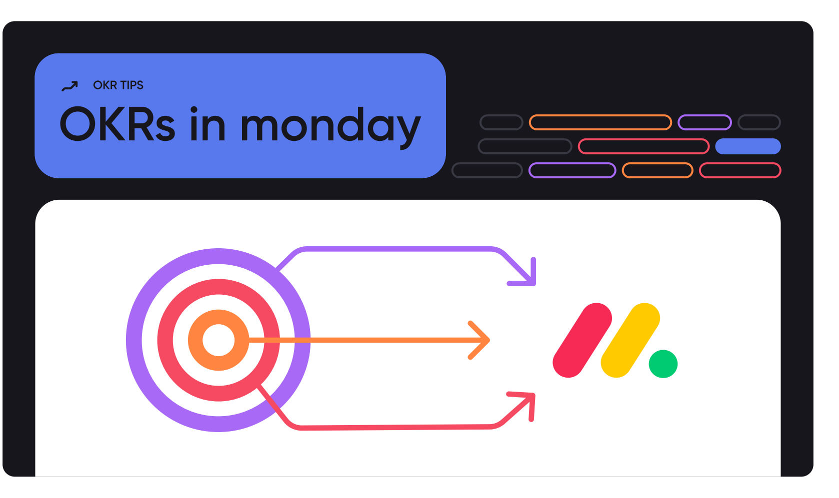
oboard

How to Implement OKRs in monday.com: A Practical Guide for Beginners



OKRs are the definitive goal-setting and strategy execution framework – however, it is not enough on its own. You can have the most amazing goals in the world, but if your day-to-day work is not built around them, then you will never achieve the goals you have set.

By integrating OKRs with monday.com, you and your team can bridge this gap between the strategy and day-to-day execution. For example, you can link Issues, Epics, and Sprints to Key Results, which lets your team remain aligned with the company values and never lose focus of the main goals.

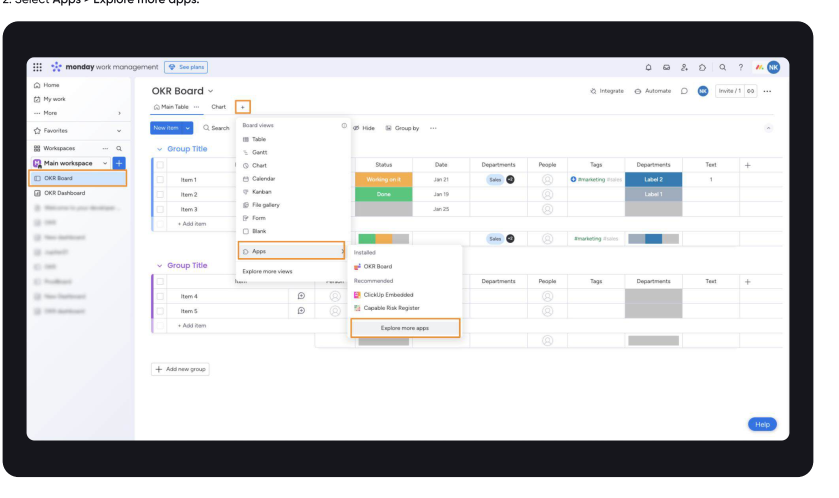
However, transforming your entire workflow like this is a tall order. So in this article, we will cover why you should use monday.com to manage OKRs and how to implement OKRs in monday.com.

How to Install OKR Board for monday.com

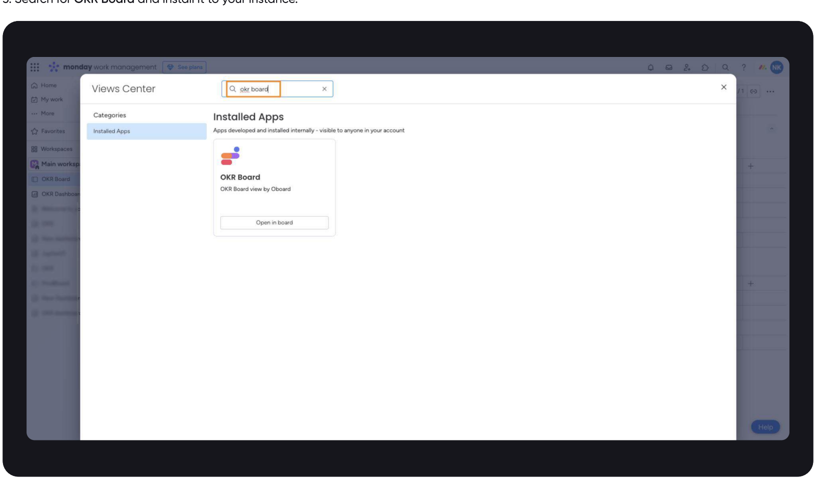
With OKR Board for monday.com, you can easily track and align your goals across your organization. You can add the app as a tab to your board or as a widget to your dashboard, ensuring easy access to your OKRs wherever you need them.

