other people in the organization.

1. From any Key Result page, click on ***Convert to Child Objective*** button
2. A pop-up window with default information from the Key Result appears
3. Edit **Objective Name, Type, Status** and **Period** if needed and save

4. If you go now to **Child Objectives tab**, you will see your new Objective



Objective Ownership

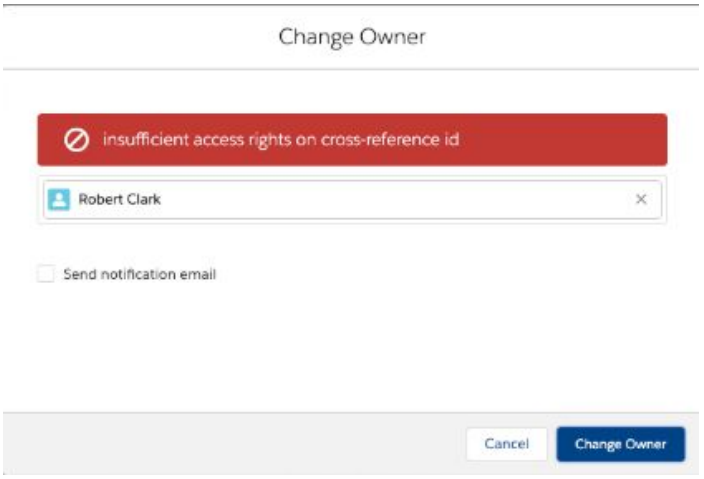
The owner of an objective is, by default, the one that has created it. But sometimes an objective needs to be reassigned to other user. For example, when you create OKRs for others following the Top Down practice, you have to change the owner.

Who can change the owner of an objective?

The objective ownership can be changed to other person by

- The current owner of the Objective
- The Salesforce Admin user that have full access to any object
- Any user above the current owner in the hierarchy

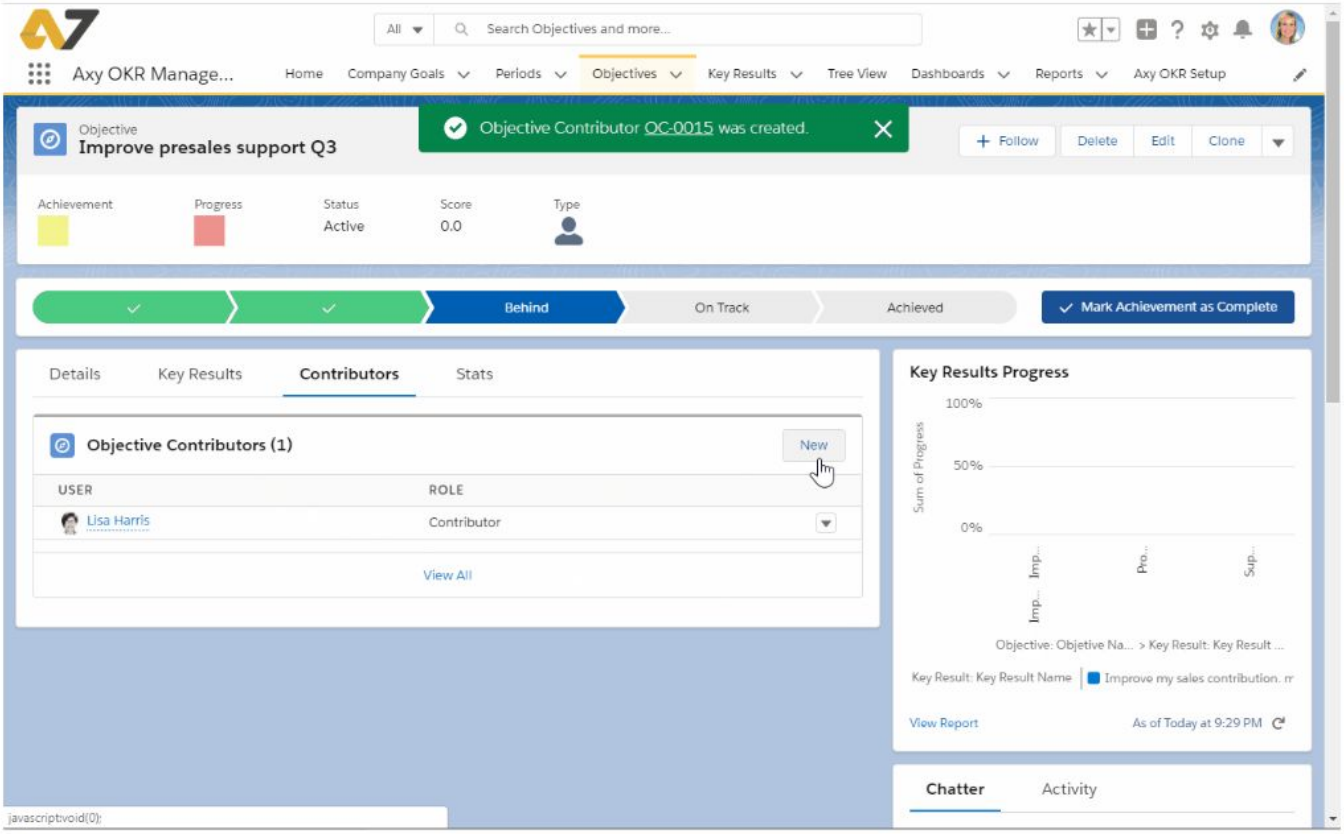
If any user different from these three types tries to change the owner of an objective, the following error will appear:



Objective Contributors

When an objective is ***Team*** type, the members (users) of the team can be defined in Axy OKR as ***Contributors*** to that objective.

A team member can be ***Responsible*** or just ***Contributor***. This ***Role*** must be defined when you are assigning the contributors to the objective.



Objective Tracking and Progress Status

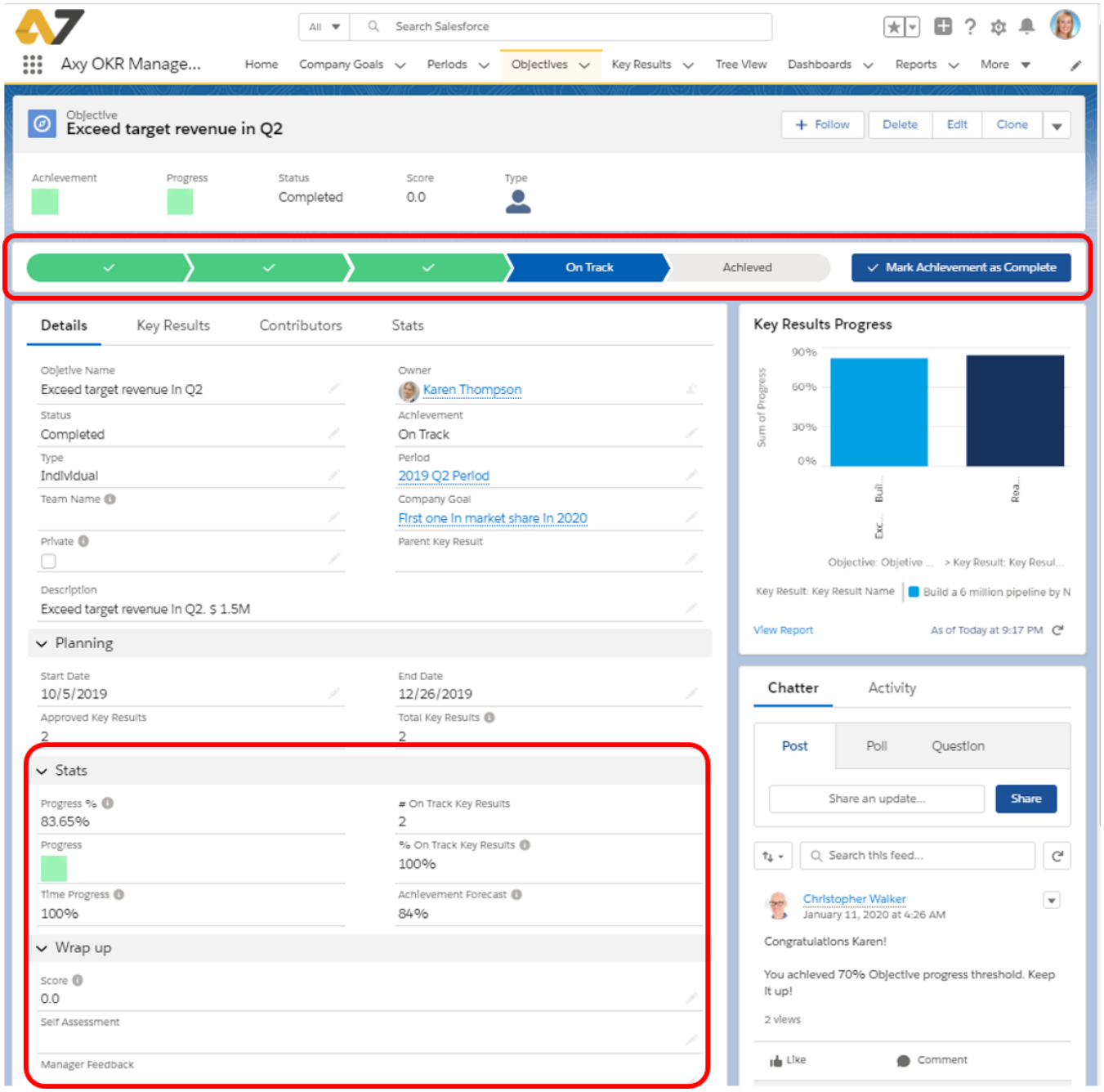
Axy OKR has several parameters for assessing the forward or completeness status of both Objectives and Key Results.

OBJECTIVES have several fields that indicate status, and all are automatically calculated. During the Execution, you have to track the following fields:

- **On TRACK key results**: Indicates the number of Key results whose progress is above 70%.
- **PROGRESS (%).** Indicates the percentage of progress based on the Progress of KRs and the weight of each KR in its contribution to the OBJECTIVE
    - Example: An OBJECTIVE with two KRs, one with 100% progress and a weight of 40% and another with 40% progress and a weight of 60% will result in an OBJECTIVE PROGRESS of 64%.
- **ACHIEVEMENT FORECAST**. It is an indicator of the progress depending on the elapsed time. If it is less than 100% it indicates that there may be a risk of not reaching it

- **ACHIEVEMENT**. This field is calculated automatically if desired, or assigned manually. It is an indicator of the good progress of the OBJECTIVE. If it is automatic, it is calculated based on the Achievement forecast and the time remaining to reach the OBJECTIVE.

When entering into the Wrap Up cycle, the objective have to be graded in the **SCORE** field. The owner decides, based on his/her analysis of the achievement and the way in which he/she has worked to achieve the objective, how to score the final Objective result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+ Follow
Delete
Edit
Clone
Achievement
Progress
Status
Completed
Score
0.0
Type
On Track
Achieved
Mark Achievement as Complete
Details
Key Results
Contributors
Stats
Objective Name
Exceed target revenue in Q2
Owner
Karen Thompson
Status
Completed
Achievement
On Track
Type
Individual
Period
2019 Q2 Period
Team Name
Company Goal
First one in market share in 2020
Private
Parent Key Result
Description
Exceed target revenue in Q2. $ 1.5M
Planning
Start Date
10/5/2019
End Date
12/26/2019
Approved Key Results
2
Total Key Results
2
Stats
Progress %
83.65%
On Track Key Results
2
Progress
% On Track Key Results
100%
Time Progress
100%
Achievement Forecast
84%
Wrap up
Score
0.0
Self Assessment
Manager Feedback
Key Results Progress
90%
60%
30%
0%
Sum of Progress
Objective: Objective ...
> Key Result: Key Resul...
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Build a 6 million pipeline by N
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Chatter
Activity
Post
Poll
Question
Share an update...
Share
Search this feed...
Christopher Walker
January 11, 2020 at 4:26 AM
Congratulations Karen!
You achieved 70% Objective progress threshold. Keep it up!
2 views
Like
Comment

Key Results

Define a Key Result

Every objective could have from 3 to 5 Key Results. These Key Results define HOW we aim to reach our objective (the WHAT).

