

SUCCESS+

CREATING OKRS THAT ACTUALLY WORK

A Bold Leader's Guide to Aligning Vision with Action

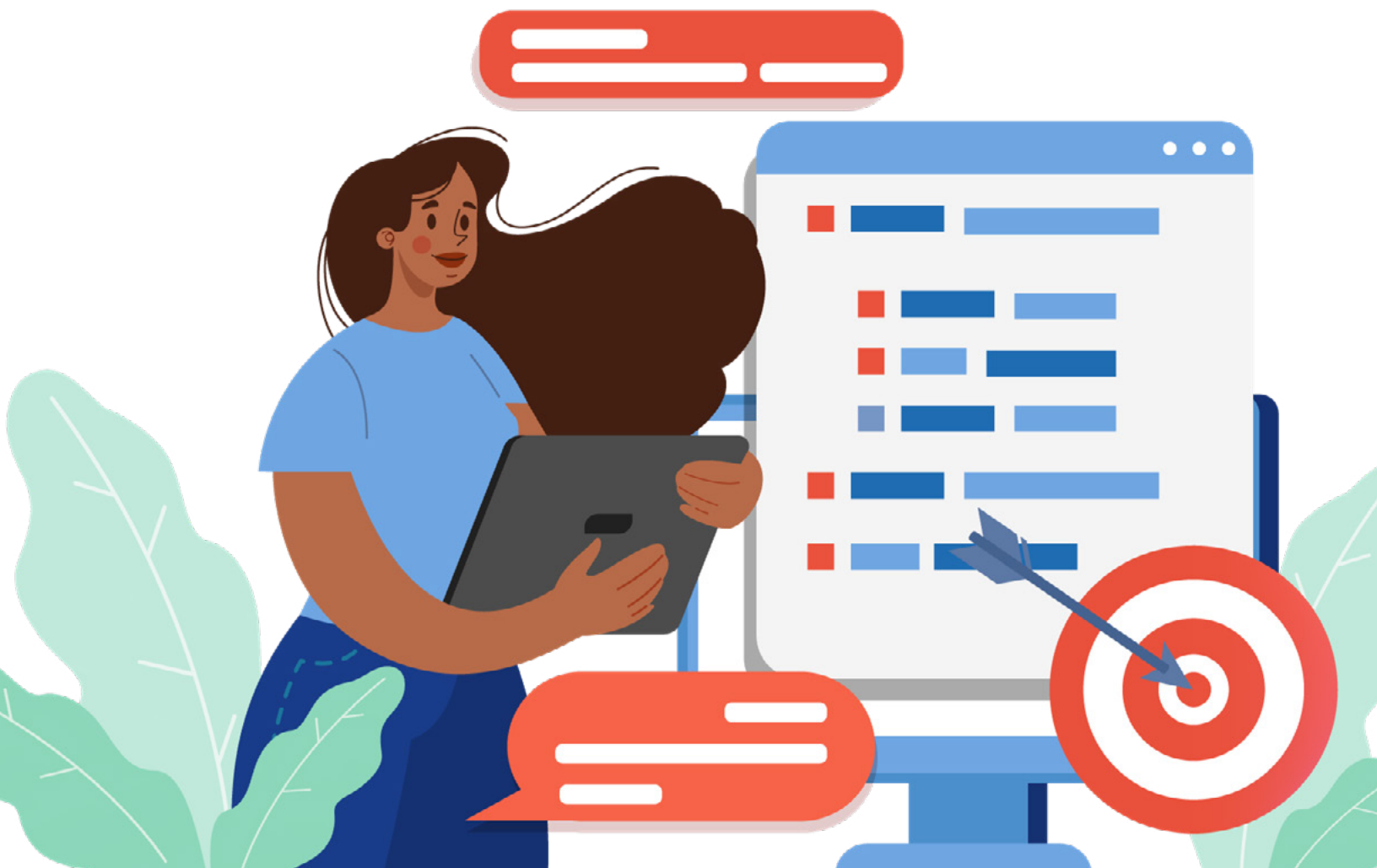


Let's be honest: Most goal-setting frameworks feel like busywork.

That's because you likely haven't developed OKRs (Objectives and Key Results). When done right, they're a simple, powerful way to translate your vision into aligned priorities.

This worksheet is designed for leaders who want alignment, focus, and results—for their business, their team, and personally.

Whether you're just starting out or fine-tuning a seasoned process, this worksheet will help you see your goals more clearly, structure them more boldly, and feel more confident in where you're headed next.



