

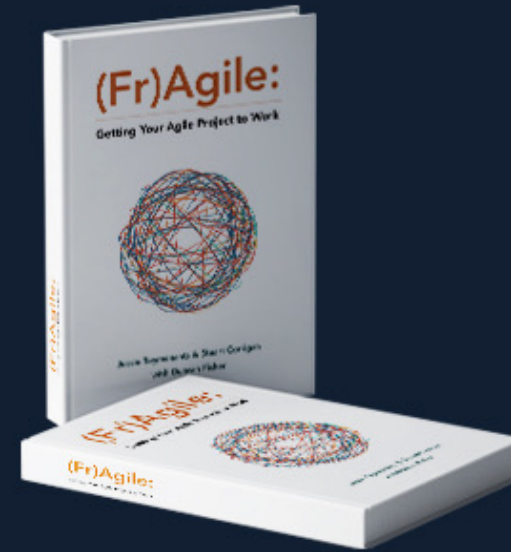


TEACHING LEADERS HOW TO DESIGN & MANAGE WORK SO THAT THEY CAN IMPROVE SERVICE & PROJECT DELIVERY •

DESCARTES
CONSULTING
LTD.



“ *Stuart is
one of the leading
experts in project
management* ”



OKRs **SIMPLIFIED**

➤ **HOSTED BY STUART CORRIGAN**

➤ **[FRAGILEBOOK.CO.UK](https://fragilebook.co.uk)**



WHAT IS AN OKR...

- Objective and Key Results
- Typically, short term objectives (a few months)
- Only a few – two to three
- ...and then it all goes wrong

LEADERSHIP MISTAKES

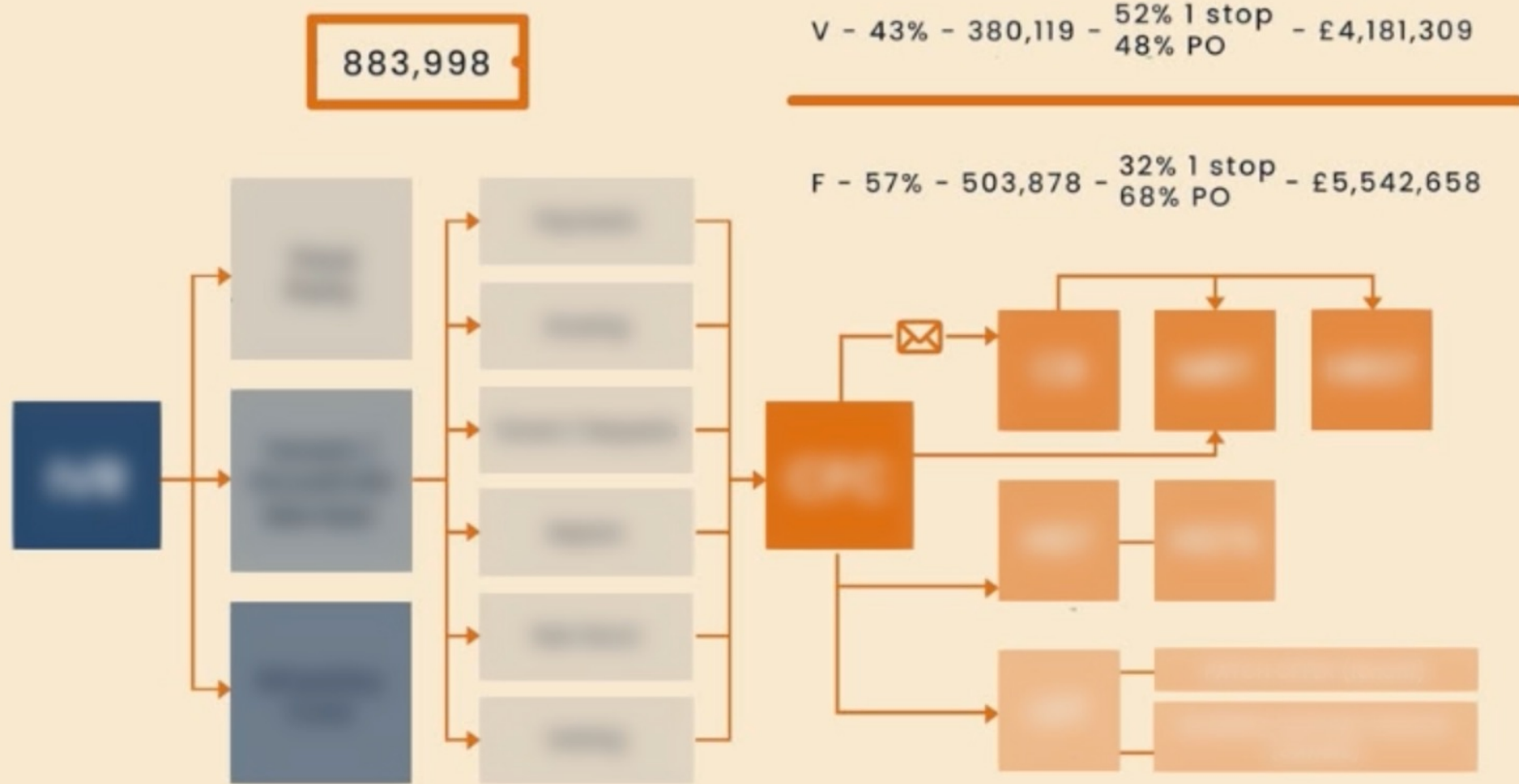
We spoke to twenty-one consultants/leaders involved in setting OKRs, the main thing they told us was...

