

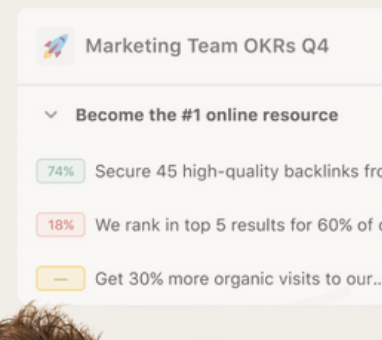
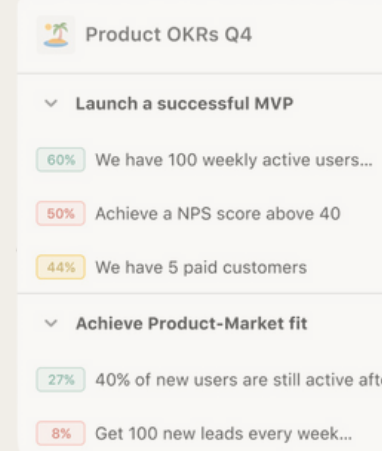
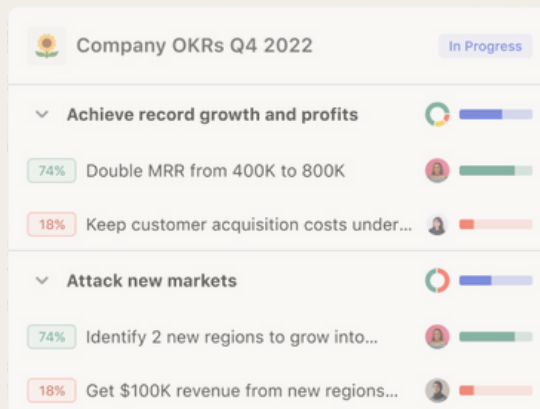


CHARLA ABIERTA

Qué herramienta elegir para reducir fricciones y mejorar los procesos de OKRs

Lucas Sánchez

Co-fundador de Master Me Up



Para los nuevos...



**Somos una consultora
que ayuda a líderes y a
sus equipos a hacer que
el cambio suceda con el
framework OKRs**



Hemos ayudado a +400 equipos



RE/MAX

Mural

MEDIA LAB
AGENCY

**Play
Ground**

jampp

|Firmaway.



-endeavor

Ze
Clinics

YOUPLANET

Smartick



¿Por qué todo el mundo está queriendo implementar OKRs?



**El 67% de las empresas
no fallan por una mala
estrategia, sino que
fallan por no poder
ejecutarla.**

Harvard Business Review



OBJETIVO

O + KR

RESULTADO CLAVE (KEY RESULT)



Un ejemplo de OKR Trimestral

Objetivo 35 %

Resultado clave (KR) 35% + 52 %

Tareas/Iniciativas

- Construya un proceso de ventas de clase mundial
- Incrementar los SQL en un 25% mediante contacto frío 1 PADRE
 - Implementar pruebas A/B para estrategias de divulgación
 - Establezca campañas de goteo por correo electrónico para un fomento continuo
 - ¿Qué puede ayudarte a lograr este objetivo?
- Reducir el ciclo de ventas de 35 días a 21 días. 1 PADRE 32 días + 10 %
- Aumentar el equipo de ventas de 6 a 12 personas. 1 PADRE 11 personas + 10 %
- Aumentar el número de clics cada 30 días de 100 clics a 200 clics/30 días 100 clics/30 días

Planificado 16 de marzo

En curso 09 mar

3 beneficios de ejecutar la estrategia utilizando OKRs

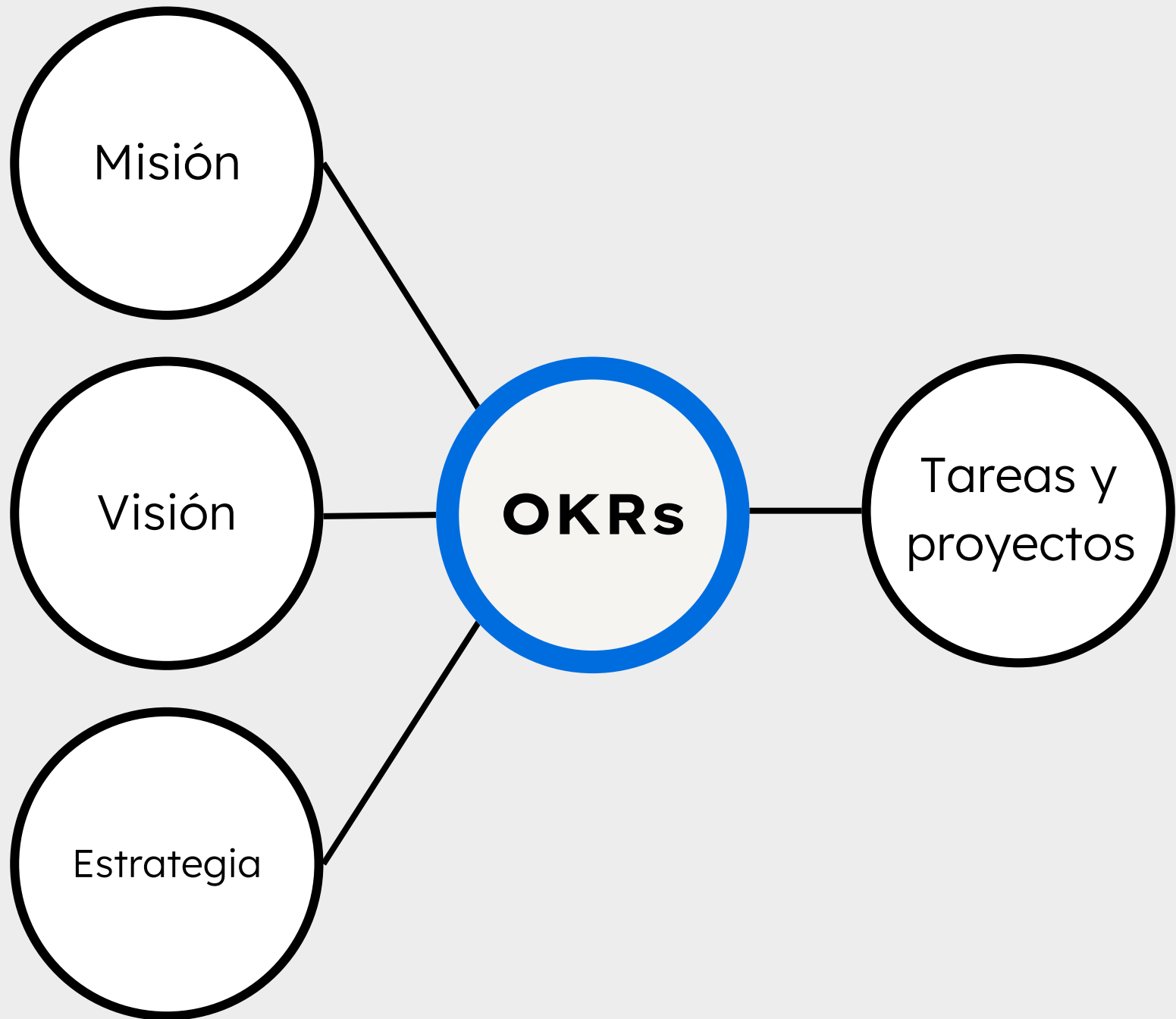


**1) Alineación y la
responsabilidad compartida.**

**2) Centra esfuerzos en
resultados.**

**3) Permite medir y hacer
cambios.**





¿De dónde surge todo esto?



