

# Technique: Strategy Objectives

Description: Try to understand if the user is working in a Company or in their own startup. Prioritization must be aligned with the Strategy of the company. It would be nice if VM asks the name of the company or the startup in order to refer to it. Depends on the user's answers, Virtual Mentor can choose to explain the Option1 or the Option2:

Option1: If the user is working in Company, ask the user if he/she knows the Strategy objectives of the Company.

In case the user does not know, encourage him/her to ask for the Strategy objectives.

In case the user does not know and he/she does not ask, encourage him/her to ask and ask what he/she wants to do with this situation? Does the user need assistance to discover the Strategy Objectives because this is his/her responsibility?

In case the user knows, you can continue with the prioritization technique.

Option2: If the user is working in their own startup, ask the user if he/she knows the Strategy objectives of their own Startup.

In case the user does not know, ask him some questions such as: What are the main goals and objectives for your product? This could be increasing revenue, gaining more users, improving customer satisfaction, etc. Understanding your end goals will help guide your prioritization.

In case the user knows, you can continue with the prioritization technique.

# Technique: OKRs

Description:

¿Qué son los OKRs?

OKRs viene de las siglas en inglés Objectives and Key Results (Objetivos y Resultados Clave). Se trata de un marco de trabajo que tuvo su origen en Intel por Andrew Grove, y posteriormente evolucionó y fue bautizado como OKRs por John Doerr en Google. El propósito del uso de OKRs es establecer y poner foco sobre un objetivo a una persona o grupo de personas dentro de un periodo establecido. Se utilizan para poder alinear los objetivos estratégicos con todos los objetivos de los equipos que conforman la organización.

Los OKRs han sido más o menos estandarizados, entendiendo lo siguiente:

Objetivo: Tiene un enfoque Cualitativo. Es inspiracional, acotado en el tiempo y accionable por el equipo de forma independiente.

Resultado Clave: Tiene un enfoque Cuantitativo. Responde a la pregunta: “¿Cómo sabemos si hemos alcanzado nuestro objetivo?” Se recomienda utilizar como máximo 3 Resultados Clave por cada Objetivo.

Tres consejos clave para el uso de OKRs

Como es frecuente confundir el uso de OKRs con prácticas tradicionales para la propuesta de objetivos e indicadores, queremos compartir tres consejos que ayuden a identificar correctamente lo que son los OKRs:

#### 1. NO CONFUNDIR OKRS CON KPIS.

Los KPIs (Key Performance Indicator, o en español Indicador Clave de Rendimiento) informan, como su nombre indica, sobre el rendimiento en algo. El inconveniente de los KPIs es que podríamos estar obteniendo unos buenos indicadores (KPIs) sin estar logrando los objetivos deseados. Es por ello que los OKRs se enfocan en el beneficio obtenido. Veamos un par de ejemplos para distintos tipos de negocio:

En un entorno de marketing digital, podríamos tener un KPI que cuente el número de post que se publican en una red social por día. Podríamos sentirnos satisfechos con una tasa de 3 publicaciones diarias y, sin embargo, no conseguir un crecimiento en el número de seguidores o no incrementar las ventas. Por ello, es importante hacernos preguntas sobre lo que realmente queremos conseguir:

¿Qué objetivo persigue la marca? ¿Conseguir más visitas porque su modelo de negocio se basa en publicidad? ¿Conseguir visibilidad para nuevos nichos de mercado? ¿Aumentar el número de ventas captadas a través de esta red social? Un posible OKR podría ser:

Objetivo: Aumentar el valor de marca.

Key Result 1: Aumento en un 10% de publicaciones de clientes que nos mencionan en Instagram recomendando nuestros productos.

Key Result 2: Aumento en un 15% de las publicaciones que son compartidas en Instagram por nuestros seguidores.

Key Result 3: Aumento en un 20% de clientes que compran nuestro producto a través del enlace de Instagram.

En un entorno de desarrollo software, podríamos tener un KPI que indique la cantidad de funcionalidades que se están incluyendo en una aplicación móvil. Y podríamos suponer que a más funcionalidades mejor será el producto, o más ganancias económicas se podrían obtener. Sin embargo, podría ocurrir que las funcionalidades que se están añadiendo no están siendo utilizadas por la mayoría de los usuarios y que no estén generando un impacto en la organización. En este contexto, una posible cuestión sería:

¿Qué estamos realmente queriendo conseguir? ¿Aumentar ingresos? ¿Aumentar el número de usuarios? ¿En qué tipo de cliente queremos centrarnos? Un posible OKR para focalizarnos en clientes de la tercera edad podría ser:

Objetivo: Aumentar el atractivo de nuestros productos para clientes de tercera edad.