Anchor in Purpose: The “Why” That Drives the “What”

Before you set objectives, reconnect with your deeper “why.” This grounds your OKRs in something more meaningful than metrics alone.

Activity

Write 1–2 sentences that reflect your purpose for the next 12 months. Use this as your north star for all OKRs.

Clarify the deeper purpose behind your work, and let it guide your goals at every level.

Samples:

- **Company Purpose:** Build a values-driven company that empowers business owners with the tools, education, and community to scale with clarity and integrity.
- **Team Purpose:** Cultivate a highly accountable, collaborative team that consistently delivers meaningful results—and finds energy and enjoyment in the process.
- **Personal Leadership Purpose:** Lead with presence and focus, making space for strategic thinking while modeling clear communication, curiosity, and composure under pressure.

What impact do I want my company, my team, and myself to have this year?

Why does this impact matter to me personally as a leader?

Where are we not living up to this vision today?

Set Bold, Focused Objectives

Objectives are qualitative, inspiring, and directional. Think: Where do you, your team, and your business want to go? Aim for 3–5 objectives per quarter.

Activity

List up to three clear, bold objectives for the quarter.

Uncover the most meaningful priorities for you, your team, and your company.

Samples:

- **Company Objective:** Position the brand as a category leader through thought leadership, partnerships, and standout content strategy.
- **Team Objective:** Build a culture of accountability and proactive communication across all departments.
- **Personal Leadership Objective:** Create more space for strategic thinking by reducing reactive tasks and delegating operational noise.

What would growth look like this quarter—for my business, my team, and myself?

What strategic priorities do I need to focus on?

Am I holding back anywhere as a leader?

Define Key Results

Key results are the metrics that demonstrate whether you're making real progress and help you know when the objective has been achieved. Aim for 2–5 key results per objective to maintain alignment and impact.

Activity

Under each objective, list 2–5 measurable key results for your company, team, and yourself.

Make sure your goals are grounded in results—not just effort.

Examples:

- **Company Objective:** Position the brand as a category leader through thought leadership, partnerships, and standout content strategy.

Key Results:

1. Publish 10 long-form leadership articles on high-authority platforms.
2. Secure 5 new strategic brand partnerships.
3. Grow LinkedIn engagement by 40% quarter-over-quarter.

- **Team Objective:** Build a culture of accountability and proactive communication across all departments.

Key Results:

1. 100% of team members submit personal OKRs within the first two weeks of the quarter.
2. Hold biweekly cross-functional check-ins with 90% average attendance.
3. Launch feedback loops in each department with at least 80% participation.

- **Personal Leadership Objective:** Create more space for strategic thinking by reducing reactive tasks and delegating operational noise.

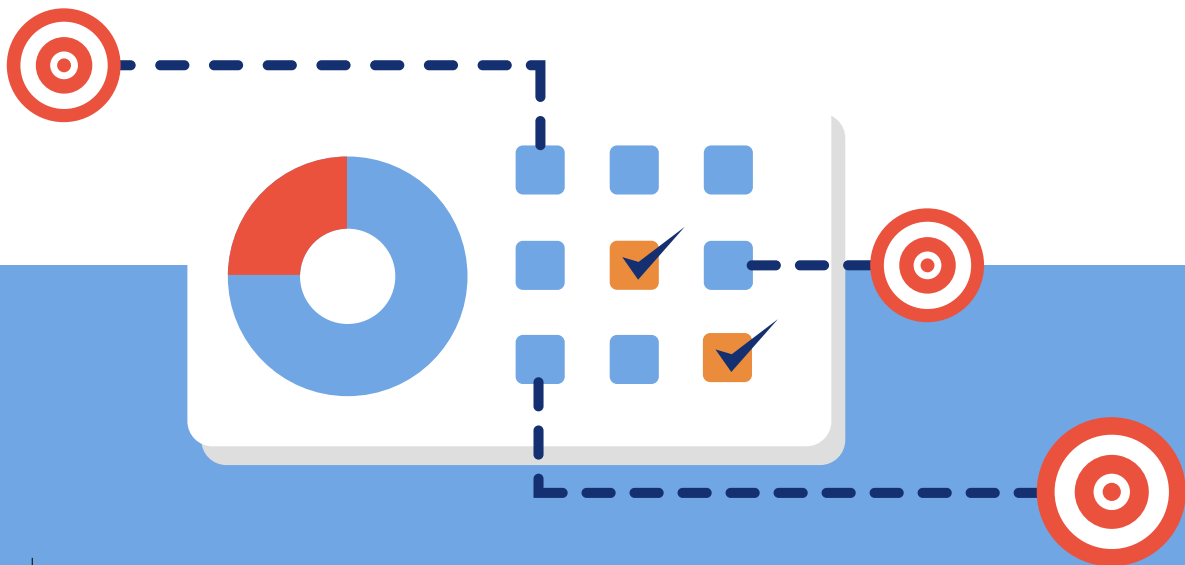
Key Results:

1. Reduce meetings by 25% through better agenda setting or delegation.
2. Block out 2 90-minute focus sessions weekly for high-level planning.
3. Delegate at least 50% of recurring operational tasks to capable team members.

