
Architecting Change:

Rethinking goal-setting
to achieve necessary change

with Sara Lobkovich

Principal Consultant & OKR Master Coach

ARCHITECTING CHANGE: Rethinking goal-setting to support necessary change

TODAY'S TOPIG:

Natural "immunity" to change makes achieving change difficult.

Shifting how we think about goal-setting from a win/loss model to a win/learn model helps organizations increase their change impact.

FOR:

Changemaker Leaders

Strategic Operators

Thinkydoers

YOUR PRESENTER:

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Founder & Principal
Consultant
Red Currant Collective*
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** and CW Moto Racing*

What we do



OKR Coaching & Consulting for organizations focused on measurably improving outcomes

Retained, project-based, and as-needed (productized service-based) OKR methodology implementation and reboot / right-track support for organizations dedicated to improving performance outcomes.

Learning & Development for Changemaker Leaders and Thinkydoer Teams

Practice-to-learn based learning & development experiences with a focus on the mechanics and characteristics of leading for strategy & goal achievement. Includes, but not limited to, competency-based OKR learning for leaders, coaches, program team members and individual contributors.

Executive Coaching & Community Connection for Strategic Operators and Thinkydoers

1:1 and group coaching and community connection programs for individuals seeking career and professional development, navigating career change, and building tools around career progression (e.g. from SVP to CEO; from discipline leader to SLT; from IC to People Leader)

Let's acknowledge the market we're all operating in

Extreme volatility.
The only constant
is change.

Performance pressure
is high, and results are
critical in a down
market.

Increased pressure on
organizational purpose
& employee
engagement.

What gets in the way of change we know is important?

Immunity to
change.
Change is HARD.

Change feels risky
(but the status
quo is risky too).

Lack of organizational
alignment & appetite
for change.

Step One: Separate Myth from Fact About Goal-setting for Change

We can only set goals we control.

Courageously and creatively setting goals we influence (but don't control) allows us to actually make change.

Setting goals within our control leads to an over-focus on activities and individual (siloed) efforts; not outcomes and collaborations.

Challenging goals are demotivating.

Setting "highest and most difficult goals" produces the highest levels of effort & performance.

People have to write their own goals to be motivated by them.

Participation in goal-setting is not required for motivation if adequate rationale is given.

OKRs are [insert objection here]

OKRs may be poorly implemented. They also may be implemented simply, efficiently, and usefully.

THE REWARD

What does victory look like?

Replace fear
with curiosity

Replace "losing"
with learning

Build resilience to take
on hard challenges and
celebrate progress

RETHINK THE JOB

Rethinking the role of the changemaker

Issue
spotter

Solution
seer

Answer
haver

Persuader

Question
asker

Case
builder

Collaborative
investment
creator

Key questions you can use to unblock change

What's ultimately most important to achieve?

If something isn't "most important," why are we invested in doing it?

Where would we benefit from objective progress data?

Where are we experiencing risk or missing opportunities because of poor progress estimation today?

Where would we benefit from greater experimentation?

Where are we afraid to try because we're afraid to fail?

What legacy / inefficient practices do we know are a problem?

Can we quantify the problem, so we can make a better-educated decision about whether to invest in fixing it?

Architecting Change

Rethinking goal-setting to achieve necessary change

with Sara Leikavich



ARCHITECTING CHANGE: Rethinking goal-setting to support necessary change

FORMER GOALS

- Support flexibility in change-making through digital products
- Support new ways of working that are more collaborative and cross-functional
- Support digital transformation and innovation

OKRs

- Strategic Initiatives
- Strategic Objectives
- Key Results

NEW OPPORTUNITIES

More Leadership

- Personalized coaching for leaders and their teams
- Strategic coaching for leaders and their teams
- Strategic coaching for leaders and their teams

More Innovation

What gets in the way of change we know is important?

Immunity to change. Change is HARD.

Change feels risky (but the status quo is risky too).

Lack of organizational alignment & appetite for change.

What we do

OKR Coaching & Consulting

For organizations focused on measurably improving outcomes.

Personalized coaching with digital transformation, OKR methodology, implementation, and strategic coaching. We help you build a high-performing, high-velocity organization.

Learning & Development

For Change-maker Leaders and Thinker/Doer Teams.

