This document is to assist you in communicating your OKR planning and Monthly and Quarterly reviews with your leadership team/organization.

How to use this document:

* **Find the content you are looking for in the Table of Contents below**
* **Copy and paste the text from the desired content into your email, Word doc, Excel sheet, etc**
* **Personalize the copied content to fit your organization’s needs**

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# Planning

## OKR Planning Schedules

### Quarterly OKR Planning Guidance

Hello,

The OKR Quarterly Planning meeting is scheduled for <<DATE>>.

In preparation for our meeting, please focus on the following guidance:

Quarterly Planning Guidance

* Come prepared to talk about your Department OKRs and how they align with the Org OKRs
* Touch on Initiatives for your Department OKRs
	+ Discuss the priority shift from Q2 to Q3 and how you will achieve the Q3 goals by indicating what KI you would stop, continue, or start.
* Look for places for alignment/shared OKRs with other departments.
* Please indicate a rough % of allocation of team effort by Key initiatives

Key suggestions

* Think about reducing the # of KRs - what are one or two primary KRs you will move.
* Focus on a few Key Initiatives

Any format is okay; however, the preference is to use either Viva Goals or Excel.

Quarterly Planning Schedule

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Meeting Date  | Start Time  | End Time  | Time Allotted  | Area  | Owner  |
| <DATE>  | 8:05am PT  | 8:45am PT  | 40 minutes  | CS&I  | Jane Doe, John Doe  |
| <DATE>  | 8:50am PT  | 9:30am PT  | 40 minutes  | CXP  | Jane Doe, John Doe  |
| <DATE>  | 9:35am PT  | 10:00am PT  | 25 minutes  | Ops  | Jane Doe, John Doe  |
| <DATE>  | 10:10am PT  | 10:45am PT  | 35 minutes  | Marketing  | Jane Doe, John Doe  |
| <DATE>  | 10:50am PT  | 11:30am PT  | 40 minutes  | OEA  | Jane Doe, John Doe  |
| <DATE>  | 9:05am PT  | 10:00am PT  | 55 minutes  | Product  | Jane Doe, John Doe  |

If you have any questions, please let me know.

Thank you,

<Your Name>

### Initial Planning Meeting - Department

Hello,

The Leadership Team OKRs for Q4 have been set.  You can find the list here: <Link to PPT/Word Doc with OKRs> The LT OKRs will be loaded into Viva Goals by <DATE>.

Draft department OKRs have been started and will be reviewed during the OKR Q4 Planning meeting on <DATE>**.**

In preparation for our meeting, please focus on the following guidance:

Quarterly Planning Guidance

* Come prepared to talk about your Department OKRs and how they align with the Org OKRs
* Touch on Initiatives for your Department OKRs
	+ Discuss the priority shift from Q3 to Q4 and how you will achieve the Q4 goals by indicating what Initiatives you would stop, continue or start.
* Look for places for alignment/shared OKRs with other departments.
* Please indicate a rough % of allocation of team effort by Initiatives

Key suggestions

* Think about reducing the # of KRs - what are one or two primary KRs you will move.
* Focus on a few Key Initiatives

Any format is okay; however, the preference is to use either Viva Goals or Excel.

Quarterly Planning Schedule

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Meeting Date  | Start Time  | End Time  | Time Allotted  | Area  | Owner  |
| <DATE>  | 07:35am PT  | 08:55am PT  | 80 minutes  | Product  | Jane Doe, John Doe  |
| <DATE>  | 09:00am PT  | 09:40am PT  | 40 minutes  | CS&I  | Jane Doe, John Doe  |
| <DATE>  | 09:50am PT  | 10:30am PT  | 40 minutes  | CXP  | Jane Doe, John Doe  |
| <DATE>  | 10:35am PT  | 11:00am PT  | 25 minutes  | Ops  | Jane Doe, John Doe  |
| <DATE>  | 11:05am PT  | 11:45am PT  | 40 minutes  | OEA  | Jane Doe, John Doe  |
| <DATE>  | 11:50am PT  | 12:30am PT  | 40 minutes  | Marketing  | Jane Doe, John Doe  |

All OKRs should be loaded into Viva Goals by **<DATE>.**

If you have any questions, please let me know.

