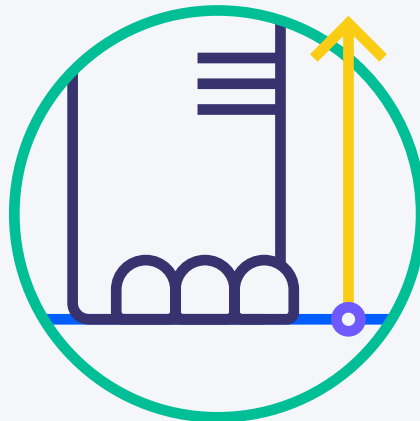**SCALED OKRs®**

BUYER'S GUIDE

Reach Goals at Warp Speed:

Finding the Right OKR Software for Your Enterprise

Introduction

Let's state the obvious: there's a giant elephant in the room.

Do we want you (and everyone) to buy our OKR software? You bet we do. We'd be lying if we claimed otherwise.

But that same knowledge has inspired us to make this guide as objectively valuable as possible because we know that any serious reader will be justifiably skeptical of any "guide" written by a software vendor. Good. You should be.

Every one of the requirements in this guide has a justification, giving you a reason why it is important, so that you can assess the logic for yourself.

With the formalities out of the way, we'll say this...

The opinions in this guide are based on experience and domain expertise. As the provider of enterprise OKR software to CNN, Adobe, **Societe Generale**, Red Hat, TomTom and hundreds of others, we have learned a thing or two about successful enterprise OKR software deployments. With more than 100,000 users worldwide, we also have a good understanding as to what it takes to make OKRs work at scale.

This guide presents more than 5 years of experience in helping companies align strategy with execution through OKRs at scale, while avoiding the numerous potential pitfalls.

If you believe in the transformational potential of OKRs as much as we do, this guide is for you. If, by any chance, you are new to OKRs and want to learn more before continuing, check out **The Ultimate OKRs Playbook**.

We look forward to your honest feedback.

Respectfully,
The Gtmhub team

Your Proposed OKR for this Guide

Objective:
Make a well-informed enterprise OKR Software purchase

Key Result 1:
Research and select at least 3 enterprise software vendors to evaluate

Key Result 2:
Evaluate all OKR software using the assessment criteria in this guide

Key Result 3:
Select an enterprise OKR solution that fully maps to our business needs, while staying within budget

Task 1:
Get executive sponsorship and buy-in

Task 2:
Write the RFIs/RFPs

Task 3:
Schedule and attend demos

Guiding Principles – the Right Enterprise OKR Software Platform should:

✓ Support the way you do OKRs

✓ Be easy for every person to use and get what they need out of it

✓ Help everyone see their contribution and goal commitments in relation to others

✓ Make it effortless to facilitate the process across the whole organization

✓ Provide flexible deployment options

✓ Safeguard the business-sensitive data you enter into it

✓ Have a team behind it that provides continuous support

With this Guide You Will:

✓ Learn the key factors to keep in mind when procuring an OKR software

✓ Save countless hours otherwise spent researching

✓ Avoid costly mistakes

✓ Be prepared to critically assess product demos

✓ Determine what questions to ask Sales teams

✓ Prepare yourself for writing an RFI/RFP

✓ Be one step closer to selecting a partner for your transformative OKR journey

Finding the Right OKR Software for Your Business   4

"

The function of good software is to make the complex appear to be simple.

Grady Booch
CHIEF SCIENTIST FOR SOFTWARE ENGINEERING AT IBM

SCALED OKRs®

Table of Contents

Enterprise-ready OKRs – how to make OKRs a Success Factor for your Organization

The following sections are comprised of the CRITICAL questions you should ask about the OKR software and its capabilities.

The Hard Facts About the OKR Software

The Suit and Tie of OKRs: Management

An enterprise OKR platform should be easy-to-use, intuitive, flexible, and work at scale. It should support the OKR framework within its design and features, so that the OKR process runs smoothly, and everyone stays aligned and informed without constant oversight.