Personalized coaching for leaders and their teams. Strategic coaching for leaders and their teams. Strategic coaching for leaders and their teams.

Executive Coaching & Community Connections

For Strategic Operators and Directors.

1:1 and group coaching with strategic coaching and community connections. Strategic coaching for leaders and their teams. Strategic coaching for leaders and their teams.

Let's acknowledge the market we're all operating in

Extreme volatility. The only constant is change.

Performance pressure is high, and results are critical in a down-market.

Increased pressure on operational purpose & employee engagement.

Stop OKR! Stop! Separate Myth from Fact About Goal-setting for Change

We can only set goals we control.	Challenging goals are demotivating.	People have to write their own goals to be motivated by them.	OKRs are (almost) arbitrary (here).
Transparency and visibility along goals are critical. But OKRs are not about transparency or visibility.	Having "higher and more difficult" goals increases the "higher" level of strategy & performance.	Transparency of your work is not required for OKRs to be successful.	OKRs are not about "higher and more difficult" goals. They are about "higher and more difficult" goals.
Setting goals without a clear understanding of the organization's strategy and mission is a recipe for failure.			

What does victory look like?

Replace fear with curiosity

Replace "losing" with learning

Build resilience to take on hard challenges and volatile programs

Key questions you can use to unlock change

What's ultimately most important to achieve?

It's everything with "most important," why are we focused on doing it?

What's our greatest benefit from achieving this goal?

It's everything with "greatest benefit," why are we focused on doing it?

Where would we benefit from greater experimentation?

It's everything with "benefit from greater experimentation," why are we focused on doing it?

What legacy / sufficient practices do we know are a problem?

It's everything with "sufficient practices," why are we focused on doing it?

Redefining OKRs

OKRs as a change-enabler

with Sara Leikavich



What are OKRs (and why do we care)?

OKRs are just goals, right? Or are they something more?

What are OKRs?

OKRs are just goals, right? Or are they something more?

Strategic OKRs

- 1-3 strategic initiatives / 1-3 strategic goals
- OKRs are critical to your growth, differentiation and innovation
- OKRs are critical to your growth, differentiation and innovation

Operational OKRs

- OKRs are critical to your growth, differentiation and innovation
- OKRs are critical to your growth, differentiation and innovation
- OKRs are critical to your growth, differentiation and innovation

Why OKRs?

What purpose do they serve? Don't we just do it? Or are they something more?

OKRs clearly communicate what's actually most important.

OKRs create space for experimentation, innovation, and change.

OKRs break the status of "singing to the choir" by "leading from behind" to help us do better.

Why Key Results?

Why bother writing measurable key results?

Eliminate subjective measures.

Respond to risks & changing circumstances faster with program data.

Eliminate the "outcome confusion" gap.

What's in it for me (individually)?

OKRs have big benefits for growth, clarity and individual, in addition to the organizational OKR.

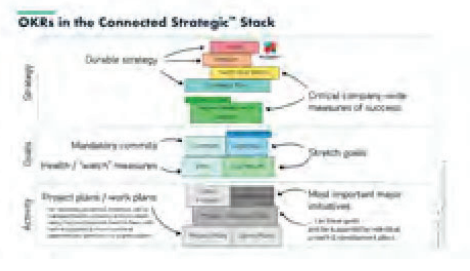
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Words & meanings: Evolutionary OKRs™

OKR OBJECTIVES

A purpose statement describing what you want and how you will get it.

KEY RESULTS

Quantifiable, measurable, and time-bound outcomes that indicate progress toward the objective.

Red Currant Collective Connected Strategy

A world of work that works for all

Enable, Transform and Strategize, leading to a world of work that works for all.

Our products are based on Connected Strategy.

Red Currant Collective OKRs

OKRs are a clear, concise, and measurable way to communicate your goals.

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Want to learn more?

Join the Red Currant Collective. Achieve change with No BS OKRs.

Sara Leikavich

COO, Red Currant Collective

8000 Haver

San Francisco, CA

A completed set of OKRs

When our work here is done, we'll have the most results that last.



Redefining OKRs

OKRs as a change-enabler

with Sara Lobkovich

Principal Consultant & OKR Master Coach

What are OKRs (and why do we care?)

