OKR MID-CYCLE REVIEW CHECKLIST

OKRQUICKSTART

Execution is everything. The intent of the Mid-Cycle review is to ensure the organization is executing effectively and that we're making good progress on achieving our outcome. This session is held once a quarter.

Preparation (1 to 2 weeks out)

- ❏ **Invitees** - Determine which stakeholders need to be present to provide an update, help make decisions or to be kept informed. This may include people beyond the immediate team.
- ❏ **Send the invite** - Make sure attendees have the invite in their calendar well in advance, and ensure they are prepared with the following.
- ❏ **Prepare data** - Key Result leads collate and prepare any data they have to validate progress, which may be supported by (but not replaced with) a showcase of what's been done to date.
- ❏ **Identify blockers** - Everyone considers what is holding them back from delivering even greater outcomes and identify who can help. Each person brings at least one challenge.
- ❏ **OKR Status Updated** - Ensure your OKR has been updated with all relevant progress commentary captured.

Run the session

Agenda

- ❏ **Introduction** - 5 minutes
  - ❏ **Explain session purpose -** Clearly explain why we're hosting the mid-cycle review and what we
  - ❏ **Clarity on the why** - Reinforce why we're using OKR and why the current OKR is important
  - ❏ **Establish psychological safety** - We're validating progress and seeking feedback from our peers with plenty of time to tweak the plan
- ❏ **Review data & showcase** - Review substantiated data for each Key Result + show what's been done- 20 minutes
- ❏ **Action plan** - Steps needed to maximize outcomes and ask the question "What are we missing to be really successful?"- 20 minutes
- ❏ **Next quarter's OKR** - Get input from each person around the room on what are the key problems to solve and priorities - 10 minutes
- ❏ **Close & celebrate** - What are the actions, decisions and communications? Remember to reflect on and capture the big achievements so far! - 5 minutes

Session outcomes

- ❏ Validate progress and course-correct where the outcome is not expected to be achieved
- ❏ Capture insights for priorities for consideration next quarter

Follow up

- ❏ Share all data and other insights from the session with interested stakeholders
- ❏ Follow up actions for completion within a week
- ❏ Communicate to teams where greater collaboration might be needed to achieve an outcome
- ❏ Ensure all ideas for the next cycle are captured