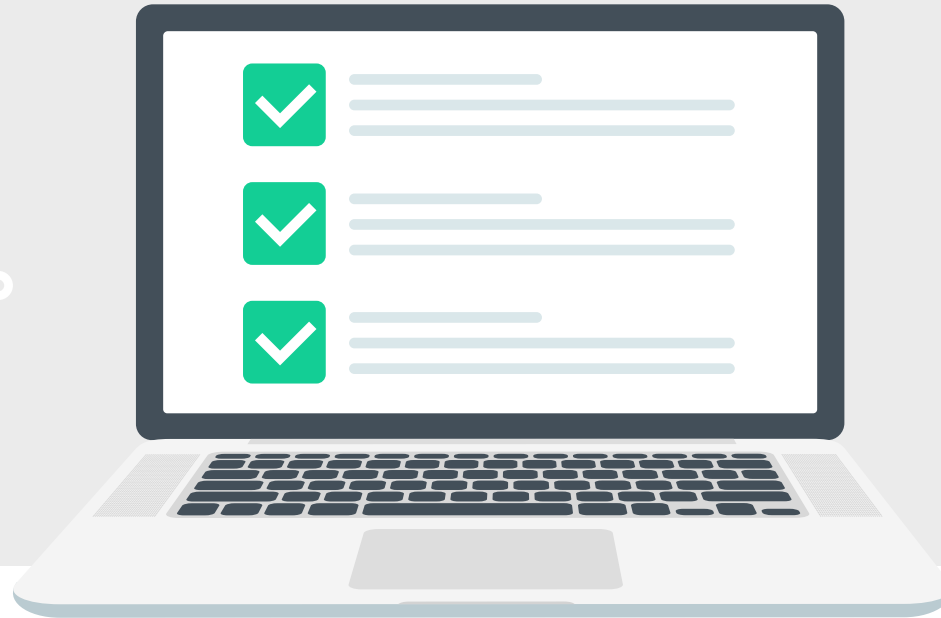




Why Manual OKR Tracking Doesn't Cut It





When companies start using Objectives and Key Results (OKRs), they begin like most, using manual tracking methods such as Excel, Google Sheets, PowerPoint, and other manual processes. By using these types of practices, OKRs are created, updated manually, and shared through email, Slack, Microsoft Teams, and an assortment of other communication channels.

The reason these manual methods become the starting point for most early OKR adopters is due to how quickly a team can pull together a list of goals, and begin tracking and documenting. Unfortunately, as organizations start to dive into the true nature of the OKR method and understand that adoption of the framework goes beyond the basics of capturing goals, teams, managers, and senior leadership begin to struggle. They realize what started as “just fine” is not good enough to scale, drive adoption or engagement, takes too much time, and becomes a burdensome process to manage.

Most would agree that standard, everyday systems such as Excel and Google Sheets are becoming the go-to solution when an organization doesn't have a better way to manage their data. In some cases, it works, while in others, “it's not good enough.” When we think of this in terms of managing OKRs, it's the latter. Trying to corral hundreds of Objectives and Key Results, or even thousands for larger organizations on shared documents, doesn't work.

Why? Manual OKR tracking practices hinder many, if not all, of the successful benefits the OKR method brings to an organization.

1 Goals are siloed and not integrated into the daily workflow where teams and individuals are performing their day-to-day work.