⚠️

For full interactive experience — open the guide in Chrome, MS Edge or download it and view with Acrobat Reader

Write the names of the vendors you'd like to compare here

FEATURE	WHY IS THIS IMPORTANT?	A	B	C
1. **Does the software support unlimited OKR levels to support your unique organizational capabilities?**	Depending on the size of your organization, you will need different levels of OKRs (e.g. company, department, team, individual, etc.) to build a healthy OKRs environment.	☐	☐	☐
2. **Can the software align multi-year, annual, half-yearly or quarterly OKRs?**	You need to be able to calibrate the speed of execution for different levels in the organization. Senior executives can chart longer-term strategic goals while teams and individuals closer to the day-to-day challenges work towards tactical ones.	☐	☐	☐
3. **Does the software support a full visualization of alignment?**	Full visual OKR hierarchy with flexible grouping (by time period, owner, type, status, etc.) lets you boost alignment and see the big picture.	☐	☐	☐
4. **Does the software come with task management features?**	Tasks are a fundamental component of your OKRs. Objectives and Key Results represent the goals individuals and teams set for themselves and the concrete plans to accomplish them. Tasks, on the other hand, emblematize the efforts one needs to make to succeed.	☐	☐	☐
5. **Does the software offer KPI tracking?**	KPIs and OKRs go hand-in-hand - KPIs provide you with real-time data available for analysis, more informed decision-making and proof that you're steering the company in the right direction.	☐	☐	☐
6. **Does the software provide flexibility and customization features?**	While the basic methodology is always more or less the same, the size, stage, industry, and culture of different organizations require the software to adapt to meet unique OKR process needs.	☐	☐	☐
7. **Does the software enable team collaboration?**	Features like comments, badges, mentions, emojis, etc. enhance communication, boost workplace happiness and increase productivity.	☐	☐	☐
8. **Does the software have a full-featured mobile app?**	Your smartphone can be key to achieving your goals. An OKR mobile app saves you tons of time as you can easily update your OKRs and tasks, monitor progress and communicate with others on the go.	☐	☐	☐
9. **Does the software offer OKR templates?**	Using pre-configured OKRs will help you quick-start your OKRs deployment and avoid losing precious time researching how to come up with proper OKRs.	☐	☐	☐
10. **Are there built-in best practices tooltips that guide you to crafting great OKRs?**	Following tried and tested OKR principles greatly increases your chances of successful OKRs adoption.	☐	☐	☐

Checkmarks are counted automatically and their sum displayed on the See the Big Picture page (p.16)

Section Total | 0 | 0 | 0

The Best Work is Hands-off Work:
Automation & Data Integrations

Whatever process you design, someone will forget about it, intentionally skip it, and or even try to quietly sabotage it. OKRs are no different. That's why the OKR process must be run based on the two key premises:

1. **Data**
understand what's happening to make solid decisions

2. **Automation**
simplify human activities to achieve more with less effort

The OKR software should automatically provide you with data-fueled metrics to complement your strategic priorities and automate repetitive tasks to boost productivity. Automation and data integrations in the OKR software propel businesses to move forward and never lose momentum with their goals.

FEATURE	WHY IS THIS IMPORTANT?	A	B	C
11. **Does the OKR platform automate repetitive tasks?**	Automation doesn't just excise repetitive tasks and free up time, but also improves reliability and removes human error from the equation.	☐	☐	☐
12. **Does the platform integrate with other systems to automate OKRs, tasks and KPIs updates?**	Automating your OKRs, tasks and KPIs to pull out real-time data from other business systems empowers you to reduce time and resources to arrive at critical insights.	☐	☐	☐
13. **Does the OKR platform offer more than 100 out-of-the-box data source integrations?**	The more connectors an OKR platform has, the higher the chance to integrate with your mission-critical business systems and easily track goal progress.	☐	☐	☐
14. **Does your OKR software provide API for integration with existing business applications and workflows?**	To extend and integrate your OKR software with your business systems the vendor needs to provide a fully exposed API.	☐	☐	☐
15. **Can the OKR platform rapidly add new integrations to meet your growing business needs?**	In case your mission-critical business systems are not on the list of available integrations, you need to make sure that the OKR software has the ability to add new custom ones.	☐	☐	☐
Section Total		0	0	0