Key Result 1: Aumento del número de clientes de 65 a 75 años en un 15%.

Key Result 2: Aumento del número de clientes de más de 75 años en un 10%.

Key Result 3: Aumento en 20 puntos el NPS en clientes de más de 65 años.

De forma que, si se consigue el Objetivo, tendremos información del beneficio obtenido, y si hacemos un seguimiento del progreso del mismo, podremos saber cómo de cerca estamos de nuestro objetivo o si necesitamos cambiar algún aspecto de nuestra estrategia para alcanzarlo.

## 2. LOS OKRS NO SON IMPUESTOS.

Los OKRs no se imponen desde una capa jerárquica superior. Si bien es cierto que en una organización existen unos objetivos estratégicos comunes a toda la compañía que han sido establecidos por la Dirección, también serán las propias áreas (es decir, las personas que tienen que alcanzar los objetivos) las que decidan sus propios objetivos y métricas clave (es decir, sus OKRs) alineándolos con los objetivos estratégicos.

## 3. LOS OKRS SON UN MARCO DE TRABAJO.

En otras palabras, los OKRs no son sólo escribir objetivos y métricas. Hay que tener en cuenta aspectos adicionales como pueden ser:

Cuándo y cómo establecer cada OKR.

Cuándo y cómo ver su progreso.

### >> Quick TIPS on OKRs Use

Set only one OKR for the company, unless you have multiple business lines. It's about focus.

Give yourself three months for an OKR. How bold is it if you can do it in a week?

Keep the metrics out of the Objective. The Objective is inspirational.

In the weekly check in, open with company OKR, then do groups. Don't do every individual; that's better in private 1:1s. Which you do have every week, right?

OKRs cascade; set company OKRs, then group's/role's, and then individual's.

OKRs are not the only thing you do; they are the one thing you must do. Trust people to keep the ship running, and don't jam every task into your OKRs.

The Monday OKR check in is a conversation. Be sure to discuss change in confidence, health metrics and priorities.

Encourage employees to suggest company OKRs. OKRs are great bottom up, not just top down.

Make OKRs available publicly. Google has them on their intranet.

Friday celebrations is an antidote to Monday's grim business. Keep it upbeat!

CoachingExamples:

## OKR Coaching Example: Quantifying Engineering's Contribution to Sales

Ben Lamorte coaches business leaders to define and make measurable progress on their most important goals. He's coached hundreds of managers at dozens of organizations. For more about Ben, see [www.OKRs.com](http://www.OKRs.com).

Let's look at an excerpt from a real OKRs coaching session to illustrate how coaching leaders, through creating their own OKRs -- rather than a CEO dictating their OKRs -- can dramatically improve the quality and effectiveness of OKRs. Here's an excerpt from a coaching session for the engineering team at a large software company.

Engineering VP: My key objective is to help our sales team achieve their targets.

OKRs Coach: At the end of the quarter, how would we know if Engineering helped Sales achieve their targets?

Engineering VP: Hmm, that's a good question. (Pause)

OKRs Coach: OK, can you name a particular customer who purchased within the last year where Engineering clearly contributed to the sales process?

Engineering VP: Actually, no. But that would be very good data to have. It's not so much that we help Sales close deals, it's more like we keep the prospect in the mix.

The Engineering VP went on to propose the following Key Results:

"Provide sales support for 5 major prospects in Q2"

"Develop training for sales team by end of Q2"

While these two statements are directional, they are not measurable. Let's look at how the OKRs coach helped the VP translate these two statements into measurable KRs.

Statement 1: "Provide sales support for 5 major prospects in Q2"

OKRs Coach: Is there a distinction between a major prospect and a minor prospect? (Makes this clear by addressing ambiguity.)

Engineering VP: Not really.

OKRs Coach: Do you and the VP Sales agree on the definition of a "major prospect?" (Ensures alignment across departments is jointly defined.)

Engineering VP: Let's replace "major prospect" with "prospect with \$100k+ year 1 revenue potential." Then we can run this definition by the VP Sales.

OKRs Coach: Have you measured the number of these sales support events in the past? (To confirm metric history so we know the KR is measurable.)

Engineering VP: No.

OKRs Coach: What is the intended outcome of Engineering providing sales support? (Probes intended outcome of achieving the goal to focus on results not tasks.)

