

1

What do we want to impact?

Related metrics and targets
Key Performance Indicators

- For example:
- Revenue
 - Churn Rate
 - Conversion, etc.

2

What are we going to focus on this quarter?

Overarching Quarterly Objectives

Overarching directional statements: what is our organization-wide focus?

1

Fixing issues

If you have a lagging Key Performance Indicator (KPI), which KPI has dropped from target level, where does the problem come from? In other words, what is broken? What do you need to fix?

2

Growth and innovation

If you are doing great in general but you want to grow faster, what is the most impactful improvement area you can go after? Is it new markets or new customer? Or new services that appealing to current customers? Building relationships? Forming partnerships?

3

Team 1

Team Objective

Draft statement: we will focus on [driving this change] to [solve this problem]

Ideation

What could be changed for us to have better results as a team?

What problems are we facing and how do we solve them? What's stopping us?

How do we drive the overarching Objective forward?

Team 2

Team Objective

Draft statement: we will focus on [driving this change] to [solve this problem]

Ideation

What could be changed for us to have better results as a team?

What problems are we facing and how do we solve them? What's stopping us?

How do we drive the overarching Objective forward?

Team 3

Team Objective

Draft statement: we will focus on [driving this change] to [solve this problem]

Ideation

What could be changed for us to have better results as a team?

What problems are we facing and how do we solve them? What's stopping us?

How do we drive the overarching Objective forward?

4

Key Results: IMPACT

- How will we measure change?
- What are the success criteria this quarter?
- What can we impact as a team?
- What can we measure to see a direct connection between our actions and KR progress?

Drafts:

KR 1 _____

KR 2 _____

KR 3 _____

Ideation

Initiatives: TO DO

- What are we going to do to drive the outcomes we want to achieve?
- What needs to get done first? What is our highest bet?
- Who does what?

First priorities:

Ideation

Key Results: IMPACT

- How will we measure change?
- What are the success criteria this quarter?
- What can we impact as a team?
- What can we measure to see a direct connection between our actions and KR progress?

Drafts:

KR 1 _____

KR 2 _____

KR 3 _____

Ideation

Initiatives: TO DO

- What are we going to do to drive the outcomes we want to achieve?
- What needs to get done first? What is our highest bet?
- Who does what?

First priorities:

Ideation

Key Results: IMPACT

- How will we measure change?
- What are the success criteria this quarter?
- What can we impact as a team?
- What can we measure to see a direct connection between our actions and KR progress?

Drafts:

KR 1 _____

KR 2 _____

KR 3 _____

Ideation

Initiatives: TO DO

- What are we going to do to drive the outcomes we want to achieve?
- What needs to get done first? What is our highest bet?
- Who does what?

First priorities:

Ideation

5



1

What do we want to impact?

Related metrics and targets
Key Performance Indicators

Quarterly targets

Customer LTV \$6,000
Sales target: \$ 1 mln

Churn rate 20%

Trial to paid conversion 40%



2

What are we going to focus on this quarter?

Overarching Quarterly Objectives

Overarching directional statements: what is our organization-wide focus?

Improve the clients' first impression of our service

Improve customer lifetime value

Fixing issues
After spending the last 6 months, we realized that our clients are not happy with the first time user onboarding process. They tend to quit the onboarding process soon. What can we do differently?

Growth and innovation
We are at our all-time highest in churn numbers but we need to bring customer engagement in the area. What worked? What didn't? Can we do anything?

Product Team

Team Objective

Draft statement: we will [improve first-time user onboarding experience] to [get users to discover value faster]

Ideation

What could be changed for us to have better results as a team?

What problems are we facing and how do we solve them? What's stopping us?

How do we drive the overarching Objective forward?



Team 2

Team Objective

Draft statement: we will [Improve our presence on relevant review websites] to [nurture leads with high buying intent]

Ideation

What could be changed for us to have better results as a team?

What problems are we facing and how do we solve them? What's stopping us?

How do we drive the overarching Objective forward?

We will explore the websites and forums where decision makers are asking questions and discussing pros and cons of different tools/services.

Our hypothesis is that by growing good reviews and active commenting, we can make our voice heard and showcase our expertise to potential new clients. Plus, we will understand our clients' decision-making process much better.

Team 3

Team Objective

Draft statement: we will [Establish regular communication with customers] to [keep them engaged]

Ideation

What could be changed for us to have better results as a team?

What problems are we facing and how do we solve them? What's stopping us?

How do we drive the overarching Objective forward?

The customers that we have meetings with tend to stay with us for many months so clearly they see value in the meetings

We have no process for follow-up meetings and emails and this is a good improvement area

3

4

5

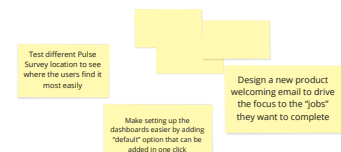
Key Results: IMPACT

- KR 1** Increase the % of HR admins who use the pulse survey feature within 7 days after sign up from 10 to 25%
- KR 2** Increase the % of company leaders who set up a birds eye view dashboard within 7 days after sign up from 2 to 20%
- KR 3** Increase % of users who login 3 times within 10 days after sign-up from 5 to 15%



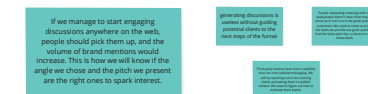
Initiatives: TO DO

- First priorities:**
 - Set up the dashboards to track usage of the prioritized features
 - Watch first-entry user recordings and come up with discoverability experiments



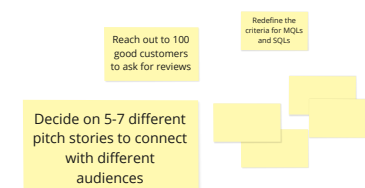
Key Results: IMPACT

- KR 1** Increase the number of positive brand mentions on web from 3000 to 6000 (30-days average)
- KR 2** Increase the number of published reviews from 10 to 50 on Capterra
- KR 3** Achieve 60+ demo requests from discussion forums & groups
- KR 4** Make sure 80% of demo requests are further qualified as good leads



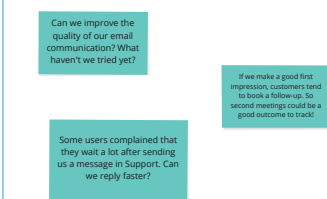
Initiatives: TO DO

- First priorities:**
 - Create a list of potential websites, groups, and forums where we can start discussions
 - Create a new GA report to track conversion on the core pages



Key Results: IMPACT

- KR1:** Increase the # of email responses from 2% to 15%
- KR2:** Reduce the response time in live chats from 6h to 1h
- KR3:** Increase 2nd meetings requests from 10% to 45%



Initiatives: TO DO

- First priorities:**
 - Initiative 1: Watch competitors' webinars to improve our pitch
 - Initiative 2: Take a course on email marketing and launch the newsletter
 - Initiative 3: Test 5 email templates with a small segment to find the best copy