Key results in Axy OKR can be typed as **boolean, numbers, TODO** lists… any of the types allow assigning a **target value** to a Key Result in order to measure the progress.

A really powerful feature is the possibility of **binding a Salesforce report** to automate the progress tracking of the key result.

Axy OKR automatically runs the bound report every night in order to update the Key Result's result and update the objective progress.

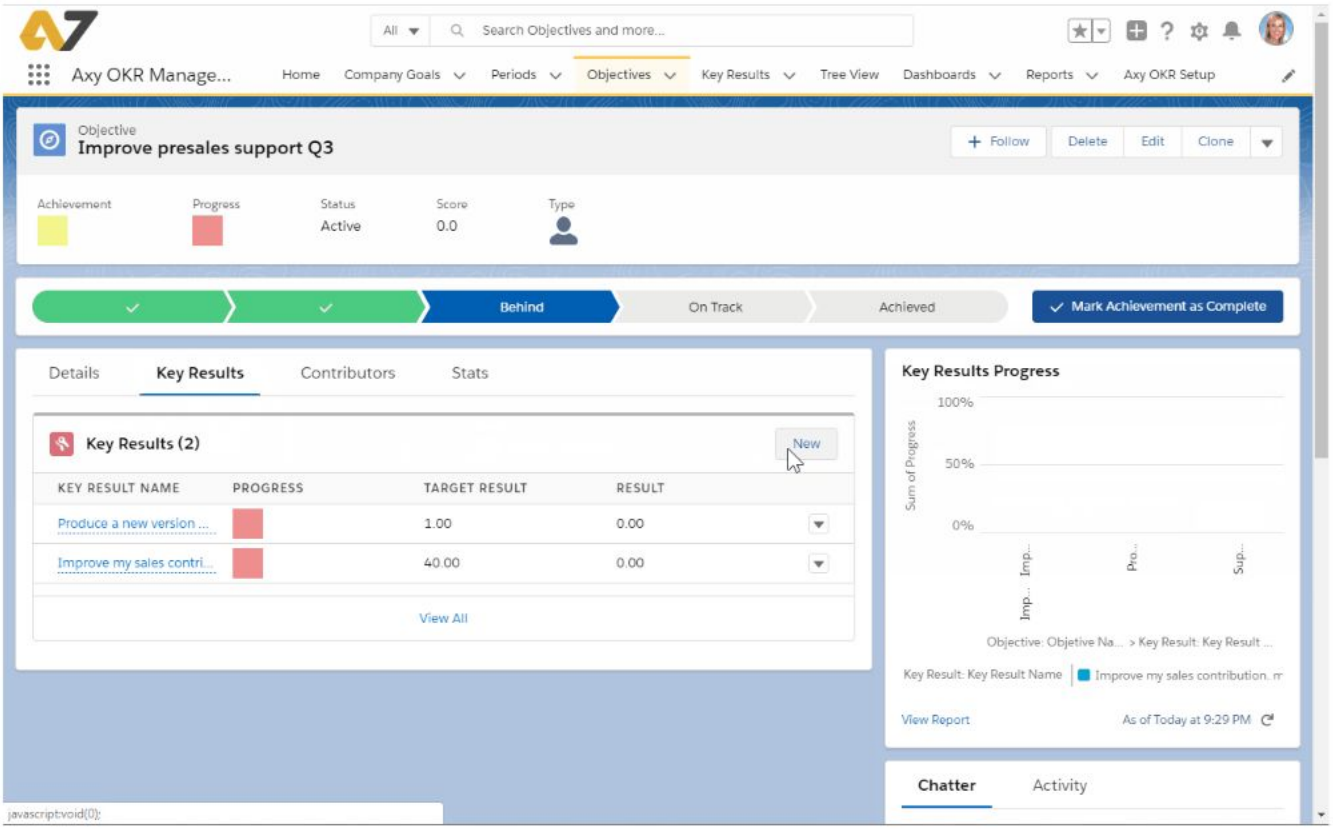
New Key Result

Go through the following steps to define a Key Result

1. Navigate to ***Key Results*** tab
    a. Or, if you are on the Objective page, navigate to ***Key Results*** subtab
2. Click on ***New***
3. Define **Key Result Name, Status, Objective, Result Type,** and **Target Key Result**
4. Decide **Due Date** for your key result
5. Define the **Weight**: Percentage of objective contribution. This is normalized by default.
6. Review what you have defined and save

In our example:

- Key Result Name: Support at least 4 new sales opportunities
- Status: Active
- Objective: Improve pre-sales support
- Result Type: Individual
- Target Key Result: 4
- Due Date: June, 20th 2109
- Weight: 35%



Key Results using Positive or Negative metrics

Usually you meet a Key Result when you reach or pass it. So when result is higher than the target, you are done. In an example:

- You define a KR to reach an NPS of 150. You will use NUMBER as type.
    - If you have an NPS of 100, Axy OKR will calculate progress as 66%
    - If you have a 165 NPS, Axy OKR will calculate progress as 110%

This is what we call a **Positive metric**: the progress is higher when the number or % is higher.

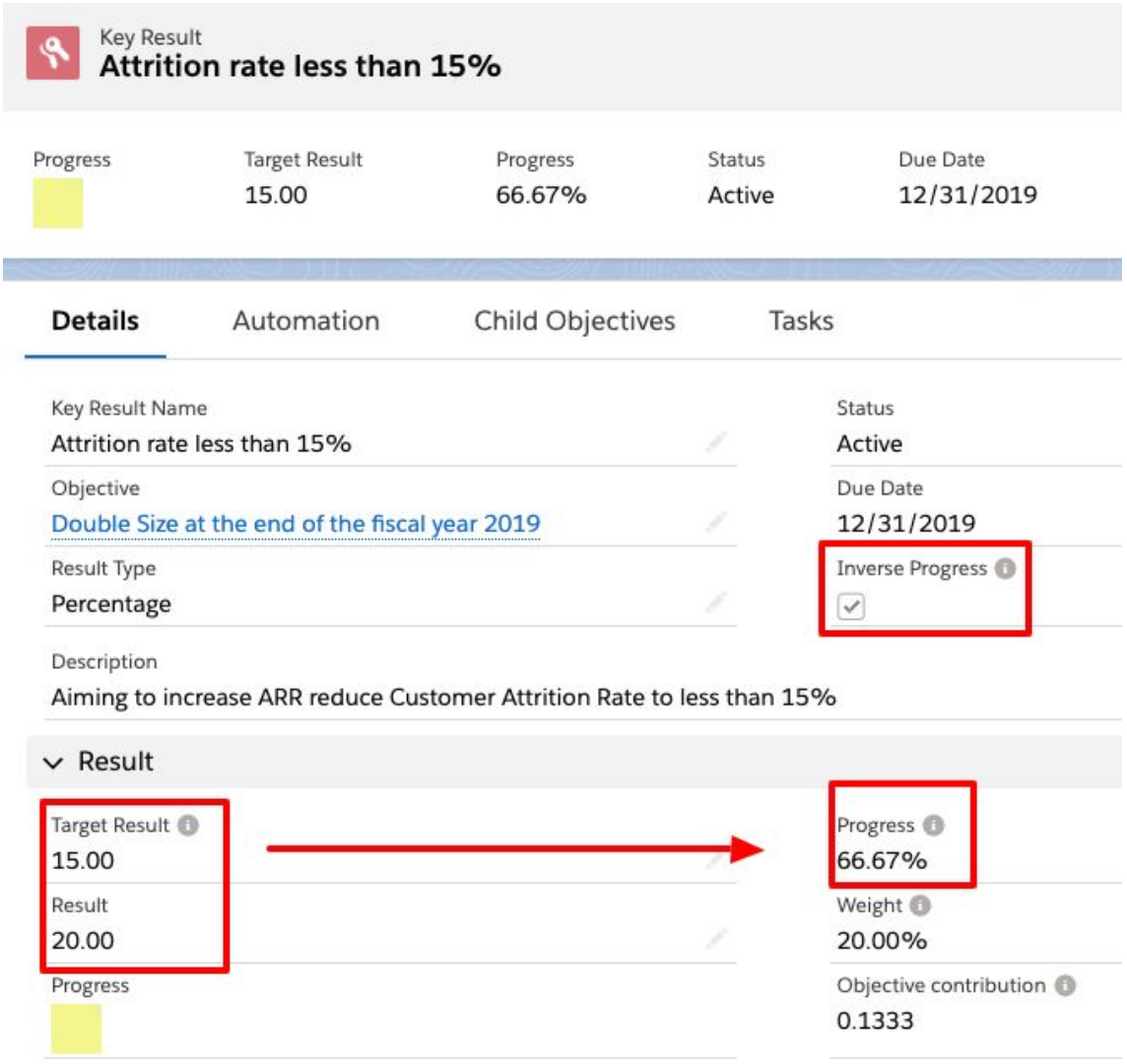
But some times you need to track a reduction of any business parameter. They are called **Negative metrics**:

- Reduce the Customer churn rate to 10%
- Employee atrittion lower than 12%
- Average Age Opportunity less than 65 days

Axy OKR measures as well the progress on a Negative metric. We called it: **Inverse Progress** since you are progressing good when lower results are getting.

It is quite simple: by just **checking the Inverse Progress checkbox** in the Key Result the system will automatically calculate the Key Result progress in Inverse mode.

The following Key Result has a target of 15%, and a result of 20%. Being negative, the lower the result the better the progres:



Tracking Key Results with Reports

A very unique feature of Axy OKR is the possibility to track and measure the progress of a Key Result binding Salesforce reports to them.

You can set any aggregated report field of any report to the Key Result you want to track. A few examples:

- Pipeline coverage, quota attainment, revenue amount… for Sales KRs
- Average case time resolution, percentage of First Call Resolution… for Customer Care KRs
- Number of MQLs, SEM efficiency by UTMs… for Marketing KRs
- The number of New Distributors, revenue from Dealers… for Channel Sales KRs
- ...

