



# STEP-CHANGE

A practical guide on how to optimize strategy, OKRs, people and culture to create a step-change in performance.



# Foreword



Business growth relies on your ability to compete in your chosen market. This means you need clarity on:

- The market and market segments you intend to play
- A deep understanding of the customer's you intend to serve better than your competition
- A strategy to win - not just exist

Being able to articulate your strategy and get everyone moving in the right direction i.e. execution, requires a number of management systems and processes to become aligned and work effectively.

Key planning components include having a:

- Mission
- Strategy
- Goals
- KPIs

Your ability to make progress and deliver on these requires other organizational design components to be thought through. These include:

- Culture - the behaviors, habits and rituals that act as the glue
- People and skills - your talent
- Productivity - optimized in many ways
- Resources - human, financial and material

This is where leaders responsible for strategy, business operations, human resources and finance need to get on the same page, align and optimize.

### *Optimizing The Overlap*

It's normal for strategy, goals, KPIs, people and culture to have overlap. The degree of overlap will depend on the strategy, the team you're in and what you do in the company.

The job of leadership is to optimize the overlap, unlocking synergies.

### *Goal Fragmentation Makes Business Optimization Harder*

Even if you've decided on a goal framework and planning and execution cadence, you often find that these goals are often kept in lots of places that range from spreadsheets, team tools, and HR software.

Goals are also often locked away and visible only to a limited group of people, making alignment hard, reducing the ability of anyone to know how and where they contribute.

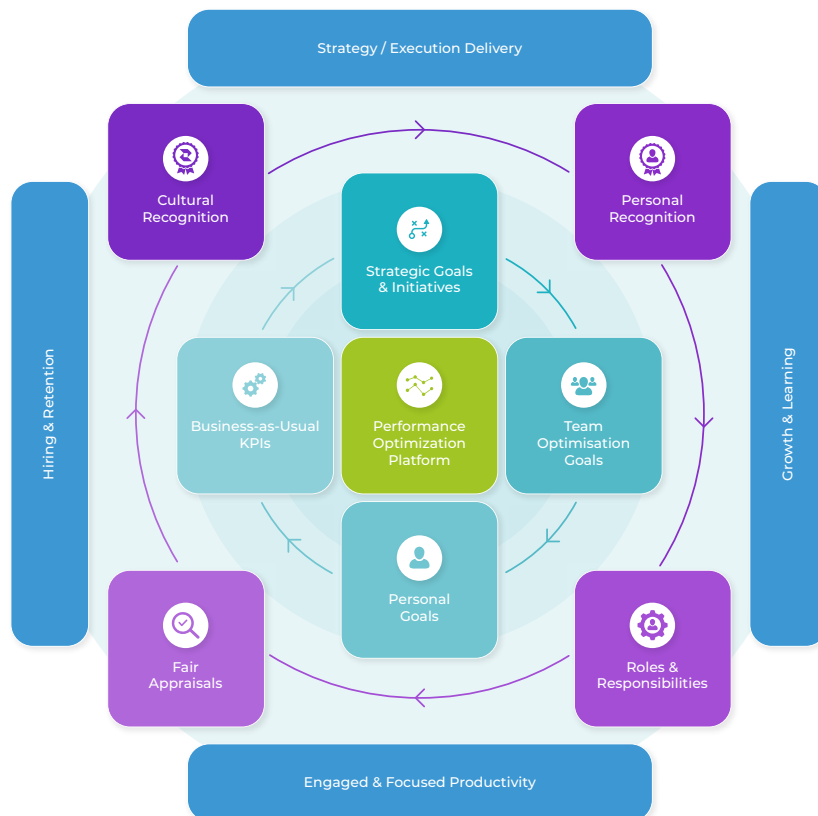
The consequence of hidden goals is a reduction in the levels of accountability, proactivity and trust - all of which leaders say they want to be present in their culture.

Put simply, hidden and decentralized goals makes seeing and unlocking the synergies, and business optimization much harder.

### *Business Optimization Creates A Step-Change*

The intent for your company is likely to include growing revenue, profits, and market share in the market segments you've chosen to compete in.

Management is the art of *'by design'* providing the direction, systems and processes, resources, capabilities, competencies, skills, and culture to maximize those lagging KPIs in order to provide value to all stakeholders - shareholders, customers and employees.



ZOKRI is a one platform that your strategy, operations, and HR leadership can use to deliver continuous performance improvements, without compromise.

Which of these areas can be optimized in your business?

What would be the impact of improving how these areas of your business are managed?



ZOKRI allows you to make any necessary improvements quickly without any downtime. Connecting existing productivity, HRIS and operations tools to your new centralized performance hub.