De los MBO a los OKR

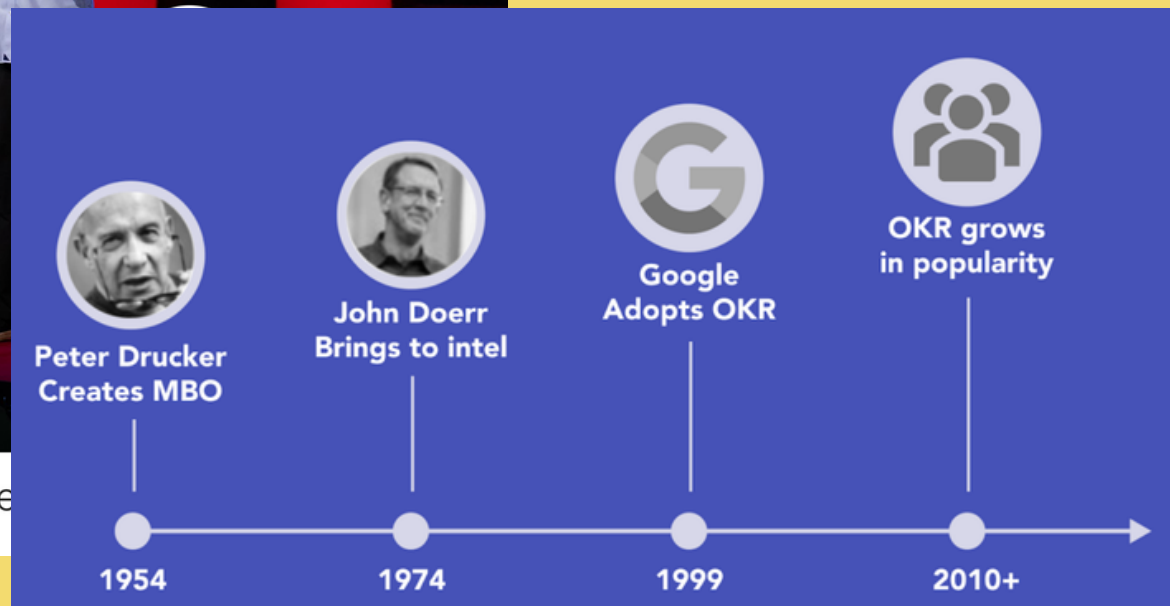
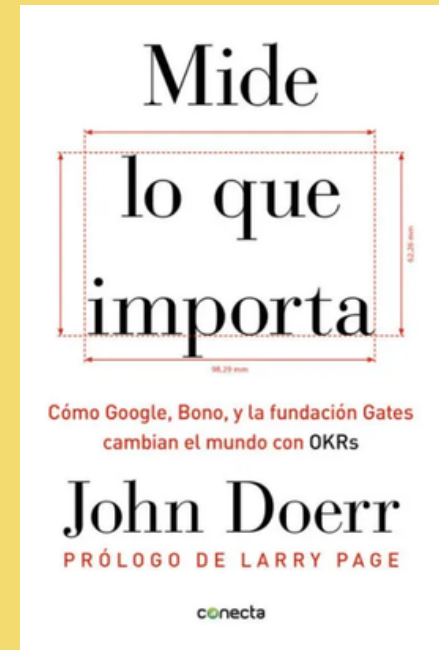
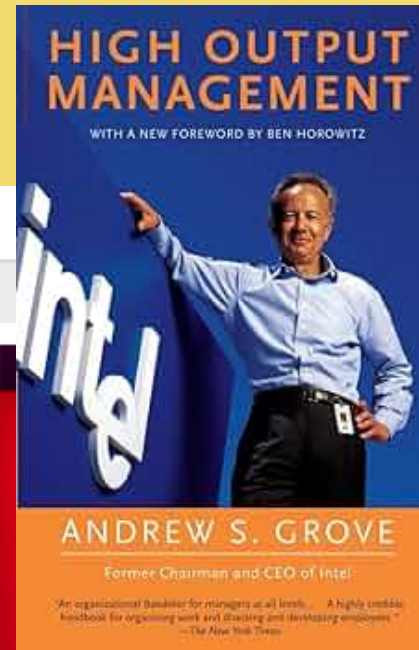
TED Ideas change everything

Ideas worth spreading has evolved, and so has our mission. [Learn why →](#)



Por qué el secreto del éxito e

8,538,618 views | John Doerr | TED2018 • April 2018



5 desafíos que los OKR ayudan a superar

- > Alineación y enfoque.
- > Comunicación y transparencia.
- > Motivación y compromiso.
- > Medición del progreso e impacto.
- > Innovación y adaptabilidad.



AHORA SI, AL TEMA DE HOY...

- 1) Cómo es trabajar con OKRs:
mentalidad y rituales necesarios.
- 2) Demo completa de Tability.
- 3) Criterios para elegir un Saas de OKRs
y comparativa con Excel/GSheets.
- 4) Roadmap ideal para implementar
OKRs.



Cómo es operar con OKRs: mentalidad y rituales necesarios



1/3

Mentalidad de crecimiento

- > Es ver al fracaso como una oportunidad de aprendizaje.
- > Esfuerzo + Práctica = Mejores habilidades.
- > Fomentar la innovación, la resiliencia y el aprendizaje continuo.



2/3

Confianza y comunicación abierta

- > Celebrar los esfuerzos, no solo los logros.
- > Alentar a salir de su zona de confort y asumir nuevos retos.
- > Dar feedback constructivo.
- > Reconocer y recompensar.



3/3

Menos foco en tareas/proyectos (outputs) y más en resultados (outcomes)

- > Outputs/Entregables: tareas, proyectos, deadlines, milestones.
- > Desarrollar una cultura basada en outcomes (resultados).
- > Pasar de sólo ejecutar, a cuestionar, experimentar y adaptarse.



Los 3 rituales de equipo que garantizan la efectividad de los OKRs



RITUAL #1 ANUAL (DICIEMBRE)

- 1) Reunión de **Revisión** del año (retro anual)
- 2) Reunión de **Brainstorming** de OKRs del año próximo
- 3) Reunión de **Definición** de OKRs del año próximo



**Ya tenemos los OKRs
anuales**



RITUAL #2 TRIMESTRAL

- 1) Reunión de **Revisión** del trimestre anterior (retro trimestral)
- 2) Reunión de **Brainstorming** de OKRs del próximo trimestre
- 3) Reunión de **Definición** de OKRs del próximo trimestre



**Ya tenemos los OKRs
para el trimestre**

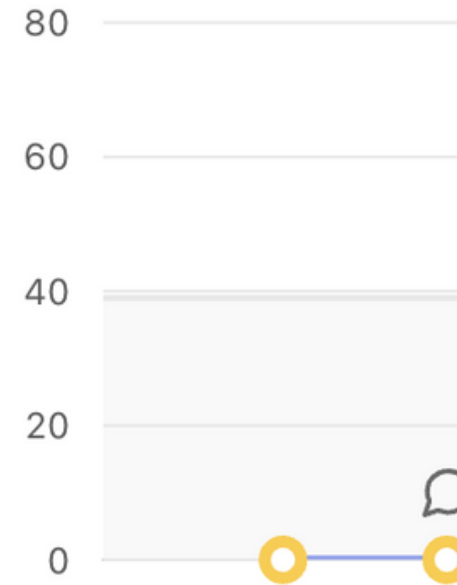


RITUAL #3 SEMANAL

- 1) **Check-ins semanales** en cada KR
- 2) Reunión **semanal de equipo** para revisar los KR y discutir iniciativas
- 3) Reunión **semanal LOM de líderes** (C-Level)

Optimizar Funnel para ger

←  Mejorar el S



LATEST CHECK-IN



71.4%

+43%

Total de llamadas age

- Llamadas concre

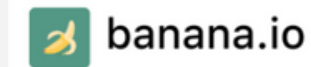
El **ritual semanal** es el más crítico para una adopción exitosa



**18 razones por las que utilizamos
Tability internamente y
recomendamos a nuestros
clientes**



Mapa estratégico



Company OKRs Q4 2022 In Progress

- ▼ **Achieve record growth and profits**
 - 74% Double MRR from 400K to 800K
 - 18% Keep customer acquisition costs under...
- ▼ **Attack new markets**
 - 74% Identify 2 new regions to grow into...
 - 18% Get \$100K revenue from new regions...