Thank you,

<Your Name>

## Annual Planning

### Kickoff Email

Hello,

Our Annual Planning for FY24 kick off meeting is scheduled for <**DATE>.**

Please find the detailed planning schedule below with a link to the planning calendar.  All weekly check-ins <**DATE>** should be on your calendar.  If you miss one of these meetings.

We plan on completing our input for the Leadership Team memo by **<DATE> to** report out on our Annual OKRs with the final memo due to Leadership Team on **<DATE>.**

Summer is finally here, and people are planning vacations.  If you have any vacations planned through September, please let me know so we can add them to our schedule.

Link to Annual Planning Schedule: <Link to Planning Schedule>

The Annual Planning tab will show a consolidated view of key dates for Q4 FY23 review meetings, FY24 annual planning schedule as well as key dates for the Q1 FY24 review meetings in one view.  For the full FY24 Review schedule, please review the RoB-FY24 tab.

Key Upcoming Dates:



We look forward to the upcoming sessions and please let us know if you have any questions.

Thanks,

<Your Name

# Monthly Review

## Workback Schedule

### Detailed Workback Schedule

|  |  |
| --- | --- |
| T-Minus | Activity |
| T-6 | Pre-Read Request |
| T-4 | Pre-Read Request Follow-Up |
| T-3 | Pre-Read Sent Out |
| T-2 | Monthly Review Question Request |
| T-1 | Consolidated Questions Sent Out |
| T-0 | Meeting |
| T+1 | Meeting Notes Sent Out |

Link to FY23/FY24 OKR Review & Retro Workback Schedule: *<Link Workback Schedule>*

|  |  |  |
| --- | --- | --- |
| Time Allotted | Area | Owner |
| 40 minutes | CS&I | Jane Doe, John Doe |
| 40 minutes | CXP | Jane Doe, John Doe |
| 40 minutes | Marketing | Jane Doe, John Doe |
| 40 minutes | OEA | Jane Doe, John Doe |
| 25 minutes | Ops | Jane Doe, John Doe |
| 90 minutes | Product | Jane Doe, John Doe |

## Email Templates

### (T-6) Pre-Read Request

Subject: Action Required: Monthly Pre-Read due ***<DATE>***

Hello,

The month end is quickly approaching, and our next monthly review meeting is scheduled for ***<DATE>*.**

In preparation for our meeting, please send me the link to your review dashboard by 5 pm PT on *<DATE>*. I will be sending out the pre-read on *<DATE>*.

As a reminder, content for your dashboard should focus on Objectives and Key Results to avoid deep dives into deliverables (vs. outcomes).

Please ensure the content you will be presenting will fit into the allotted time noted below for your area as we will not have time to extend it to the next meeting.

| Time Allotted | Area | Owner |
| --- | --- | --- |
| 40 minutes | CS&I | Jane Doe, John Doe |
| 40 minutes | CXP | Jane Doe, John Doe |
| 40 minutes | Marketing | Jane Doe, John Doe |
| 40 minutes | OEA | Jane Doe, John Doe |
| 25 minutes | Ops | Jane Doe, John Doe |
| 80 minutes | Product | Jane Doe, John Doe |

Key upcoming dates

**<DATE>:** OKR Monthly Review Pre-Read sent out to all attendees

**<DATE>:** Hot Topic request sent to LT

**<DATE>:** Consolidated hot topic requests sent out to all attendees

**<DATE>:** OKR Monthly Review Meeting

**<DATE>:** LT Offsite - Q4 Planning

**<DATE>:** Department Q4 Planning

**<DATE>:** LT Q4 Planning Review

**<DATE>:** Department Q4 Planning Review

**<DATE>:** All Q4 OKRs Finalized

You can view the full ROB calendar here: *<Link to Workback Schedule>*

If you have any questions, please let me know.