# Master Strategy, Goals & KPIs



The first things you are going to need to put in place are:

- Strategic Themes / Pillars, you could also use Balanced Scorecard
- KPIs for the Company and Teams
- A goal setting framework like OKR, along with clear guidance and policies on how and when goals need to be set, agreed, updated and discussed

## *An Easy To Follow Strategic Planning Process*

How do you come up with a cohesive business strategy?

Across your organization there are issues and opportunities that need to be addressed. Each leader and manager will have a different perspective on these, based on their department's function, and their own roles and responsibilities.

Strategy management is the process whereby these are listed and debated, and what matters most, agreed upon.

## *Creating Strategy & Goals Is A Social Process*

This means strategy is a social process, in the same way goal creation is.

What becomes the focus of strategy and goals is part of a negotiation between leaders and managers, with the needs of the company and customers hopefully taking priority over the needs of any individual.

Which is why it is important that managers also play a part in the process and are not just there to do their business-as-usual activities.

You will also find that with inclusion you get better decisions being made, more buy-in, and more energy being directed towards your strategic aims.

The better you are at managing this process, and it is a process, the better your strategy and goals will be.

### *Customer Value Based KPIs & Strategic Intent*

In order to win in the markets you've chosen to play in you need to have clarity on how you intend to provide value to customers.

You need to work out how you are going to serve those customers better than your competitors, and how you intend to move towards being the market or market segment leader.

How you will best serve those customers, and provide more customer value is dependent on your product and service offering.

For example, you might decide that you will focus on providing the:

- Best Product Experience
- Fastest Time To Value
- Deepest Customer Relationships

Market Leadership and Customer Centricity is most companies Strategic Intent, and the KPIs that represent them makes a good top level annual Company OKR that acts as a scoreboard for what comes next, strategy.

It's your strategy for achieving growth, profit, and customer satisfaction – better than anyone else in the market / market segment is where the real strategic planning work begins.

## *List Challenges or Opportunities Impacting Generic Business & Customer KPIs*

For the market, market segment and customers you serve, you now need to discover challenges or opportunities that are specific to your organization that are getting in the way of you winning, and winning should always be the aim of your strategy.

To create a great strategy you don't just take yourself away on a weekend retreat, you need to know and unlock what is in everyone's mind over a number of weeks.

Good questions to consider to create this list are:

- What are the major issues being faced that are holding us back?
- What is performing badly, which processes are not working properly, which opportunities are being missed?
- Which core capabilities and competencies do we need to improve or acquire as a source of sustained competitive advantage or distinctness?
- What do we need to make progress on most right now and why?

As you capture the answers to these questions you will see thematic clusters form.

These clusters will not be limited to just issues. They are likely to include blue-sky thinking and address external factors like competitors.



Brainstorm on a whiteboard under the headings:

- Major Issues
- Under Performing KPIs
- Missed Opportunities
- Improve Current Core Capabilities
- Develop New Capabilities
- Blue Sky Ideas

Use different coloured sticky notes for each heading and when all ideas have been captured, cluster them. Also see if you can create a hierarchy as you notice some clusters related to others and have supporting and causal relationships.

### *Articulate A Strategy*

Now try to see and articulate 'what is really going on' and create new headings for these new clusters - these are your Strategic Pillars and should describe a selection of battlegrounds you want to win.

At the end of the process you should be able to articulate how you're going to grow revenues and profits, and serve customers in specific markets, better than your competitors.

## Operationalizing Strategic Pillars

<b>Mission</b> To become the XXX leading XXX.							
<b>Strategic Intent</b> Grow revenues and Profits x 300% Y on Y							
<b>Strategic Pillar</b> Pillar 1		<b>Strategic Pillar</b> Pillar 2		<b>Strategic Pillar</b> Pillar 3		<b>Strategic Pillar</b> Pillar 4	
<b>KPIs</b>	<b>OKRs</b>	<b>KPIs</b>	<b>OKRs</b>	<b>KPIs</b>	<b>OKRs</b>	<b>KPIs</b>	<b>OKRs</b>
KPI 1	Strategic OKR and cascade of supporting OKRs	KPI 1	Strategic OKR and cascade of supporting OKRs	KPI 1	Strategic OKR and cascade of supporting OKRs	KPI 1	Strategic OKR and cascade of supporting OKRs
KPI 2		KPI 2		KPI 2		KPI 2	
KPI 3		KPI 3		KPI 3		KPI 3	
KPI 4		KPI 4		KPI 4		KPI 4	
KPI 5		KPI 5		KPI 5		KPI 5	

*ZOKRI platform and operationalizes all of this, providing the focus, the scoreboard and systems and processes to follow that keep everyone aligned and on track.*

Once you have your Strategic Pillars, define a set of KPIs that would act as a scoreboard for these Strategic Pillars.

Then plan your OKRs in and across teams. Your OKRs are your battleplan, describing exactly how you are going to win each battleground.

