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The Chief of Staff
OKR Playbook

Grow with people through your organization's OKR journey

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How The Chief of Staff Brings in Organizational Alignment

You are your organization's chief of Staff (COS) and the strategic partner of your Chief Executive Officer (CEO). You act like his eyes and ears. As a COS, you understand that the position isn't always clearly defined. Responsibilities vary from workplace to workplace, your role being a catch-all role. It is your responsibility to ensure leaders of your organization have what they need to transform their high-level strategy into business results.

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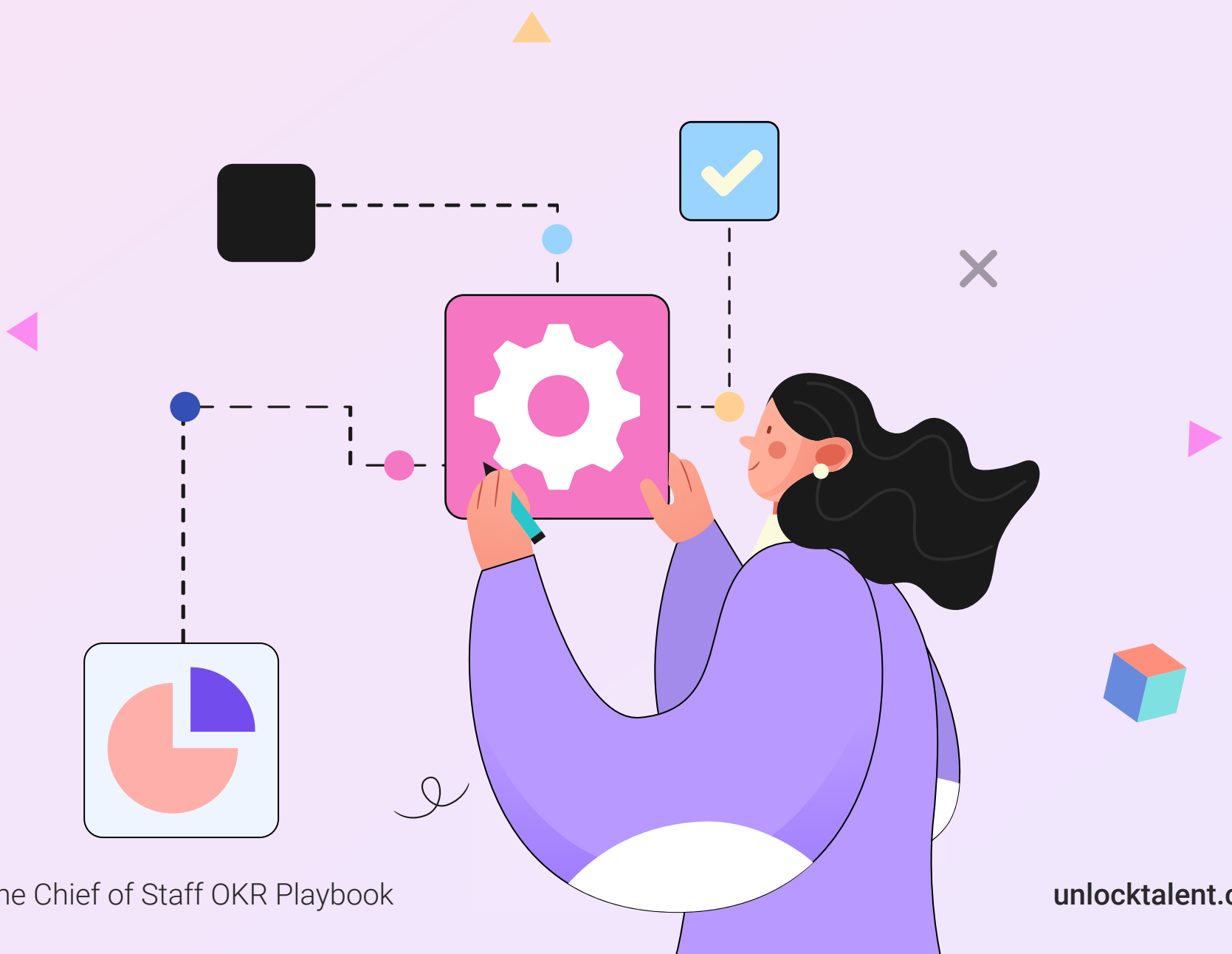
As a COS, you know that only work and goals need not be aligned, but the people creating the goals and doing the work. If that doesn't happen, your organization may easily go out of sync and miss the set goals. You play a critical role in ensuring that leaders across your organization are focused and aligned on the organization's vision, mission, purpose, objectives, and values. Only then can they effectively communicate organizational goals to their teams. Everyone in the organization should be focused and accountable for accomplishing the overarching organizational goals.