How will I know this objective was achieved?

What metrics matter most?

Am I focused on meaningful outcomes over the activity itself?



Identify Leverage Actions

You've got your destination (objectives) and your milestones (key results). Now, let's brainstorm a few key actions that will move the needle—without overwhelming your calendar.

Activity

List 1–3 leverage actions for each key result. Remember to use verbs and keep it lean.

Focus on what matters—and avoid busywork in disguise.

Examples:

- **Company-Level Key Result:** Secure 5 new strategic brand partnerships.

Leverage Actions:

1. Reach out to 15 potential partners with customized proposals.
2. Create a one-sheet outlining mutual value and impact.
3. Host 3 virtual coffee chats with ideal-fit partner brands.

- **Team-Level Key Result:** 100% of team members submit personal OKRs within the first 2 weeks.

Leverage Actions:

1. Host a 60-minute OKR kickoff workshop with a Q&A.
2. Provide a fillable template with real examples, broken down by role.
3. Schedule 1:1 office hours for team members needing extra support.

- **Personal Leadership Key Result:** Block out two 90-minute focus sessions weekly for high-level planning.

Leverage Actions:

1. Schedule recurring calendar blocks on Monday and Thursday mornings.
2. Turn off all notifications during focus blocks.
3. Delegate one low-priority meeting per week to protect deep work time.

What leverage actions will make the biggest impact here?

What am I tempted to do that won't really matter?

Who else needs to be informed, involved, or empowered for these leverage actions to go as planned?



Measure, Reflect, Adjust (The CEO Debrief Loop)

Great leadership isn't just about setting direction—it's about learning and adjusting. A regular review fosters trust, clarity, and course correction power. Build a regular rhythm of review for yourself, your team, and your business.

Activity

Create a biweekly (or monthly) check-in ritual. Use this space to jot reflections.

Notice what's working, what's stuck, and what needs to shift.

Examples:

- **Company-Level Check-In** (Week of Aug. 18)
 - **Key Result Progress:** 3 of 5 partnership meetings booked.
 - **Win:** New content series caught the attention of 2 industry influencers.
 - **Challenge:** Partner decision-makers are slower to respond than anticipated.
 - **Next Step:** Create a "fast-start" incentive package to speed up conversions.
- **Team-Level Check-In** (Week of Sept. 1)
 - **Key Result Progress:** 85% of the team submitted personal OKRs.
 - **Win:** Peer reviews on OKRs created great dialogue across departments.
 - **Challenge:** One department feels unclear on how to align OKRs with company goals.
 - **Next Step:** Host a quick alignment session and share a company-wide OKR map.
- **Personal Leadership Check-In** (Week of Oct. 13)
 - **Key Result Progress:** Completed 3 out of the 4 planned deep work sessions.
 - **Win:** Finally made headway on a long-delayed strategy brief.
 - **Challenge:** Still reacting to Slack notifications during focus time.
 - **Next Step:** Set device limits and use Do Not Disturb during work blocks.

What's working better than expected? Where's the energy?

What's stuck, and what might need to change?

What decision or shift am I avoiding as a leader?



One Bold Commitment

Step forward with intention. Choose one powerful promise you're ready to keep—for yourself, your team, and your business.

Activity

Use this space to name one commitment you'll honor and let it guide your next steps as a purposeful leader.

Make one clear promise to guide your leadership.

Examples:

- **Company-Level Commitment:** I commit to reviewing our company OKRs every quarter with the leadership team and will make space for honest reflection, not just reporting.
- **Team-Level Commitment:** I commit to having monthly 1:1s focused solely on development and alignment, not just performance updates.
- **Personal Leadership Commitment:** I commit to starting each week with 30 minutes of quiet planning—no emails, no meetings, just space to lead with clarity.

What's one commitment I can make today to lead with greater clarity and focus?

What kind of leader am I becoming by honoring this commitment?

What's one habit I'm willing to protect—even when things get busy?



Ready to Go Deeper?

The SUCCESS® Leadership Lab is where high-performing entrepreneurs like you build habits of clarity, communication, and courage.

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