



A GUIDE TO THE **OKR BODY OF KNOWLEDGE** (OKRBOK™ GUIDE)

3. OKR ROLES

The Practical Implementation Guide for Managing OKRs

Includes a section about aligning OKRs with other Agile Frameworks



3. OKR ROLES

3.1 Introduction

OKRs (Objectives and Key Results) involve multiple roles within an organization, and each plays a crucial part in ensuring the success of the framework. These roles help to create, implement, track, and adjust OKRs to align the organization's goals with actionable outcomes. The key roles involved in OKRs are as follows:

- CEO/Executive Leadership
- Solution/Workspace/Department Leaders
- Product Owners/Project Managers/Kanban Managers/Scrum Masters
- Team Members (Individual Contributors)
- Cross-functional Teams
- HR/People Operations
- Finance Team
- OKR Champion/OKR Coach (optional)
- OKR Reviewers/Performance Reviewers (optional)
- Data Analysts/Business Intelligence Teams (optional)

3.2 OKR Roles

3.2.1 CEO / Executive Leadership

- Role: Set high-level company-wide OKRs.
- Responsibilities:
 - Define the company's strategic vision and high-level objectives.
 - Align organizational OKRs with the company's overall mission and values.
 - Inspire and motivate the entire company by setting ambitious and clear objectives.
 - Ensure that OKRs are integrated into the company culture and decision-making.

Figure 3-1 shows a Vabro interface for adding organization goals/objectives, where the user sets a goal name, assigns a goal owner, selects a time period and sets privacy.

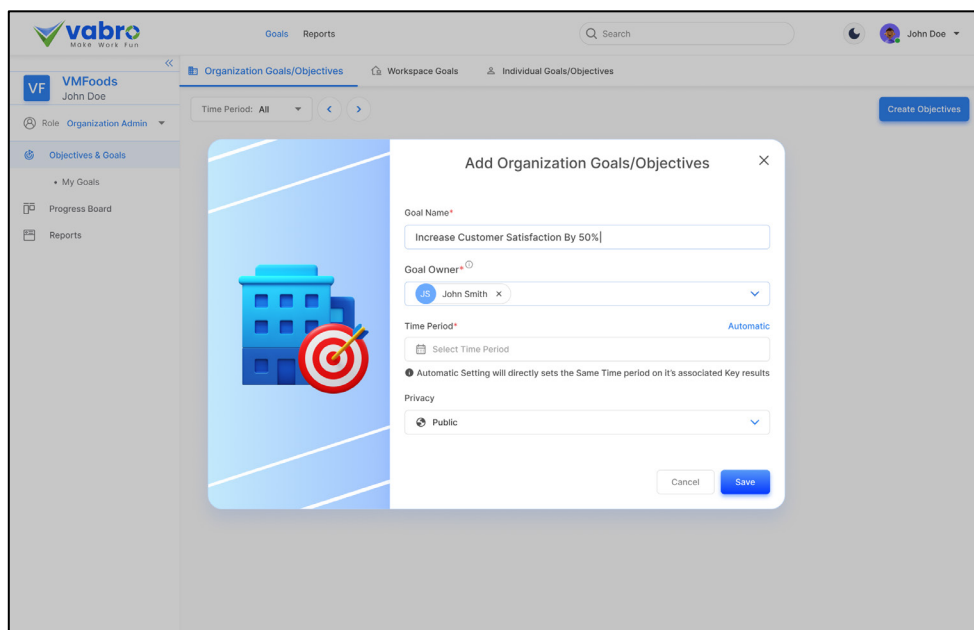
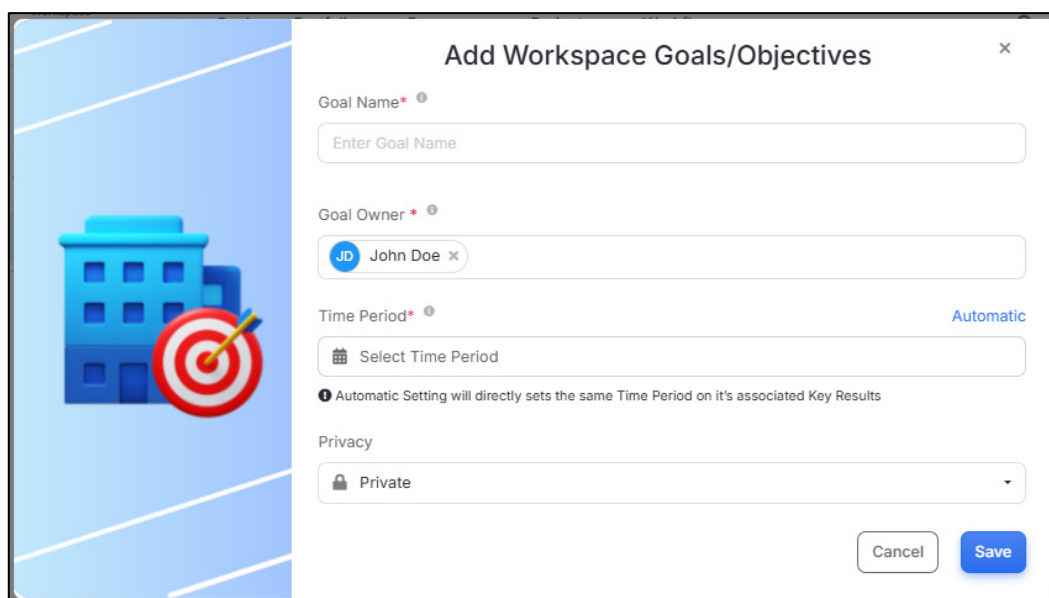