Adding OKR Board as a Tab to Your Board

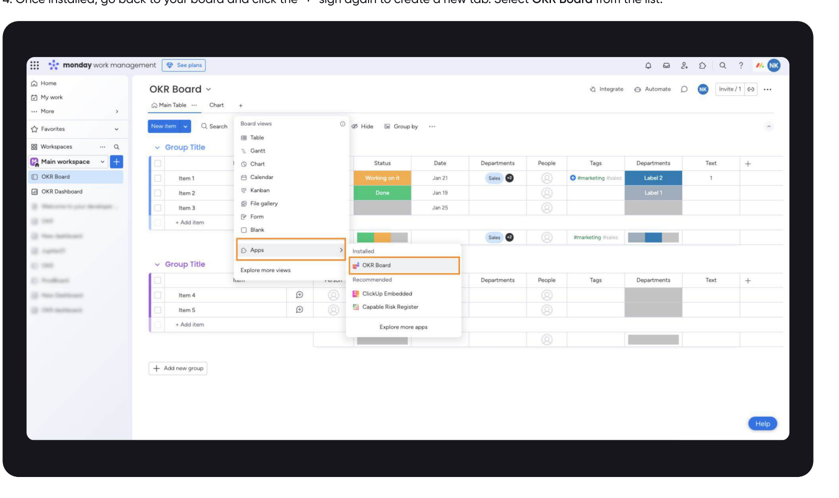
1. Open your board and click the "+" sign.
2. Select **Apps > Explore more apps.**



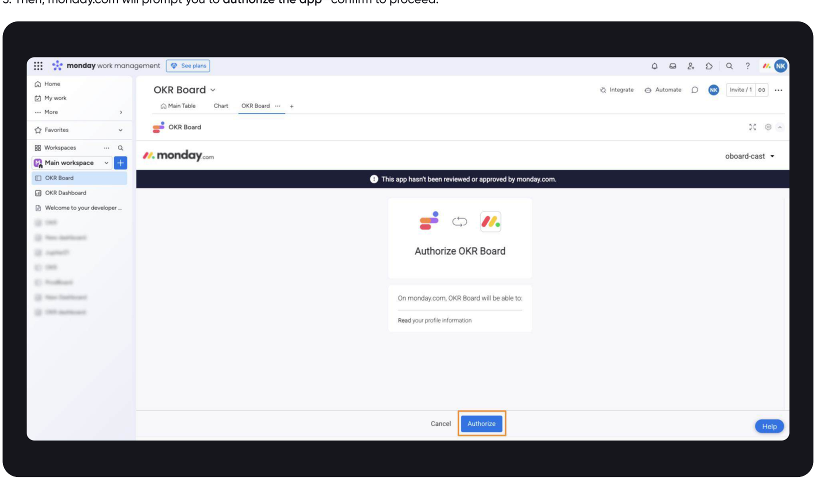
3. Search for **OKR Board** and install it to your instance.



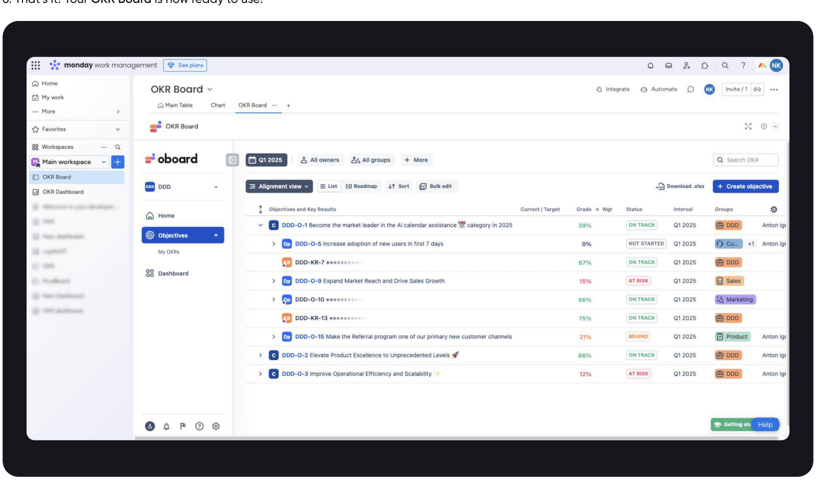
4. Once installed, go back to your board and click the "+" sign again to create a new tab. Select **OKR Board** from the list.