Did you win? Your aligned OKRs and KPIs will tell you. But you need everyone to focus on them and execute.

Your Strategic Pillars need to become the focus of the entire organization throughout each planning and execution cycle.

## *Everyone Needs Goals – Without Goals We Drift*

Goals are the language by which we communicate a desirable future state that we want, or even need to arrive at, and define measurements that tell us whether we got there.

With goals we have purpose and are less likely to find ourselves drifting of course.

There are number of types of goals and measures within a business:

- Strategic goals and initiatives
- Business operations or BAU
- Personal

A business requires all of these types of goals and they all need to be clearly differentiated.

### *Strategic Goals*

Your strategic planning process should describe the markets or segments that you're going to compete in, and how you plan to win against your competitors.

The implementation of your strategy requires your strategy to be clearly articulated, goals to be mapped against the strategy, and then executed.

### *Business-as-Usual Goals & KPIs*

In addition to strategic goals, each team will have a variety of jobs-to-be-done and processes that are followed from week-to-week - business-as-usual (BAU).

The effectiveness of BAU is often monitored using KPIs that need to either be maintained or improved. These Business-as-Usual (BAU) KPIs can often be used as 'measures' and 'targets' within a goal.

As part of your goal setting cycle a team might be asked to look for ways to improve BAU performance. Targeting any issues or opportunities that might result in performance improvements. This is where OKRs can be used to describe the specific targeted improvements well.

### *Personal Goals & KPIs*

Depending on your role within a business, you might find yourself with performance and developmental goals and KPIs.

Performance based goals and KPIs relate to your role and responsibilities. For example, a Sales Representative will have a Sales Quotas to hit. An employee in Accounts Receivable will have a level of debt to collect. A Customer Service Representative will have customers to serve, potentially developing the relationship and increasing the customer value.

There are also goals and KPIs orientated to how you propose to improve and develop within the company. These might be orientated around learning new skills or taking on new responsibilities.

That being said, people are more than the goals and KPIs they own and support.

Although every individual in a company has a role and set of responsibilities. Their contribution to your team and company is only partially covered by their ability to fulfill what is required, as measured by the goals, initiatives and KPIs you have owned and supported.

These measures will have ignored who an employee is and how they have interacted with colleagues. We've all worked with people that bring energy, ambition, experience, endeavor, inspiration, kindness, care, understanding, compassion, and of course laughter to work. Often going above-and-beyond what is required of them.

It would also make sense that we know where these people are as when they are not there they will be very much missed.

It also makes sense that we recognize them, so that they feel noticed and others might aspire to be a little more like them. What's the point of having invisible heroes!

It is important to note that it is qualities like these, along with social bonds formed with colleagues, that provide the foundations for goal achievement, as much as having the right time, tools and budgets.

## Using OKRs For Setting Goals

When it comes to setting goals you have a range of frameworks to choose from. One of the most popular and best is Objectives and Key Results or OKR.

OKR is a goal setting acronym that on the face of it is just a really simple goal format. You have an Objective and less than a handful of Key Results that measure the success of the Objective. These goals can often align with each other, in cascades.



However OKR is way more than a goal setting format where Objectives and Key Results are written and linked together in cascades.

As much as it is a format, OKR is a way of thinking, working, discussing, agreeing, updating, sharing and learning, as a goal format. OKR focuses on creating value, aligning resources, execution, innovation and learning.

Implemented well, goal setting using OKR will help improve performance across the business. Maturing strategy delivery capabilities, creating more accountability and transparency.

### *OKR Principles, Beliefs, Philosophies*

There are some tenets, principles and beliefs that align with OKRs and good business practices in general we can use to guide us.

- Leadership will provide annual strategic direction in the form of a mission, strategic pillars and related objectives.
- Each quarter teams will propose objectives, initiatives and measurable outcomes that will help you achieve your strategic objectives.
- Measurable outcomes are set at a level that stretches teams and it's clear that success does not require 100% progress to have been achieved. The final success of an objective is considered at the end of the OKR cycle with progress, learnings and other inputs being used to retrospectively decide success levels.
- Through a process of discussion you will reach a consensus on which objectives to resource and which people will lead and work towards these objectives. Not everything being proposed will be progressed.
- OKR and Initiative progress will be updated weekly via a centralized goal management platform like ZOKRI with Red, Amber, Green and comment based narratives being used to spot and describe areas of risk.
- Teams will meet to discuss goal progress and implementation issues weekly or bi-weekly.
- Your OKR cycle will set the pace, increase urgency and energy by getting people to check-in more, most check-ins happen weekly. Once you set the cadence everybody moves quicker, energy and urgency is noticeable, creating a high energy culture.