Product OKRs Q4 In Progress

- ▼ **Launch a successful MVP**
 - 60% We have 100 weekly active users...
 - 50% Achieve a NPS score above 40
 - 44% We have 5 paid customers
- ▼ **Achieve Product-Market fit**
 - 27% 40% of new users are still active after 2...
 - 8% Get 100 new leads every week...

Marketing Team OKRs Q4 In Progress

- ▼ **Become the #1 online resource**
 - 74% Secure 45 high-quality backlinks from...
 - 18% We rank in top 5 results for 60% of our...
 - Get 30% more organic visits to our...

Engineering OKRS Q4 In Progress

- ▼ **Significantly increase the speed of our...**
 - 74% Reduce build times from 25 to under 5...
 - 25% Reduce cycle time from 28 days to 6...
- ▼ **Build a world-class infrastructure...**

Definición sencilla de OKRs + Iniciativas

Publish

Q4 Engineering Team

Objective Improve the reliability and uptime of the company's production systems

Cover at least 75% of potential disaster scenarios in the disaster recovery plan

 0 → 75%


✓ Conduct a risk assessment to identify potential disaster scenarios



✓ Test the disaster recovery plan to ensure it is effective



Reduce the average time to resolve production issues by at least 25%

 32 → 24 min

✓ Review the incident response process and identify bottlenecks



✓ Provide training and resources to help team members troubleshoot and fix production issues



Increase the uptime of the company's production systems by at least 5%

 92 → 98% uptime

✓ Identify and address single points of failure in the system architecture



✓ Monitor availability and track progress towards improving uptime



+

Plan score

93 /100

FOCUS

DESCRIPTIVE

MEASURABLE

ACCOUNTABILITY

Tips

Assign each outcome to someone on your team

Make sure to assign each outcome to someone on your team

Actualización automática de KR's

TARGET ADVANCED DATA SOURCE CHECK-INS API

Connect to a data source to retrieve the check-ins data without switching c

CHANGE DATA SOURCE

- ✓ Select a data source
- Link
- Dependent Key Results
- Amplitude (not connected)
- Asana
- ChartMogul (not connected)
- Clickup
- Help Scout (not connected)
- Github
- Gitlab (not connected)
- Google Sheets (not connected)
- Hubspot
- Jira
- PostgreSQL (not connected)
- MySQL (not connected)
- MariaDB (not connected)

Librería de Ejemplos y generación con AI

Generate via AI BETA



WHAT'S YOUR OBJECTIVE?

Describe your Objective in one sentence

Examples:

- "Rank on the top 5 of Google"
- "Build an amazing growth engine"
- "Create a vibrant office culture"

Tabilty will suggest key results for you!

AI credits used: 3,400 / 100,000

Generate

[Cancel](#)

mastermeup.com/generator

Browse OKRs and goals templates

Search

ALL

STARTUPS

PRODUCT

MARKETING

ENGINEERING

CU

All templates **(818)**

Stay informed on influencer trends and social media hype

DIGITAL MARKETING PUBLICATIONS

INFLUENCER TRENDS

SOCIAL MEDIA ANALYST

DIGITAL MARKETING

Boost Productivity & Results of KOL Marketing

AUTOMATION

CONVERSION RATE OPTIMIZATION

CONTENT STRATEGIST

KOL MANAGER

KOL MARKETING

Enhance provision of advisory services

CLIENT ENGAGEMENT

SERVICE INNOVATION

SERVICE ADVISOR

CLIENT RELATIONSHIP MANAGER

Get 3x more traffic to our website

Increase unique page views to 300,000

- Create a content marketing plan to promote existing content
- Create a targeted email campaign to drive traffic to high-value pages
- Increase engagement through social media campaigns
- Monitor and optimize website performance to improve page loading speed

Improve ads to get CTR of 5%

- Review existing ads for relevance and effectiveness
- Analyze the best performing ad campaigns for insights
- Create new ads with a focus on high-converting keywords
- Test different ad variations to determine the highest CTR

Grow blog traffic share to be 30% of all website traffic

Made for Tabilty

Use Tabilty to track all your goals and initiatives in one place.

[Get started ->](#)

Use this template

Download CSV

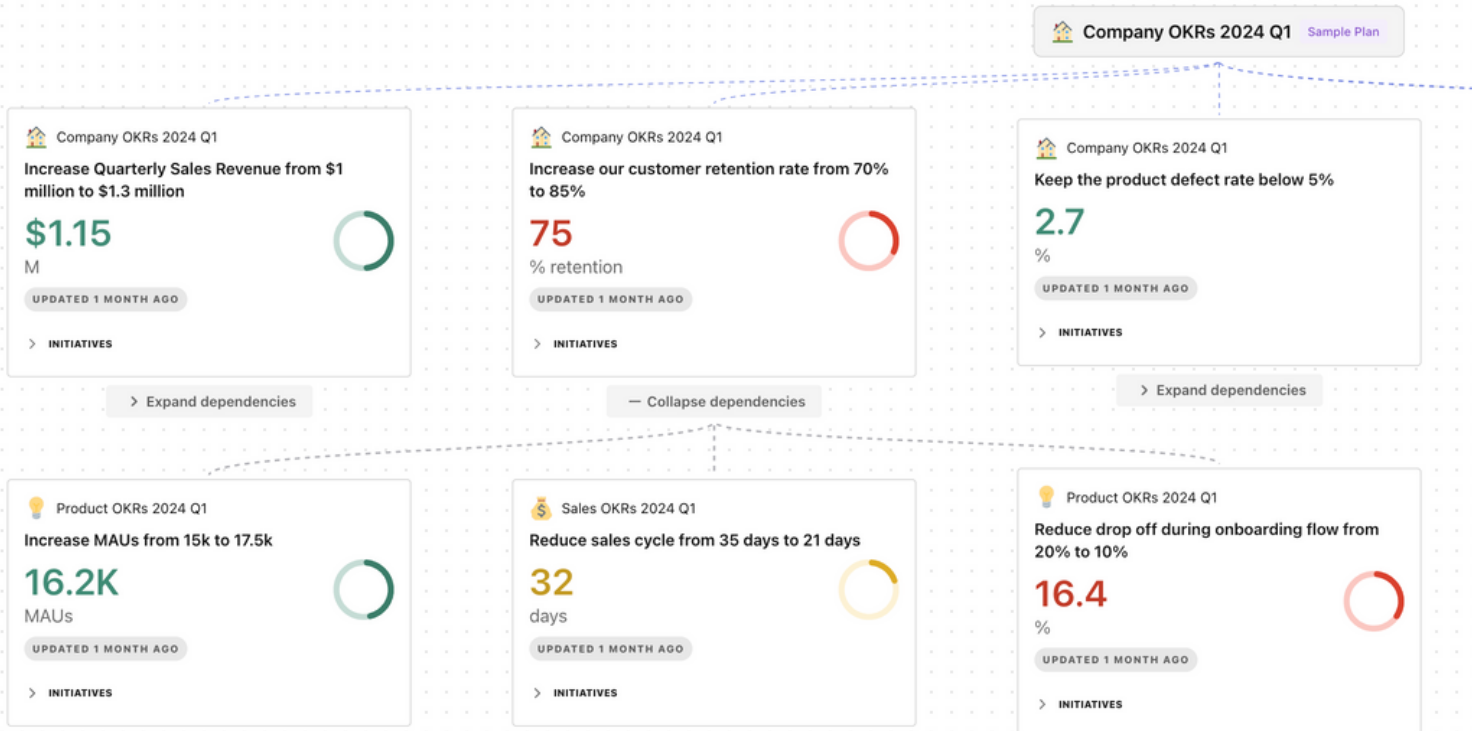
traffic content-marketing marketing gretel