Aren't OKRs just goals? Why do we need another wonky acronym?



Evolutionary OKRs are:

- a **thinking, deciding, and learning** practice
- that helps us achieve greater **growth, transformation and innovation**
- by aligning on our most important measures of **progress and success**

Evolutionary OKRs mean:

- Thinking deeply about what's **important** and *might* be possible
- Identifying which measures of progress and success help us make **better decisions** in our work and organizations
- Curiosity, experimentation, and even "failure" help us learn how to **improve and grow.**

<https://findrc.co/3FMtKw2>

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RED CURRANT COLLECTIVE

Why OKRs?

What purpose do OKRs serve? Can't we just do X, Y or Z planning mechanism and call it good?



OKRs clearly communicate what's actually most important

- Teams often struggle to understand how their work matters; leaders often struggle to meet team members' needs for expectation clarity.
- OKRs solve for both gaps and reduce cognitive overhead spent on wondering what's actually important.



OKRs create space for experimentation, innovation, and change

- OKRs are set as **stretch measures**, where we are safe to try, learn, and even fail, in the pursuit of progress.
- Instead of only celebrating checkboxes and wins, we celebrate learning, and progress.



OKRs break the habits of "keeping busy" & "looking good" to help us do better

- When we leap from strategy to activity thinking, we may be *very busy* but may not be actually *getting better*.
- Instead of wanting our KR's to look good, we want our KR's to be *honest* to show us where we need to improve.

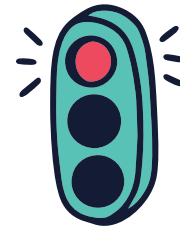
Why Key Results?

Why bother writing measurable Key Results?



Eliminate watermelon metrics

- Green subjective progress reports all quarter may lead to red on our major outcomes.
- Replace subjective with objective progress measures to reduce risk of outcomes winding up watermelon.



Respond to risks & changing circumstances faster with progress data

A host of cognitive biases keep us attached to the activities we plan, whether or not they're actually leading to progress on our most important success measures.

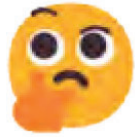


Eliminate the "outcome confidence" gap

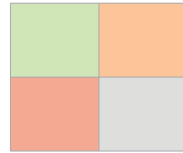
Without objective measures of progress to help us know whether we're on or off track, we may **project** confidence instead of **being** confident, and miss chances to address blockers and make necessary plan shifts.

What's in it for me (individually)?

OKRs have big benefits for people leaders and individuals, in addition to the organization & SLT.



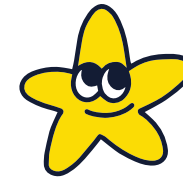
Define your own success & progress measures even if external expectations aren't clear



OKRs help us focus on and prioritize what's important, not just urgent



OKRs on a page reduce the "if I can't see it, it doesn't exist" risk of most strategic planning artifacts