## OKR Cycles / Cadence

To help you achieve your Mission and Strategy consider setting goals at a company and team level at the following cadence:

### LEVEL

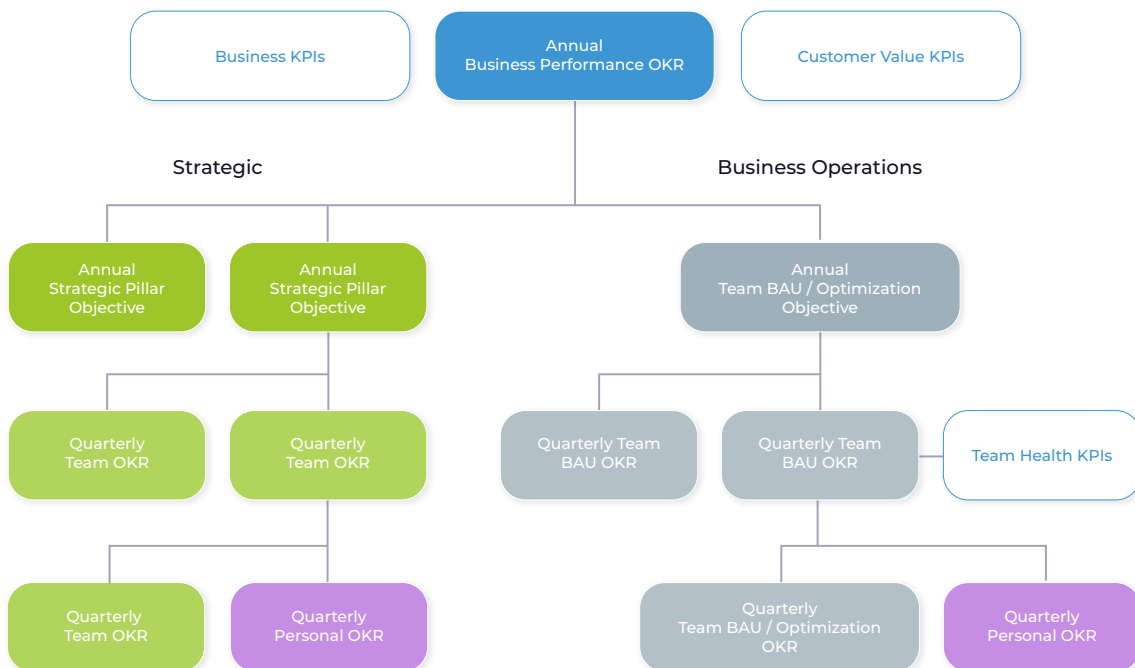


Company Growth Goal & KPIs  
 Company Strategic Goals  
 Supporting Strategic Goals  
 BAU Team Goals & KPIs  
 BAU Optimization Goals  
 Cross-Functional Teams  
 Personal Goals

### FREQUENCY



Annually  
 Annually  
 Quarterly  
 Quarterly  
 Quarterly  
 Quarterly When Needed  
 Quarterly



A good way of planning and aligning OKRs and differentiating what is strategic from BAU. Note that OKRs do not need to follow your org chart with many being cross-functional, customer and product centric.

## Writing Objectives

Depending on whether the OKR is Strategic, BAU or Personal, an Objective is the answer to:

- What do you need to work towards and make progress on this quarter?

*Perhaps it's:*

- Strategic: Something that you need to achieve to support the Company Strategy
- BAU Optimization: Something that might help to improve team performance
  - *Poorly performing KPIs and you want to address the root causes*
  - *A system or process you use that you want to make more efficient*
  - *The development of a capability or competency that will help you do your work more effectively*
  - *The delivery of a really important improvement project e.g. roll-out of a new software system*

Here's an example of a BAU Optimization Objective with supporting information:

### Objective

Significantly reduce the time it takes to resolve a customer claim to increase Customer Satisfaction.

### What and Why Now?

It's the thing customers complain most about. If we target this it will help us improve customer satisfaction a lot and a wide range of KPIs will improve across the business.



## *Key Results & Initiatives*

There are two things to think about next - Key Results & Initiatives

- Key Results are usually measurable outcomes with targets.
- Initiatives are the work that you need to: complete, release, implement, roll-out, update, launch etc. that help you progress Key Result measures and targets.

Note that every OKR has Key Results, but not every OKR needs to have Initiatives.

## *Key Results*

Key Results are the measures and targets that if met or exceeded would mean that the Objective will have been reached.

You typically create 1 to 3 Key Results per Objective. The average is 2.

These need to be carefully thought through, so here is some guidance on set Key Results for your Objective.

