



Make Your Plan Agile & Fix Your OKR Mess

Fixing 3 Common Issues in Agile Plans

- ◆ The 3 Common Issues with Agile Plans
- ◆ The Strategic Planning Model
- ◆ How to Fix a Disconnected Plan
- ◆ How to Fix a Plan That's Too Tactical
- ◆ How to Fix an Unstructured Plan

Phone

Main: +1 -775-747-7407

Online

Email: hello@onstrategyhq.com

Web: www.OnStrategyHQ.com

 @OnStrategyHQ

 @OnStrategyHQ

 @OnStrategyHQ

 @VirtualStrategist

Introduction

Agile planning and OKRs have undeniably changed the way organizations plan—for good reason: keeping your team aligned and focused on a quarterly cycle has a long list of benefits over the traditional annual planning cycle.

How can it go wrong? And what happens when it does?

We see organizations all the time that were unable to hit the ground running upon completion of their plans. It's not for a lack of effort; there are a few common issues that surface:

1. Team and individual goals are disconnected from the vision and strategic direction of the organization.
2. The plan is too tactical or operational.
3. The plan is unstructured and inconsistent.

In this guide, we'll outline how you can fix each planning challenge without completely re-doing your plan.



[Watch the Video Here](#)

The Agile Planning Model

Agile means we can skip some of the traditional planning elements, right? Wrong!

One common misconception about agile planning and OKRs is that you can skip some of the traditional plan elements and just focus on creating a plan that refreshes every quarter.

We disagree, and here's why: you need to have a clear direction and vision for your goals/OKRs to have focus! Goals without a direction just create silos with your organization pulling in different directions.

We'll be addressing some of the common issues we see in strategic plans using the diagram referenced in this video and displayed on the following page.



[Watch the Video Here](#)

The Agile Strategic Planning Model

Mission: Statement of Purpose & Impact

Reason for being and why.

Current State

- Past Performance
- SWOT, Diagnosis
- Competitive Advantages

Business Strategy

- Target Segments, Value Proposition
- Where to Play, How to Win
- Guiding Principles

Future State

- Big, Bold Vision
- Future Outcomes
- Business Health Metrics

3-Year Roadmap

- Strategic Priorities & Milestone Roadmap
- Company-wide Goals/OKRs
- Team Goals/OKRs
- Individual Goals/OKRs

Management System

Management Cycle

Weekly | Monthly | Quarterly

Communication

Staff | Exec Mtgs. | Board

Results Reporting

Data | Reporting | Software

Team Culture

Values | Behaviors | Ways of Working

3 Common Planning Traps and How to Fix Them

We see three common traps that teams fall into as they build their agile plans. If you find your plan has any of these flaws, don't fret! With some effort, each can be addressed by using different elements from our strategic planning model.

The three common agile planning pitfalls and how to mitigate them:

01 **Goals/OKRs are Disconnected from the Vision & Direction**

Any strategic plan—OKRs, balanced scorecard, or otherwise—are built to help achieve a desired future state. It's the whole purpose of planning.

No matter the structure, a great plan has a set of long-term strategic goals that span about three to five years. We usually recommend that a plan has at least three of these strategic goals, but no more than six.

You likely set your (3- or 5-year) strategic direction then had your team create goals or OKRs to support that direction. But an agile plan **really needs annual company-wide priorities and targets** to be successful.

If your team’s goals or OKRs are disconnected from your direction, it’s likely because your plan is missing annual organization-wide priorities.



Creating an agile plan with quarterly priorities from the bottom up is awesome, but it gets messy without a bridge between your direction and what you need to get done this year. Plans missing the annual company-wide focus create lots of goals that pull in different directions.

Fix Disconnected Goals and OKRs

Step 1: Create Annual Priorities

To fix your team’s disconnected goals and OKRs, you’ll need to revisit your plan and set **three to five annual objectives or priorities with measures**. You can check out our guide on [strategic priorities/objectives here](#).

Step 2: Create Annual Measures/KPIs

With your annual priorities defined, your planning team should create annual measures of success or identify KPIs. These outcomes should support your long-term direction. Check out [the guide on creating Key Performance Indicators with 100 examples](#).

Step 3: Team Revises and Re-aligns Goals/OKRs

Instruct your team to revise and re-align their goals/OKRs to your annual priorities and long-term direction.

 **Tip**

You don't have to delete everything and start over. Have your team revise what they have, create additional goals and actions, and delete anything else that doesn't align to your annual priorities or direction.

02 The Plan Is Too Tactical or Operational

Sometimes after a planning effort, you're left with a plan that's too tactical or operational. If your plan feels like a to-do list rather than a set of strategic priorities or shifts, you know you don't have a strategic plan.

Instead of allowing your strategic plan to be a set of daily to-dos, **consider revisiting your SWOT analysis to look at what you need to strengthen, fix, or pursue to achieve your desired future state.**



Tip

Strategic plans create the future. They don't outline your day-to-day. Make sure your plan reflects what shift it needs to take to achieve your desired future state.