Study the Past to Predict the Future:
Reporting + Analytics

The OKR software should provide a high-level overview of your OKR performance and show you how effective your organization is at running the OKR process. OKR-related reports illuminate where and what issues have occurred and help you identify performance problems or trends that need further investigation.

FEATURE	WHY IS THIS IMPORTANT?	A	B	C
16. Does the software offer real-time progress reports?	OKR reports reveal how your strategic plan is going and give you a more in-depth look not only into your team's performance, but also the overall business health.	☐	☐	☐
17. Can you customize your reports?	Customizing your reports can make them more informative and contextual for your business,vincrease clarity and promote transparency. When you've chosen the dimensions that make the most sense for your business, you're able to reach the best possible OKRs decisions.	☐	☐	☐
18. Can you export data and download reports as CSV or PDF files?	Downloading OKR reports enables you to easily share data with others and safely store all your weekly, monthly, or quarterly OKRs accomplishments offline.	☐	☐	☐
Section Total		0	0	0

Nobody Ever Regrets Protecting Themselves: Enterprise-grade Security

Holding the Gates:
User Management and Authentication

The OKR software should provide a high-level overview of your OKR performance and show you how effective your organization is at running the OKR process. OKR-related reports illuminate where and what issues have occurred and help you identify performance problems or trends that need further investigation.

ENTERPRISE-GRADE SECURITY	WHY IS THIS IMPORTANT?	A	B	C
19. Does the OKR platform support Single Sign-On (SSO)?	SSO reduces the number of attack surfaces and improves enterprise security because users only log in once each day and only use one set of credentials. Using SSO is safer than passing around passwords.	☐	☐	☐
20. Does the OKR software support the most popular SSO integrations?	You should have a wide choice of identity management tools to log into your OKR software with SSO credentials to best suit your needs.	☐	☐	☐
21. Does the OKR software offer stronger means of authentication than login & password (e.g., one-time passwords, SMS, two-factor authentication, etc.)?	Adding an additional layer of security makes it harder for an attacker to access your data.	☐	☐	☐
22. Does the OKR software support Account Lockout?	You should choose an OKR software that automatically locks user accounts in case of consecutive unsuccessful logon attempts. This slows down password-guessing attacks and compensates for fragile passwords.	☐	☐	☐
Section Total		0	0	0

Making Oversight Easy:
User Management and Profiles

The OKR software should give you a single point of maintenance to securely manage digital identities and user access to your OKR-related data within your organization. Proper User Management & Profiles eliminate security breaches by minimizing the impact of human error, prevent unauthorized access to sensitive information and allow your security teams to detect risky identity behavior.

ENTERPRISE-GRADE SECURITY	WHY IS THIS IMPORTANT?	A	B	C
23. Does the software offer an effective User Account Management module?	Users should be provisioned, reorganized, edited, deprovisioned in bulk to ensure the right people easily have the right access to the organization's mission-critical systems at the right time.	☐	☐	☐
24. Can the OKR software be integrated with external enterprise provisioning/deprovisioning tools?	Delegating the provisioning/deprovisioning process to an external identity management tool improves security as user management and permissions are managed in one place and inappropriate data access to former employees' accounts is prevented.	☐	☐	☐
25. Does the OKR software allow for disabling user accounts without deleting account information and history?	Proper disabling of user accounts doesn't leave former employees' accounts vulnerable to attack by deactivating profiles in a timely fashion, without losing precious information.	☐	☐	☐
	Section Total	0	0	0

Tiering Responsibilities and Control:
Role-based Access Control (RBAC)

The OKR software should give you a single point of maintenance to securely manage digital identities and user access to your OKR-related data within your organization. Proper User Management & Profiles eliminate security breaches by minimizing the impact of human error, prevent unauthorized access to sensitive information and allow your security teams to detect risky identity behavior.