“OKRs are generally set arbitrarily, without any data to determine if the right objective is set”.

How To Decide On The Right Objectives

**Study The
Operation**

**Study The
Market**



WE HAVE BLURRED CONTENT BECAUSE CLIENT CONFIDENTIALITY IS ALWAYS IMPORTANT TO US

Understand **The Current System**

Objective

**Current
Capability**

Method

OBJECTIVES

*Reduce the
time to close
a case*

*handle
more calls one
stop*

*Increase
the number of
apps kept*

*Matsushita 'we will win, you will lose,
it's because of how you think!'*

Understand **The Current System**

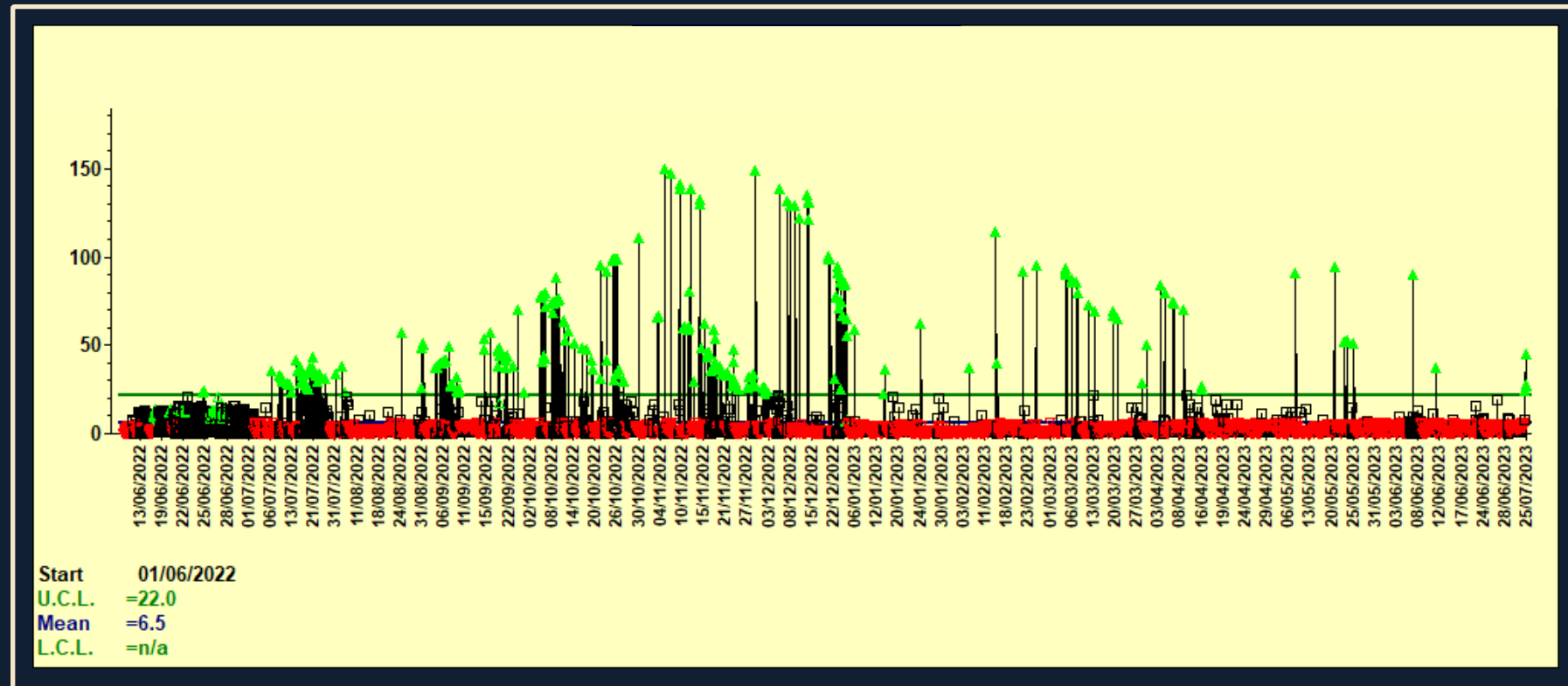
Objective

**Current
Capability**

Method

THE TIME IT TAKES TO CLOSE A CLIENT QUERY TO 99% CONFIDENCE LEVEL

END TO END TIME IS 22 OR LESS



SPECIFY METHOD

- *Team 1 takes the call*
- *Passes to a specialist team*
- *Specialist team try to contact the customer back*
- *48% of the time close the case without passing to the customer*
- *80% of what's left pass to a field team member*
- *They contact the customer again and go to see them*

NEW METHOD



Set up one team



Multiskilled



**Have access to
field officer's diary**



**Appt made then
and there**

NEXT PROBLEM

**All the text days
we should set big
targets**

**So, let's say you
have 20% share in a
market text says
'shoot for 50%'**

**Or let's say it takes
you 60 days to process
a mortgage claim
text says you should
shoot for 30 days**

BHAG goals!

Remember the research

TARGET SETTING

TWO PROBLEMS...

- If the target is set higher than the system is capable of then dysfunctional behavior set in
- Lower people go to sleep
- Motivation is lowered
- People cheat