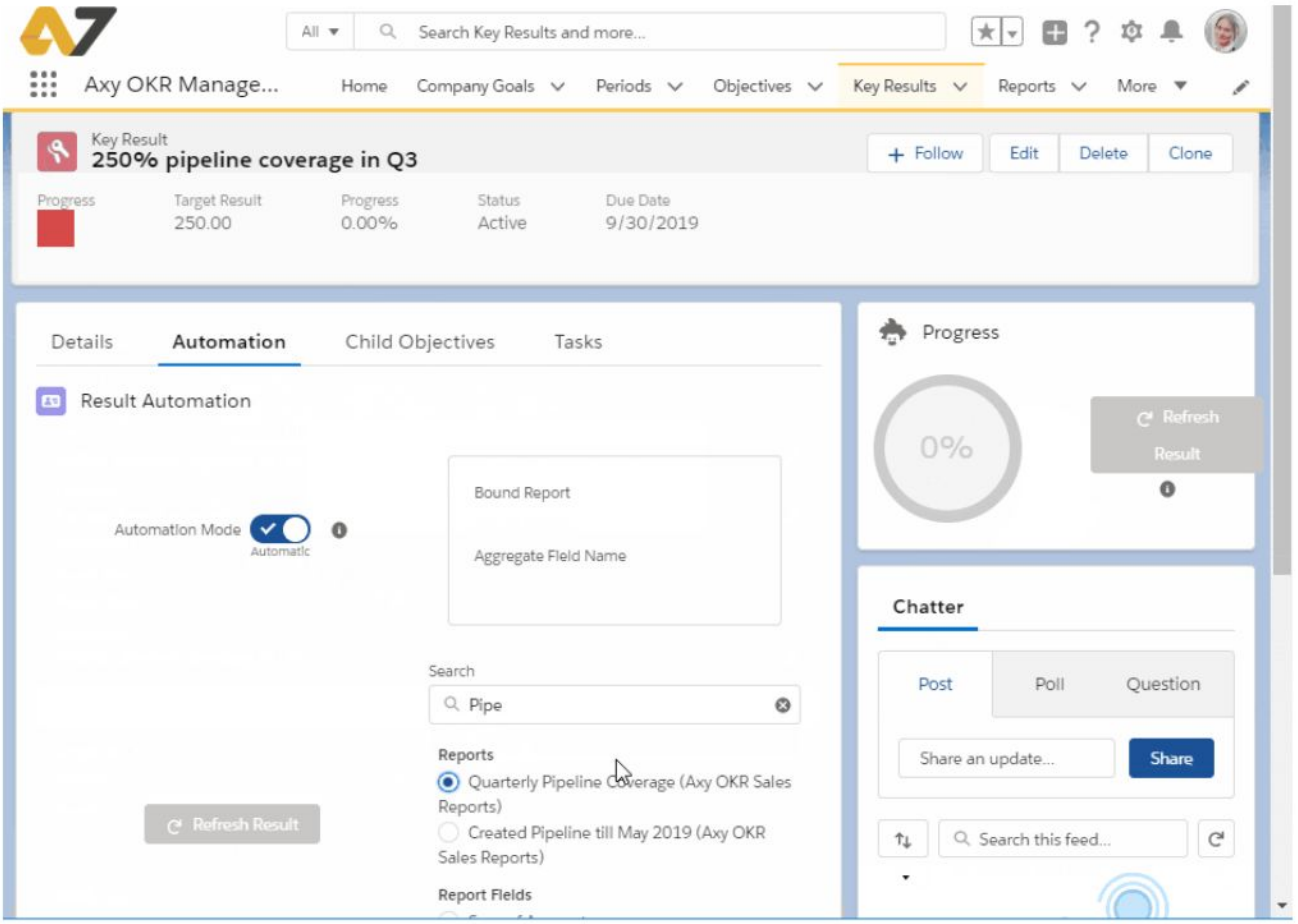
Go through the following steps to bind a report to a Key Result

1. Browse to any Key Result page
2. Click on ***Automation*** sub-tab
3. Toggle on the ***Automation Mode*** switch
4. ***Search the report*** you want to bind
5. Select the ***Aggregate Field*** of the report you want to use to track the Key Result
6. A success message will appear as Axy OKR is running the report and updating the result

In our example:

- Key Result Name: 250% Pipeline coverage in Q3
- Bound report: Quarterly Pipeline Coverage
- Aggregate Field Name: Pipeline coverage

Important note: Axy OKR **runs the report using the objective's owner user**. This means that visibility sharing settings are applied, so the data gathered from the report is the correct one for every Key Result owner.

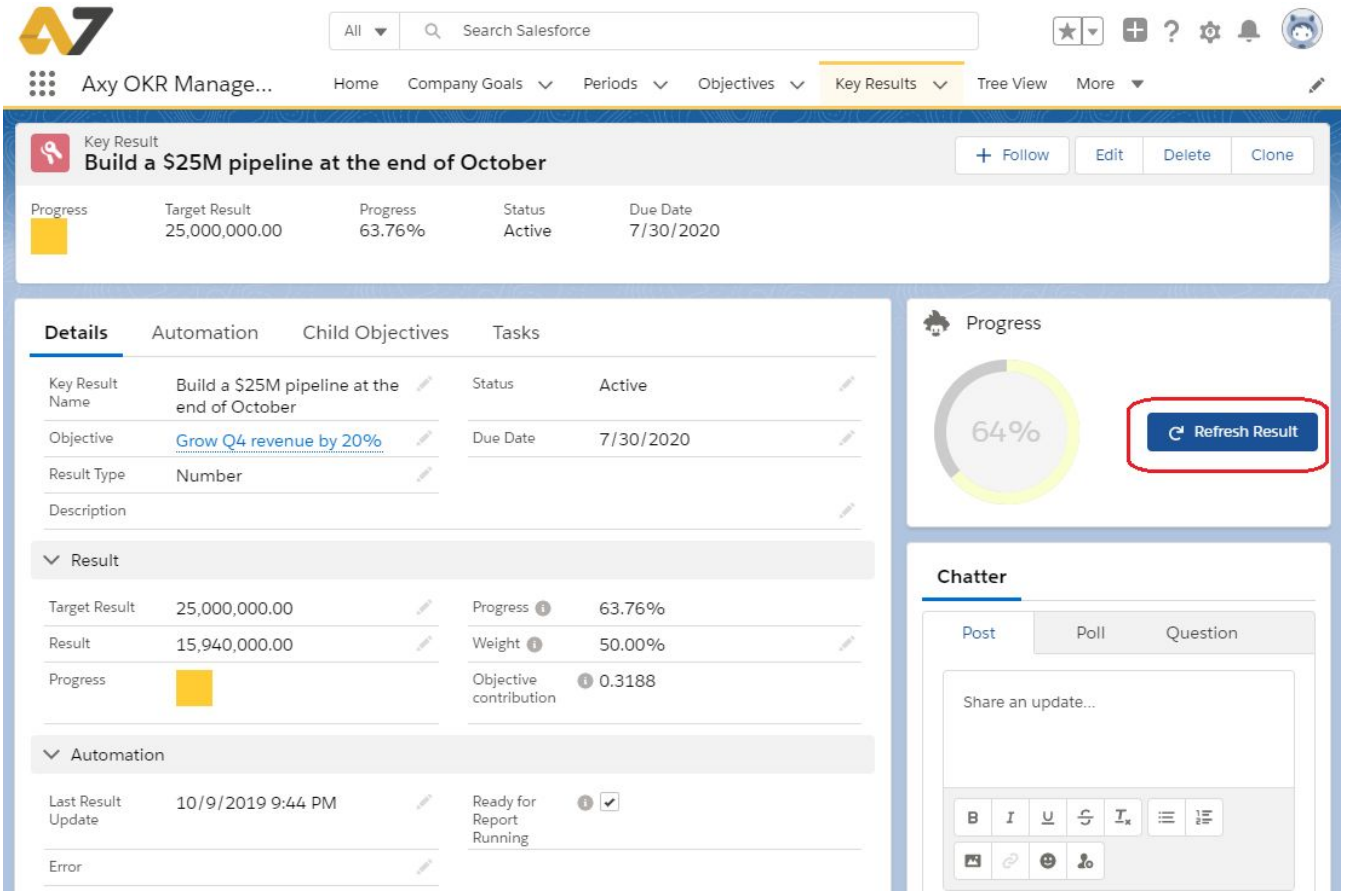


When and How bound reports are Refreshed

Axy OKR will refresh automatically each KRs with a bound report scheduling a job to run the report on behalf of the owner.

Axy OKR will schedule the jobs with the frequency defined in the ***Automation Interval in minutes*** field defined in the ***Axy OKR Setup*** tab in the [Automation] section.

Bound reports can be refreshed as well by pressing the ***Refresh Result*** button at any time in the Key Result main view. This will **only work for the owner of the OKR** or any other **Team member** if the **OKR is Team type**.


All
Search Salesforce
Axy OKR Manage...
Home
Company Goals
Periods
Objectives
Key Results
Tree View
More
Key Result
Build a $25M pipeline at the end of October
+ Follow
Edit
Delete
Clone
Progress
Target Result
25,000,000.00
Progress
63.76%
Status
Active
Due Date
7/30/2020
Details
Automation
Child Objectives
Tasks
Key Result Name
Build a $25M pipeline at the end of October
Objective
Grow Q4 revenue by 20%
Result Type
Number
Description
Status
Active
Due Date
7/30/2020
Result
Target Result
25,000,000.00
Result
15,940,000.00
Progress
Progress
63.76%
Weight
50.00%
Objective contribution
0.3188
Automation
Last Result Update
10/9/2019 9:44 PM
Ready for Report Running
Error
Progress
64%
Refresh Result
Chatter
Post
Poll
Question
Share an update...

Tree View

Using the Tree View

Alignment is key for organization success. For aligning OKRs, the **Tree View** is a powerful visual tool. You will be able to:

- See the **complete scheme** of OKRs **dependencies and contributions**.
- You will find how **every objective owner is contributing to the parent OKR**
- **Objective details and key results** are accessible by clicking on every box
- You can navigate on the tree opening and closing levels

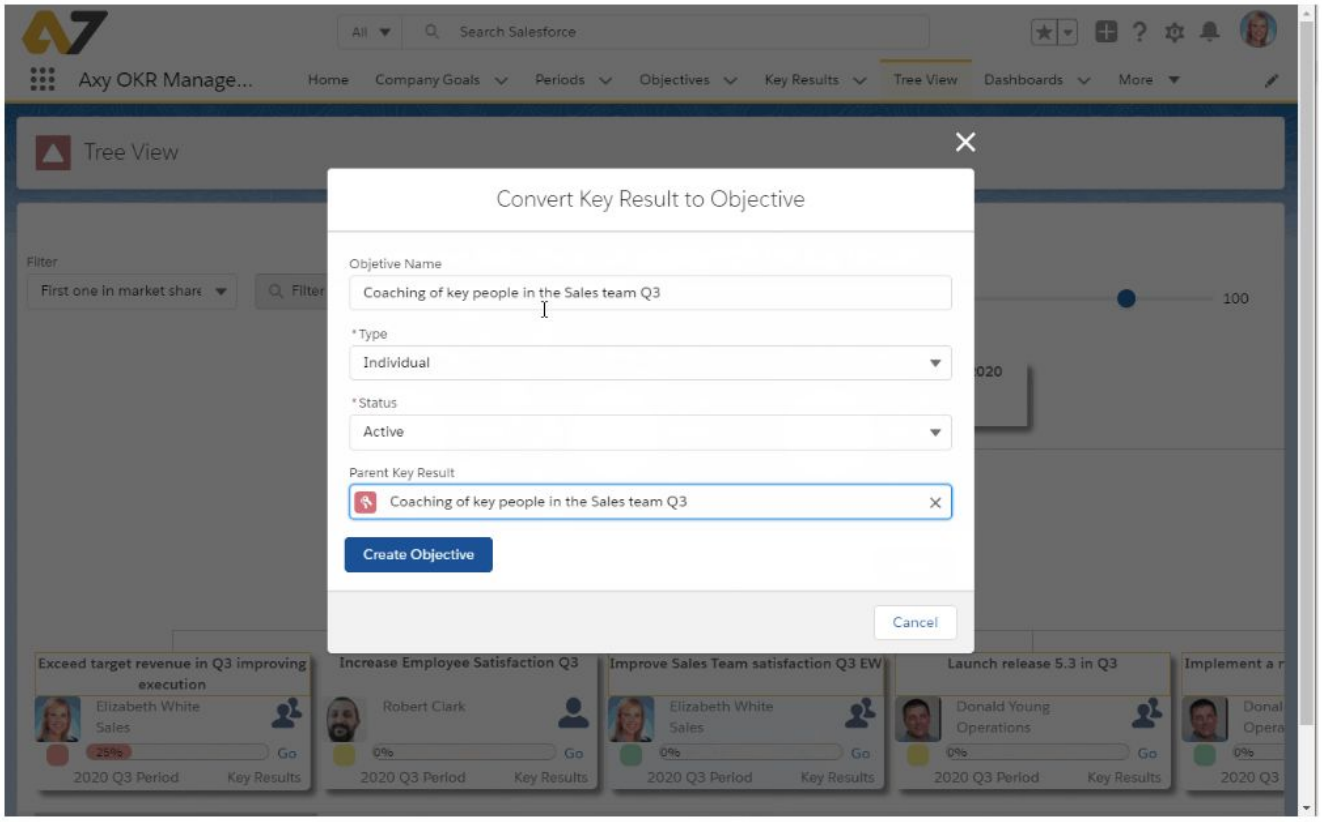
A good practice to define and align objectives is to create them directly from the Tree View

Important note: To **see any OKR in the Tree View** they have to be ***Active*** and ***Not Private.***