ENTERPRISE-GRADE SECURITY	WHY IS THIS IMPORTANT?	A	B	C
26. Does the OKR software use Role-Based Access Control?	The OKR software should come with a set of predefined system roles based on several factors, including authorization, responsibilities, and job competency.	☐	☐	☐
27. Does the OKR software track the change history of user authorizations?	You should be able to obtain such information for review and audit purposes.	☐	☐	☐
	Section Total	0	0	0

Under Watchful Eyes: Audit Logs

Since it's challenging and time-consuming to keep track of every user activity, Audit logs do it for you – they register every action that users do in the OKR software. Audit logs help companies monitor data, review account activity if and when incidents occur or keep track of suspicious activity.

ENTERPRISE-GRADE SECURITY	WHY IS THIS IMPORTANT?	A	B	C
28. Does the OKR software offer Audit logs and trails?	Any activity (like OKR updates) and access to your content should be recorded by the OKR software. This ensures users follow all documented protocols and assists with detecting fraud.	☐	☐	☐
29. Does the OKR software generate pre-defined audit reports?	These reports let you save these records indefinitely and provide historical evidence for analysis and security purposes.	☐	☐	☐
	Section Total	0	0	0

The Insurance Policy for Your Enterprise: Data Security & Compliance

The OKR software holds the most sensitive strategic, tactical, and operational information – data security is of utmost importance. The best way to be sure of the level of security a software vendor provides is to evaluate its security posture and look for rigorous third-party audit processes and certifications.

ENTERPRISE-GRADE SECURITY	WHY IS THIS IMPORTANT?	A	B	C
30. Does the OKR software encrypt the data contained in the database?	Encryption is a crucial security defense through which data is encoded and remains unreachable or hidden from unauthorized users. It protects data confidentiality and enhances security of communication.	☐	☐	☐
31. Does the OKR software offer protection of client-server exchanges and data transfers to external and backend systems?	When data passes through the Internet before reaching its destination, you need to make sure that the software vendor provides data traffic protection and takes preventative action against possible attacks.	☐	☐	☐
32. Have the security controls of the OKR software been audited by a third-party auditor for security?	The assessment of the OKR software vendor's policies, procedures and infrastructure by a 3rd party carrying out a penetration test speaks of dedication to ever-evolving security and privacy best practices.	☐	☐	☐
33. Is the OKR software SOC2 Type II compliant?	SOC 2 Type II is the industry's highest and most important security classification for software platforms assessing security controls that are relevant to its operations and compliance.	☐	☐	☐
34. Is the OKR software GDPR compliant?	The vendor's GDPR compliance means that the protection of personal data and privacy of EU citizens is ensured. It's critical that your OKR software meets your data residency requirements to ensure compliance with data protection laws.	☐	☐	☐
	Section Total	0	0	0

A Great House Starts with a Solid Foundation: Infrastructure

Only robust IT infrastructure can handle complexity, adapt quickly to new environments, and ensure business continuity.

ENTERPRISE-GRADE SECURITY	WHY IS THIS IMPORTANT?	A	B	C
35. Does the software vendor have data centers in more than one location?	Multiple data centers ensure operational flexibility and data protection in the event of unexpected downtime.	☐	☐	☐
36. Are the OKR software's data centers compliant with the most rigorous security standards like ISO (27001 & 22301) and SOC (1 & 2)?	Compliance with such important security standards prove the software vendor's commitment to the security of the information it controls and processes, including all client information.	☐	☐	☐
	Section Total	0	0	0

OKR Deployment Shouldn't Be Difficult: Implementation & Support

Accommodation Done Right: Deployment Options

Deployment refers to all hosting requirements and procedures that make the software available to end-users. An enterprise-ready OKR platform should offer deployment models in line with its varying clients' cloud strategy, compliance frameworks and OKR platform requirements.