KEY RESULTS ARE SHORT TERM BASED ON YOUR EXPERIMENT



**Number of calls
handled one stop**



**Number of cases
closed incorrectly**



**Number of clients that
kept their appt**



Time to close a case

What Makes For **Good Measures**

**END TO END
IN THE SYSTEM**

**CAN SEE
VARIATION**

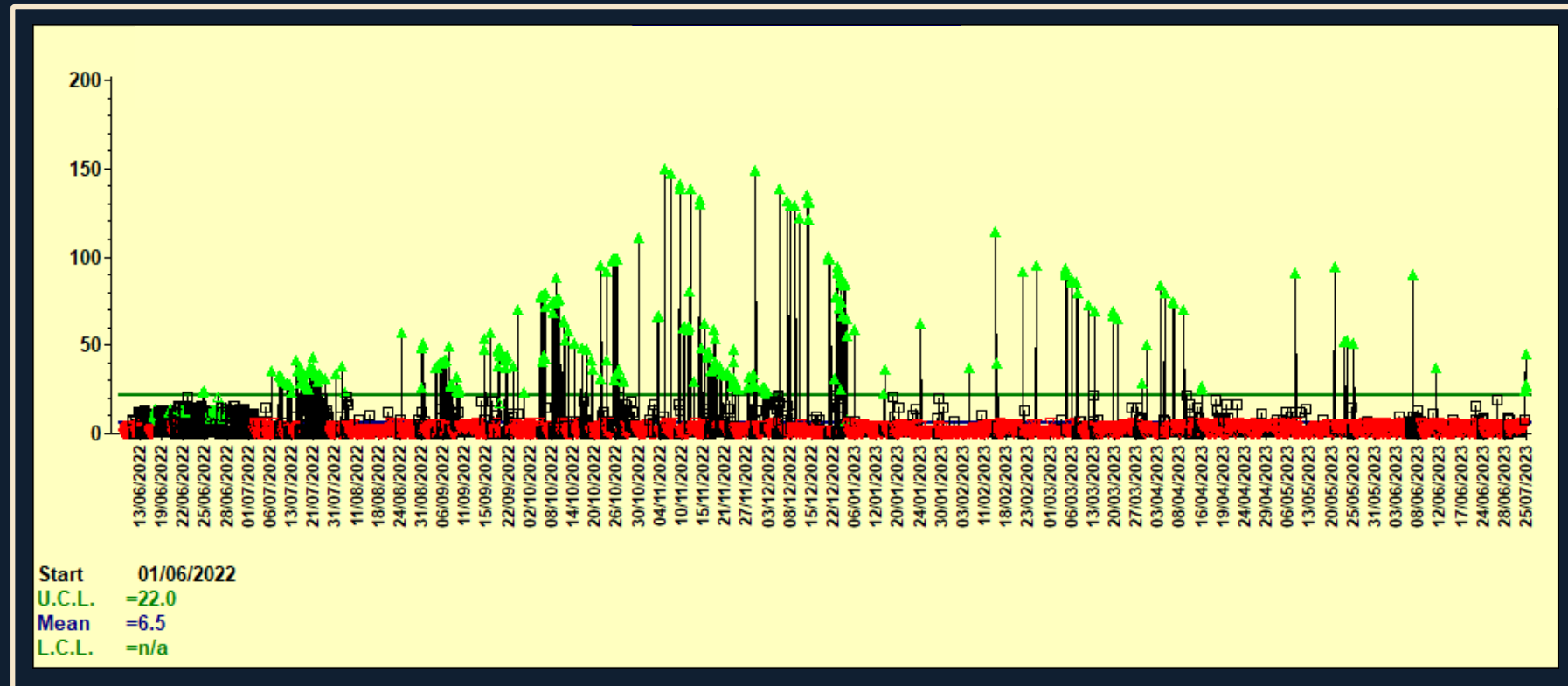
**NOT BASED
ON AVERAGES**

99% CONFIDENCE LEVEL

CAN SEE TRENDS

WHERE WILL YOU SET YOUR TARGET?

END TO END TIME IS 22 OR LESS



PERMANENT & TEMPORARY MEASURES

➤ **Permanent**

➤ **Related to the purpose
of the system**

➤ **Temporary related to the
key objective and
experiment**

➤ **Both are based on actual
outcomes and capability not
based on some grand idea**