Figure 3-1: Setting Organization-wide Goals and Objectives (Source: Vabro)

3.2.2 Solution/Workspace/Department Leaders

- Role: Translate company OKRs into specific departmental or team OKRs.
- Responsibilities:
 - Cascade the company-wide OKRs down to their specific team or department.
 - Align their team's objectives with overall organizational goals.
 - Set team-specific key results that are measurable and achievable.
 - Track progress and ensure team members stay focused on their key results.
 - Review OKRs regularly, adjust goals when necessary, and provide feedback and coaching to team members.

Figure 3-2 displays a form in the Vabro platform for adding workspace goals/objectives, where users can input goal name, owner, time period, and privacy settings before saving the information.



The screenshot shows a modal window titled "Add Workspace Goals/Objectives" with a close button (X) in the top right corner. On the left side of the modal is a blue building icon with a red target and a yellow arrow hitting the bullseye. The form contains the following fields:

- Goal Name***: A text input field with a red asterisk and a help icon. The placeholder text is "Enter Goal Name".
- Goal Owner***: A dropdown menu with a red asterisk and a help icon. The selected value is "JD John Doe" with a close button (X).
- Time Period***: A dropdown menu with a red asterisk and a help icon. The selected value is "Automatic". Below the dropdown is a calendar icon and the text "Select Time Period". A note below reads: "Automatic Setting will directly sets the same Time Period on it's associated Key Results".
- Privacy**: A dropdown menu with a lock icon and the text "Private".

At the bottom right of the modal are two buttons: "Cancel" and "Save".

Figure 3-2: Setting Workspace-level Goals and Objectives (Source: Vabro)

3.2.3 Product Owners /Project Managers/ Kanban Managers/ Scrum Masters

- Role: Manage the execution of OKRs, particularly those related to products, projects, workflows or DevOps.
- Responsibilities:
 - Break down company or team OKRs into specific projects or product initiatives.
 - Ensure that resources are allocated to meet key results and that projects/workflows stay on track.
 - Coordinate with cross-functional teams to ensure alignment on OKRs.
 - Monitor progress and report on status during OKR reviews.

Figure 3-3 displays a goal tracking dashboard in Vabro for "Increase Customer Satisfaction," showing 46% completion, status as "On track," a progress graph, key result, attachments, and comments.