Alineamiento, en vez de cascadeo

Company OKRs 2024 Q1 [Sample Plan](#)

KEY RESULTS INITIATIVES NOTES **MAP** RETROSPECTIVES

Use the map to visualise cascading dependencies between key results - [learn more](#)



My focus: aquí comienza la semana

The screenshot displays the 'My focus' dashboard for Lucas Sánchez. The interface includes a sidebar with navigation options like 'My focus', 'Plans', 'Insights', 'Strategy map', 'Filters', 'Dashboards', 'People', 'Teams', and 'Standups'. The main content area is divided into several sections:

- My key results:** A section with sub-sections 'PENDING CHECK-INS' (No check-ins to do!) and 'ACTIVE KEY RESULTS'. It lists five items with progress indicators: 'Definir posicionamiento, Acerca y nuevo plan de comunicación' (0%), 'Crear reels de contenido para generar tráfico hacia Lead Magnets' (0 reels), 'Generar discovery calls inbound' (4 inbound calls), 'Desarrollamos un producto self paced' (On track), and 'Incrementar el alcance orgánico en un' (0).
- My tareas:** A list of tasks including 'Hablar con Fede para que me explique...', 'Definir posicionamiento, Acerca y nuevo plan de comunicación', and 'Funnel Workshop ABC B2B'.
- Recently visited:** A list of recently visited items such as 'Growth Q2 '24', 'Producto Q1 '24', 'Corporativo Q2 '24', 'Demo Plan', '2024', and 'Branding Q2 '24'.
- My network:** A section for team management, including 'My manager', 'My direct reports', and 'My teams' (PRODUCTO, GROWTH, FOUN).
- Standups:** A notification at the bottom right stating 'Your standups are up to date!' with a 'See all standups' button.

At the top right, there are utility icons for language (English), search, and notifications. The user's profile 'Lucas Sánchez' is shown with a flag icon, 4 items, 75 NCS, 4% progress, and 0/3 items.

Check-ins de cada KR con nivel de confianza

Increase Quarterly Sales Revenue from \$1 million to \$1.3 million



DATE

17 Apr 202

PROGRESS

\$ 1.15 M

Type '+' to add to the previous value

CONFIDENCE

ON TRACK

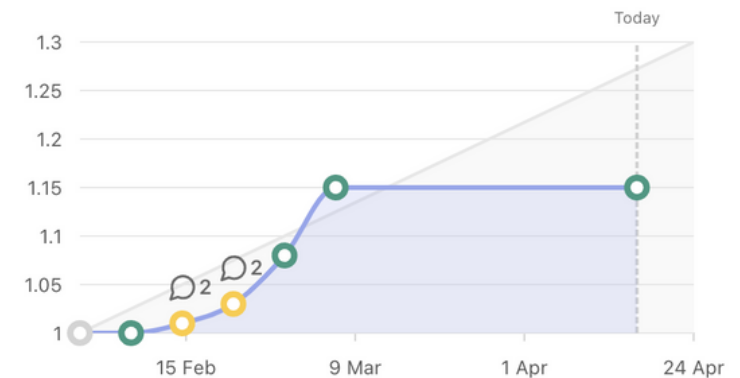
AT RISK

OFF TRACK

ANALYSIS

B I [List Icon] [List Icon] [Link Icon] [Image Icon]

Write better updates by answering these questions:
- How did you get to where you are today?
- Is there anything you need to do differently?
- Do you have an ask for the team?



\$1.15M

50%

\$1M

\$1.3M

RELATED INITIATIVES

3/5 completed

- Sales team all walks through competitor set-up
- Roll-out gift basket gift for high priority leads
- Sales team takes updated Sandler Training

Create

[Cancel](#)

Feedback de cada KR powered by AI

▼ ENTRENAMIENTO ✨



EL CONSEJO DE TABBY. ?

Generar nuevo

Creado el 16 de abril de 2024

Te quedan 8 días y necesitas aumentar tus MAU en un 52%. Dado el progreso hasta ahora, alcanzar su objetivo parece un desafío. Sin embargo, intensificar sus esfuerzos podría hacerlo posible.

Sugerencias:

- Mejore la funcionalidad de su aplicación para la retención de usuarios.
- Incrementar los esfuerzos de marketing y anuncios para llegar a una audiencia más amplia.
- Colabora con personas influyentes relevantes para el dominio de tu aplicación.
- Implemente funciones nuevas e interesantes para atraer usuarios potenciales.
- Optimice su aplicación para los motores de búsqueda para aumentar la visibilidad.

Eliminar análisis

Créditos de IA utilizados: 2900/40 000

Kanban de Tareas/Iniciativas linkeados a los KR's

The image shows a Kanban board interface for 'Marketing Team OKRs Q4' in an 'In Progress' state. The board is organized into two main sections, each with a specific OKR goal. The first section, 'Achieve record growth and profits', has a progress indicator of 2/7. The second section, 'Be on track for a successful launch of next quarter', has a progress indicator of 3/8. Each section contains four columns: 'Later', 'Next Week', 'This week', and 'Done'. Tasks are represented as cards with titles, descriptions, assignees, and due dates. A tooltip is visible over a task in the 'Next Week' column of the first section.

Marketing Team OKRs Q4 In Progress Edit plan Present

Overview **Tasks** Insights Notes

Achieve record growth and profits

2/7

- Later**
 - Improve sales material
Keep customer acquisition costs...
Dec 21
 - Hire ad specialist to optimize our campaigns
Keep customer acquisition c...
Dec 11
- Next Week**
 - Create 35 new OKR templates for design teams
Co-publish a thought leadership...
Dec 11
- This week**
 - Narrow down the 2 that seems the most attractive
Identify 2 new regions to grow in...
Dec 12
- Done**
 - Build a list of 10 possible regions
Co-publish a thought leadership...
 - Update OKRs templates website
Co-publish a thought leadership...

Be on track for a successful launch of next quarter

3/8

- Later**
 - Create PR kit
Secure 10 press articles with...
- Next Week**
 - Create landing page with beta signup form
Build a mailing list of 1.0000...
- This week**
 - List on Product Hunt as an upcoming product
Build a mailing list of 1.0000...
- Done**
 - Find relevant Facebook and LinkedIn groups
Build a mailing list of 1.0000...