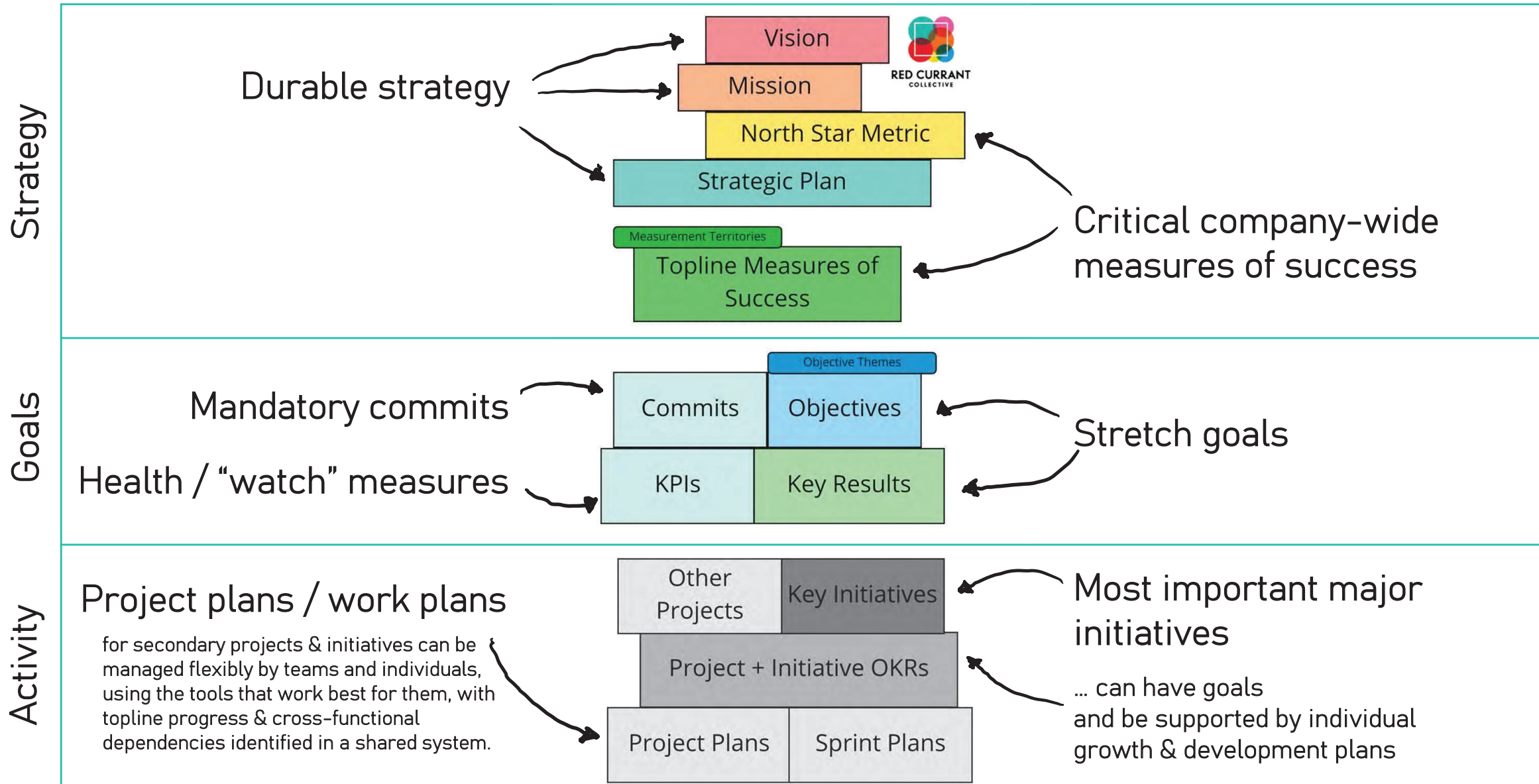
Retrain your brain for your reward centers to activate when:

- Task completion
- We "win"
- We experiment
- We learn
- We make progress



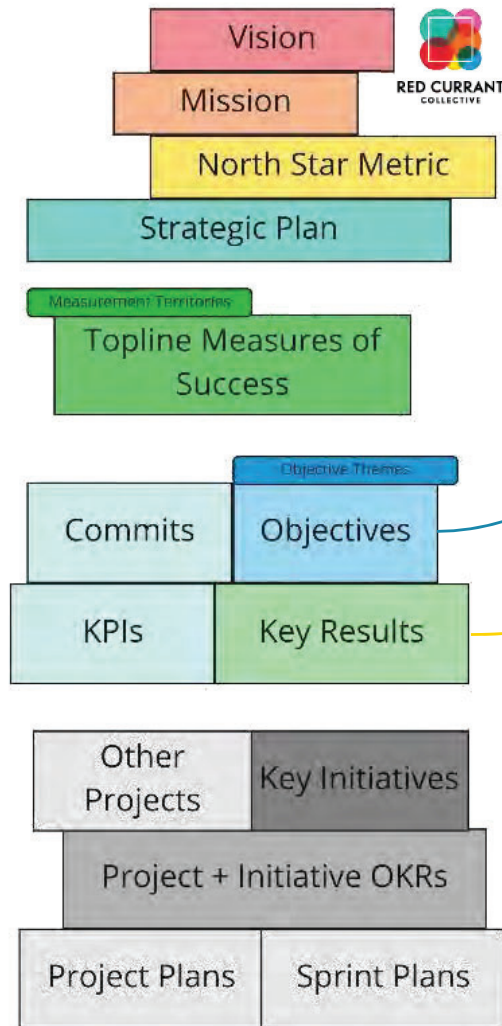
Less mind-reading and cognitive overhead trying to figure out what's important