ONE OTHER SET OF MEASURES



Measure inputs



**Measure adherence to
you work method**



**Then you can predict
your outcomes**



**'we're going to be late,
great news!'**

SUSTAINING THE NEW WAYS OF WORKING

Process Confirmation

To Do

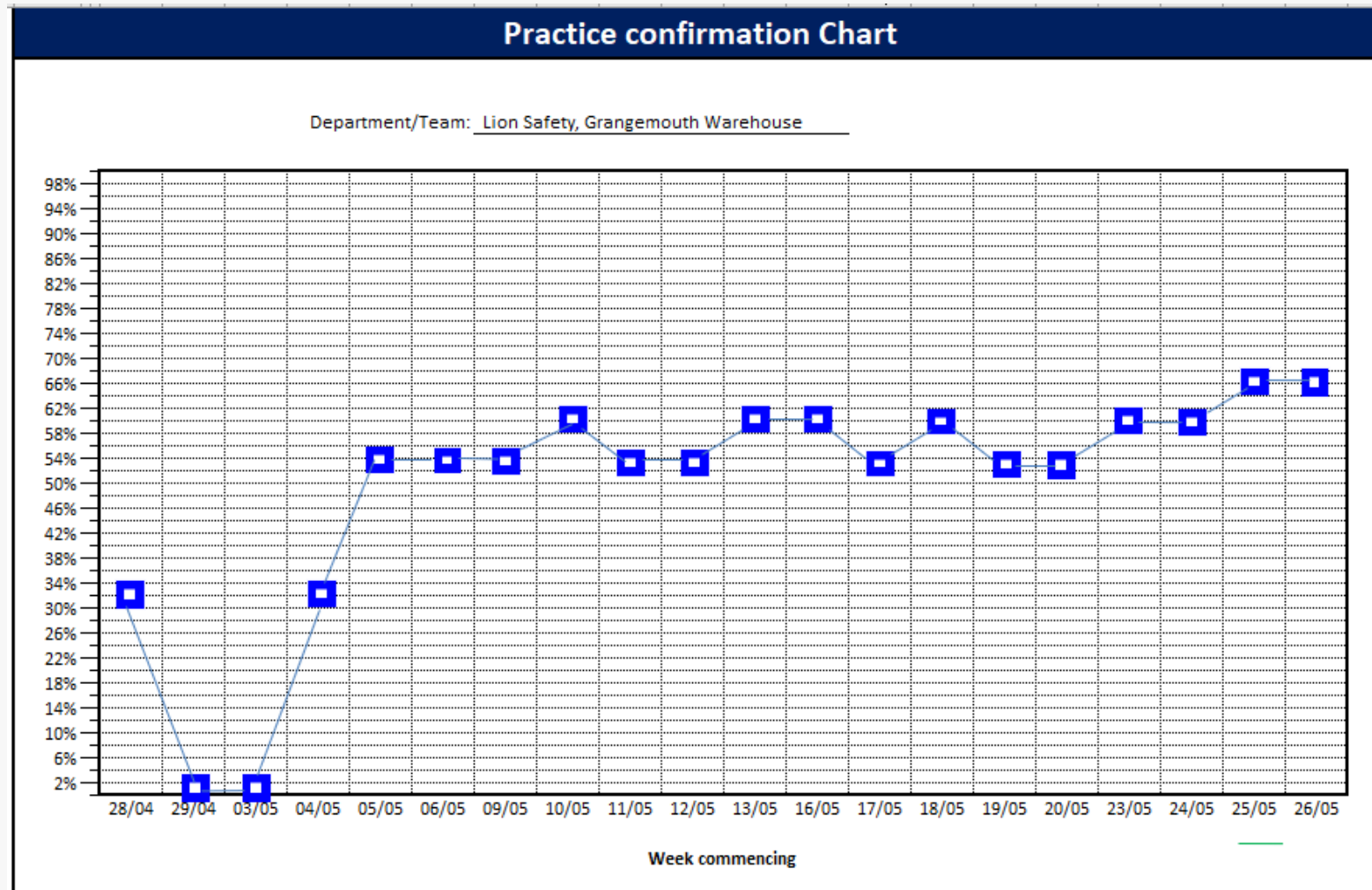
Doing

Done

Blocked - Need Support

	Leonardo	Mar-23	
No.	Check action	1-210%17%24%31%	Comments
1	Ensure that you only work on one task at a time and only start what you can finish.	<div><div></div><div></div><div></div><div></div><div></div></div>	Successfully introduced. Wider community have observed this positive behaviour
2	Ensure that you do not accept unplanned work	<div><div></div><div></div><div></div><div></div><div></div></div>	Partially implemented.
3	Ensure that if you get blocked, stop, and immediately get help.	<div><div></div><div></div><div></div><div></div><div></div></div>	Honest feedback received that work is still being done
4	Ensure you work on the tasks in the order/sequence in which they fall	<div><div></div><div></div><div></div><div></div><div></div></div>	Partially implemented.
5	Ensure you are clear and agree what you have been asked to do – before you start.	<div><div></div><div></div><div></div><div></div><div></div></div>	Partially implemented however, the team feel there remains work to be undertaken on this rule
6	Ensure everyone is aligned and aware of issues to the plan	<div><div></div><div></div><div></div><div></div><div></div></div>	Partially implemented.
7	Ensure that if you are not working on the current WIP you support Full Kitting	<div><div></div><div></div><div></div><div></div><div></div></div>	Partially implemented.