5. Then, monday.com will prompt you to **authorize the app**—confirm to proceed.



6. That's it! Your **OKR Board** is now ready to use!

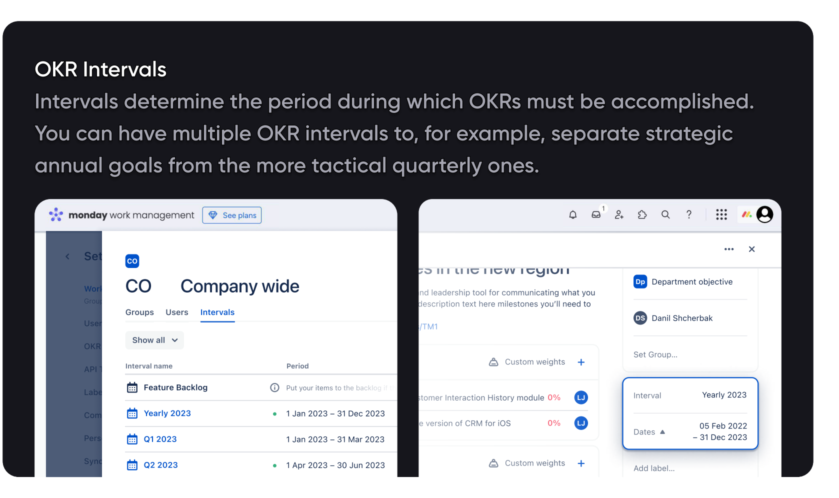


How to Manage OKRs in monday.com

In this guide, we will go step-by-step, showcasing the best way to set up OKRs using our OKR Board for monday.com.

Step 1. Decide on Your OKR Intervals and Cadence

Intervals are OKR cycles in which you set, execute, and monitor your goals in a particular timeframe. They are fully customizable and can always to adjusted to your needs.

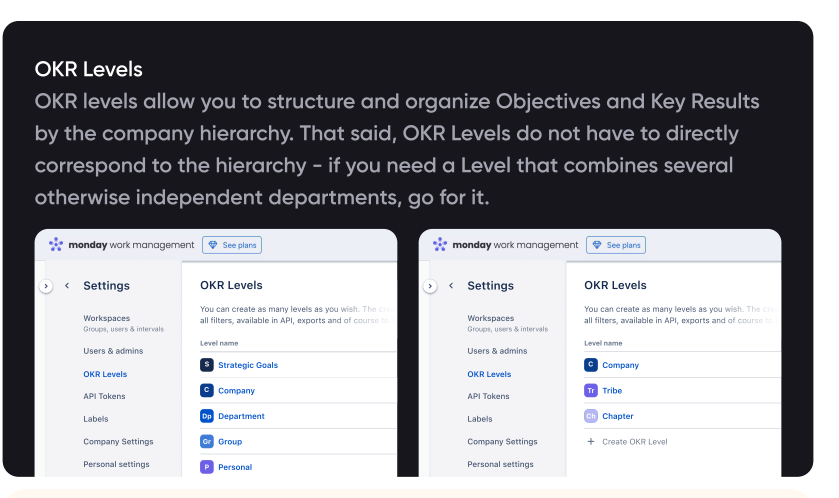


By default, OKR Board for monday.com is set up to work on a quarterly cadence and comes with quarterly and yearly OKR Intervals. However, you can create your own if you wish to follow a different cadence.

Step 2. Define OKR Levels

OKR Levels allow you to create a custom hierarchy for your objectives based on your company structure.

By default, OKR Board for monday.com is set up for a structure with three levels: Company, Group, and Personal. You can rename existing levels – for example, turn Group into Department – or create additional ones to better represent your company's hierarchy.

