Brainstorming Guide: Quarterly vs. Annual OKR Planning Worksheet

DATE	TEAM

Use the following questions to guide a team discussion during an OKR planning session. By reviewing these ideas and points of discussion, you can come to an informed decision about whether quarterly or annual OKRs will better serve your organization's goals and are best suited to your team's capabilities.

Strategy

- What are our long-term strategic goals? How do these goals break down into shorter, actionable steps?

- Do our objectives require long-term focus, or can they be achieved in shorter cycles? On a scale of 1–10, let's rate the proposed timeline of our objectives (with 1 being the shortest cycle and 10 being the longest).

- How dynamic is our industry and market environment? Do our (and our competitors') goals and priorities change rapidly? On a scale of 1–10, rate our industry (with 1 being the quickest to change and 10 being the slowest).

- What are our business cycles like? Consider any seasonal variations, like cash flow, regulations, and other fluctuations. Are there specific times of the year when planning and review are more feasible?

Resources and Engagement

- How well is the team doing with current goal-setting cycles? What has worked in the past and what has worked less well?

- Do we have the tools and processes in place to implement new cycles?

- Do we have the bandwidth and resources to plan, execute, and review OKRs every quarter? On a scale of 1–10, rate our estimated resources (with 1 being the least capacity for a quarterly cycle and 10 being the highest). Consider the human, administrative, and overhead cost of analyzing data and incorporating feedback.

- What motivates our team? Are they more motivated by short-term wins or long-term goals? On a scale of 1–10, let's rate their preference (with 1 being the greatest responsiveness to short-term wins and 10 being the greatest responsiveness to long-term goals).

- How does the frequency of goal setting impact the team's engagement and productivity? Are they flexible and ready to pivot if their goals change?

- How often does the team need feedback to improve performance?

- Who are our other stakeholders? How often will they require updates or resets?

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