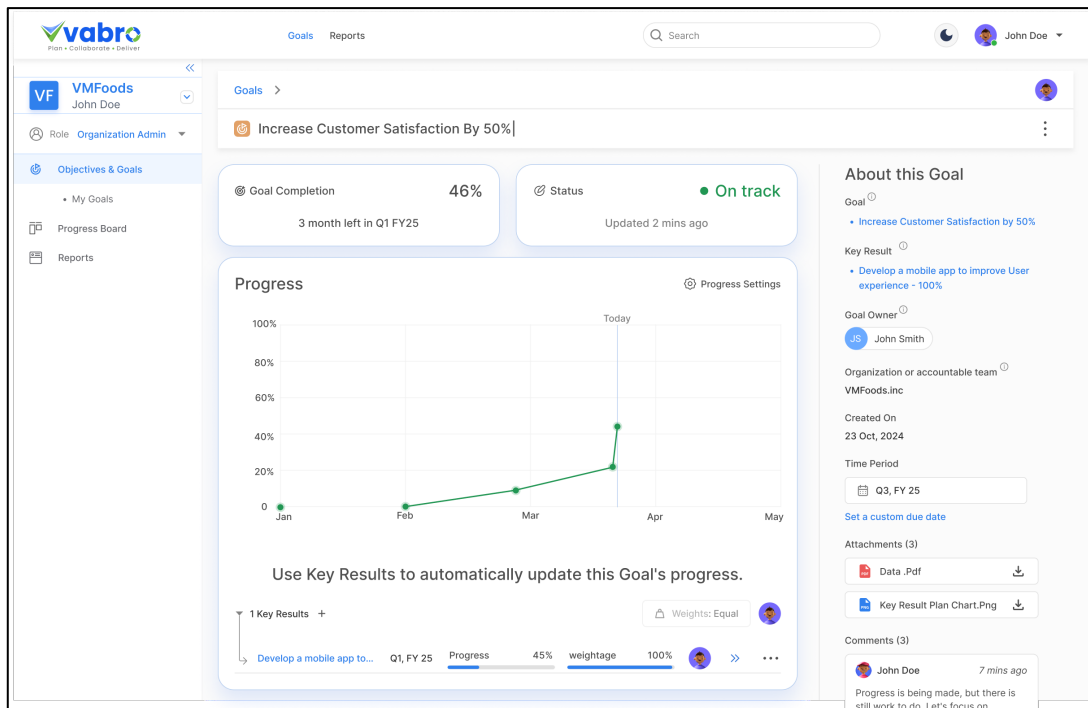


Figure 3-3: Defining and Tracking Goals (Source: Vabro)

3.2.4 Team Members (Individual Contributors)

- Role: Contribute to the achievement of team and company OKRs.
- Responsibilities:
 - Set individual OKRs that align with team and organizational objectives.
 - Actively work toward achieving key results and track progress.
 - Participate in regular check-ins and feedback sessions to ensure goals remain on track.
 - Collaborate with colleagues to share insights and contribute to broader organizational success.

Figure 3-4 shows a form in Vabro for adding individual goals/objectives, where users input the goal name, select a time period, and confirm the goal owner before saving the entry.

The screenshot shows a modal window titled "Add Individual Goals/Objectives" with a close button (X) in the top right corner. On the left side of the modal is a blue sidebar with a graphic of a building and a target. The main content area contains three input sections:

- Goal Name***: A text input field with a placeholder "Enter Goal Name".
- Time Period***: A dropdown menu with a calendar icon and the text "Select Time Period". To the right of the dropdown is a link labeled "Automatic". Below the dropdown is a small informational note: "Automatic Setting will directly sets the same Time Period on it's associated Key Results".
- Goal Owner***: A selection field showing a user profile icon with initials "JD" and the name "John Doe".

 At the bottom right of the modal are two buttons: "Cancel" and "Save".

Figure 3-4: Defining and Tracking Individual Goals (Source: Vabro)

3.2.5 Cross-Functional Teams

- Role: Collaborate across functions to ensure alignment and achievement of OKRs.
- Responsibilities:
 - Coordinate efforts across different departments (e.g., marketing, sales, engineering) to ensure that OKRs are aligned and complementary.
 - Share progress, feedback, and insights to optimize cross-functional collaboration and meet shared objectives.

3.2.6 HR / People Operations

- Role: Support the OKR process through talent management and alignment with employee development.
- Responsibilities:
 - Ensure that OKRs are integrated with performance management, career development, and employee engagement initiatives.
 - Help employees align their personal development goals with organizational OKRs.
 - Measure how OKRs impact employee satisfaction, engagement, and productivity.

3.2.7 Finance Teams

- Role: Ensure OKRs align with financial goals and resources.
- Responsibilities:
 - Ensure that key results related to financial performance (e.g., revenue, profitability, cost management) are aligned with company OKRs.
 - Monitor financial outcomes and ensure that the necessary resources are available to meet key results.

Help track the ROI of OKRs and contribute to financial decision-making based on OKR performance.

3.2.8 OKR Champion/OKR Coach (optional)

- Role: Facilitate the OKR process across the organization.
- Responsibilities:
 - Educate and train teams on the OKR framework.
 - Guide leadership and employees in crafting clear, measurable objectives and key results.
 - Ensure consistency in how OKRs are set, tracked, and reviewed.
 - Provide ongoing support to teams and individuals to drive successful implementation.
 - Ensure regular OKR reviews and help teams adjust their goals as needed.

This role is optional and could also be played by any person in the company who has the necessary training, experience and/or certification about effective use of OKR framework.