Thank you,

<Your Name>

### (T-3) Pre-Read: Monthly OKR Review

Subject: Pre-Read: Monthly OKR Review ***<DATE>***

Hello,

Our Monthly OKR Review meeting is scheduled for ***<DATE*>**. Please find the agenda below (all times listed as PT) as well as links to the associated dashboards.

*Action:* Please assign an individual from your group who will be responsible for taking notes and sharing action items for your area. Notes should be added here: *<Monthly OKR Review doc link>*. Action Items should be added here:*<OKR Review Action Items doc link>*

| Meeting Date | Start Time | End Time | Time Allotted | Area | Owner | Link to Dashboard |
| --- | --- | --- | --- | --- | --- | --- |
| <DATE> | 07:35 am | 08:55 am | 80 minutes | Product | Jane Doe, John Doe |  |
| <DATE> | 09:05 am | 09:45 am | 40 minutes | CS&I | Jane Doe, John Doe |  |
| <DATE> | 09:50 am | 10:30 am | 40 minutes | CXP | Jane Doe, John Doe |  |
| <DATE> | 10:35 am | 11:00 am | 25 minutes | Ops | Jane Doe, John Doe |  |
| <DATE> | 11:05 am | 11:45 am | 40 minutes | OEA | Jane Doe, John Doe |  |
| <DATE> | 11:50 am | 12:30 am | 40 minutes | Marketing | Jane Doe, John Doe |  |

Please ensure you have the Outlook invite on your calendar, and forward to the appropriate meeting participants as needed.

Thank you,

<Your Name>

### (T-2) Reminder: Monthly Review Department Questions Request

Hello,

This is a reminder to please send any questions you may have for the presenters/departments based on the OKR Monthly Review Dashboards pre-reads by 5pm PT on ***<DATE>*.** I will consolidate all questions and send the final list to the presenters so they can be prepared to discuss during our meeting.

Please let me know if you have any questions.

Thank you,

<Your Name>

### (T-1) Consolidated Hot Topics

Hello,

Please find the consolidated questions/topics for the presenters/departments based on the pre-reads. Please come prepared to discuss these during our meeting.

| Meeting Date | Start Time | End Time | Time Allotted | Area | Owner | Link to Dashboard | Open Questions / Topics for Discussion |
| --- | --- | --- | --- | --- | --- | --- | --- |
| <DATE> | 07:35 am | 08:55 am | 80 minutes | Product | Jane Doe, John Doe |  |  |
| <DATE> | 09:05 am | 09:45 am | 40 minutes | CS&I | Jane Doe, John Doe |  |  |
| <DATE> | 09:50 am | 10:30 am | 40 minutes | CXP | Jane Doe, John Doe |  |  |
| <DATE> | 10:35 am | 11:00 am | 25 minutes | Ops | Jane Doe, John Doe |  |  |
| <DATE> | 11:05 am | 11:45 am | 40 minutes | Marketing | Jane Doe, John Doe |  |  |
| <DATE> | 11:50 am | 12:30 am | 40 minutes | OEA | Jane Doe, John Doe |  |  |

Thank you,

<Your Name>

### (T-0) Meeting Reminders

**USE:** Send in the meeting chat at the beginning of the meeting.

**Meeting Format: Please** review Red/Yellow OKRs and any help needed. We will review Green OKRs if time allows.

**Action:** Please assign an individual from your group who will be responsible for taking notes and sharing action items for your area. Notes should be added here: *<Monthly OKR Review doc link>* Action Items should be added here: *<OKR Review Action Items doc link>*

I will send out a recap to all the meeting attendees and include the links to the notes/action items/recordings after our call on **<DATE>.**

Links to Dashboards for <DATE> review meeting

|  |  |
| --- | --- |
| Team | Dashboard Link |
| CS&I |  |
| CXP |  |
| Marketing |  |
| OEA |  |
| OPS |  |
| Product |  |