Revisión de OKRs en Modo Presentación

Acme OKRs In Progress

Plan Overview

BRING A WORLD CLASS EXPERIENCE TO OUR CUSTOMERS

47% Reach a NPS of 60 or above

49% Increase the number of weekly active users from 20k to 28k

POWER UP OUR GROWTH LOOP

80% Get 75 new trials every week

— Bring a world class experience to our customers

53% Bring a world class experience to our customers

70% Bring a world class experience to our customers

47% Reach Reach a NPS of 60 or above

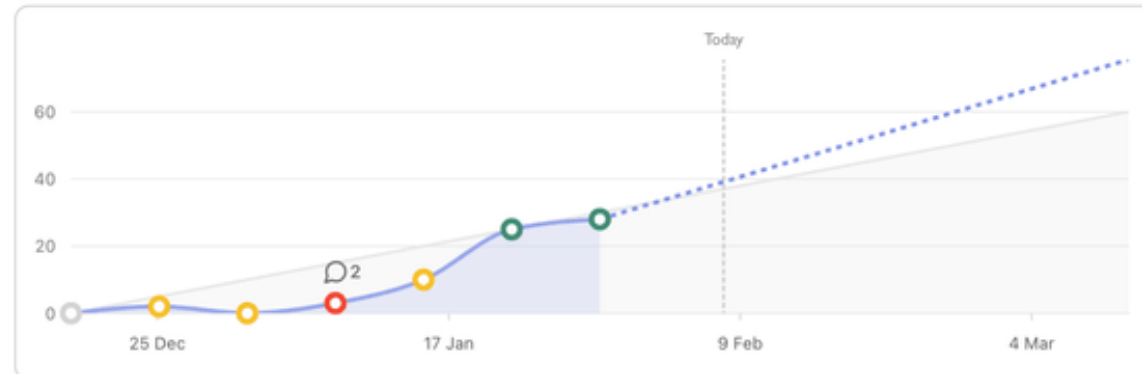
OVERALL PROGRESS



TASK COMPLETION



TIMELINE



Latest Check-in

Create Check-In

28 NPS On track +12%

We believe that we're going to steady at that 20-30 mark, but we have some ideas on how we can make things better outside of Product work. We will start by working with

Gráficos de progreso de cada KR

Marketing Team OKR | FY2022 Marketing OKRs | [+ Check-in](#)

Overview | Tasks | Insights | Notes

NET CONFIDENCE SCORE | **TASK CO**

45
NCS

74%

Reach 100 Active Weekly Users

70%

Today

20
0
150
100
0

Latest Check-in +

90 active users +10%

90%

Owner Seiji Ono

Contributors [Avatar] [Avatar] [Avatar] +

Tags Acquisition Product WAU +

Alignment

74% Double MRR from 400K to 800K
Company OKRs Q4

74% Current outcome

74% Build a mailing list of 1,0000...
Eddie's GoalsQ4 2022

Overview | Tasks | Insights | Notes

Tasks

3/5

- List on Product Hunt as... Dec 21
- Share on Reddit, HackerNews,...
- ✓ Create landing page with beta...

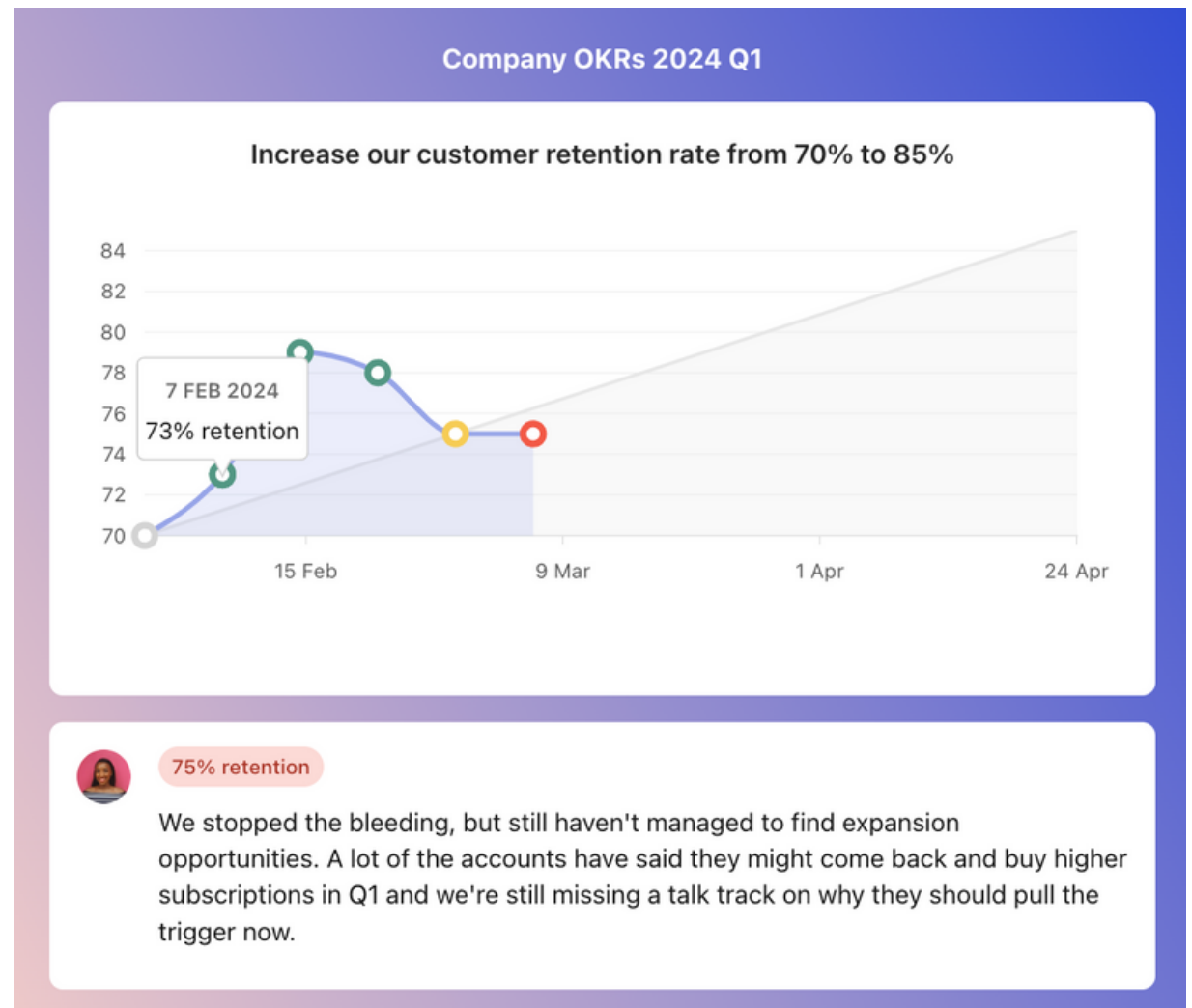
+ Add a task

Be on track for a successful launch

- 44% All websites have Google Ads
- 74% Increase the number of event
- 70% Enroll 5 influencers to boost c
- 18% Secure 10 press articles with
- 90% Build a mailing list of 1,000 pe

Become the brand leader in our ca

Descarga de gráficos con último check-in



Retros

 **Company OKRs 2024 Q1** [Sample Plan](#)

KEY RESULTS INITIATIVES NOTES MAP **RETROSPECTIVES**

Create new

28 Mar 2024

Mar 2024 Retrospective

28 Mar 2024

Edit

Download as PDF

Share



Mar 2024 Retrospective

Summary

Write your retrospective summary here

At risk

Increase Sales Growth

65%

Click to edit something something

Pending

Significantly boost Product Quality

20%

Click to edit

Going forward

Start

- List of things to start doing

Stop

- List of things to stop doing

Standups diarios (o semanales)

The screenshot displays a standup diary interface with a dark teal sidebar on the left and three columns of standup updates on the right. The sidebar contains navigation options: My Dashboard (with a red notification badge '2'), Plans, Filters, Strategy Map, Teams, and Standups. The main content area is titled 'Standups' and features three columns, each representing a different team or individual.