8	Ensure that the Chunk/Epic owner understands that they are responsible for Full Kitting	<div><div></div><div></div><div></div><div></div><div></div></div>	Successfully implemented
9	Ensure you only proceed to the next Chunk/Epic/Task if you are Fully Kitted	<div><div></div><div></div><div></div><div></div><div></div></div>	
10	Ensure that you don't wait until the end of the previous chunk/Epic to start Fully Kitting	<div><div></div><div></div><div></div><div></div><div></div></div>	To be monitored. Feedback is that it may be difficult if a more senior person requests
11	Ensure you are given the time you need to complete a task. If needed ask the Scrum Master/PM for more time to be allocated and learnings captured	<div><div></div><div></div><div></div><div></div><div></div></div>	
12	Ensure the buffer is available/consumed at the latter stages in order to protect the plan	<div><div></div><div></div><div></div><div></div><div></div></div>	Partially implemented by one PCL and another will be sharing/reviewing the slides with their wider team
13	Ensure that the Scrum Master/PM alerts Leadership as soon as there are concerns that the buffer will potentially be consumed and the end date is in jeopardy	<div><div></div><div></div><div></div><div></div><div></div></div>	
14	Ensure you adhere to all the above rules	<div><div></div><div></div><div></div><div></div><div></div></div>	

STEP 1 – PROCESS CONFIRMATION SHEET



**Importantly,
the designated
CI managers
and leaders
observe that the
principles are
being followed**

Thank you. and...



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with me on LinkedIn if you want to
take advantage of our FREE Audit
or OKR Workshop



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