FEATURE	WHY IS THIS IMPORTANT?	A	B	C
37. Does the OKR software support multi-tenant cloud architecture?	Multi-tenancy is the SaaS (Software as a Service) standard in which the application is fully managed by the OKR software vendor. It allows for a highly scalable, highly efficient deployment, reducing the need for you to manage infrastructure and handle updates and maintenance.	☐	☐	☐
38. Does the OKR software support single-tenant cloud architecture?	Single tenancy offers you their own independent database and instance of the software. This is an advantage in highly regulated industries, where handling of highly sensitive data or high levels of network customization and storage infrastructure are needed.	☐	☐	☐
39. Can the OKR software be deployed on-premise?	The reasons to require on-premise deployment can differ, but broadly include regulatory compliance, security, and privacy. The OKR Software needs to be fully portable and deployable to your own infrastructure.	☐	☐	☐
40. Can the OKR software be deployed on a private cloud?	A private cloud can be located at your enterprise's own datacenter, or it can be hosted by a third-party cloud provider. Hosting an OKR software on your private cloud can address specific IT requirements, similar to on-premise deployment, but offer faster scalability.	☐	☐	☐
	Section Total	0	0	0

Making Good Support, Great: SLA & Support

Stellar support and SLA commitments can turn an overall great OKR software into the right one for a modern enterprise. They can de-risk performance concerns for OKR buyers and strengthen the relationship between an OKR software vendor and the buying enterprise.

FEATURE	WHY IS THIS IMPORTANT?	A	B	C
41. Does the OKR software offer account-level change management?	Special users should be able to enable or disable features for individual users depending on policy changes or other changes in access rights or requirements.	☐	☐	☐
42. Does the OKR software offer at least 99.95% SLA uptime?	This is a standard uptime guarantee requirement for high-availability software, equating to 5 mins of possible downtime per week.	☐	☐	☐
43. Does the OKR software offer availability status metrics & historical records?	In the spirit of transparency, high-availability software vendors provide real-time uptime metrics as well as historical availability, allowing for comparison of availability with SLA.	☐	☐	☐
Section Total		0	0	0

We're All in This Together: Partnership Support

Providing a great OKR software is often only one part of the success equation. OKRs are deployed in the enterprise's business orchestration journey at different times, and this means different context and challenges. That's why highly experienced external partners can be an essential element of the enterprise's OKR success – from the strategic & conceptual stages to OKR integration and ongoing coaching & support.

FEATURE	WHY IS THIS IMPORTANT?	A	B	C
44. Does the OKR vendor offer strategic support from prominent external partners?	A strategic partner helps with clarity and direction when an enterprise has not yet defined when, where, and how to adopt OKRs or with course correction later. Prominent external consultants with a proven track record make all the difference in strategic decisions and bring out the best of OKRs.	☐	☐	☐
45. Does the OKR vendor offer implementation support from prominent external partners?	While the OKR software vendor covers the technical implementation of OKRs, there are other aspects of a successful adoption. An external implementation partner brings experience and know-how in the human aspects of OKR deployment, reinforces clarity in governance and lends a helping hand in change management on the end-user level.	☐	☐	☐
46. Does the OKR vendor offer ongoing coaching support from prominent external partners?	Even after a successful rollout, your OKR journey continues on a path to constant improvement and additional scaling. External coaching partners provide ongoing support in ironing out the OKR rituals, adopting best practices and getting the best out of their chosen OKR software.	☐	☐	☐
Section Total		0	0	0

The Team for Your Team: Customer Success

A Customer Success team is dedicated to supporting successful deployment and ongoing usage of the OKR software platform, as well as giving advice on effective OKR implementation practices. The main purpose of the CS team is to make sure you are utilizing the OKR software in the best way depending on context and be your internal advocate, communicating your feedback and trying to solve your issues in a timely manner.

