OKRFlow - Product Requirement Document

<u>Web Application</u>

Vision & Purpose

Startups and enterprises struggle to align team goals with company strategy. Spreadsheets and manual tracking create silos and reduce accountability. Our OKR Tracking Tool will:

- Help teams set, track, and align Objectives & Key Results.
- Provide real-time visibility of progress at all levels (Company, Team, Individual).
- Enable accountability, transparency, and alignment across orgs.

Core Features

A. OKR Creation & Alignment

- Create **Objectives** (qualitative goals) and **Key Results** (measurable outcomes).
- Add **Initiatives/Tasks** linked to Key Results.
- Add **Goal Cycle, Start and End Dates.**
- Add **Owners**.
- Allow **Goal Type**: Company → Department → Team → Individual.
- Add **Track Progress Type**.
- Add **Key Results :** Min 1, Max 5
- **Weightage & priority** setting (ex: O1 = 40%, O2 = 60%).

Reference of Objective & Key Result Creation :
▶ Peoplebox - Overview of OKR Software

B. Tracking & Progress

- Update KR progress (manual entry + auto % calculation).
- Real-time progress bar for each Objective.
- Timeline view (quarterly / yearly OKRs).
- Automated scoring at end of cycle (0.0 – 1.0 scale).

Ref of Task Updating & Tracking :
▶ Space OKR Review - Standalone OKR Tool for Measuring & Tracking Your Obj…

C. Dashboards

- **Company Dashboard:** Overview of company OKRs, progress %, heatmap.
- **Team Dashboard:** OKRs by team, alignment view.
- **Personal Dashboard:** My OKRs, tasks, progress.

D. Collaboration & Check-ins

- Weekly check-ins with traffic light status (Green/Yellow/Red).
- Commenting & discussion on Objectives/KRs.
- Notifications & reminders for updates.

E. Reporting & Analytics

- Export OKR reports (PDF, Excel).
- Trend analysis: OKR completion rate over quarters.
- Alignment visualization (tree view: company → team → individual).

F. Admin & Roles

- Role-based access: Admin / Manager / Employee.
- Add/remove users, assign to teams.
- Integrations: Google/Slack/MS Teams for SSO + reminders.

Other References :
▶ 5 Best OKR Software Tools in 2024 [Objectives and Key Results]

Product Flow (User Journey)

Step 1: Login / Signup → SSO option.
Step 2: Company Admin creates company OKRs for the quarter.
Step 3: Managers align team OKRs under company OKRs.
Step 4: Employees create their individual OKRs linked to team goals.
Step 5: Weekly check-ins → update progress / comment.
Step 6: Dashboard shows real-time progress.
Step 7: End of quarter → auto scoring + report generation.

Dashboard Design

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1. Top Navigation Bar

Always visible across the app:

- **Logo / Brand** (top-left)
- **Tabs:** Company | Teams | My OKRs | Reports | Settings
- **Search Bar:** Quick search for Objectives, Key Results, or people.
- **Profile Dropdown:** My account, notifications, logout.

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2. Main Dashboard Sections

A. Overall Company Progress (Hero Section)

- **Progress Ring / Gauge**: Shows % of company-wide OKR achievement.
- **Traffic Light Indicator**: Green (on track), Yellow (at risk), Red (off track).
- **Quarter Timeline Bar:** Marks where we are in the cycle.

  Example: A circular chart in the center → "Company OKRs: 63% completed"

B. Heatmap of Teams / Departments

- Grid or list view of all teams with traffic light colors:
    - **Sales – 70% (Green)**
    - **Marketing – 45% (Yellow)**
    - **Product – 30% (Red)**
- Clicking a team drills down to **Team Dashboard**.

C. Top Objectives Snapshot

- Table or card view of all Objectives:
    - O1: *Expand into 2 new markets* → Progress: 55% → Status: Yellow
    - O2: *Improve NPS to 70+* → Progress: 40% → Status: Red
- Each Objective is expandable to see **Key Results** underneath.

D. My OKRs / Personal Section

- Shows logged-in user's own OKRs and tasks.
- Quick update buttons (e.g., slider for progress %).
- Weekly Check-in reminder: *"You have 2 OKRs pending update this week."*

E. Action Feed (Right Sidebar)

- Notifications, updates, reminders.
- Example:
  - *Marketing updated O1: Social Media Engagement to 60%*
  - *Quarterly check-in due for Sales Team tomorrow*
  - *John commented on KR: 'Website Bounce Rate < 35%'*

3. Visualization Elements

- **Progress Rings / Donuts** – Show completion % (company, team, personal).
- **Heatmap** – Red/Yellow/Green status per team.
- **Tree View / Alignment Map** – Expand to see how company goals cascade down.
- **Trend Graphs** – Historical view of OKR progress across the quarter.

4. UI Style Recommendations

- **Clean, minimal UI** → avoid clutter, focus on what matters.
- **Colors with meaning:**
  - Green → On Track
  - Yellow → Needs Attention
  - Red → At Risk
- **Typography:** Bold for Objectives, lighter for KRs.
- **Icons:** Use small icons for updates, comments, deadlines.

5. Responsiveness

- Desktop: Full dashboard view with all sections.
- Mobile: Priority to *My OKRs + Notifications* (scroll-friendly, collapsible).

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6. User Roles → Dashboard Views

- **Founder/CEO:** Company-wide view first.
- **Team Lead:** Team dashboard first, then company context.
- **Employee:** Personal OKRs first, then linked team goals.

End Goal: Within 30 seconds of opening the dashboard, a user should know:

1. Where the company stands (overall %).
2. Which teams/OKRs are at risk.
3. What they personally need to act on.