This ebook walks you through the multiple roles you play in building and supporting the OKR program at your organization. Before we talk about these roles, let's start with the building blocks of an OKR program.

How The Chief of
Staff Builds an
OKR Program

An effective OKR system starts with the development of clear and concise goals. Once the goals are established, key results (KRs) are mapped to those goals or objectives (Os), and these KRs have a metric associated with them. KRs should be actionable with you, as the COS playing a crucial role.

The best thing about using an OKR framework is that it makes objectives and key results visible to all. Everyone in the organization can see who is

working on what. As to what a Chief of Staff does concerning OKRs, he ensures regular check-ins with leaders, so everyone is on track with their goals. He also identifies challenges, if any. Running OKR weekly check-in meetings helps to see how leaders and their teams progress on their goals and set priorities for the coming week. UnlockTalent product comes with a Check-ins feature, enabling you to update your project progress weekly. The aim of the Chief of Staff should be to create a well-oiled machine running smoothly and efficiently.

The Role of the
COS Around OKRs

Role 1 : Aligning Strategy to Business Results

Turning strategy into business outcomes is no child's play, but with OKRs, it is well-defined where your organization wants to go and how everyone gets there. As you establish your organization's OKRs, here

are a few ways using which you can help leaders focus better on business outcomes.

- For any given planning cycle, your executive team must agree on just 3-5 objectives, and each objective should have 3-5 key results.

- Boosting leaders to set aspirational OKRs to keep your organization motivated and inspired.

- Writing objectives with a larger organizational purpose to serve, **for instance**, Expanding the business faster to emerge as a sustainable business leader.

Role 2 : Improving Collaboration Across Departments

One thing that adopting the OKR methodology does best for you is bringing people together. Employees feel a part of the team, highly engaged, well-connected, and successful. Your role as a COS calls for strengthening cross-functional alignment, and OKRs help you do that. How?

- Engaging the C-Suite towards a common organizational goal instead of allowing them to work in silos.

- Identify what is the most important for business growth and the company's progress while benefitting from the right skill-set of the people across teams and departments.

- Optimize the CFR feature of OKR software to enable leaders to gauge their teams' ability and motivation level.

# Role 3 : Enforcing Key Result Ownership

Your role as a COS doesn't end once the objectives are set. When key results are written, ensure they possess clear ownership and measurable metrics to track outcomes effectively. KRs, when written correctly, objectives become actionable, and the progress against them can be measured over time. Here, we talk about how you can establish key result ownership as the Chief of Staff.

- Once the objectives are established, schedule a time with your executive team to meet again to discuss the next steps.

- Encourage leaders to attach metrics to key results. These metrics may be %, currency, or numbers. Avoid setting KRs that can't be measured, such as binary (Yes/No) metrics and delivery dates.

- Assure there is only one owner for each KR. Only then can accountability be established.

Role 4 : Driving Rhythm

It isn't enough to align your executive team on your business's key focus areas as the Chief of Staff. You are responsible for developing a strong cadence of communication, action, and accountability to ensure success. You understand that delivering focused and aligned objectives and key results becomes impossible if the right execution habits are not in place. The Chief of Staff ensures leaders trigger the right conversations to boost employee engagement, provide timely recognition and feedback, and conduct weekly check-ins to coach and support where needed. But how do you maintain the rhythm?