### (T-0) Notes & Action Items Reminder

**USE:** Send in the meeting chat at the end of the meeting as a reminder.

**Reminder:** Please add your meeting notes here: *<Monthly OKR Review doc link>* Action Items should be added here: *<OKR Review Action Items doc link>*

### (T-0) OKR Summary/Reminder

**USE: Send** as an email or in a group chat with all attendees as a reminder.

Thank you for attending the OKR Monthly Review meeting on **<DATE>.**

Please make sure to add in your OKR review meeting notes here: *<Monthly OKR Review doc link>* and action items here: *<OKR Review Action Items doc link>*. All action items should have Owners and Due Date populated by ***<DATE>*.** An OKR Monthly Review Summary email will be sent out to all attendees on ***<DATE>*.**

If you missed a meeting or would like to go back to review for notes/action items, please find the list of dashboards and meeting links below.

|  |  |  |
| --- | --- | --- |
| Team | Dashboard Link | Recording Link |
| CS&I |  |  |
| CXP |  |  |
| Marketing |  |  |
| OEA |  |  |
| OPS |  |  |
| Product |  |  |

Thanks!

<Your Name>

### (T- +1) OKR Monthly Review Meeting Summary

Thank you for attending the monthly OKR review.  We had a productive session, are continuing to mature our approach/process. Please find the link to the meeting notes, action items as well as the team dashboard links and associated meeting recordings below.

Meeting Notes: <Monthly OKR review notes>

Action Items: <OKR Review Action Items link>

|  |  |  |
| --- | --- | --- |
| Team | Dashboard Link | Recording Link |
| CS&I |  |  |
| CXP |  |  |
| Marketing |  |  |
| OEA |  |  |
| OPS |  |  |
| Product |  |  |

Reminder: if you haven’t filled out the *<Feedback form link>* survey, please do so. We've had some great feedback so far that we look forward to implementing in our next meeting.

**Our next review session is our Quarterly Closeout on 4/6.** The full FY23 OKR Review schedule can be found here: *<OKR Review and Retro Workback Schedule link>*

Key upcoming dates

**<DATE>:** Department Q4 Planning

**<DATE>:** LT Offsite - Q4 Planning

**<DATE>:** LT Q4 Planning Review & Finalization

**<DATE>:** Department Q4 Planning Review & Finalization (All OKRs in VG Tool)

**<DATE>:** OKR Quarterly Closeout Pre-Read sent out to all attendees

**<DATE>:** Hot Topic request sent to LT

**<DATE>:** Consolidated hot topic requests sent out to all attendees

**<DATE>:** OKR Monthly Review Meeting

As we get closer to the end of Q3, we will be sending out more information on expectations for closing out Q3 as well as Q4 planning. Thank you again for the productive and informative sessions.

Thank you,

<Your Name>

# Quarterly Review

## Workback Schedule

### Detailed Workback Schedule

|  |  |
| --- | --- |
| T-Minus | Activity |
| T-14 | Send reminder to executives to being closing out OKRs 2 weeks before quarter-end |
| T-7 | Send reminder to department heads to begin closing out OKRs 1 week before quarter-end |
| T-6 | Pre-Read Request |
| T-4 | Pre-Read Request Follow-Up |
| T-3 | Pre-Read Sent Out |
| T-2 | Quarterly Review Question Request |
| T-1 | Consolidated Questions Sent Out |
| T-0 | Meeting |
| T+1 | Meeting Notes Sent Out |

Link to FY23/FY24 OKR Review & Retro Workback Schedule: *<OKR Review and Retro Workback Schedule link>*

### Closeout Workback Schedule

|  |  |
| --- | --- |
| Time | Action |
| 4 days before end of time period | Close Department/Team OKRs for the quarter |
| 1 week after time period | Close Org OKRs for the quarter |
| 2 weeks after time period | Retrospective for Org/Department/Team OKRs for the quarter |