## *Measure & Targets – Best*

The most common and our preferred Key Result formula is:

[Increase / Decrease] [Metric Name] from X to Y

X = Starting Value

Y = Target Value (can be a stretch target or have both target and stretch target)

Here's an example:

- Reduce claim time to resolution from 5 days to 2 days

## *Baseline*

Another approach when you know the measure but can't set a target because you don't measure it yet, name your measure or metric and put [BASELINE] and ZERO's as values.

## *Big Strategic Projects & Milestones*

If the Key Result is to complete a big strategic project you can either:

- Progress of a project / cards being managed in your PM tool e.g Jira
- Simple % complete or milestone based Key Result

## *Initiatives*

Initiatives are not your everyday task list, they are how you and your team propose to meet the Objective. Different people often work on different initiatives during a quarter, and OKR meetings will spend a lot of time talking about these.

*Initiatives are the answer to the question: What could and should we do to achieve this Objective?*

*Initiative 1: Implement new complaint tracking software*

*Initiative 2 ...*

*Initiative 3 ...*

*There are two types of key initiative to think about:*

### *Task Based Initiatives*

*Initiatives can be as big as a project or a collection of tasks.*

*Initiatives that are project or task based have a due date as well and the aim to complete them.*

## *Initiatives As Experiments*

Sometimes Initiatives can be experiments as well.

Your experiment might have a hypothesis and its aims. Perhaps you are trying to influence a leading key performance indicator moving it from X to Y?

At the end of an experiment you might document the results and your learnings. Did your experiment have the desired impact on the OKR?

## *OKR Examples*

So you can see more examples of the OKR format at work, here are some examples of OKR you can learn from.

### **KPI Targeted OKR**

#### **Objective**

Create a big jump in inbound leads for sales

#### **Key Results**

Increase the number of MQLs from X to Y (Aspirational)

Increase the number of SQLs from X to Y (Committed)

Nudge the quality higher with MQ : SQLs % from X to Y (Aspirational)

*Note: see how the Key Results 'balance' quality and quantity - an OKR best-practice.*

## Process Targeted OKR

### Objective

Significantly reduce the time it takes to resolve a customer claim to increase Customer Satisfaction

### Key Results

Reduce claim time to resolution from 5 days to 2 days or at a stretch 1 day  
Increase the post claim CSAT rating from 62% to 80% or at a stretch 90%

*Note: see how the Key Results 'balance' an efficiency gain with an expected outcome.*

## Strategic OKR

### Objective

Launch [Company in NYC] and get first local customers

### Key Results

Open the new NYC office with first wave of staff by X Date  
Meet 250 potential new customers face-to-face  
Close 10 new deals

## Product Launch Focused OKR

### Objective

Launch a game-changing Car Insurance app

### Key Results

Get 10,000 people to download the app  
Get 1,000 people to apply for car insurance via the app  
Achieve 50 reviews of 4 stars + in the App Stores

See how in this example the Key Results are not describing the work going. They describe what success of that work would look like - an app that gets used, converts visitors to customers and is liked a lot. Also, this OKR is cross-functional - Marketing, Product, Engineering work on this.

## *Going From A Draft OKR To A Signed-Off OKR*

The key to creating high impact OKRs that will move-the-needle and are not just wishful thinking, which means you have the time and resources to execute them is having a process that ensures OKRs are socialized and considered properly. Good questions to ask as part of this process are:

- Why is it important that we make progress towards this OKR now?
- How much time and resource is needed to make good progress?
- Who needs to be working on this OKR?
- Do you have the skills, experience and knowledge in the team to achieve the OKR?
- Does the OKR align with Strategic or Team OKRs?
- Who needs to sign-off the OKR?
- Who needs to be made aware of the OKR?

ZOKRI allows you to design processes like this as part of the OKR cycle. You can read more about [OKR cycle management](#) here.

## *How To Launch OKR*

It's a common practice to launch Company OKRs in a town hall every quarter along with department and cross functional OKR leads sharing their OKRs.

## *Updating & Discussing OKRs*

### *Weekly Check-Ins*

If you own OKRs or aligned Activities you will be reminded via ZOKRI to update the following information at the cadence you choose, which for most is weekly.

- Progress - what's the latest progress, often a metric as you've seen. If the metrics come from an integrated tool or spreadsheet, this will be automatically updated.

- Confidence or Risk - how confident are you about hitting the target?  
Is this at risk?
- Comments - what information can you share for context?
  - What's Holding You Back & What Do You Need?
  - What's Going Well?
  - General Comments

In ZOKRI these updates take minutes and will automatically get shared with team members and interested colleagues.

Where something has been holding someone back, you should mark the issue as resolved.

KPIs often have a different check-in schedule as the metrics might be on a monthly update schedule.