- Publish an annual calendar for visibility on the OKR planning, when monthly reviews occur, and when quarterly scoring and reflection occur.

- Automate the OKR planning and tracking process using OKR software.

- Make OKR planning an agile, fluid process. It is a safe practice to remind your leaders that they can change course, if required, to accomplish desired results.
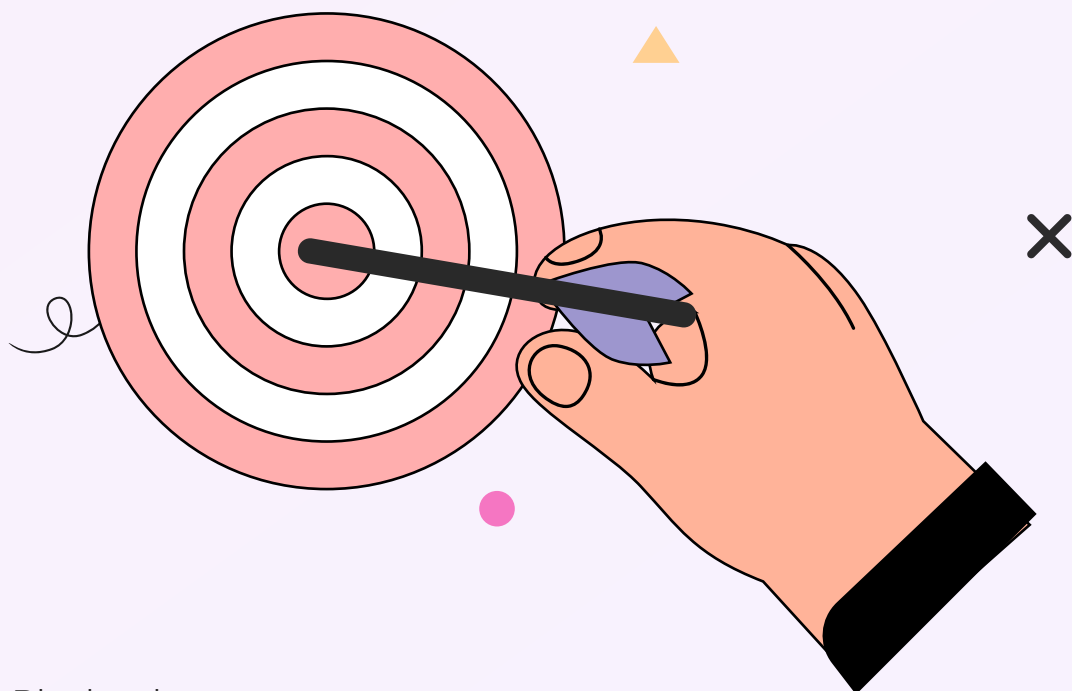
Role 5 : Focusing on the Details

Now that you have your objectives and key results set and are also maintaining rhythm, it is time to focus on the details. Though we have discussed your role as a COS in driving the planning rhythm, frequent check-ins at the leadership level offer insights. You learn which goals teams are steadily progressing towards and which may fall behind. The Chief of Staff helps leaders to focus on the details by:

- Concentrating on only one objective during each weekly meeting with leaders.

- Setting calendar reminders to prepare executives for OKR strategic review before the beginning of the next cycle.

- Adopting integrations. Doing so enables leaders and their teams to integrate the goal-tracking process into the organization's daily operations.

Role 6 : Boosting Employee Engagement

Most C-level executives opine that employee engagement is crucial to the success of their organization. The Chief of Staff plays a crucial role in furthering employee engagement as that directly relates to employee retention, morale, and motivation of employees. Besides, engaged teams are highly productive. But how does a COS engage leaders and their teams more by employing an OKR framework?