ACME Co. Standups (Today)

- Seiji Ono** (4 hours ago): This has been a productive week so far. I have a few things I want to get done today. (3 likes)
- Omar Livingston** (5 hours ago): Got a lot on my plate today, will be heads down most of the day! (1 like)
- Julia Bennett** (36 hours ago): Today we're launching the new landing page for ACME. A few things I need to get done before we're ready:
 - Coordinate with social media team about posts/timing
 - Queue the newsletter to go out tonight after launch

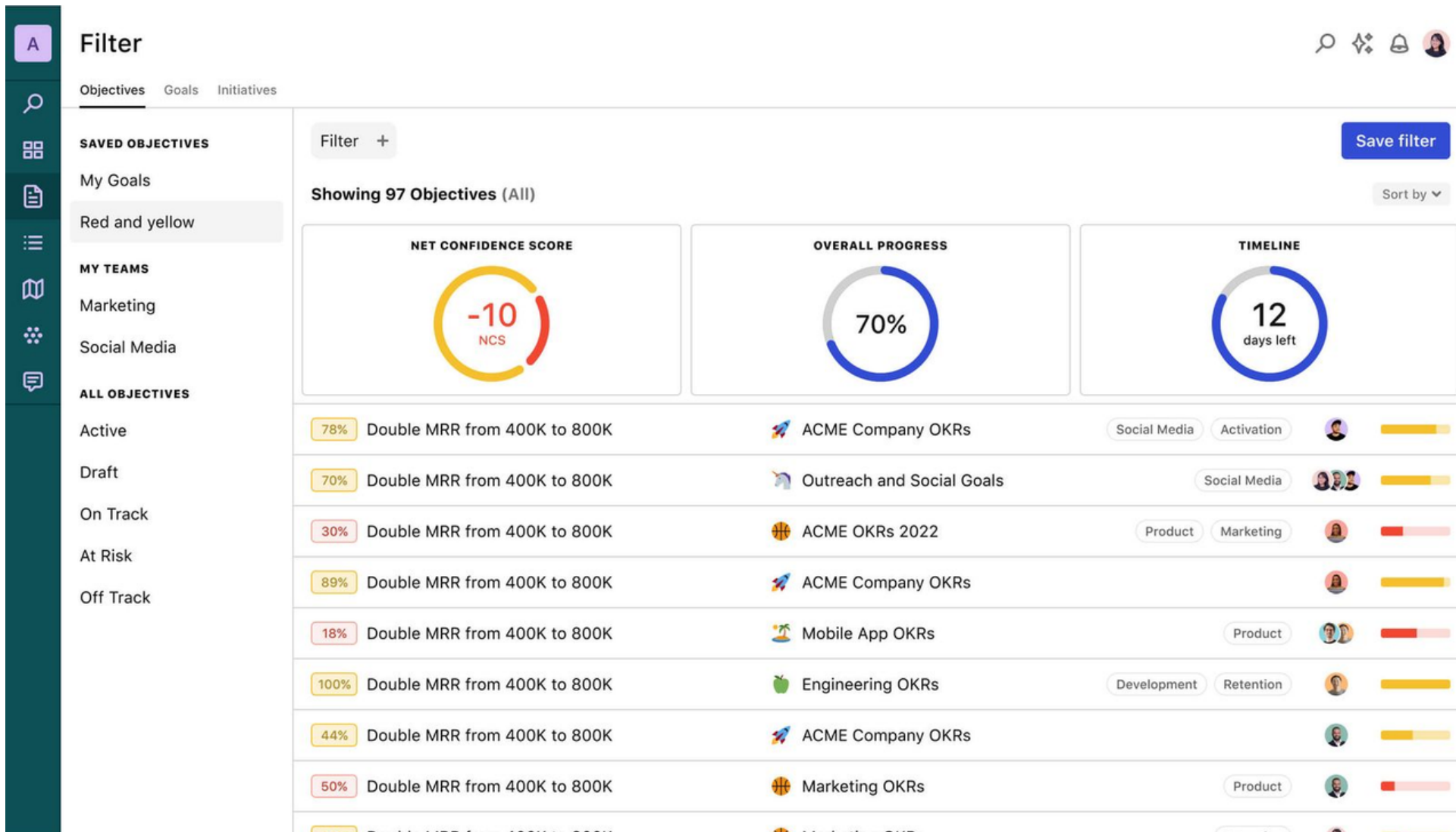
Rocky Parker's Standups (Yesterday)

- Rocky Parker** (24 hours ago):
 - Friday:
 - Create new drip email sequence
 - Added A/B test on the pricing page
 - Today:
 - Switching over the drip feed to the 30-day schedule.
- Lucy Dang** (20 hours ago): Can you share volume #? Would be great to see a simple estimation. (3 likes)
- Rocky Parker** (2 days ago): Waiting on the new landing page to launch. We've got a few prototypes were working on and they will be ready for review later.

Nina Pierce's Standups (Yesterday)

- Nina Pierce** (24 hours ago): Today, I'll be working on implementing the new login feature and fixing a couple of bugs in the checkout process. I'll also be reviewing some code changes from yesterday's pull request. Lmk if you need anything!
- Lucy Dang** (20 hours ago): How do you plan to approach the new login feature? (1 like)
- Nina Pierce** (2 days ago): Focused on improving the page loading speed by optimizing some images and reducing the size of the JavaScript bundle. Also fixing a few bugs reported by our QA