New Objective from Tree View

Go through the following steps to define an Objective

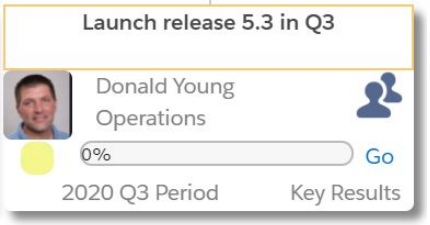
1. Navigate to ***Tree View*** tab
2. Look into the tree for the Objective you want to contribute, going up and down through the levels
3. Click on the ***Key Results*** label in the objective box. A popup with the Key Results will appear
4. Choose the Key Result and click on the symbol to directly **convert** it **into an Objective**
5. A pop-up window with default information from the Key Result appears
6. Edit **Objective Name, Type, Status** and **Period** if needed and save
7. Your new Objective Details page appears



Collapsed view of the Tree

There is a Check box in the Tree View named ***Team Collapsed.*** When this option is checked, the Tree View

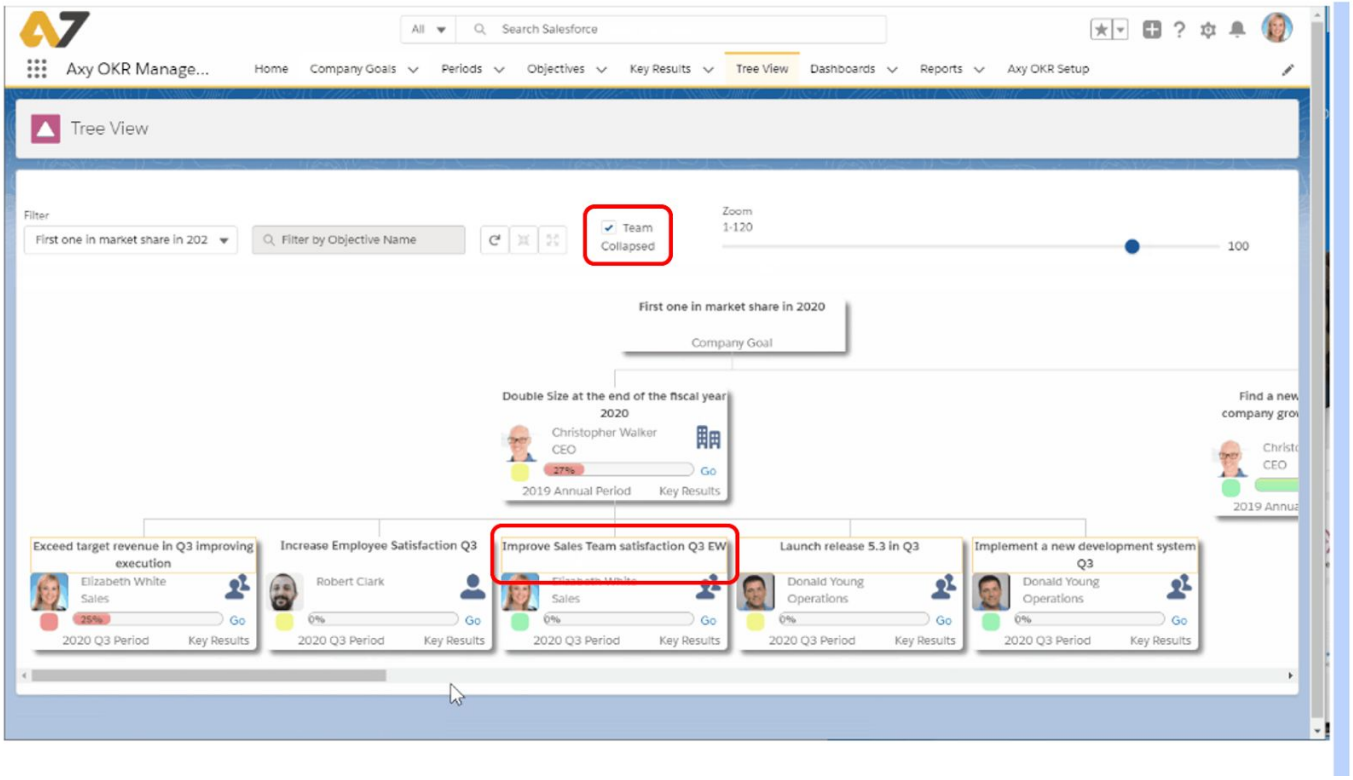
- shows every Objective defined as **Team Objective** drawn with a ***yellow border***
- any **objective under a Team objective will not be displayed**



You can always display the different levels of OKRs contributing to a Team OKR just by clicking on it.

When you navigate to the Tree View, the Team Collapsed option is always checked.

To see the complete Tree, just un-check the Team Collapsed option and refresh by clicking in .



Axy OKR Dashboards

Managing OKRs evolution

OKR methodology success depends very much on continuous management, planning, executing and wrapping up, and then starting again.

Axy OKR provides a complete set of reports and dashboards to facilitate the adoption and the management of OKRs for every phase and stage.

Dashboard Filters

Axy OKR has a dashboard for each cycle of OKR management:

- Planning
- Execution
- Wrap-Up

In each of these dashboards you will see several reports, all related to a set of OKRs. Axy OKR decides the Objectives shown on each dashboard by filtering if they are in Planning, Execution and/or Wrap Up cycles

To calculate this, the systems uses the **current date** and the **Objective Start and End dates**:

- An objective is in **Planning** if the current date is within the Planning Cycle and between Objective Start and End Date
- An objective is in **Execution** if the current date is within the Execution Cycle and between Objective Start and End Date
- An objective is in **Wrap-Up** if the current date is within the Planning Cycle and between Objective Start and End Date

Planning Dashboard

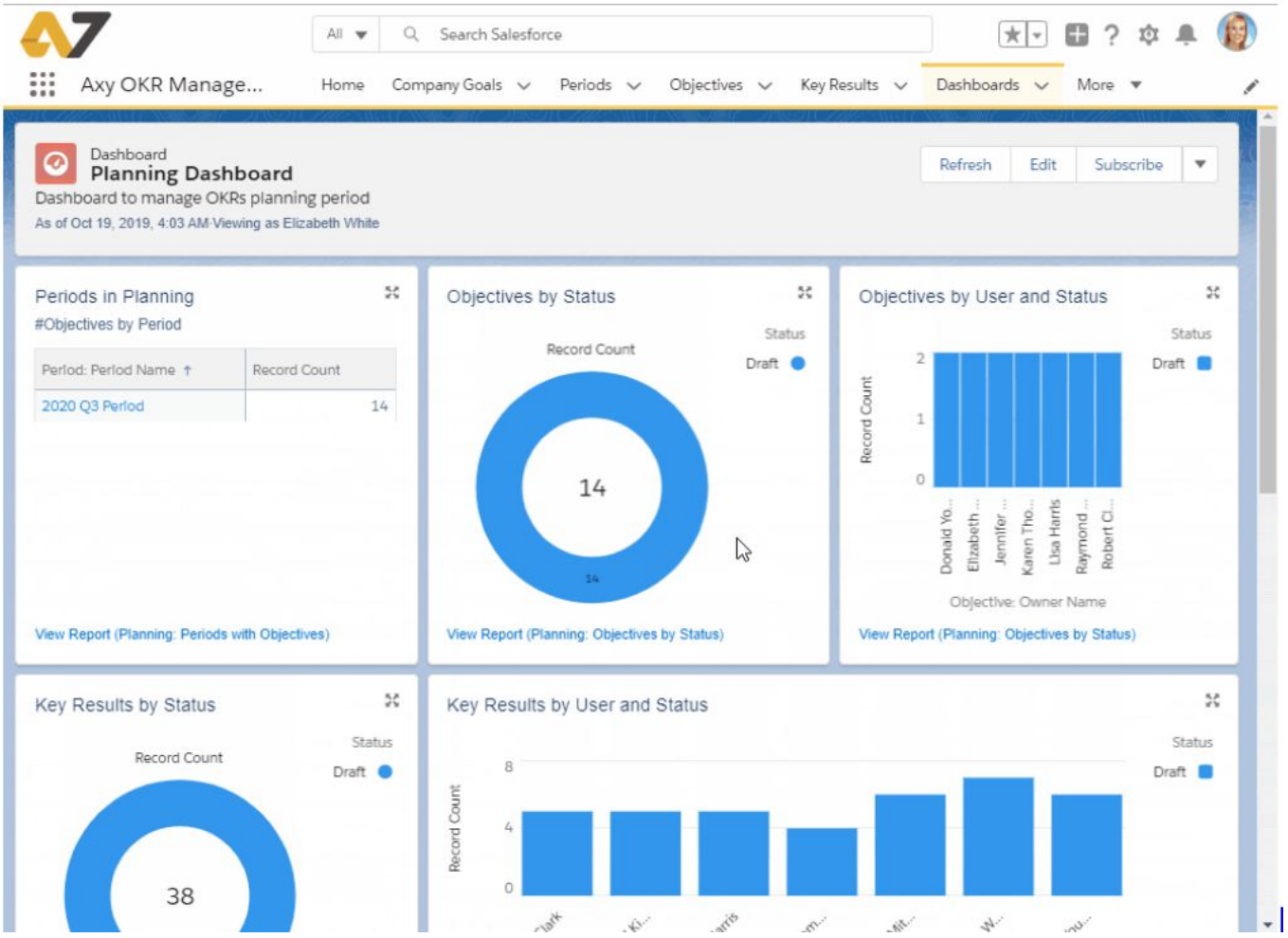
In the Planning cycle, you want to make sure everything is ready to start execution. Planning dashboard shows to you:

- **Periods in Planning Cycle**. Usually the following quarter

- **Objectives by Status**. How the organization is progressing on objectives definition and approvals
- **Objectives by User and Status**. How everyone is progressing on objectives definition and approvals
- **Key Results by Status**. How the organization is progressing on Key Results definition and approvals
- **Key Results by User and Status**. How everyone is progressing on Key Results definition and approvals
- **Automatic vs Manual Key Results.** How "automated" is your OKR structure
- **Automatic vs Manual Key Results, by User.** In percentage.
- **Users with objectives with more than 3 KRs**. Having more than 3 Key Results in an objective can imply you are not focusing on the important levers for your objective. This is only a "common sense" rule. But if most of the objectives have more than 3 KRs, you probably need to review some of them.
- **Users with objectives with less than 3 KRs**. To be sure that everyone applies OKR best practice of having at least 3 KRs per objective. Or investigate if they have a reason for that.
- **# Objectives by user.** How many objectives has every user. Three on average is good practice.

Go through the following steps to access to Planning Dashboard

1. Navigate to ***Dashboard*** tab
2. Go to ***Planning OKR Dashboard*** *in* ***Axy OKRs Dashboards folder***
3. Refresh it and browse


All
Search Salesforce
Axy OKR Manage...
Home
Company Goals
Periods
Objectives
Key Results
Dashboards
More
Dashboard
Planning Dashboard
Dashboard to manage OKRs planning period
As of Oct 19, 2019, 4:03 AM·Viewing as Elizabeth White
Refresh
Edit
Subscribe
Periods in Planning
#Objectives by Period
Period: Period Name
Record Count
2020 Q3 Period
14
View Report (Planning: Periods with Objectives)
Objectives by Status
Record Count
Status
Draft
14
View Report (Planning: Objectives by Status)
Objectives by User and Status
Record Count
Status
Draft
Objective: Owner Name
View Report (Planning: Objectives by Status)
Key Results by Status
Record Count
Status
Draft
38
Key Results by User and Status
Record Count
Status
Draft

Execution Dashboard

When you are in execution you should review every two weeks how the organization is progressing towards the OKRs. You can not wait till the last moment to see if you, your team or the organization are in the good direction.

OKRs should be flexible, and if any of them is not working, you should decide to change it even before the period ends.