### *Weekly Team Meetings*

Once a week for 15 to 30 minutes get teams together to discuss their OKR(s), and more specifically the activities currently being worked on and those that are going to shortly get worked on. A good agenda format is:

- Previous meeting action status
- OKR and Initiative progress
- Priorities for the week ahead

You can either have ZOKRI on screen or meetings can also be scheduled via ZOKRI with the Meetings Module. This module prepares slides and allows you to assign actions as take notes during the meeting for easy action tracking and contact report and contact report distribution.

## *Monthly Reporting*

At the month it is common to ask OKR owners to submit a short update on how the OKR is progressing. Highlighting any issues that are slowing progress, as well as noteworthy achievements or breakthrough moments. If you're using ZOKRI the platform will remind you to submit this report.

## *Completing OKR & Retrospectives*

You can complete an OKR during or at the end of the quarter or year. You can also carry on an OKR (with or without amendments to Key Results and targets) into the next quarter or year if it's still the most important objective to make progress on at that moment in time.

When you complete an OKR you should complete what is called a Retrospective. You do this in ZOKRI on the OKR details page itself.

Here you will be asked to complete four things:

- 1 To share your reflections of how you worked towards the objective.  
For example:
  - Was this the right OKR to be working towards?
  - Did you get the time you wanted or needed?
  - Did you keep to the check-in, meeting and reporting cycle?
  - Were the people or resources that you needed available to you?
  - What was the mood and energy levels amongst the team?
  - Did business-as-usual work or firefighting take time away from the Objective?

2 What did you learn, and more specifically what should you:

- Keep doing
- Start doing
- Stop doing

3 How successful was the OKR?

When you create an OKR, you are trying to describe what success looks like using Key Result measures and targets.

As you will have read, with OKR we often set stretch targets. For this reason 100% + progress towards all stretch goals would not be a reasonable expectation, so often less than 100% can also be a success.

There are other ways of succeeding as well. Perhaps we've learned, discovered or even invented something valuable that won't have shown up in the final % progress number.

This is why at the end of a quarter, for each OKR we sit and discuss the OKR and capture what we did and learned, label the success of the OKR using the following grades:

- Excellent
- Good
- OK
- Poor
- Bad

It's a much fairer and balanced way to define what goal success looks like.



4 Should this OKR now be considered as complete or continued in the next quarter?

- Completed
- Continue with edits
- Continue without edit

Retrospectives can be managed in ZOKRI with seamless transitions of OKRs between quarters happening if OKRs need to be continued.

### *Team KPIs*

Every team has a set of KPIs they monitor to tell them how the team is performing, where attention is needed, and what is already good and needs to be maintained.

Ideally these KPIs are visible to all other teams as it helps to optimize information flow, alignment and support.

Some people have individual KPIs as well.

As you have seen, sometimes Key Results use these KPIs, but not always.

Most employees day-to-day work will be supporting either OKRs and the aligned Initiatives or team KPIs.

ZOKRI can track your KPIs, set targets and thresholds and collect check-in comments and reports, also integrating with your favorite tools and spreadsheets where useful.

### *Personal OKRs*

Every quarter, an employee and their manager should consider agreeing personal OKR along with any activities that would help an employee achieve the OKR.

## *Appraisals & OKRS*

Everyone has different roles and responsibilities and therefore contributes in many different ways.

When it comes to appraisals people should be appraised based on the work they have contributed. To some degrees, employees have generally contributed to company goals, team goals, initiatives and KPIs, and personal goals, initiatives and KPIs.

For this reason, OKRs and the initiatives that helped deliver them might be referenced as part of an appraisal in the same way KPIs might. But they are not the only way an employee's contribution should be measured. They are just part of every employee's story.

Which brings us nicely to culture!

## **Be A Culture Builder**



There is a strong correlation between the type of culture you have and performance. It has been found that a high-trust, generative culture is not only important for creating a safe working environment—it is the foundation of creating a high-performance organization.

A number of methodologies have been developed to measure culture. These include the [Westrum Typology](#). Here three different organizational cultures have been shown to have six characteristics.

<b>Pathological Power-oriented</b>	<b>Bureaucratic Rule-oriented</b>	<b>Generative Performance-oriented</b>
Low co-operation	Modest co-operation	High co-operation
Messengers shot	Messengers neglected	Messengers trained
Responsibilities shirked	Narrow responsibilities	Risks are shared
Bridging discouraged	Bridging tolerated	Bridging encouraged
Failure leads to scapegoating	Failure leads to justice	Failure leads to inquiry
Novelty crushed	Novelty leads to problems	Novelty implemented

These 6 statements with grading that ranges from, 1 (strongly disagree) to a 7 (strongly agree), can be used to test your own organization:

- 1 On my team, information is actively sought
- 2 On my team, failures are learning opportunities, and messengers of them are not punished
- 3 On my team, responsibilities are shared
- 4 On my team, cross-functional collaboration is encouraged and rewarded
- 5 On my team, failure causes inquiry
- 6 On my team, new ideas are welcomed

The generative performance-oriented culture is very similar to another cultural trait called Psychological Safety. Something that's explored next.