### Planning Schedules

Quarterly Review Schedule

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Meeting Date | Start Time | End Time | Time Allotted | Area | Owner |
| <DATE> | 8:30am PT | 9:30am PT | 60 minutes | Product | Jane Doe, John Doe |
| <DATE> | 9:35am PT | 10:15am PT | 40 minutes | CXP | Jane Doe, John Doe |
| <DATE> | 10:35am PT | 11:15am PT | 40 minutes | CS&I | Jane Doe, John Doe |
| <DATE> | 11:20am PT | 11:50am PT | 40 minutes | Ops | Jane Doe, John Doe |
| <DATE> | 12:00pm PT | 12:40pm PT | 40 minutes | OEA | Jane Doe, John Doe |
| <DATE> | 12:45pm PT | 1:25pm PT | 40 minutes | Marketing | Jane Doe, John Doe |

## Email Templates

### (T-14) Executive – Quarter End Close Out Reminder

Hello,

The quarter end is quickly approaching, and our next quarterly review meeting is scheduled for ***<DATE>*.**

In preparation for this meeting, please make sure to close and score your OKRs by the end of the month.

Please see the schedule below with key upcoming dates. If you have any questions, please reach out to me directly.

**Key upcoming dates**

**<DATE>:** LT Offsite - Q4 Planning

**<DATE>:** Department Q4 Planning

**<DATE>:** LT Q4 Planning Review

**<DATE>:** Department Q4 Planning Review

**<DATE>:** All Q4 OKRs Finalized

**<DATE>:** OKR Quarterly Closeout Pre-Read sent out to all attendees

**<DATE>:** Hot Topic request sent to LT

**<DATE>:** Consolidated hot topic requests sent out to all attendees

**<DATE>:** OKR Monthly Review Meeting

Thank you,

<Your Name>

### (T-7) Department – Quarter End Close Out Reminder

Hello,

The quarter end is quickly approaching, and our next quarterly review meeting is scheduled for ***<DATE>*.**

In preparation for this meeting, please make sure to close and score your OKRs by the end of the month.

Please see the schedule below with key upcoming dates. If you have any questions, please reach out to me directly.

**Key upcoming dates**

**<DATE>:** LT Offsite - Q4 Planning

**<DATE>:** Department Q4 Planning

**<DATE>:** LT Q4 Planning Review

**<DATE>:** Department Q4 Planning Review

**<DATE>:** All Q4 OKRs Finalized

**<DATE>:** OKR Quarterly Closeout Pre-Read sent out to all attendees

**<DATE>:** Hot Topic request sent to LT

**<DATE>:** Consolidated hot topic requests sent out to all attendees

**<DATE>:** OKR Monthly Review Meeting

Thank you,

<Your Name>

### (T-6) Pre-Read Request

Subject: Action Required: Quarterly Pre-Read Due *<DATE>*

Hello,

The quarter end is quickly approaching, and our next quarterly review meeting is scheduled for ***<DATE>.***

**In preparation for our meeting, please send me the link to your review dashboard by 5 pm PT on** *<DATE>*. **I will be sending out the pre-read** **on** *<DATE>*.

Thank you for all your feedback on the last OKR Review meeting. We've consolidated and incorporated that feedback into the *<OKR Closeout and Retrospective Guidance doc>* that we will use for our upcoming meeting. The guidance doc contains information on meeting structure, OKR dashboard guidance, scoring guidance and sample retrospective questions.

As a reminder, content for your dashboard should focus on Objectives and Key Results to avoid deep dives into deliverables (vs. outcomes).

Please ensure the content you will be presenting will fit into the allotted time noted below for your area as we will not have time to extend it to the next meeting.

|  |  |  |
| --- | --- | --- |
| **Time Allotted** | **Area** | **Owner** |
| 40 minutes | CS&I | Jane Doe, John Doe |
| 40 minutes | CXP | Jane Doe, John Doe |
| 40 minutes | OEA | Jane Doe, John Doe |
| 25 minutes | Ops | Jane Doe, John Doe |
| 40 minutes | Marketing | Jane Doe, John Doe |
| 80 minutes | Product | Jane Doe, John Doe |

**Key upcoming dates**

**<DATE>:** Department Q4 Planning Review

**<DATE>:** All Q4 OKRs Finalized

**<DATE>:** OKR Quarterly Closeout Pre-Read sent out to all attendees

**<DATE>:** Hot Topic request sent to LT

**<DATE>:** Consolidated hot topic requests sent out to all attendees

**<DATE>:** OKR Monthly Review Meeting

If you have any questions, please let me know.