3.2.9 OKR Reviewers/Performance Reviewers (optional)

- Role: Monitor and evaluate progress toward OKRs.
- Responsibilities:
 - Track the progress of OKRs through regular check-ins and performance reviews.
 - Provide constructive feedback to teams and individuals based on OKR performance.
 - Ensure that OKRs are being evaluated and adjusted in line with changing priorities or new learnings.
 - Assess the effectiveness of the OKR system and suggest improvements.

This role is optional and could also be played by any person in the company who has the necessary training, experience and/or certification about effective use of OKR framework. Use of an OKR Digital Tool may also help in regularly tracking progress of OKRs.

3.2.10 Data Analysts/Business Intelligence Teams

- Role: Measure and report on key results.
- Responsibilities:
 - Help define quantifiable key results and ensure that appropriate data is collected for tracking.
 - Provide reports and insights on progress toward OKRs, identifying trends, challenges, and areas for improvement.
 - Use data to inform decision-making and suggest course corrections when progress is off track.

This role is optional and could also be played by any person in the company who has the necessary training, experience and/or certification about effective use of OKR framework. Use of an OKR Digital Tool may also help in measuring and reporting on OKRs.

In short, OKRs require collaboration across many levels of an organization, from leadership to individual contributors. The key roles involve setting goals, ensuring alignment, tracking progress, providing support, and continuously improving the OKR process.

3.3 Roles and Responsibilities

Table 3-1 captures the key roles and associated responsibilities in OKR when using various digital OKR tools or SaaS platforms.

Digital OKR Tools or SaaS Platforms	Roles and Key Responsibilities
Vabro	<p>Organization Admin (CEO, COO, CIO): Define top-level strategic OKRs, review company-wide progress dashboards.</p> <p>Workspace Admin (HR Head, PMO, Customer Service Head, IT Head, etc.): Configure Workspace or Department OKRs and connect them to overall company OKRs for engagement.</p> <p>Product Owners: Configure Projects and Workflows and define contribution to the Company OKRs.</p> <p>Kanban Manager: Update key results relevant to their Kanban Workflows and Board, and request feedback on goal progress.</p> <p>Scrum Master: Update key results relevant to their projects and Board, and request feedback on goal progress.</p> <p>Team Members – Define and manage individual OKRs for improving performance and productivity. Individual OKRs may or may not be connected to company OKRs.</p>
Lattice	<p>Executives: Align company OKRs with employee performance reviews.</p> <p>HR Teams: Configure performance management and OKRs for engagement.</p> <p>Managers: Conduct 1:1 meetings, give feedback on OKRs.</p> <p>Employees: Update key results, request feedback on goal progress.</p>
WorkBoard	<p>Executives (CEO, COO, CIO): Define top-level strategic OKRs, review company-wide progress dashboards.</p> <p>OKR Champions: Set up and manage OKRs across teams, provide training.</p> <p>Team Leaders: Align team objectives, track progress using WorkBoard's insights.</p> <p>Employees: Update OKR progress, use weekly check-ins for accountability.</p>
Weekdone	<p>Executives: Use company-wide OKR dashboards for visibility.</p> <p>Managers: Monitor OKRs via weekly reports and team pulse updates.</p> <p>Employees: Update OKRs, submit weekly progress reports.</p>

Gtmhub	<p>Executives: Set up automation rules for tracking OKRs.</p> <p>Data Analysts: Use Insights Hub for data-driven OKRs.</p> <p>Managers: Track leading/lagging indicators with advanced analytics.</p> <p>Employees: Provide updates and check-in on team OKRs.</p>
Perdoo	<p>Executives: Use "Roadmap" feature to connect OKRs with company strategy.</p> <p>OKR Champions: Configure OKR cycles and facilitate workshops.</p> <p>Managers: Track team OKRs using Health Reports and Check-ins.</p> <p>Employees: Contribute to team OKRs and update key results.</p>
7Geese	<p>Executives (C-Level): Set company-wide strategic objectives, ensure alignment across teams, and monitor overall performance.</p> <p>OKR Program Owner / Champion: Implement the OKR framework, train teams on best practices, and maintain consistency in OKR processes.</p> <p>Department Heads: Align departmental goals with company strategy, monitor progress, and support cross-functional collaboration.</p> <p>Team Leaders / Managers: Break down department OKRs into actionable team goals, conduct regular check-ins, and provide feedback.</p> <p>Individual Contributors: Set personal OKRs aligned with team goals, track progress regularly, and engage in continuous feedback loops.</p> <p>HR & People Ops Teams: Integrate OKRs with performance management processes, promote a feedback-driven culture, and support employee engagement.</p> <p>Data Analysts: Analyze OKR performance data, provide actionable insights for leadership, and support data-driven forecasting.</p>
Koan	<p>Executives: Ensure goal alignment through reflection prompts.</p> <p>Managers: Monitor team progress using team dashboards.</p> <p>Employees: Provide feedback and insights in regular check-ins.</p>
Ally.io	<p>Executives: Monitor OKRs across departments using Goal Trees.</p> <p>Managers: Set cascading OKRs aligned with business priorities.</p> <p>Employees: Track personal and team progress, contribute insights.</p>