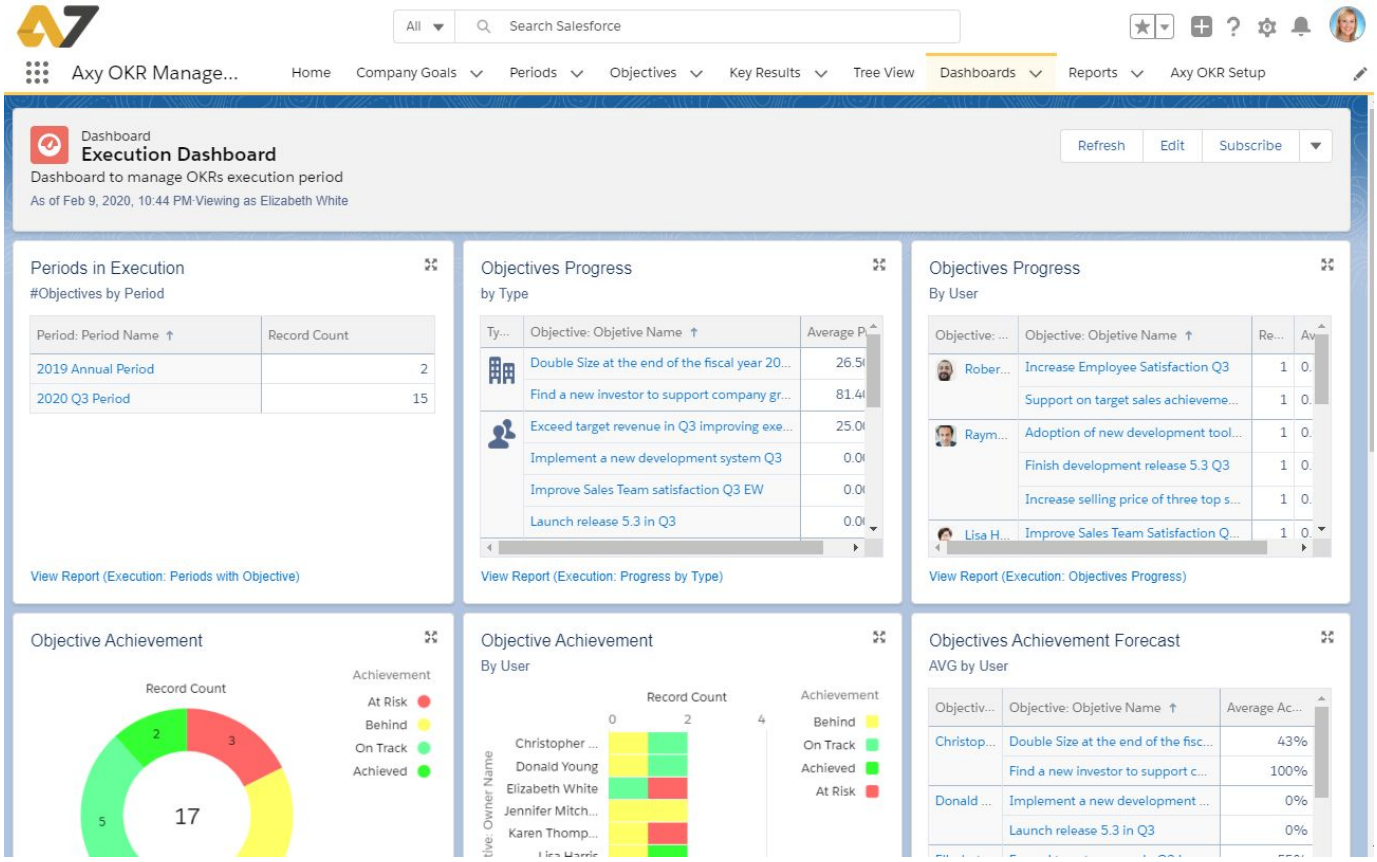
Axy OKR provides a set of reports in the Execution Dashboard that allows you to detect the OKRs progress, and take action on it.

Execution dashboard shows to you:

- **Periods in Execution Phase**. Usually the actual quarter and the year
- **Objectives Progress by Type.** It shows the percentage of objective progress per type: Company, Teams, and Individuals
- **Objectives Progress by User**. It shows the percentage of objective progress per user.
- **Objectives achievement.** Displays the number of objectives per achievement level: At risk, Behind, On Track or Achieved
- **Objectives achievement by User.** Displays the number of objectives per achievement level and by user.
- **Objectives achievement forecast**. Axy OKR calculates achievement forecasts based on Time Progress and Objective Progress. This report helps to focus on those objectives that probably will not be accomplished, so corrective actions should be taken.
- **# Not On Track Key Results by user**. You can see the users with the number of Key Results they have not on track.
- **Key Results Achieved by Period**. The number of already achieved and not yet achieved
- **Objectives with Overdue Date**. Tracking of objectives with a past due date
- **Objectives progress by user**. Showing the objectives progress evolution classified by type (Company, Team and Individual) and users.

Go through the following steps to access to Execution Dashboard

1. Navigate to ***Dashboard*** tab
2. Go to ***Execution OKR Dashboard*** *in* ***Axy OKRs Dashboards folder***
3. Refresh it and browse


All
Search Salesforce
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Home
Company Goals
Periods
Objectives
Key Results
Tree View
Dashboards
Reports
Axy OKR Setup
Dashboard
Execution Dashboard
Dashboard to manage OKRs execution period
As of Feb 9, 2020, 10:44 PM·Viewing as Elizabeth White
Refresh
Edit
Subscribe
Periods in Execution
#Objectives by Period
Period: Period Name
Record Count
2019 Annual Period
2
2020 Q3 Period
15
View Report (Execution: Periods with Objective)
Objectives Progress
by Type
Ty...
Objective: Objetive Name
Average P
Double Size at the end of the fiscal year 20...
26.5
Find a new investor to support company gr...
81.4
Exceed target revenue in Q3 improving exe...
25.0
Implement a new development system Q3
0.0
Improve Sales Team satisfaction Q3 EW
0.0
Launch release 5.3 in Q3
0.0
View Report (Execution: Progress by Type)
Objectives Progress
By User
Objective: ...
Objective: Objetive Name
Re...
Rober...
Increase Employee Satisfaction Q3
1
0.
Support on target sales achieveme...
1
0.
Raym...
Adoption of new development tool...
1
0.
Finish development release 5.3 Q3
1
0.
Increase selling price of three top s...
1
0.
Lisa H...
Improve Sales Team Satisfaction Q...
1
0.
View Report (Execution: Objectives Progress)
Objective Achievement
Record Count
Achievement
At Risk
Behind
On Track
Achieved
2
3
5
17
Objective Achievement
By User
Record Count
0
2
4
Achievement
Behind
On Track
Achieved
At Risk
Christopher ...
Donald Young
Elizabeth White
Jennifer Mitch...
Karen Thomp...
Objectives Achievement Forecast
AVG by User
Objectiv...
Objective: Objetive Name
Average Ac...
Christop...
Double Size at the end of the fisc...
43%
Find a new investor to support c...
100%
Donald ...
Implement a new development ...
0%
Launch release 5.3 in Q3
0%

Wrap-Up Dashboard

Wrap-Up is probably the most important phase of the OKRs methodology. In this phase, you have to have conversations with your team, analyze, be critical and honest, assess whether the activities defined in the Key Results have actually contributed to the Objectives. And assess how the Objectives within the organization have contributed to the Main Objectives and the Company goal.

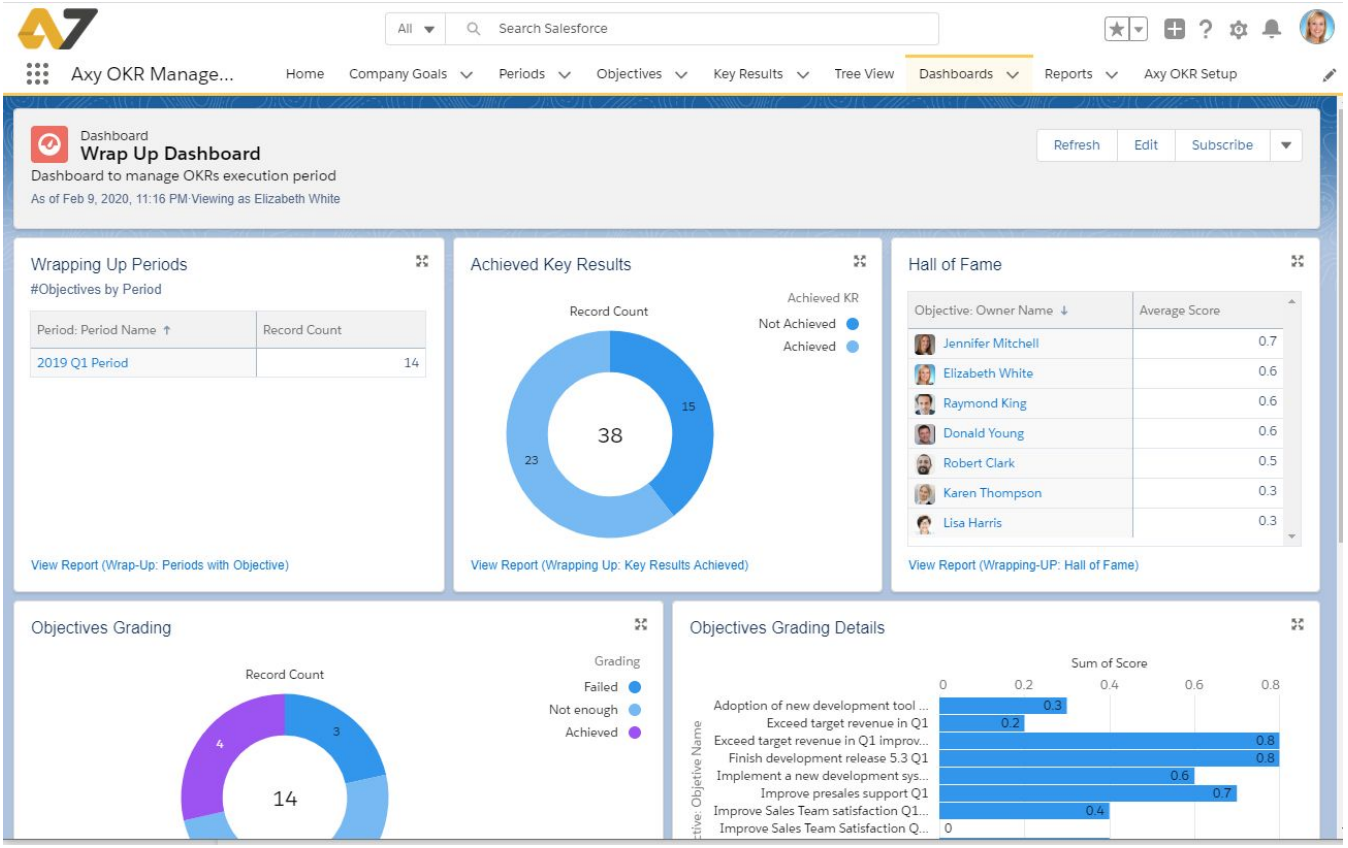
This is the time to set the **Scoring (Grading)** to the objectives. This scoring, discussed and agreed with the Managers, shows the actual progress and achievement of the objectives.