## What Google Found Out About Performance & Culture

An extensive workplace performance research project to discover the secrets of effective teams at Google - code-named [Project Aristotle](#), concluded that psychological safety plays a huge role in team performance along with: dependability, structure and clarity, meaning, and impact.

- **Psychological safety:** Psychological safety refers to an individual's perception of the consequences of taking an interpersonal risk or a belief that a team is safe for risk taking in the face of being seen as ignorant, incompetent, negative, or disruptive.

In a team with high psychological safety, teammates feel safe to take risks around their team members. They feel confident that no one on the team will embarrass or punish anyone else for admitting a mistake, asking a question, or offering a new idea.

The statements that are used measure Psychological Safety are:

- If I make a mistake in this team, it is held against me
- Members of this team are able to bring up problems and tough issues
- People on this team sometimes reject others for being different
- It is safe to take a risk in this team
- It is difficult to ask other members of this team for help
- No one on this team would deliberately act in a way that undermines my efforts
- Working with members of this team, my unique skills and talents are valued and utilized

- **Dependability:** On dependable teams, members reliably complete quality work on time (vs the opposite - shirking responsibilities).

A team has poor visibility into project priorities or progress, and there is a diffusion of responsibility with no clear owners for tasks or problems.

Good questions to consider are:

- When team members say they'll get something done, do they?
  - Do team members proactively communicate with each other about delays and assume responsibility?
- 
- **Structure and clarity:** This refers to an individual's understanding of job expectations, the process for fulfilling these expectations, and the consequences of one's performance are important for team effectiveness.

Goals can be set at the individual or group level, and must be specific, challenging, and attainable.

Google uses Objectives and Key Results (OKRs) to help set and communicate short and long term goals.

Organizations where leaders visibly align around common OKRs and demonstrate their commitment are better able to establish a common approach across teams.

Where structure and clarity is lacking it is not clear who is responsible for what and there is no clear decision-making process and rationale.

Question to consider include:

- Do team members know what the team and project goals are and how to get there?
- Do team members feel like they have autonomy, ownership, and discrete projects?

- **Meaning:** Finding a sense of purpose in either the work itself, or the output, is important for team effectiveness.

The meaning of work is personal and can vary: financial security, supporting family, helping the team succeed, or self-expression for each individual, for example.

Meaning is lower when work assignments are based solely on ability, expertise, workload; with little consideration for individual development needs and interests. In addition to a lack of regular recognition for achievements or milestones.

Questions to consider include:

- Does the work give team members a sense of personal and professional fulfillment?
  - Is work matched to team members based on both skills / ability and interest?
- **Impact:** The results of one's work, the subjective judgment that your work is making a difference, is important for teams.

Seeing that one's work is contributing to the organization's goals can help reveal impact.

Signs that your team needs to improve impact: include having too many goals, limiting ability to make meaningful progress

Questions to consider:

- Do team members see their work as creating change for the better?
- Do team members feel their work matters for a higher-order goal?
- How are current team processes affecting well-being/burnout?

ZOKRI has been designed to support your business by optimizing all of these critical aspects of organizational and team performance - from proving strategy and goal clarity, to ensuring impact and meaning are felt and understood.

## *Examples Of Company Values That Are Consistent With Performance*

Here are some ideas for company values that align with high performing companies and teams. Here's a few we've captured you might want to borrow from.

### *People matter most*

We are here to make our customers and our colleagues lives better:

- *Don't be a dick.* Wheaton Law
- *Go for great. Own your game. Be kind. Get big things done.* Robin S. Sharma
- *Put the customer first. Invent. And be patient.* Jeff Bezos
- *Success is not the key to happiness. Happiness is the key to success. If you love what you are doing, you will be successful.* Albert Schweitzer

### *Take ownership and be transparent*

We are transparent about where we are and where we plan to get to:

- *By recording your dreams and goals on paper, you set in motion the process of becoming the person you most want to be. Put your future in good hands—your own.* Mark Victor Hansen
- *The thing about goals is that living without them is a lot more fun, in the short run. It seems to me, though, that the people who get things done, who lead, who grow and who make an impact... those people have goals.* Seth Godin
- *A lack of transparency results in distrust and a deep sense of insecurity.*  
Dalai Lama

## *Be courageous and do not fear failure*

We do not fear failure, failure is how we practice to be the best at what we do:

- *The great danger for most of us lies not in setting our aim too high and falling short; but in setting our aim too low, and achieving our mark.* Michelangelo
- *Only those who dare to fail greatly can ever achieve greatly.* Robert F. Kennedy
- *Success comes from knowing that you did your best to become the best that you are capable of becoming.* John Wooden
- *It is hard to fail, but it is worse never to have tried to succeed.* Theodore Roosevelt
- *There are no secrets to success. It is the result of preparation, hard work, and learning from failure.* Colin Powell
- *You have to set goals that are almost out of reach. If you set a goal that is attainable without much work or thought, you are stuck with something below your true talent and potential.* Steve Garvey
- *There are risks in every action. Every success has the seed of some failure.*  
Liz Wiseman

## *We are all work in progress*

Our ability to be individually vulnerable and coachable is our collective strength:

- *The highest quality of thinking cannot emerge without learning. Learning can't happen without mistakes.* Liz Wiseman
- *To share your weakness is to make yourself vulnerable; to make yourself vulnerable is to show your strength.* Crissi Jami
- *Education is the ability to listen to almost anything without losing your temper or self-confidence.* Robert Frost
- *An investment in knowledge pays the best interest.* Benjamin Franklin



## *We will win together*

We put the company and team before ourselves so that we all might thrive.

- *The Diminisher is a Micromanager who jumps in and out. The Multiplier is an Investor who gives others ownership and full accountability. Liz Wiseman*
- *The only thing that permits human beings to collaborate with one another in a truly open-ended way is their willingness to have their beliefs modified by new facts. Sam Harris*
- *Teamwork begins by building trust. And the only way to do that is to overcome our need for invulnerability. Patrick Lencioni*
- *Teamwork is the ability to work together toward a common vision. The ability to direct individual accomplishments toward organizational objectives. It is the fuel that allows common people to attain uncommon results. Andrew Carnegie*
- *Find a group of people who challenge and inspire you, spend a lot of time with them, and it will change your life. Amy Poehler*
- *It isn't how much you know that matters. What matters is how much access you have to what other people know. It isn't just how intelligent your team members are; it is how much of that intelligence you can draw out and put to use. Liz Wiseman*

### *Questions to consider:*

Do you and your colleagues know your values and are your values lived and are they measured, tracked and enforced?

Does your company and teams work and act in a way that is consistent with these and do you have the data to prove that?

Leaders are responsible for planning systems that support the delivery of strategy and goals, and building a high performing culture that supports goal achievement.

ZOKRI has applied system thinking to ensure organizations have a management system that embeds common values, beliefs, and working practices. Ensuring employees work effectively together to achieve strategic, team and personal goals.

## **Fair Appraisals Improve Performance**



A large 2016 metastudy by the CIPD, that looked at the effect of performance appraisal on workplace performance. Here's an extract from the synthesis:

The study found that “an employee’s reaction to feedback is one of the most important mediators in the performance appraisal process. In fact, there is strong evidence that employees’ reaction to feedback, and not feedback per se, determines the extent to which their performance will improve.

How an employee will react to the feedback on their appraisal, however, is strongly moderated by the perceived fairness of the appraisal process: when the procedure is perceived to be just, employee reactions are more likely to be favorable, largely irrespective of the outcome.

Perceived fairness, in turn, is moderated by several other variables, of which perceived usefulness, rating method, rating accuracy, focus of the feedback, level of employee participation, and quality of the relationship between manager and employee seem to have the largest impact.

There are a wide number of variables that potentially affect the accuracy of the performance rating, which as a result may threaten the validity of the appraisal outcome (judgment) and seriously affect the fairness of the appraisal process."

### *Improving Fairness & Accuracy*

Accuracy and fairness requires the ability to appraise an employee against what they do and what they bring to their team or teams and wide organization. The following areas are a good basis for better, fairer, more balanced and less biased appraisals.

- 1 Collect inputs throughout the year as it's hard to remember what happened X weeks ago, never mind X months ago.
- 2 Make it easy to reference relevant OKR, KPI and Initiatives along with document / file evidence for appraisals.
- 3 Give and receive recognition based on:
  - *Specific competencies, responsibilities and skills e.g. managing roadmap.*
  - *Cultural values and behaviors from a library e.g. accountability, going above-and-beyond.*
  - *Individual traits from a library e.g. attention to detail, kindness, collaborative, committed, great common sense, confidence.*

## *Make the process efficient and enjoyable*

A common complaint is that running a good appraisal process takes a huge amount of time. So the whole process needs to be made faster and more efficient.

Managers and employees have not got huge amounts of time to piece together the information required at a level of quality that underpin the need for fairness and accuracy.

ZOKRI can do all of this and helps you maintain current and accurate job roles with associated competencies, responsibilities and skills. Colleagues can recognise each other against these and provide context for that recognition.

It is easy for anyone to reference the goals they owned or supported directly or indirectly in addition to KPIs.

And of course there's culture and the personal traits that make people amazing.

## Learn More About ZOKRI



If you would like to learn more about ZOKRI our software and coaching options, visit the website [here](#).