Profit.co	<p>Executives: Align corporate strategy with OKRs via strategy planner.</p> <p>OKR Champions: Configure OKR processes, assign ownership.</p> <p>Managers: Track OKR alignment with KPIs.</p> <p>Employees: Regularly update and manage progress on personal/team OKRs.</p>
JOP (Joy of Performing)	<p>Executives: Align OKRs with business vision.</p> <p>HR Teams: Manage engagement, track OKRs alongside performance.</p> <p>Managers: Guide teams through OKR-based performance plans.</p> <p>Employees: Use AI-driven coaching for OKR improvements.</p>
Leapsome	<p>Executives: Drive business alignment through OKRs and feedback cycles.</p> <p>HR Teams: Integrate OKRs with performance and learning.</p> <p>Managers: Align OKRs with team objectives and career growth.</p> <p>Employees: Track progress, receive feedback, and align learning with OKRs.</p>
Mooncamp	<p>Executives: Monitor high-level strategic OKRs.</p> <p>Managers: Define department-wide OKRs and track progress.</p> <p>Employees: Update OKRs and provide status reports.</p>
15Five	<p>Executives: Define company-wide OKRs using Best-Self Review.</p> <p>HR Teams: Set up OKR-driven performance check-ins.</p> <p>Managers: Track OKRs through weekly pulse surveys.</p> <p>Employees: Align personal growth with team OKRs.</p>
Quantive	<p>Executives: Use OKR analytics to drive business strategy.</p> <p>Managers: Align business intelligence (BI) with OKRs.</p> <p>Employees: Integrate daily work with measurable outcomes.</p>
Betterworks	<p>Executives: Align corporate OKRs with HR-driven performance management.</p> <p>OKR Champions: Manage OKR lifecycle, set cadence for tracking.</p> <p>Managers: Link OKRs to employee performance plans.</p> <p>Employees: Regularly update OKRs and track feedback loops.</p>

Table 3-1: OKR Roles in AI-enabled Digital OKR Tools

The Practical Implementation Guide for Goal Setting with OKRs

The Objectives and Key Results Body of Knowledge (*OKRBOK™ Guide*) provides a structured yet flexible approach to successfully implementing the OKR framework—a widely adopted framework for goal setting, strategic alignment, and performance management. First introduced in the technology sector, OKRs have since been embraced across various industries, including software development, finance, healthcare, retail, education, human resources, sales and marketing, and more. This framework is applicable to organizations of all sizes, from startups to global enterprises, helping them focus on measurable outcomes and continuous improvement.

The *OKRBOK™ Guide* is built on insights from thousands of goal-setting implementations across industries, with significant input from experienced OKR practitioners, business leaders, and experts in organizational strategy. Its development was a collaborative effort involving contributions from diverse fields, ensuring a well-rounded and practical approach to OKR adoption. Feedback from the global OKR community and inputs from the VMEdU® Global Authorized Training Partner Network—comprising over 2,000 companies in more than 50 countries—played a significant role in its creation. The development of the *OKRBOK™ Guide* has truly been a collaborative effort involving numerous experts and practitioners from diverse disciplines.

The *OKRBOK™ Guide* is a comprehensive yet easily accessible resource that includes real-world examples of OKR implementation using popular IT tools. It helps organizations and teams establish meaningful objectives, track progress effectively, and ensure alignment across functions. The guide also explores how OKRs integrate with other Agile methodologies such as Scrum, Kanban, and DevOps, providing a holistic view of modern business strategy execution.

This guide serves as a valuable resource for both experienced OKR practitioners and professionals new to goal-setting frameworks. Whether you are a leader looking to drive alignment or a team member seeking clarity in execution, the *OKRBOK™ Guide* standardizes the OKR approach globally, significantly enhancing business performance, transparency, and return on investment.