Make Your Plan More Strategic

Step 1: Revisit Your SWOT Analysis

If you didn't complete your SWOT analysis or it's out-of-date, we recommend completing a new one. Need to complete a SWOT? [Get the free guide to complete yours here.](#)



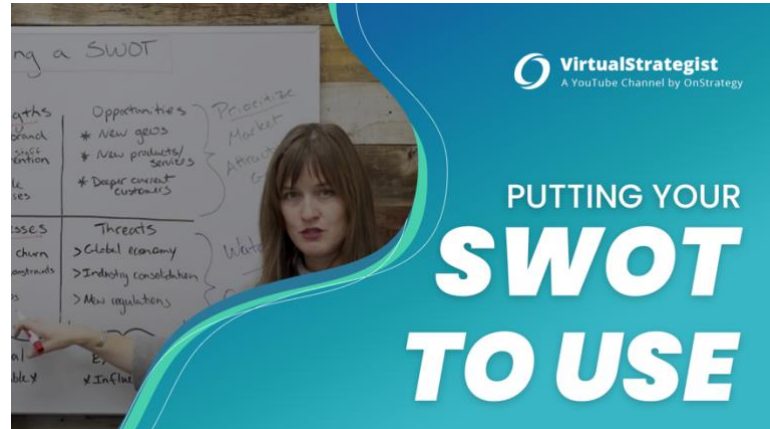
[Watch the Video Here](#)

Step 2: Put Your SWOT to Work!

In your SWOT, there are many ideas to improve your position, weaknesses you might fix, opportunities to tackle, threats to mitigate, or strengths to leverage. The purpose of a SWOT is to help create priorities and goals based on your current position! Put that SWOT to work!

Tip

Not sure how to prioritize all of the opportunities in your SWOT? [Check out this guide on using the Fit/Attractiveness matrix](#) to help prioritize your core growth opportunities.



Watch the Video Here

03 The Plan & Goals are Unstructured

If you're looking at your plan and seeing huge inconsistencies in the structure and quality of your plan across different functional teams, it's likely because your team was unclear how to set great goals and results.

The simplest way to fix an unstructured plan is to set very clear standards and expectations about how your team creates their goals and actions.

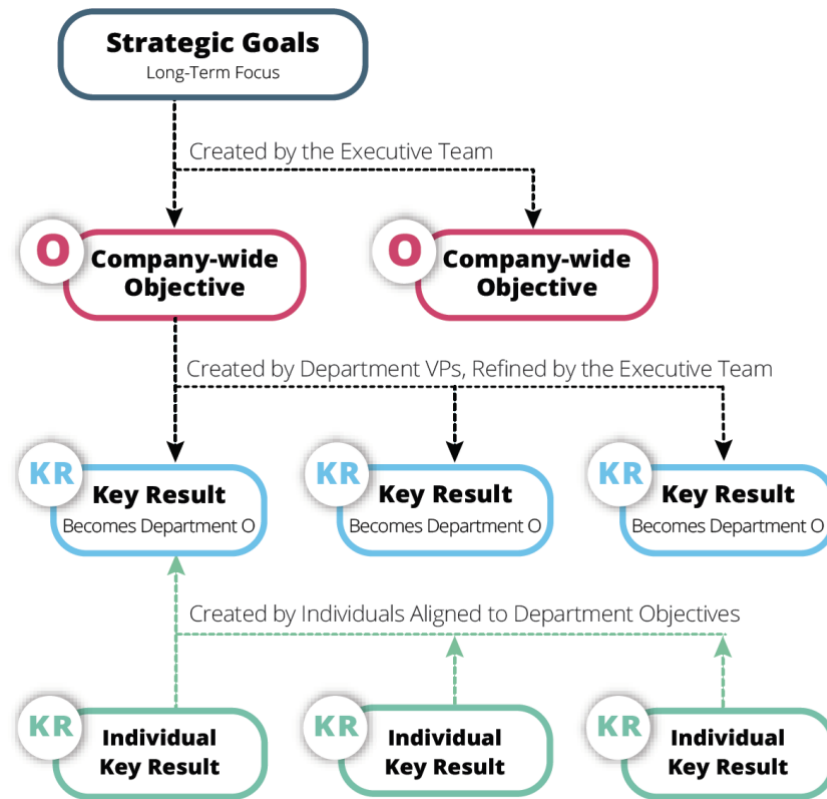
If you need guidance and a worksheet to help your team [create great OKRs/goals, check out our free guide here.](#)



Extra Tip for Plans Struggling with Structure

Sometimes organization's struggle with too many levels in a plan. That's ok! But you shouldn't just live with the chaos because you're trying to right-fit your plan into a perfect structure.

Instead, simplify your plan structure by using the model on the following page.



Strategic Goals/Objectives

These are your long-term (3-5 year) goals.

Annual Company-wide Objectives

These are your annual company-wide goals that state what you need to achieve and where you need to focus.

Key Results/Department Objectives

These are owned by department heads and reflect how functional teams support the annual company-wide goal.

Individual Key Results

Created by each individual, Key Results define the quarterly focus for those aligned to the department objective.

Why it Works

This is a simple plan structure and creates shared department and individual key results that support the organization's annual goals. You can find more helpful tips on this plan structure in our [OKR Essentials Cheat Sheet!](#)



We'd love to help build your agile plan with OKRs.
Let's get started today!

Contact us at Hello@OnStrategyHQ.com

Phone

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