Thank you,

<Your Name>

### (T-3) Pre-Read: Quarterly OKR Review

Subject: Pre-Read: Quarterly OKR Review ***<DATE>***

Hello,

Our Quarterly OKR Review meeting is scheduled for ***<DATE>*.** Please find the agenda below (all times listed as PT) as well as links to the associated dashboards.

***Action:* Please assign an individual from your group who will be responsible for taking notes and sharing action items for your area.** Notes should be added here: *<Q3 OKR Closeout doc link>*. Action Items should be added here: *<OKR Review Action Items doc link>*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Meeting Date** | **Start Time** | **End Time** | **Time Allotted** | **Area** | **Owner** | **Link to Dashboard** |
| <DATE> | 8:00am PT | 9:15am PT | 80 minutes | Product | Jane Doe, John Doe |  |
| <DATE> | 9:20am PT | 10:00am PT | 40 minutes | CS&I | Jane Doe, John Doe |  |
| <DATE> | 10:05am PT | 10:30am PT | 25 minutes | CXP | Jane Doe, John Doe |  |
| <DATE> | 10:35am PT | 11:00am PT | 25 minutes | Ops | Jane Doe, John Doe |  |
| <DATE> | 11:05am PT | 12:00pm PT | 55 minutes | Marketing | Jane Doe, John Doe |  |
| <DATE> | 1:00pm PT | 1:40pm PT | 40 minutes | OEA | Jane Doe, John Doe |  |

Please ensure you have the Outlook invite on your calendar, and forward to the appropriate meeting participants as needed.

For reference, you can find the previous OKR Review Summary here: *< Monthly OKR Review doc link>*

Thank you,

<Your Name>

### (T-2) Quarterly Review Presenter Questions Request Reminder

Subject: Quarterly Review Presenter Questions Request Reminder

Hello,

This is a reminder to please send any questions you may have for the presenters/departments based on the OKR Quarterly Review Dashboards pre-reads by **5pm PT on *<DATE>***. I will consolidate all questions and send the final list to the presenters so they can be prepared to discuss during our meeting.

Please let me know if you have any questions.

Thank you,

<Your Name>

### (T-1) Consolidated Hot Topics

Subject: Quarterly Review Presenter Questions

Hello,

Please find the consolidated questions/topics for the presenters/departments based on the pre-reads. Please come prepared to discuss these during our meeting.

| **Meeting Date** | **Start Time** | **End Time** | **Time Allotted** | **Area** | **Owner** | **Link to Dashboard** | **Open Questions/Topics for Discussion** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| <DATE> | 11:00am PT | 11:40am PT | 40 minutes | OEA | Jane Doe, John Doe |  |  |
| <DATE> | 7:35am PT | 8:55am PT | 80 minutes | Product | Jane Doe, John Doe |  |  |
| <DATE> | 9:00am PT | 9:40am PT | 40 minutes | CS&I | Jane Doe, John Doe |  |  |
| <DATE> | 9:50am PT | 10:30am PT | 40 minutes | CXP | Jane Doe, John Doe |  |  |
| <DATE> | 10:35am PT | 11:00am PT | 25 minutes | Ops | Jane Doe, John Doe |  |  |
| <DATE> | 11:35am PT | 12:15pm PT | 40 minutes | Marketing | Jane Doe, John Doe |  |  |

Thank you,

<Your Name>

### (T-0) Meeting Reminders

**USE:** Send in the meeting chat at the beginning of the meeting.

**Action:** Please assign an individual from your group who will be responsible for taking notes and sharing action items for your area. Notes should be added here: *<Q3 OKR Closeout doc link>*. Action Items should be added here: *<OKR Review Action Items doc link>*