- Using the Conversations, Feedback & Recognition (CFR) feature of an OKR software, the Chief of Staff provides a context for key discussions around organizational goals and critical teams.

- Ensure transparency on goals throughout the organization, where everyone can see who is working on what.

- Help teams focus on the common organizational objective and stay aligned with it as they break the high-level goals into their tactical OKRs through leaders.

Role 7 : Bringing Agility to the Organization

The Chief of Staff supervises, aligns, and motivates the organization and keeps checking internal and external conditions. He can build the muscle for sensing the ever-dynamic market landscape by employing a solid OKR process. The onus of bringing critical thinking and curiosity to the OKR process is on the COS, leading the charge for business leaders. The concern is how the Chief of Staff, using OKRs, improves strategic agility across the organization.

- Reduce the planning phase, and by doing this activity more frequently, the transition from an annual cycle to a quarterly one.

- Make shorter sprints of focused behavior, reflection, and reset.

- Assess leading indicators of success and act where processes or progress seem to break down.

What a Chief of Staff Has to Say

"I organize and align strategic priorities with members of the senior leadership team, making sure the right people are talking about the right things at the right time and ensuring that our young adults stay at the center of all our planning and decision-making. My goal is to see around corners so that our president and CEO can always say, "Yes, I was just talking about that yesterday. Let me share what we discussed for your input," to a board member or funder. I also shape our internal leadership communications so that our staff is informed and inspired and see how their day-to-day work connects to our mission and the Opportunity Movement."

— Alison Washabaugh, Chief of Staff, Year Up

Now that we have learned about the critical role OKRs play for The Chief of Staff let's take an OKR Example.
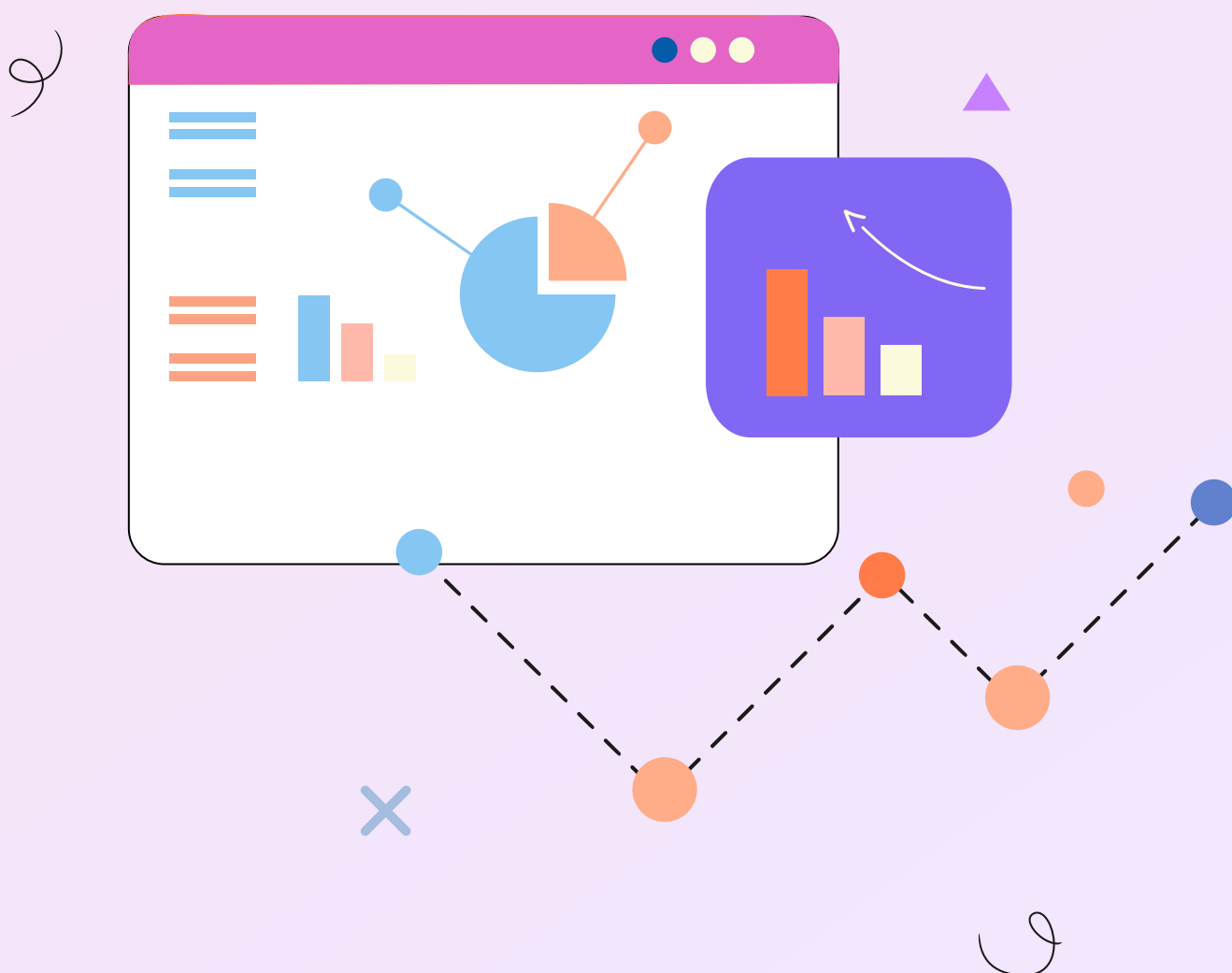
The Chief of Staff OKR Example