Wrap-Up dashboard shows:

- **Wrapping up Periods**. Usually the past quarter.
- **Achieved Key Results**. The total number of key results Achieved and Not Achieved
- **Hall of Fame.** Ranking of individuals as per objective scoring
- **Objectives Grading.** The number of Objectives classified as Failed, Not Enough and Achieved
- **Objectives Grading details.** The scoring ranking of Objectives.
- **Users with objectives not scored**. The list of people with no yet scored objectives
- **Objectives with Overdue Date**. Tracking of objectives with a past due date, classified by type (Company, Team or Individual)

Go through the following steps to access to Execution Dashboard

1. Navigate to ***Dashboard*** tab
2. Go to ***Wrap-Up OKR Dashboard*** *in* ***Axy OKRs Dashboards folder***
3. Refresh it and browse


All
Search Salesforce
Axy OKR Manage...
Home
Company Goals
Periods
Objectives
Key Results
Tree View
Dashboards
Reports
Axy OKR Setup
Dashboard
Wrap Up Dashboard
Dashboard to manage OKRs execution period
As of Feb 9, 2020, 11:16 PM·Viewing as Elizabeth White
Refresh
Edit
Subscribe
Wrapping Up Periods
#Objectives by Period
Period: Period Name
Record Count
2019 Q1 Period
14
View Report (Wrap-Up: Periods with Objective)
Achieved Key Results
Record Count
Achieved KR
Not Achieved
Achieved
38
15
23
View Report (Wrapping Up: Key Results Achieved)
Hall of Fame
Objective: Owner Name
Average Score
Jennifer Mitchell 0.7
Elizabeth White 0.6
Raymond King 0.6
Donald Young 0.6
Robert Clark 0.5
Karen Thompson 0.3
Lisa Harris 0.3
View Report (Wrapping-UP: Hall of Fame)
Objectives Grading
Record Count
Grading
Failed
Not enough
Achieved
14
3
4
Objectives Grading Details
Sum of Score
0
0.2
0.4
0.6
0.8
Adoption of new development tool ...
Exceed target revenue in Q1
Exceed target revenue in Q1 improv...
Finish development release 5.3 Q1
Implement a new development sys...
Improve presales support Q1
Improve Sales Team satisfaction Q1...
Improve Sales Team Satisfaction Q...
0.3
0.2
0.8
0.8
0.6
0.7
0.4
0

Axy OKR Customization Setup

Axy OKR permits to customize several configuration options to better adjust it to your OKR Management process: to define best practices, as the quantity of OKRs per person or the thresholds for OKR scoring and grading.

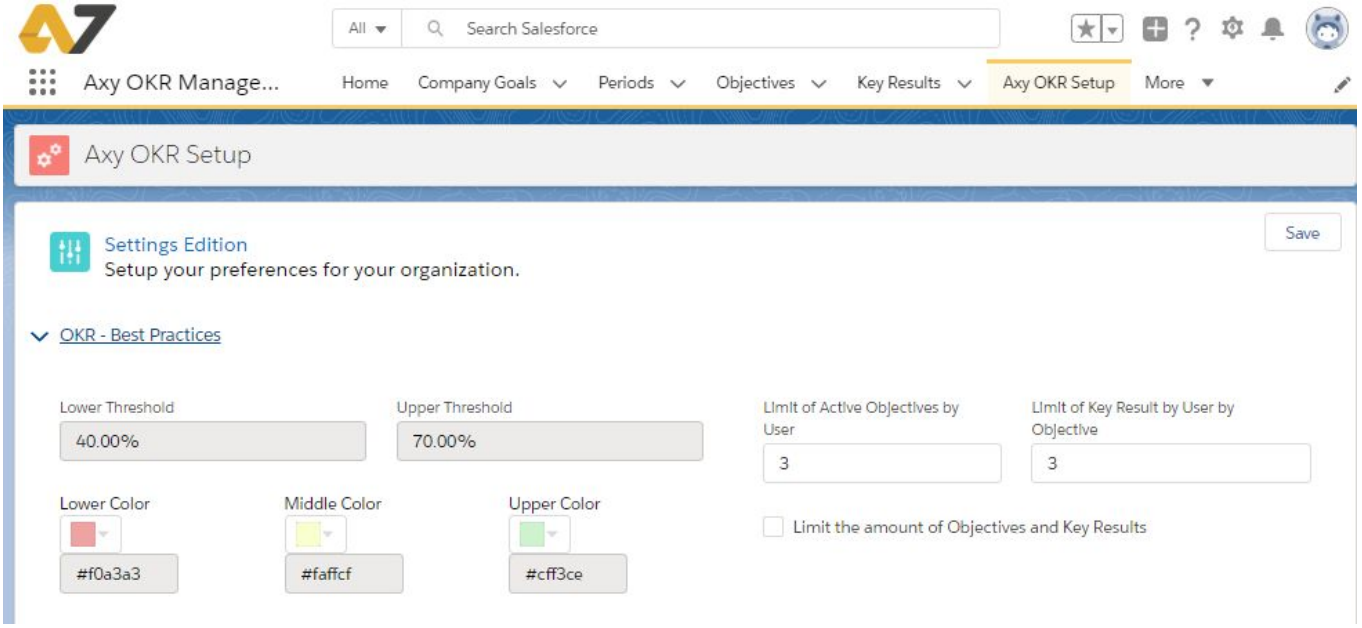
- **OKR - Best Practices**
- **Automation**
- **Notifications**

Let's explain each of them

OKR - Best Practices

Go through the following steps to access to Axy OKR Setup > OKR - Best Practices

1. Navigate to ***Axy OKR Setup*** tab
2. Go to ***OKR - Best Practices***



Here you can find some configuration parameters to “help” your users to follow several best practices:

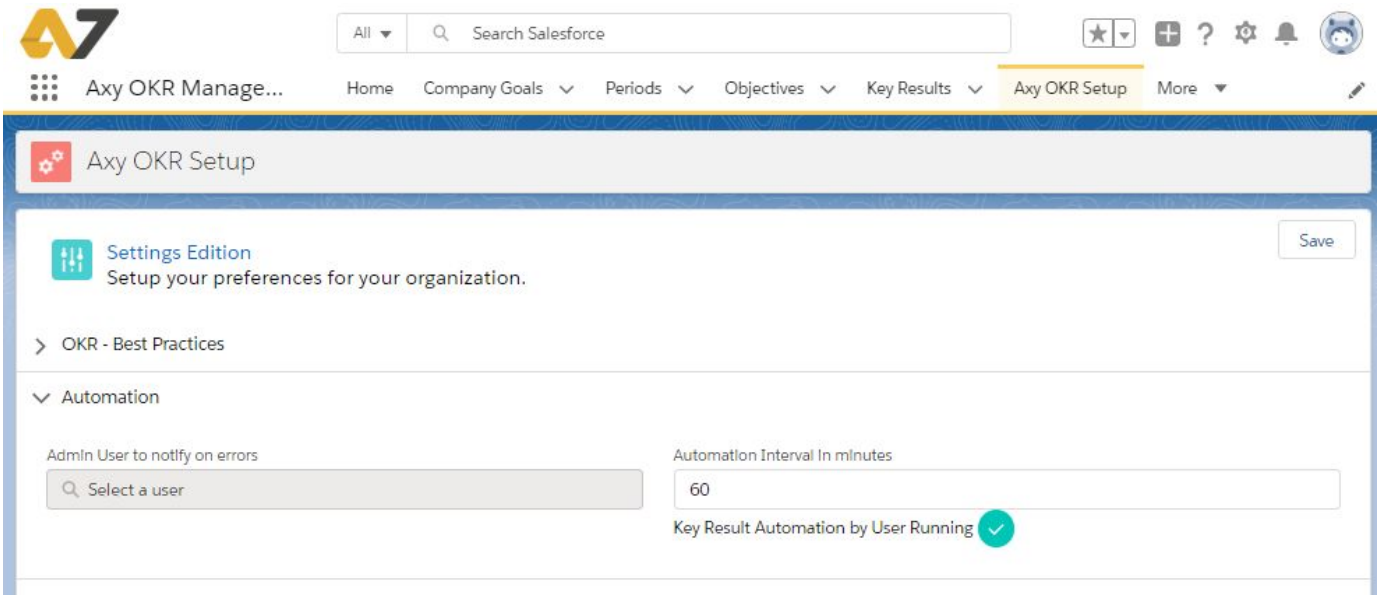
- **Lower and Upper Thresholds.** These numbers define the intervals for Objective progress: bad, regular or good

- **Lower, Middle and Upper Colors.** Red, yellow and green by default to graphically show the wealth of your objective progress
- **Limit of Active Objectives by User.** Best practice for setting Objectives is having from 3 to 5 per person.
- **Limit of Key Result by Objective.** Best practice for setting Key Results is having from 3 to 5 per each objective.
- **Limit the amount of Objectives and Key Results.** If you check this box, the limits for OKRs will be enforced.

Automation Parameters

Go through the following steps to access to Axy OKR Setup > Automation

1. Navigate to ***Axy OKR Setup*** tab
2. Go to ***Automation***



Here you can find some configuration parameters to govern the automation functions:

- **Admin User to notify on errors.** Select the user you want to be notified in case of any unlikely error
- **Automation Interval in minutes.** Define the frequency of the Automation process that run the bound reports and update the results in the KRs.

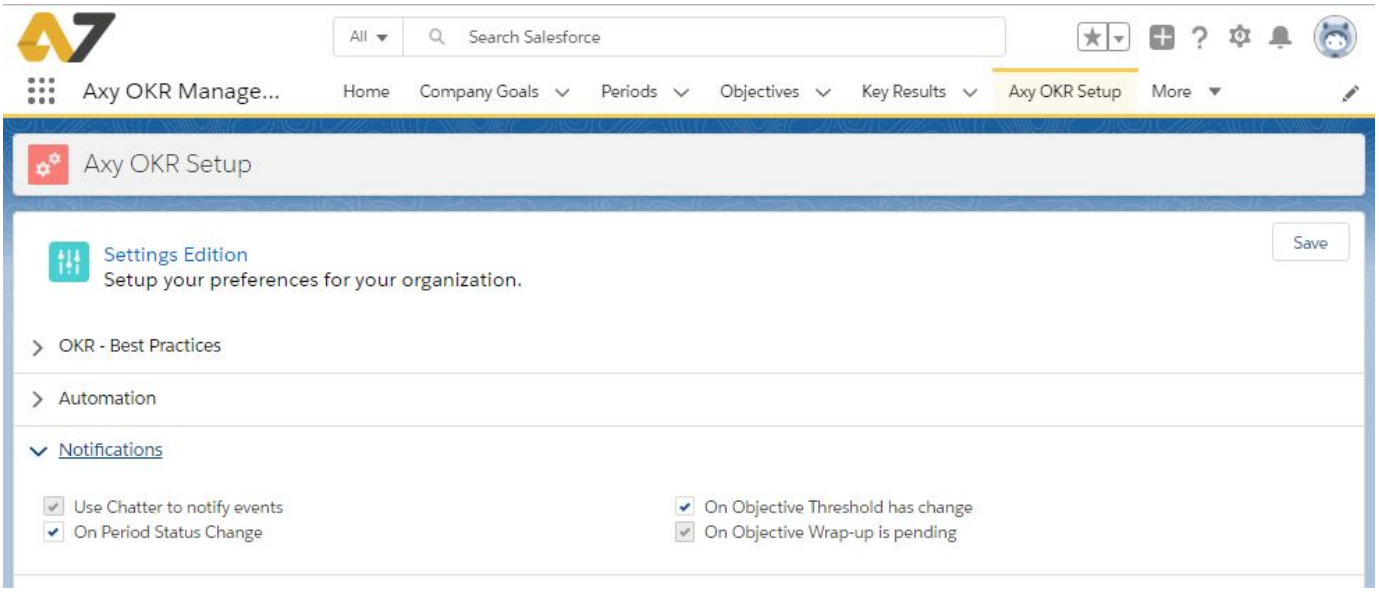
- Axy OKR will schedule a job on behalf of the OKR user XX minutes after the last refresh.
- **Refresh cycles are per KR.** This means that, per each KR, cycle will start individually at the time of the report binding.

- **Key Result Automation by User Running.** If you check this box, Automation process will run.