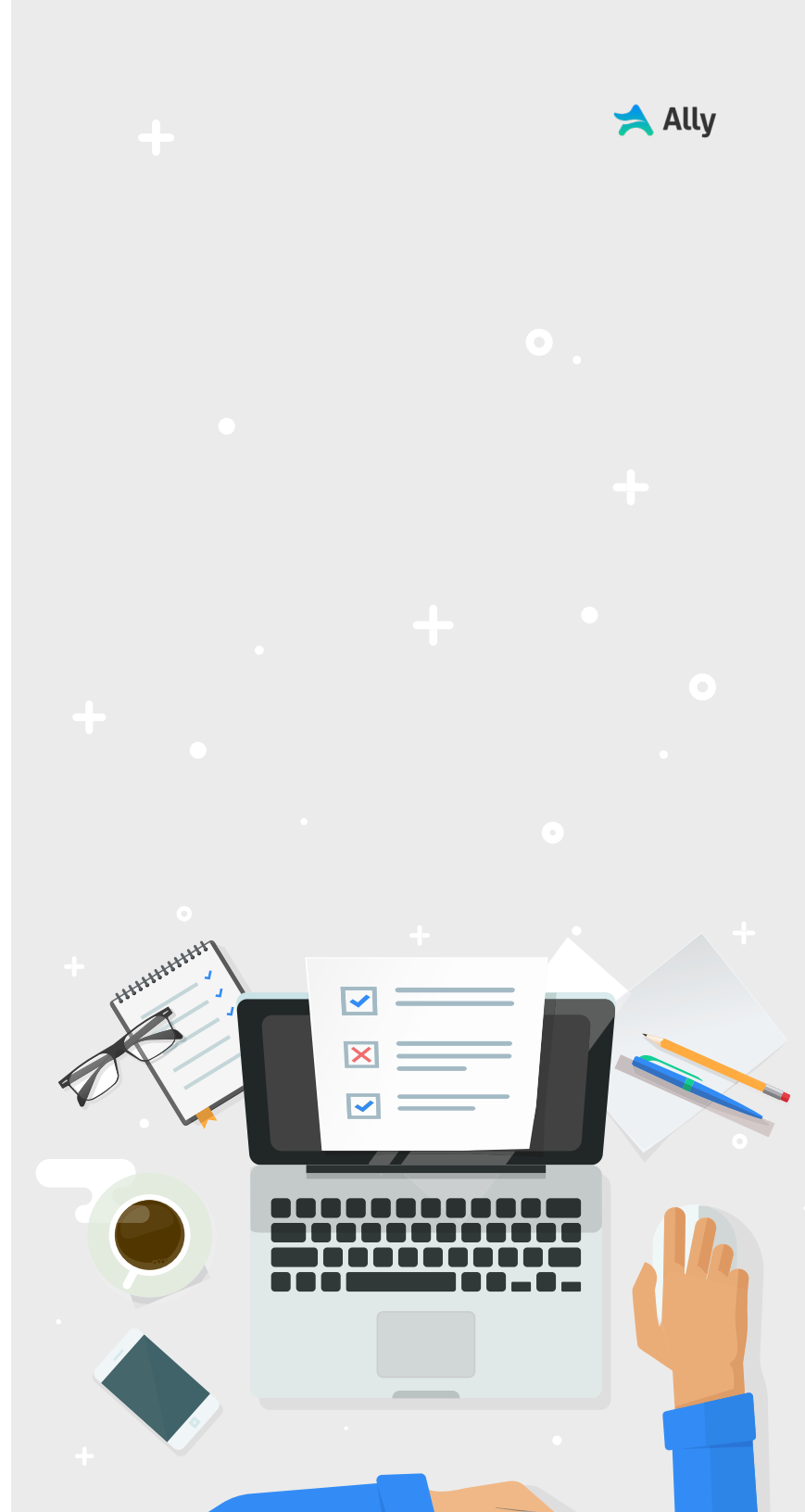
2 Employees are less engaged, and tracking progress becomes difficult—especially when a company doesn't have the benefit of automating gentle reminders to request weekly check-ins.

3 Tracking progress and rolling up reports is time-consuming, manual and leaves room for errors.

4 Managing the alignment, or multi-alignment of goals both horizontally and vertically across teams is near impossible.

5 Dependencies can become lost between the lines.

In addition to the points above, here are a few additional problems that arise when organizations choose to manage OKRs manually.



Managing multiple spreadsheets is unwieldy and impractical



Most companies start adopting OKRs through a proof-of-concept stage where they're trying to validate the value of Objectives and Key Results. When doing this, they begin by rolling the goal-setting framework out in a small test group, consisting of one or several teams. For this stage, spreadsheets seem to work just fine since it's a confined sample with a small amount of data to manage. But when it's time to take the next step and roll out OKRs company-wide, the sheer volume of data and documents being shared and updated on a weekly check-in cadence becomes an inundating process.