Panel de insights general con filtros



Panel de insights de cada plan



Marketing Team OKRs In Progress

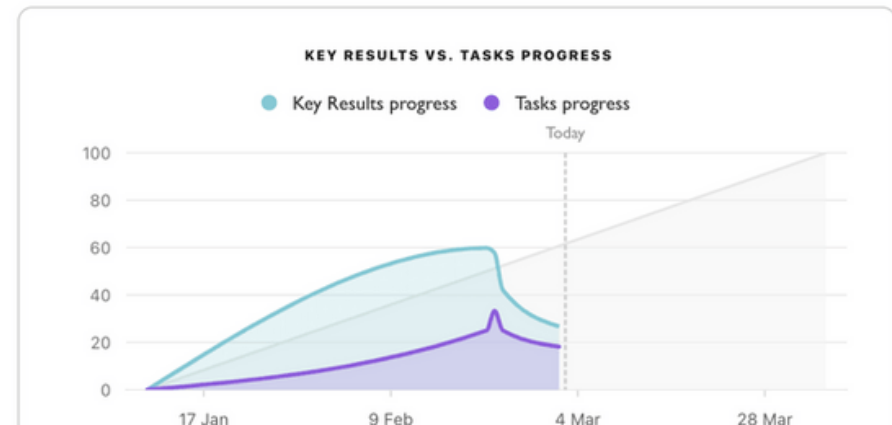
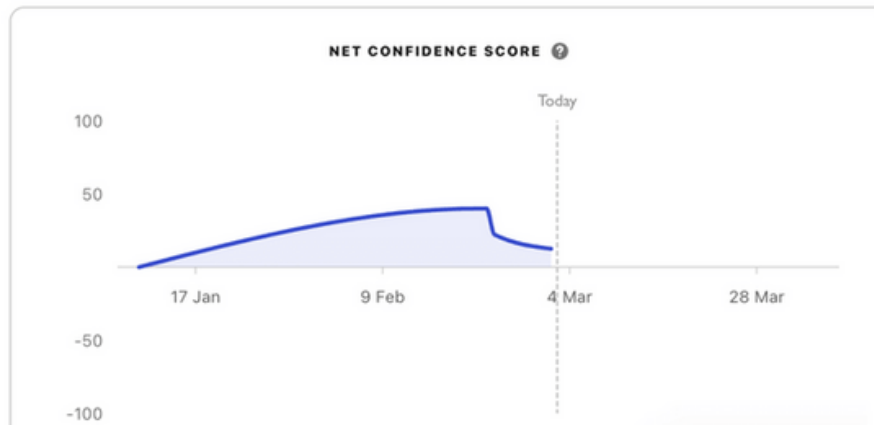
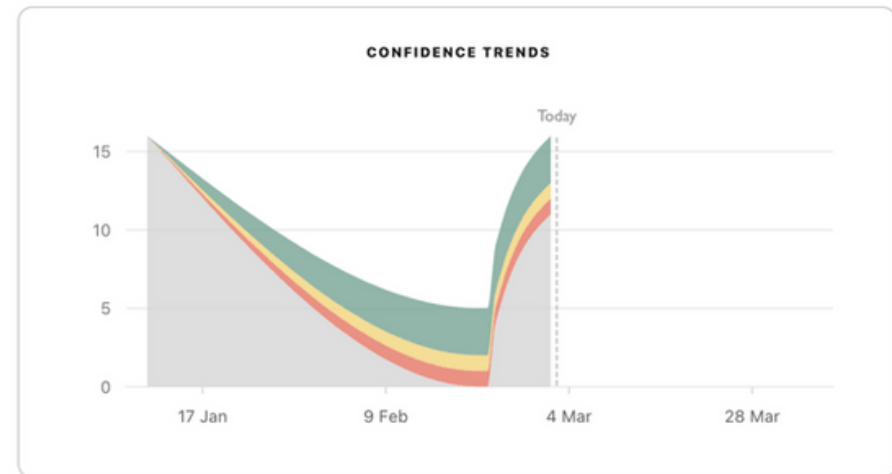
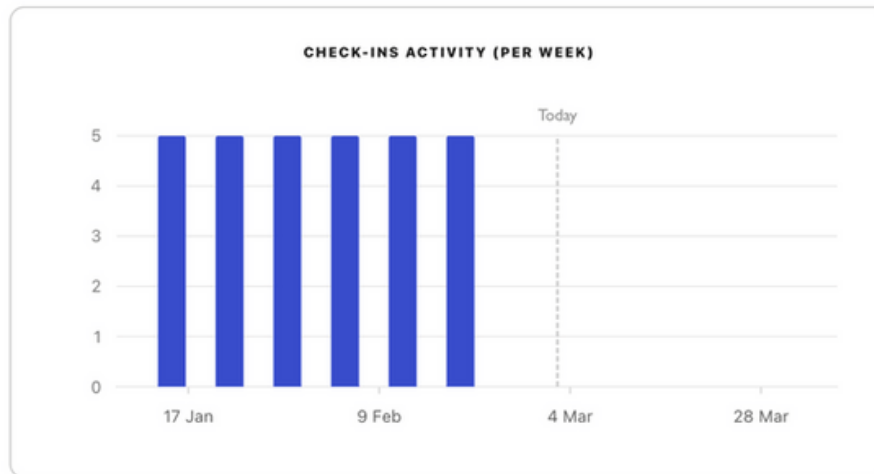


Edit plan

Present




Overview **Tasks** Insights Notes



Dashboards con Widgets

Sten's dashboard BETA

Add Widget



Sten Pittet

🚩 13 🔄 15 NCS 📊 9% 📌 0/8 🍊 5

View user

🏠 Company OKRs 2024 Q1

🕒 7 days left
Timeline

🚩 35%
Overall progress

📌 10/22
Initiatives completed

📊 40 NCS
Net Confidence Score

Marketing risk






We couldn't find any key results.