Notifications Parameters

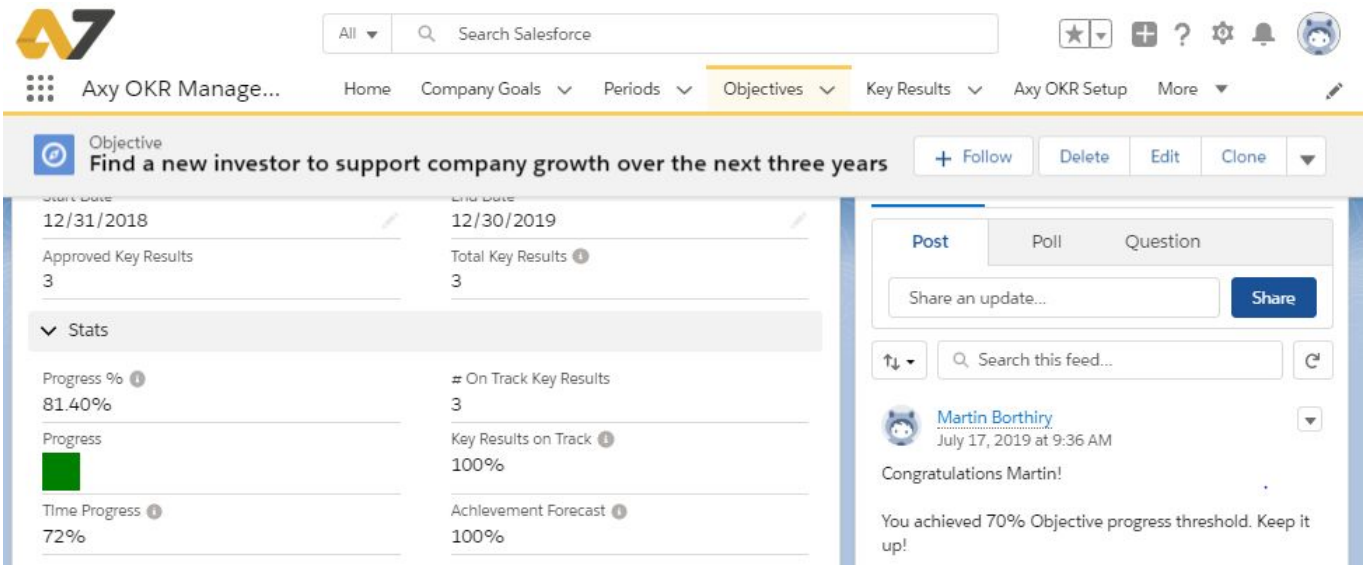
Go through the following steps to access to Axy OKR Setup > Notifications

1. Navigate to ***Axy OKR Setup*** tab
2. Go to ***Notifications***



Here you can find some configuration parameters to govern the notifications

- **Use Chatter to notify events.** If you check this box, Chatter will be used to notify events. Example



The following check boxes manage the type of events will be notified

- **On Reached Objective Threshold.** When the objective progress pass one of the thresholds. See previous example
- **On Period Status Change.** To notify everyone the period is changing. The possible states are Planning, Active, Wrapping-Up, Completed or Cancelled
- **On Objective Wrap-up is pending.** Notifies an Objective is not Wrapped-Up yet

Axy OKR Installation

In this section, **Salesforce admin** will find how to:

- **Install** Axy OKR in your Salesforce org.
- Assign Axy OKR **licenses**
- Assign app **Permission Sets**
- Provide access to **Axy OKR Reports and Dashboards**
- Access to **app logs**
- Activate the **Field History Tracking** (Recommendation)
- **Uninstall** Axy OKR

Install Axy OKR in your Salesforce org

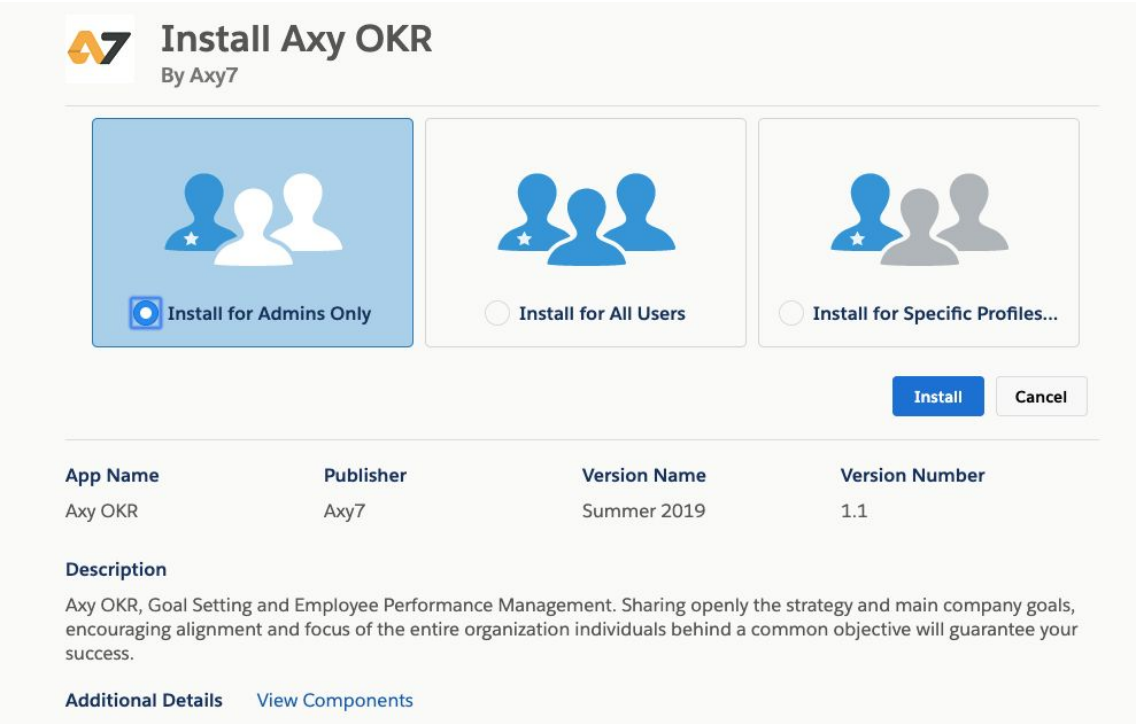
Axy OKR is an app from appexchange that you can install in any Salesforce org type: production, sandbox, developer...

To install Axy OKR you need *Download AppExchange Packages* permission on your profile for your Production environment.

1. Go to our ***App listing*.**
2. Log in with your production Salesforce user.
3. Click on ***Get It Now***.
4. Select if you want to install it in a ***sandbox*** or ***production*** environment.
5. Check installation details, the ***number of licenses*** that you want to have and click on ***Confirm and Install***. It is possible that you need to write again your user and password.
6. Select ***Install for Admins Only.*** After the installation process, you are going to assign permission sets to the different users

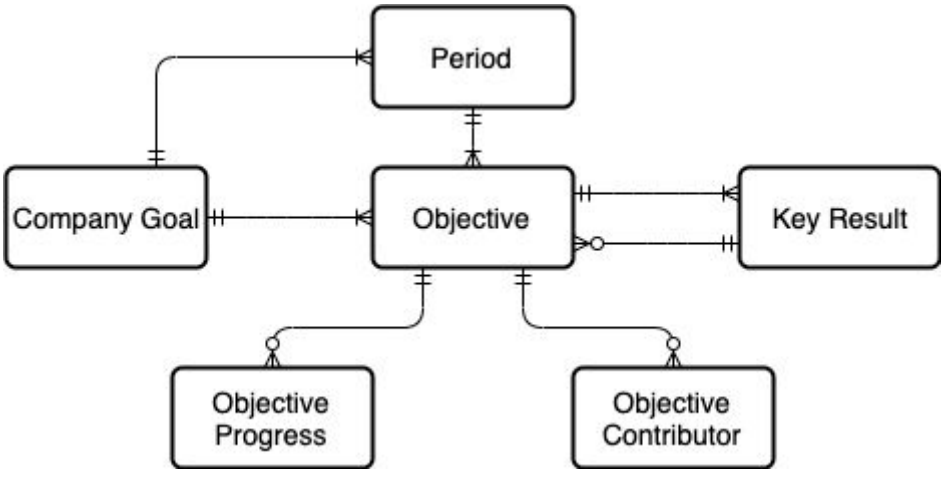
In some cases the Axy OKR installation could fail because the installation user doesn't have the 'Change Dashboard Color' permission. If this is your case, please follow these steps:

1. Create a new permission set.
2. Find the ***Change Dashboard Color*** permission and select it.
3. Assign the new permission to the installation user.
4. Try to install the app again.



Axy OKR Objects and Relationships

Below you have the Entity and Relationship Diagram of the main Axy OKR Objects.



Axy OKR Main ERD

Assign Axy OKR licenses in your Production environment

Once you have installed Axy OKR for your production org, it is time to assign the Axy OKR licenses to the users. You decide who will have access to the app so you will get a license for each of them.

1. Go to ***Setup***
2. Find for ***Installed Packages***
3. Click on ***Axy OKR Management***
4. Click on ***Manage Licences***
5. Click ***Add Users***
6. Select the users you want to assign to the package (After selecting the user, Salesforce automatically moves to the Selected Users list).
7. Click ***Add***.

Now you have to assign the Axy OKR Permission Sets

Assign Axy OKR Permission Sets

In Axy OKR you have three Permission Sets to assign to users with different functions and permissions:

- **Axy OKR – User.** Every user that will have standard access to the app including every app object, mainly Objectives and Key Results**.**
- **Axy OKR – C-Level User**. This permission is designed for C-Level people, Directors, Managers… the members with responsibility for managing the organization. These users will have the same access as an Axy OKR - User but with ***Full Access to Company Goal records*** including View All and Modify All permissions.
- **Axy OKR – Admin User.** With this permission set, the assigned user will have the same access as an Axy OKR - User, with the ability to access and set up the app in the Setup tab.

Important note: You have to assign ***at least one*** Axy OKR – Admin User **and one** Axy OKR – C-Level User permission set.

You can add several permission sets to the same user. As an example, you can assign Axy OKR – Admin User and Axy OKR – C-Level User to an user.

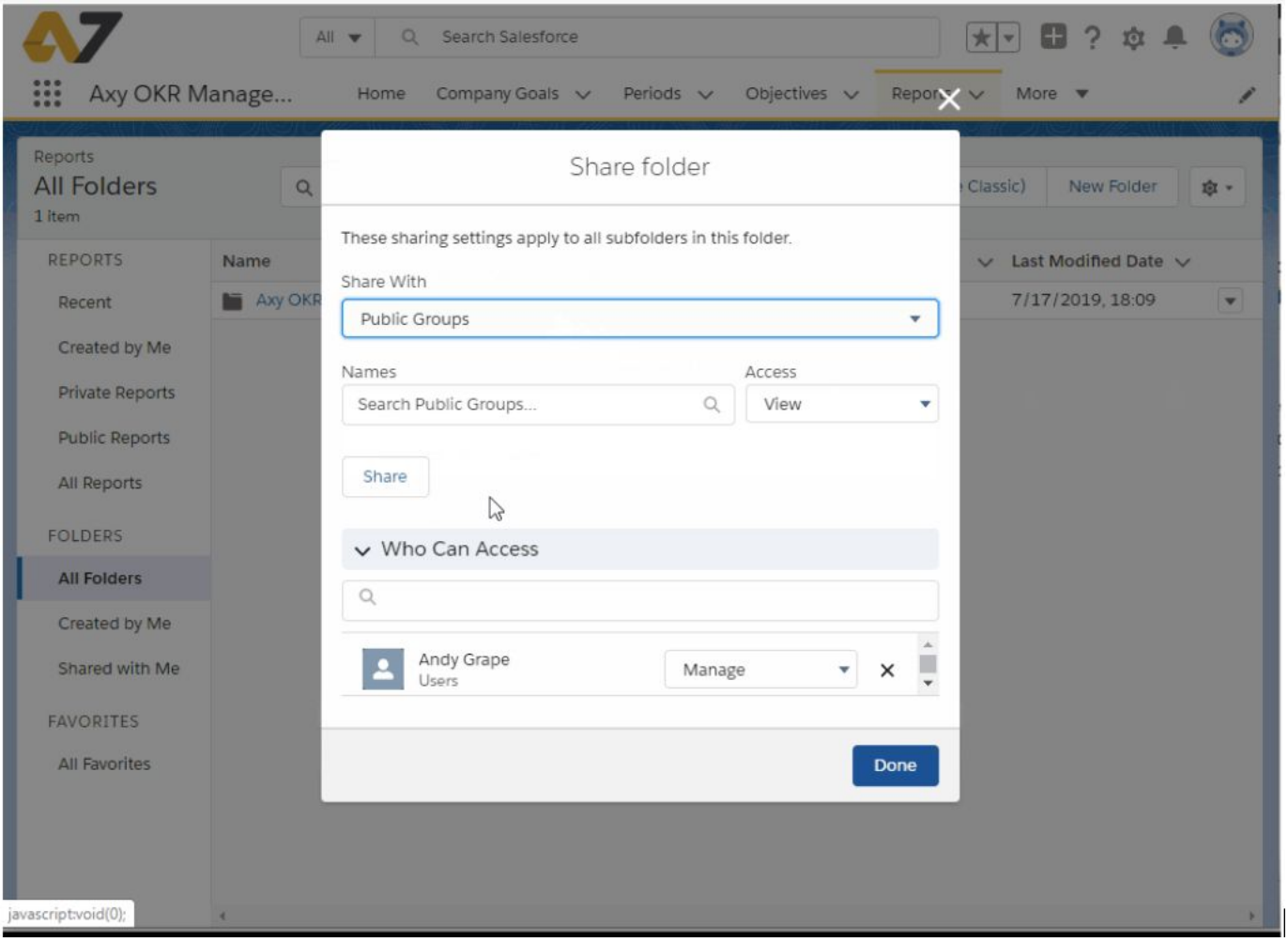
To assign them, follow the next steps for each of the three Axy OKR permission sets:

1. Go to ***Setup***
2. Find for ***Permission Sets***
3. Click on any of the Axy OKR permission sets and then ***Manage Assignments***
4. Click on ***Add Asignments***
5. You will access the list of users in your Salesforce org. ***Check the boxes*** of the users you want to assign that permission set and click ***Assign***

Providing access to Axy OKR Reports and Dashboards

Axy OKR provides a set of predefined Reports and Dashboards. **Admin user has to share access to those reports and dashboard** with the Axy OKR users.

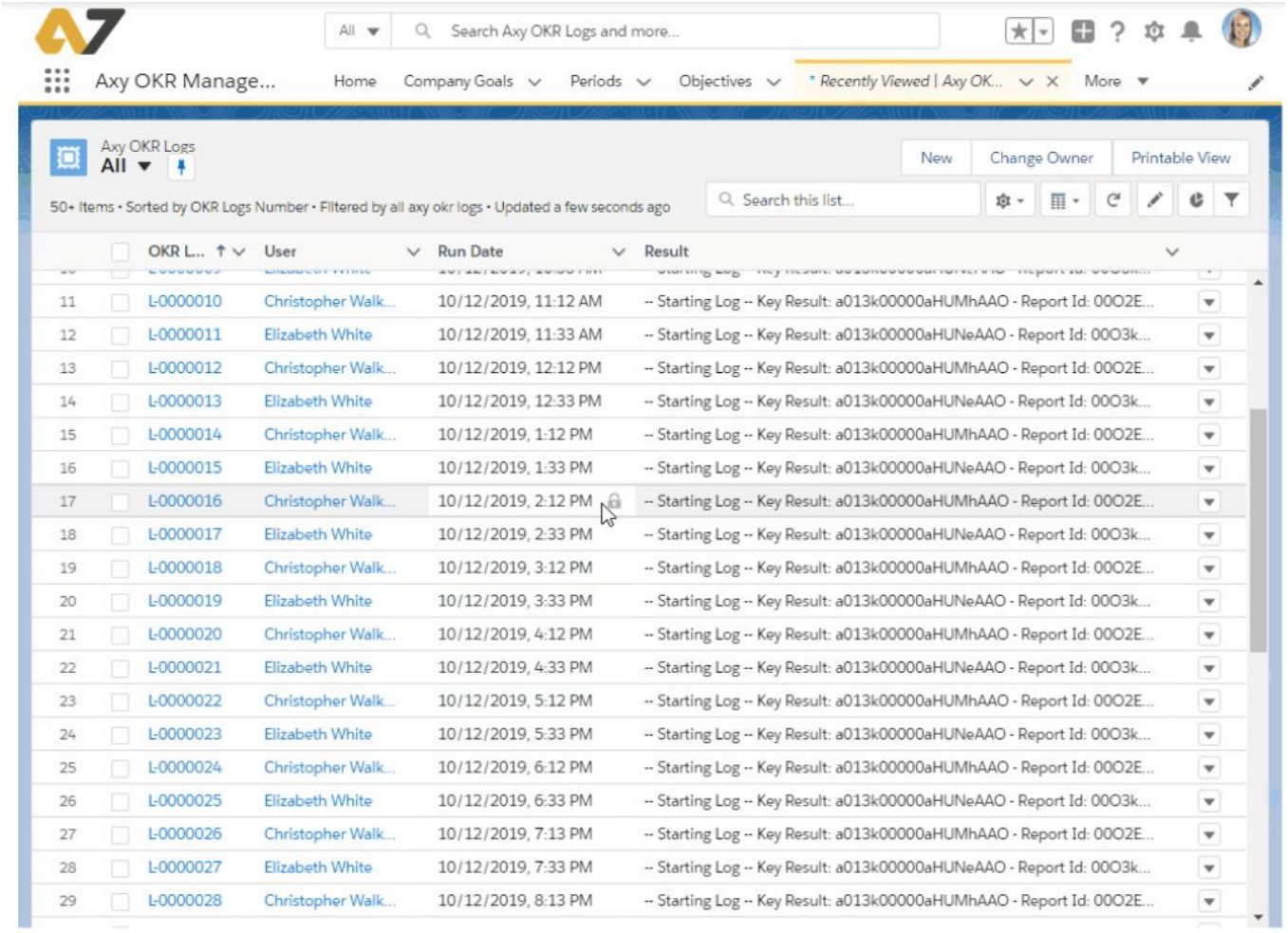
1. Go to ***Reports***
2. Browse to ***All Folders***
3. Go to ***Axy OKR Reports*** and **share** the folder with the **Internal Users group**, only for **viewing.**
4. Follow the same steps for ***Dashboards***



Access to Axy OKR Logs

As an app admin, you can see the Axy OKR Logs tab. To get the automatic Key Results results, we schedule a job by user. Each time the job is executed, we save a log record in this object to check that everything is working right.

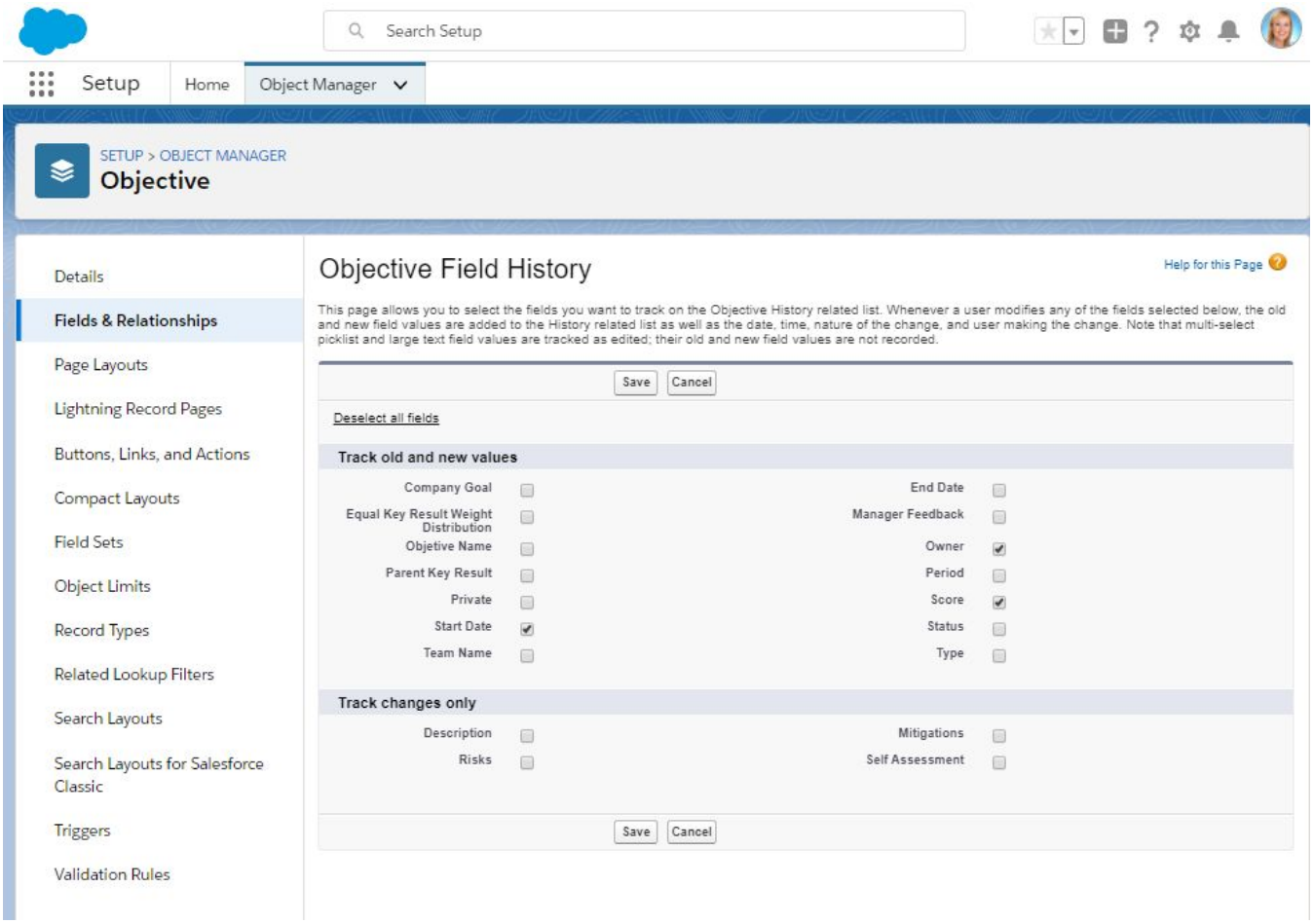
1. Navigate to ***Axy OKR Logs*** tab
2. Select the list view you want to review



Activate Field History Tracking.

We consider that tracking the changes on several Objective and Key Result fields is a good practice, as you are managing with Axy OKR the execution of your business. Therefore, our recommendation is to activate the Field History Tracking.

1. Go to ***Setup***
2. Navigate to ***Object Manager***
3. Find for any ***Object*** you want to track. For example, Objective.
4. Select Objective and then ***Fields & Relationships***
5. Select ***Set History Tracking***
6. **Check the fields** you want to track. Owner, Score and Start Date could be a good election.



Uninstall Axy OKR

In order to uninstall Axy OKR, there are **two processes that must be previously manually disabled**.

1. Go to ***Setup***
2. Find for ***Process Builder***
3. Deactivate ***Axy OKR Objective*** and ***Axy OKR Period***

Axy OKR also has a **Flow that must be disabled.**

1. Go to ***Setup***
2. In Quick Find, look for ***Flows.*** You will see ***Quick KR Creation***
3. Click on the Drop-Down list at the right and select ***View Details and Versions***
4. Deactivate the flow

If you have already been using the app, you have probably assigned the Axy OKR Permission sets. Prior to uninstalling it, you have to **remove the assignments of every permission set.**

1. Go to ***Setup***
2. Find for ***Permission Sets***
3. Click on any of the Axy OKR permission sets and then ***Manage Assignments***
4. Click on ***Add Asignments***
5. You will access the list of users in your Salesforce org. ***Check the boxes*** of the users you want to remove that permission set and click ***Remove Assignments***

Now is the moment to uninstall the package:

1. Go to ***Setup***
2. Find for ***Installed Packages***
3. Click on ***Uninstall*** link near to ***Axy OKR Management package***

Please read the information provided by the uninstall process, taking into account what you want to do with the data you created while you were using the app.

If you want to **save a copy of your data**, please **select the option "Save a copy of this package's data for 48 hours after uninstall"** and you will receive an email to save your data locally.