Often, this can lead to sporadic follow-up, and lack of follow-through on progress. In this scenario, OKRs become an add-on to complex workflows rather than becoming the foundation of strategic focus and direction.

It's nearly impossible to ensure participation and compliance



OKRs are designed to improve cross-functional alignment, collaboration, and accountability. When managed in disparate documents, they become another place for employees to check and update, as opposed to automating updates with the systems they are already using. Because these documents remain separate from workflows, employees may fail to make updates and cloud the “single source of truth” that OKRs aim to create. Since employee goals contribute to team and organizational goals, a lack of transparency prohibits team members from seeing where they are in reaching broader Objectives.

Spending more time managing a cumbersome process that should be easy and efficient



Managing OKRs in a multitude of documents is cumbersome at every level—leadership, operations, and human resources. Having to parse hundreds or even thousands of lines of data to decipher whether or not employees are up-to-date on progress, which goals are on track, behind, or even at risk is time-consuming, and often becomes a struggle.

By not having an easy way to visualize progress and accountability, it becomes harder to manage one-on-one coaching sessions between employees and their managers.

Cascading objectives and rolling up progress is cumbersome



John Doerr, the man who helped bring OKRs to Google and the world, noted that “cascading makes an operation more coherent.” When a company develops top-level OKRs to guide the business over a specific period, goals need to be cascaded to different teams and employees to make these Objectives a reality. Cascading goals using manual tracking methods is difficult, and requires employees to individually track and manage their goals in their respective areas. This in turn causes a lack of transparency—which is critical to the overall success of OKRs.

Again, this process may start as “just fine,” but let’s remember that one of the benefits of using OKRs is that they are flexible and iterative. They can be updated often and re-aligned when goals and Objectives change. Let’s think about a common scenario where a company-wide Objective changes mid-quarter, and impacts teams and individual priorities which requires a mass-update to be made on all separate spreadsheets. It’s an overwhelming thought, and even more overwhelming task.

OKRs are agile, and manual tracking isn't



One of the key benefits of using the OKR method is to adopt agile strategy planning and execution. This requires goals to be at the forefront of individuals' day-to-day work, requires company-wide transparency, collaboration, and on-going progress check-ins. The framework, when adopted, successfully enables organizations and teams to move together in one cohesive direction to achieve broader company goals.

When goals are tracked manually, there is a lack of insight and transparency. Updates are done ad-hoc, and it becomes difficult for teams to understand how their work aligns with other teams—knowing where progress stands towards achieving those goals, and how broader business Objectives are being met.

To manage OKRs at scale, and to gain the full agile benefits, it requires smarter processes that go beyond manual tracking. Having a simple and efficient way to manage the company hierarchy, to support team structures, alignment, and multi-alignment—even dependencies becomes critical.



Conclusion

The manual tracking of OKRs creates an island that disconnects goals from the tools and apps that the workforce uses daily. When goals live outside teams or individuals purview, it's difficult for contributors to hold themselves accountable. Further, strategic focus may be lost in the day-to-day distraction of competing priorities, detracting away from the work that matters most. If teams struggle to parse through information manually, it can result in a lack of insight into annual and quarterly progress. The loss of these insights does nothing to boost employee morale or engagement and leads to lower adoption and contribution throughout the OKR process.

If you're in the process of searching for a better OKR template, or workarounds to enable a more straightforward manual tracking process—or just starting with OKRs, it's never the wrong time to consider a dedicated OKR tool.

We promise the small investment is worth its weight in gold.

About Ally

Ally is a strategic goal-setting and business performance management solution that enables businesses to shift from traditional, disjointed planning and execution to a modern, OKR-based framework that drives strong alignment, agility, transparency, and empowers the workforce. Ally's solution makes it incredibly easy to adopt OKRs as a seamless part of the users' daily workflow. The platform has built-in OKR best practices and provides seamless integration to several enterprise systems, including Slack, Salesforce, Jira, Smartsheet, Asana, and ZenDesk. Ally's comprehensive professional services offer continuous support, dedicated training, and coaching to ensure best-practices for implementation and successful change management. Since its launch in 2018, Ally has been adopted by hundreds of leading organizations in more than 70 countries.

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