Integración con Slack/Teams y gestores de tareas

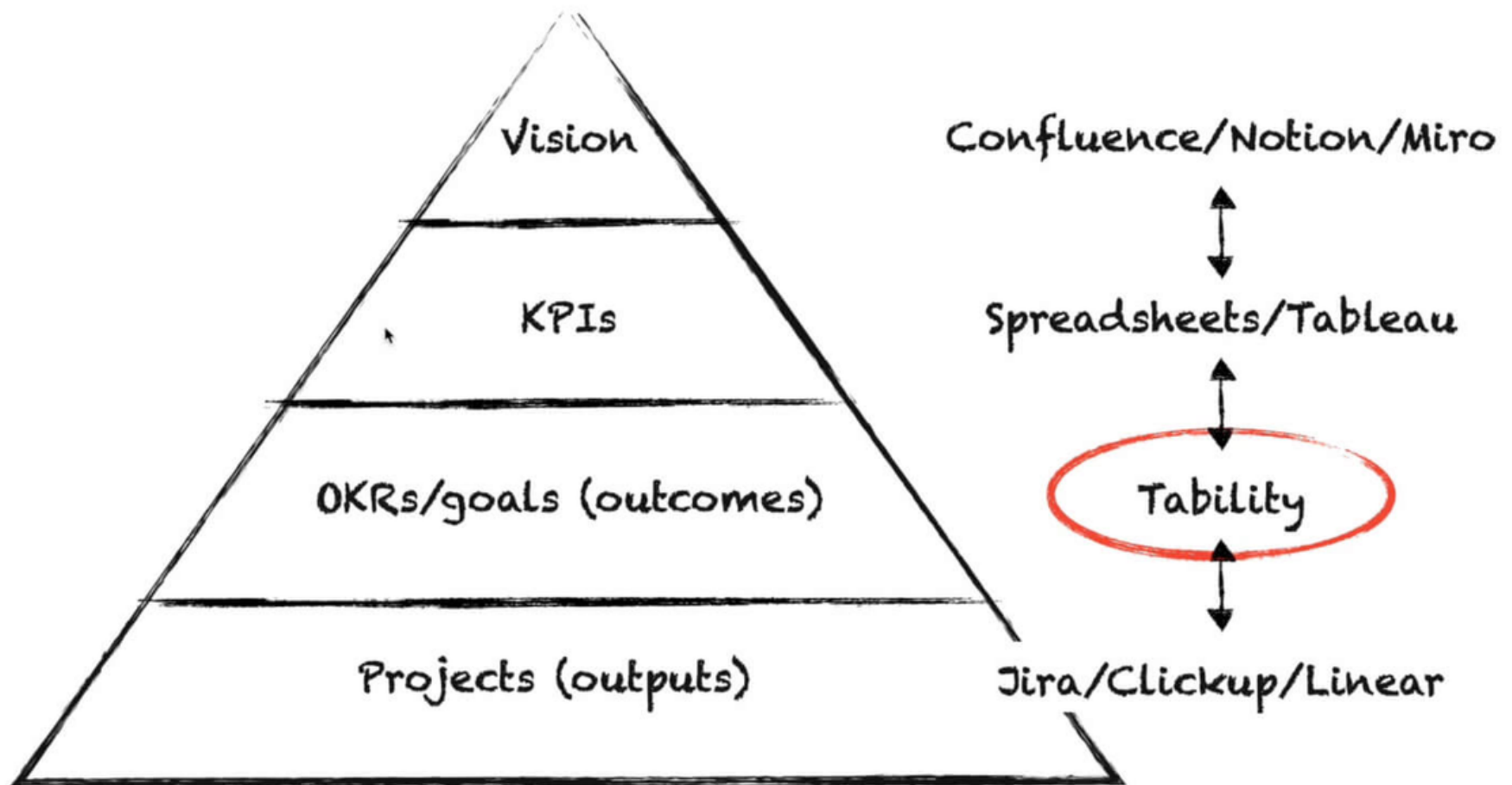
Power up our Product Growth

3X Increase MAUs from 15k to 17.5k 1 PARENT

- Introduce Gamification Elements to Boost User Interaction
- Analyze User Feedback and Implement Top-Requested Features
- Create and Execute Social Media Ad Campaigns to Attract New Users
- TE-547 code splitting
- What can help you achieve this goal?

 <p>Asana</p> <p>Learn more</p>	 <p>ClickUp</p> <p>Learn more</p>	 <p>Jira</p> <p>Learn more</p>
 <p>Shortcut</p> <p>Learn more</p> <p>COMING SOON</p>	 <p>Trello</p> <p>Learn more</p> <p>COMING SOON</p>	

Tability (o alternativa) es la pieza faltante entre la estrategia y las tareas/proyectos



Otros Saas alternativos



1. Perdoo
2. Microsoft Viva Goals (ex Ally.io)
3. Workboard
4. Lattice
5. Weekdone
6. Betterworks
7. Quantive
8. Profit.co
9. Mooncamp



Prueba 14 días (+ 30 días)

Cupón: MMUSUBS

tability

PRECIOS CARACTERÍSTICAS RECURSOS INTEGRACIONES SOLICITAR UNA DEMOSTRACIÓN ACCESO Pruébalo gratis

Establezca mejores objetivos y consiga más.

Todo lo que necesitas para establecer y realizar un seguimiento de tus objetivos. Comience gratis.

Básico

\$4 por asiento/mes

Simplifique la generación de informes y conecte los resultados con los productos,

el mapa estratégico, la planificación de iniciativas, la generación de informes y las funciones para compartir.

Pruébalo gratis

Más

\$5 por asiento/mes

Conecte sus herramientas y aumente los ciclos de retroalimentación

Todo en Basic + API de registros, fuentes de datos, equipos, standups y SAML SSO.

Pruébalo gratis

De primera calidad

\$8 por asiento/mes

Automatice completamente los procesos y alinee a escala

todo en Plus + Cascading Map, sincronización automática de registros, controles de acceso avanzados, registro de auditoría y soporte de primer nivel las 24 horas, los 7 días de la semana.

Pruébalo gratis



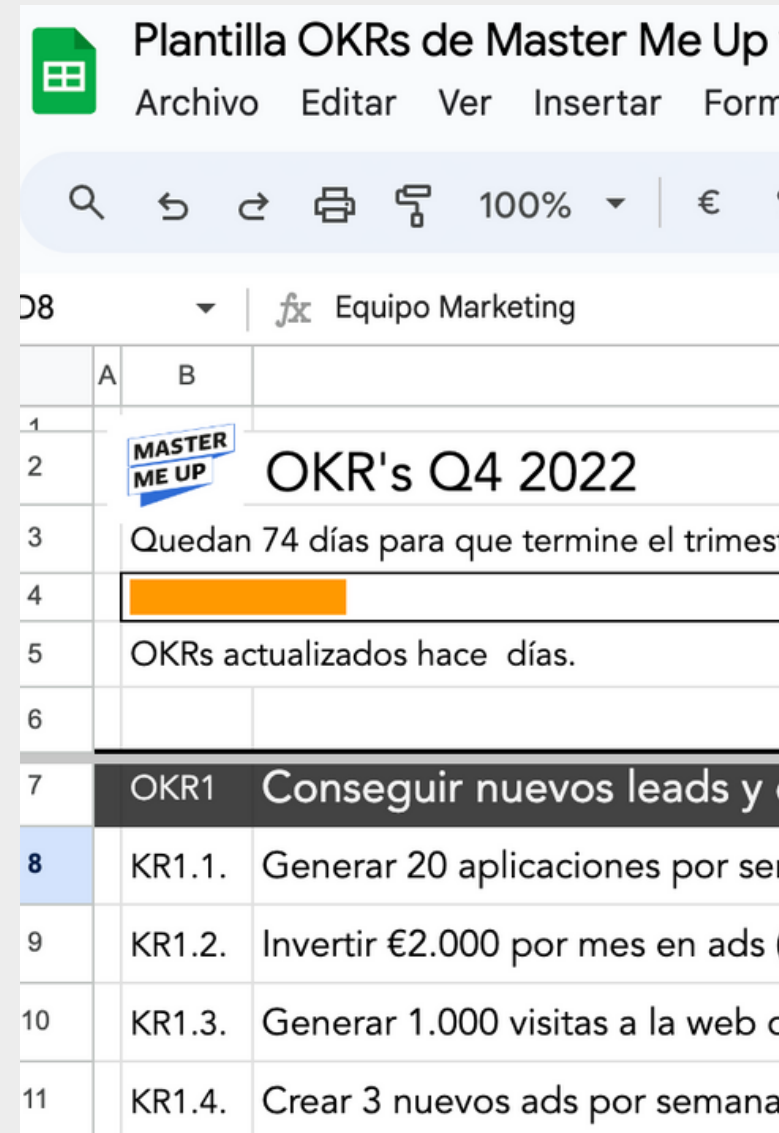
¿Y Excel / Google Sheets?



Desafíos con Excel / GSheets



mastermeup.com/plantilla-okr

- Falta de visibilidad y alineación entre equipos.
- Dificultad para actualizar y dar seguimiento.
- Riesgo de inconsistencias y errores humanos.
- Limitaciones para analizar y reportar progreso.



Plantilla OKRs de Master Me Up
Archivo Editar Ver Insertar Form

Equipo Marketing

	A	B
1		
2		OKR's Q4 2022
3		Quedan 74 días para que termine el trimestre
4		
5		OKRs actualizados hace días.
6		
7	OKR1	Conseguir nuevos leads y
8	KR1.1.	Generar 20 aplicaciones por semana
9	KR1.2.	Invertir €2.000 por mes en ads
10	KR1.3.	Generar 1.000 visitas a la web
11	KR1.4.	Crear 3 nuevos ads por semana

Utiliza Excel o Google Sheets para las primeras pruebas piloto



**La herramienta digital
para gestionar OKRs es
una pieza más del
rompecabezas**



**Lo realmente difícil es
incorporar el mindset, los
rituales y que todos los
equipos logren alinearse y
trabajar por resultados**



**Y que todo esto ocurra sin
perder el foco en el
negocio**



Contar con un mentor externo puede acelerar la implementación y adopción



Workshops

Bootcamp

Accelerator

Blog



Roadmap para operar con OKRs en 6 meses



Si buscas solo entrenamiento y hacer una primera prueba...



Muchas gracias

Q&A