**Links to Dashboards for *<DATE>* review meeting**

|  |  |
| --- | --- |
| **Team** | **Dashboard Link** |
| CS&I |  |
| CXP |  |
| Marketing |  |
| OEA |  |
| OPS |  |
| Product |  |

### (T-0) Notes and Action Items Reminder

**USE:** Send in the meeting chat at the end of the meeting as a reminder.

**Reminder:** Please add your meeting notes here: *<Q3 OKR Closeout doc link>*. Action Items should be added here: *<OKR Review Action Items doc link>*

### (T-0) OKR Summary Reminder

**USE:** Send as an email or in a group chat with all attendees as a reminder.

Thank you for attending the OKR Quarterly Review meeting on **<DATE>**.

Please make sure to add in your OKR review meeting notes here: *<Q3 OKR Closeout doc link>* and action items here: *<OKR Review Action Items doc link>.* All action items should have Owners and Due Date populated by ***<DATE>***. An OKR Monthly Review Summary email will be sent out to all attendees on ***<DATE>***.

If you missed a meeting or would like to go back to review for notes/action items, please find the list of dashboards and meeting links below.

|  |  |  |
| --- | --- | --- |
| **Team** | **Dashboard Link** | **Recording Link** |
| CS&I |  |  |
| CXP |  |  |
| Marketing |  |  |
| OEA |  |  |
| OPS |  |  |
| Product |  |  |

Thanks!

<Your Name>

### (T- +1) OKR Quarterly Review Meeting Summary

Thank you for attending the monthly OKR review.  We had a productive session, are continuing to mature our approach/process. Please find the link to the meeting notes, action items as well as the team dashboard links and associated meeting recordings below.

Meeting Notes: *<Monthly OKR Review doc link>*

Action Items: *<OKR Review Action Items doc link>*

|  |  |  |
| --- | --- | --- |
| **Team** | **Dashboard Link** | **Recording Link** |
| CS&I |  |  |
| CXP |  |  |
| Marketing |  |  |
| OEA |  |  |
| OPS |  |  |
| Product |  |  |

Reminder: if you haven’t filled out the *<OKR Monthly Review Feedback survey link>*, please do so. We've had some great feedback so far that we look forward to implementing in our next meeting.

**Our next review session is our Quarterly Closeout on *<DATE>*.** The full FY23 OKR Review schedule can be found here: *<OKR Review and Retro Workback Schedule link>*.

**Key upcoming dates**

**<DATE>:** LT Offsite - Q4 Planning

**<DATE>:** Department Q4 Planning

**<DATE>:** LT Q4 Planning Review

**<DATE>:** Department Q4 Planning Review

**<DATE>:** All Q4 OKRs Finalized

**<DATE>:** OKR Quarterly Closeout Pre-Read sent out to all attendees

**<DATE>:** Hot Topic request sent to LT

**<DATE>:** Consolidated hot topic requests sent out to all attendees

**<DATE>:** OKR Monthly Review Meeting

As we get closer to the end of Q3, we will be sending out more information on expectations for closing out Q3 as well as Q4 planning. Thank you again for the productive and informative sessions.

Thank you,

<Your Name>

## Feedback/Survey

### Request for feedback

Hello,

Thank you for attending the quarterly OKR review.  We had productive sessions today with great feedback like extending our meetings to 45 minutes for each group to allow time for everyone to showcase their work.

As we continue to mature our approach/process, please take a moment to fill out the *<OKR Review Feedback survey link>*. We've had some great feedback from previous meetings that we continue to implement, and I'm looking forward to the next round of feedback to incorporate.

Thank you in advance for investing in our continued growth.

<Your Name>

# **Dashboard Guidance**

## Guidance

### Monthly Check-In Template

1. What went well/completed
2. Key Learnings & opportunities to improve
3. Risks & help Needed

### Quarterly Check-in Template

What is the start, stop, continue from Q#?

1. Start
2. Stop
3. Continue