OKRs in the Connected Strategic™ Stack



Words & meanings: Evolutionary OKRs™

The Connected Strategic™ Stack



OKR OBJECTIVES

A purpose statement describing **what** we're pursuing together and **why** it matters



KEY RESULTS

Enunciation of our **most important objective measures of success** for a given time period

- Directional, inspiring and aspirational description of the changed future we're aiming for together
- Objective quality can't be forced, and language usefulness and breadth of applicability may vary. We identify an OKR Objective's theme(s) in addition to the O language, to aid in clarity and usefulness.
- Objective duration is flexible. Some Os may span one or more years, quarters, or sprints; and some may be "until achieved." Provide a description to clarify duration.
- Focus is important. Aim to limit the number of objectives (not more than 3-5 at the company-level, and teams may have as few as one).
- Key Results are presumed stretch goals; if achievement at 100% is mandatory, they are identified as a COMMIT
- Objective measures clarify how we'll measure success, and how we'll evaluate progress objectively
- There is no set / fixed number of Key Results. The right number is the number that gives us (1) clarity about what's most important and (2) objective progress information to increase our confidence we'll achieve our outcome goals.
- In our non-committed Key Results, we are **safe to try, and even "fail"** if in doing so, we learn important new lessons for how to improve in the future.

A completed set of OKRs

When our work here is done, what does the end result look like?

Red Currant Collective Connected Strategy

Vision **A world of work that works for all**





Mission Enable Thinkydoers and strategic operators to create maximum impact in their revolutionary work-lives.

North Star Measure *Not yet identified, in observe & learn phase*

Topline Measures

- GROWTH** Inbound leads
- GROWTH** Word of mouth
- GROWTH** % of revenue from services vs products
- CUSTOMER SAT** Spontaneous (unsolicited) positive feedback

Objectives

- INFLUENCE** Become a trusted source of behavioral insight and practical / applied resources among people working with or considering OKRs 
- CONTENT & COMMUNITY** Increase our content & community momentum, so Thinkydoers and status-quo challengers find, connect with and amplify us 
- GOOD GROWTH & FINANCIAL HEALTH** Shift from services to a blend of products and services to increase the number of people we can help 
- COMMUNITY & CONNECTION** A healthy team that practices what we preach, doing our own revolutionary work 

Red Currant Collective OKRs

O1: INFLUENCE

Become a trusted source of behavioral insight and practical / applied resources among people working with or considering OKRs



Key Results

1. Increase word of mouth measured by 10x social media unprompted mentions of brand terms (from 0 / month to 10 / month)
2. Increase strongly positive feedback responses by 14% (from 46% to 60%)
3. Increase brand content post amplification by 10x (from 1 / month to 10 / month)

O2: CONTENT & COMMUNITY

Increase our content & community momentum, so Thinkydoers and status-quo challengers find, connect with, and amplify us



Key Results

1. Land two podcast guest or media appearances per quarter with a link to our site
2. Not more than 1 in 3 M+ content pieces is a solo production (2/3 are interviews / collabs)
3. Achieve a 4 star average rating on book from beta readers
4. 100% of Medium size + larger content pieces are repurposed into every distribution channel at least once

O3: GOOD GROWTH & FINANCIAL HEALTH

Shift from services to a blend of products and services to increase the number of people we can help



Key Results

1. Increase inbound lead contacts for non-course products and services by 10x (from 1 / mo to 10 / mo)
2. Increase % of revenue from services vs products by 22% (from 3% to 25%)
3. Automate early inquiry sales nurture to reduce loss rate after custom proposal from 3 to 1 per year

O4: COMMUNITY & CONNECTION

A healthy team that practices what we preach, doing our own revolutionary work



Key Results

1. Achieve a < 5 hour sleep debt and maintain it until the race season starts (from 11 to 5)
2. Zero content pieces go cold (fail to publish within six weeks of first draft)

Want to learn more?

Join me on Maven this December:

Achieve change with No-BS OKRs

<http://findrc.co/nobsokrs>

\$100 discount for LinkedIn Live participants who register early using the Coupon Code: NOBSEARLY

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