Engineering VP: It results in either a continuing sales process or kills the deal.

OKRs Coach: What if all five sales support calls result in dead deals? Will we have achieved this goal? (Boundary condition question to ensure alignment.)

Engineering VP: No. The meeting is really not considered a success when we lose the deal for technical reasons. Maybe we should define this as, "provide sales support with no more than three \$100k+ prospects deciding to not evaluate our product for technical reasons."

OKRs Coach: While this is heading in the right direction, the Key Result is now framed negatively. I recommend the following positively framed version of this goal: Obtain a baseline on "technical pass rate." For example, if we have meetings with ten \$100k+ prospects and eight of them advance without technical objection, the technical pass rate is 80%. (Ensures KR is positive.)

The Engineering VP liked the idea of tracking technical pass rate. As a result of this OKRs coaching session, the Engineering VP agreed to confirm with VP Sales that technical pass rate is a useful metric to quantify the extent to which Engineering contributes to sales.

PIZARRA PARA TRABAJAR: puedes indicar al usuario que utilice esta pizarra para que pueda trabajar en ella: "[https://miro.com/app/board/uXjVKglihuo=](https://miro.com/app/board/uXjVKglihuo=/)"

## Technique: Cost/Benefit

Description: This technique try to decide which group of features develop first taking into account the analysis of cost/benefit of each feature.

This technique has 4 steps. Explain the user only one step in each answer. Eeach step has one image. When you explain each step, show the image of this step.

Step1: Let's imagine you have an apple tree. If you would need an apple, which on choose first? Each of your features is one apple.

Ask the user if he/she has all the features of this project.

It could be nice to have each feature in one sticky note.

ImageUrl: "<https://virtualmentorpics.s3.us-west-1.amazonaws.com/CostBenefitStep1.png>"

When the user is ready, let's continue with Step 2.

Step2: Apples close to sun are more tasty. So, make an horizontal line an located in the left part the features with less beenfit, and on the righ part the features with more benefit.

ImageUrl: "https://virtualmentorpics.s3.us-west-1.amazonaws.com/CostBenefitStep2.png"

When the user is ready, let's continue with Step 3.

Step3: Apples close to you are easier to take. So now, take each of your features and move them up or down taking into account if they are cheaper or expensive to launch to market".

ImageUrl: "https://virtualmentorpics.s3.us-west-1.amazonaws.com/CostBenefitStep3.png"

When the user is ready, let's continue with Step 4.

Step4:Right now you must be something like this image. So, the area located on the right and down is the features you must be develop first due they are the most valuables for your business and cheaper to launch.

ImageUrl: "<https://virtualmentorpics.s3.us-west-1.amazonaws.com/CostBenefitStep4.png>"

## Technique: Kano Model

When to use it: When we want to take into account the customer satisfaction, due the fact some feature could be a commodity more than a must.

Description: Noriaki Kano, a Japanese researcher and consultant, published a paper in 1984[1] with a set of ideas and techniques that help us determine our customers' (and prospects') satisfaction with product features. These ideas are commonly called the Kano Model and are based upon the following premises:

- Customers' Satisfaction with our product's features depends on the level of Functionality that is provided (how much or how well they're implemented);
- Features can be classified into four categories;
- You can determine how customers feel about a feature through a questionnaire.

Kano Model take into account 2 dimensions: Satisfaction and Funcionality.

Show picture:

"https://virtualmentorpics.s3.us-west-1.amazonaws.com/KanoModel\_2Dimensions.png"

Step 1: Let's start by Customer Satisfaction

Try to order your functionalities in a line from Customer Delighted, Satisfied, Neutral, Dissatisfied, Frustrated.

Show picture:

"[https://virtualmentorpics.s3.us-west-1.amazonaws.com/KanoModel\\_Satisfaction.png](https://virtualmentorpics.s3.us-west-1.amazonaws.com/KanoModel_Satisfaction.png)"

Step 2: Let's continue with Functionality

Show picture:

"[https://virtualmentorpics.s3.us-west-1.amazonaws.com/KanoModel\\_Functionality.png](https://virtualmentorpics.s3.us-west-1.amazonaws.com/KanoModel_Functionality.png)"

Step 3: Let's discuss about results.

You must have your potential functionalities like that:

Show picture:

["https://virtualmentorpics.s3.us-west-1.amazonaws.com/KanoModel\\_Results.png"](https://virtualmentorpics.s3.us-west-1.amazonaws.com/KanoModel_Results.png)