FEATURE	WHY IS THIS IMPORTANT?	A	B	C
47. **Does the OKR software vendor have a Customer Success (CS) team?**	The CS team can assist you with the organizational cultural shift you'll be undergoing, help you achieve your goals and provide you with useful resources and dedicated support.	☐	☐	☐
48. **Would you have a dedicated Customer Success Manager (CSM)?**	A dedicated CSM provides guidance throughout all stages of the customer journey, jumps on calls, and gets to know you and your needs, which ultimately results in a long-lasting and fruitful partnership, as well as an increased probability of overall program success.	☐	☐	☐
49. **Can the Customer Success team educate you through effective learning resources of your choice such as webinars, regular consultations and 1:1 demos?**	People have different learning styles, so your flexibility in learning resources is crucial to finding what works best for you.	☐	☐	☐
Section Total		0	0	0

Tech Teams Make the World Go 'Round: Technical Success

The OKR vendor should have a Technical Success function to support the Customers Success team and guide you throughout your OKR software journey – from onboarding through adoption to continued usage of the platform. The Technical Success team is responsible for the solution implementation and must be able to help you translate your complex business needs into data-backed solution designs by communicating with the Engineering teams.

FEATURE	WHY IS THIS IMPORTANT?	A	B	C
50. **Does the OKR vendor provide in-house Technical Success support?**	You'd want to work with a team that knows the OKR software inside out and can effectively communicate your needs to implement product enhancements.	☐	☐	☐
51. **Can the Technical Success team translate your requirements to custom solutions?**	You need to ensure flexibility - the Technical Success team should have the ability to customize design solutions tailored to your use cases.	☐	☐	☐
Section Total		0	0	0

See the Big picture

	A	B	C	NOTES
The Hard Facts about the OKR Software	**0**	**0**	**0**	
↑ The Suit and Tie of OKRs: Management	0	0	0	
The Best Work is Hands-off ork: Automation & Data Integrations	0	0	0	
Study the Past to Predict the Future: Reporting + Analytics	0	0	0	
Enterprise-grade Security	**0**	**0**	**0**	
↑ Holding the Gates: User Management and Authentication	0	0	0	
Making Oversight Easy: User Management and Profiles	0	0	0	
Tiering Responsibilities and Control: Role-based Access Control (RBAC)	0	0	0	
Under Watchful Eyes: Audit Logs	0	0	0	
The Insurance Policy for Your Enterprise: Data Security & Compliance	0	0	0	
A Great House Starts with a Solid Foundation: Infrastructure	0	0	0	
Implementation & Support	**0**	**0**	**0**	
↑ Accommodation Done Right: Deployment Options	0	0	0	
Making Good Support, Great: SLA & Support	0	0	0	
We're All in This Together: Partnership Support	0	0	0	
The Team for Your Team: Customer Success	0	0	0	
Tech Teams Make the World Go 'Round: Technical Success	0	0	0	
Total	**0**	**0**	**0**	
	A	B	C	

Did You Achieve Your Reading OKR?

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Task 2:
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Task 3:
Schedule and attend demos

Task 4:
Get executive sponsorship and buy-in.

5 Things to Remember

→ Don't believe everything you see – test the OKR platform yourself.

→ If you don't have the time to try out each software, organize demo calls. Count the clicks needed to perform an action.

→ Be specific about what you need. But do take 'No' for an answer, appreciate the honesty. This speaks of the vendor's integrity.

→ Check out customer reviews. The truth is usually hidden there.

→ Take your time to make this decision and be certain. If you end up not liking it, there's always a way out.

From Confusion to Clarity

About Gtmhub

Inspired by the proven Objectives and Key Results (OKR) goal-setting methodology, Gtmhub offers the most flexible business orchestration software for mission-driven organizations to provide clarity of strategy and execution across teams, functions, and business units.

Learn more

About Company Name

Company Description

Company URL

Company Email Address

In partnership with

Gtmhub