Objective (O): Introduce highly efficient business practices to increase productivity

Key Results:

- Increase goal achievement score from 45% to 60%.
- Reduce time spent on virtual calls and meetings from hours to 15 mins daily stand-ups.
- Automate business practices from 0 to 5.

The Chief of Staff in a Modern Workplace

The Chief of Staff works as the right hand to the CEO, planning for, developing, and ensuring the implementation of the organizational objectives. Employing the OKR framework, he helps leaders deconstruct larger organizational goals into achievable tasks. Most importantly, he leverages the OKR superpowers – focus, alignment, rhythm, and agility.

Remember, as the modern workplace evolves, so does your role as a COS. What used to be a niche role is now a mainstay in most organizations. To support the CEO, you must understand exactly where they need your input and help, which makes the CEO's job easier.

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We have already come to terms with an entirely different workplace post-COVID-19. Organizations thus need specific strategies and processes to ensure employees are driven, feel connected with company goals, and the company culture fosters individual growth.

Here's how UnlockTalent helps you support the OKR program at your organization and hence, get the executive team on the fastest track to seeing business results.

About
UnlockTalent

The landscape of employee engagement has changed. With enterprises transitioning to remote and hybrid work environments, the conventional model needs an upgrade to cater to global teams. UnlockTalent holistically integrates strategic alignment, feedback processes, continuous learning, real-time recognition, and performance to elevate every employee's engagement experience.

Designed to integrate with your current tech stack or work independently, UnlockTalent helps functional leaders get started quickly. Personalized support and positive customer experiences make UnlockTalent a go-to product for enterprises looking to create a great work culture. Headquartered in New Jersey, UnlockTalent has been named one of the fastest-growing companies today.

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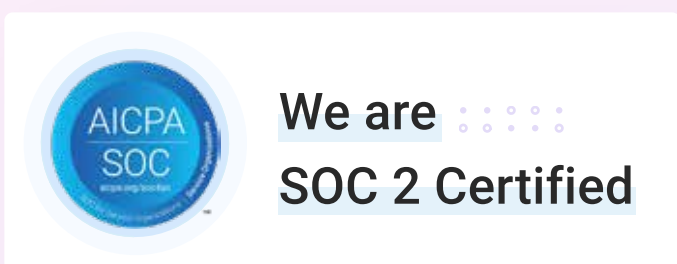
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