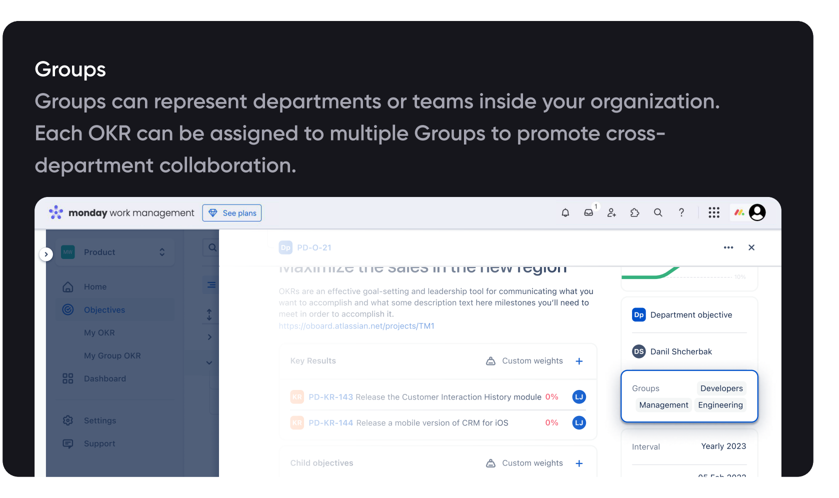


NOTE: Our experience with OKRs shows that the best practice is to keep 3–5 OKR Levels. Having a higher number leads to a lot of busywork and compromises alignment. There are exceptions, of course, but we still recommend keeping them simple.

Step 3. Separate Team Members into Groups

OKR Board for monday.com allows you to reflect your company's structure and separate users into Groups. Groups can represent departments, teams, or other organizational units inside your company that are united by the same goal.

With Groups, you can assign OKRs not only to their specific owner but to the entire unit – or even several units at once to promote cross-department collaboration.



You can also use Groups as filters with OKR Board for monday.com's reporting tools, allowing you to quickly create reports focusing on a specific unit in your company.

Step 4. Create Objectives and Key Results

OKR is a goal-setting and strategy execution framework that helps organizations set, communicate, and track objectives and the measurable outcomes needed to achieve them.

NOTE: Taking a deep dive into the OKR framework is a bit out of scope for this article. To learn more about them, we recommend you start with OKRs: How John Doerr's Formula Makes Companies Grow and continue with the OKR Alignment Guide. Alternatively, you can watch our 16-minute guide on YouTube.

In the most basic OKR definition, OKRs consist of two parts:

- The "Objective" is a clear, qualitative goal aligned with the organization's strategic plan.
- The "Key Results" are specific, quantifiable metrics used to measure the progress toward that objective.

By providing a shared understanding of what success looks like, OKRs help teams stay focused and aligned. Here are some OKRs examples to illustrate the concept:

Objective: Increase market share in the Q4.

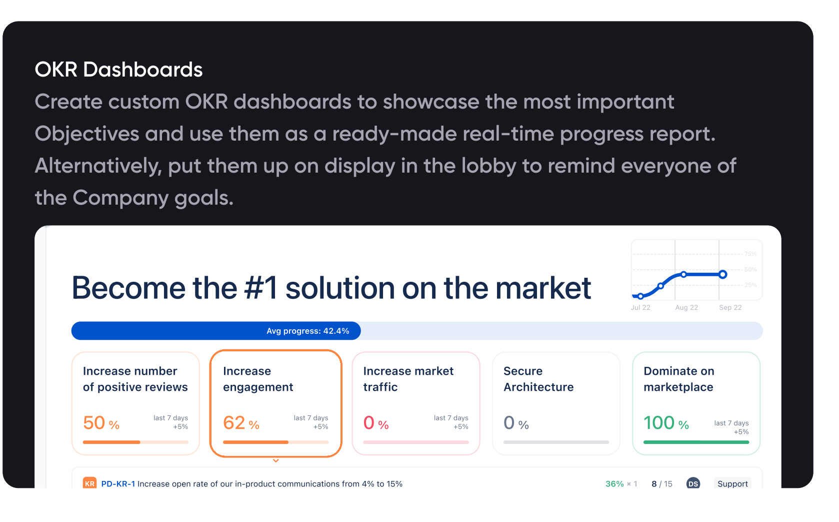
- Key Result: Achieve $2 million in new customer sales.
- Key Result: Onboard 10 new enterprise clients.
- Key Result: Increase customer retention rate to 95%.

NOTE: To learn the best practices for designing OKRs, check out How to Write OKRs That Will Help You Succeed. To get more examples of OKRs in different industries, check out the OKR Examples category on Oboard Blog.

Step 5. Set Up an Executive and Team Dashboards

OKR Board for monday.com has multiple ways to display OKRs – your Home page, OKR Roadmap, OKR Structure Map, etc. They are invaluable when you want to get a bird's eye view of the project or your total responsibilities, but what if you want to focus on a select few instead?

Custom OKR Dashboards were designed to solve this issue. They allow you to select up to 10 Objectives and monitor them on a dedicated Dashboard, which can be shared with others. It can also be exported as a PDF in a single click and added to your executive report.

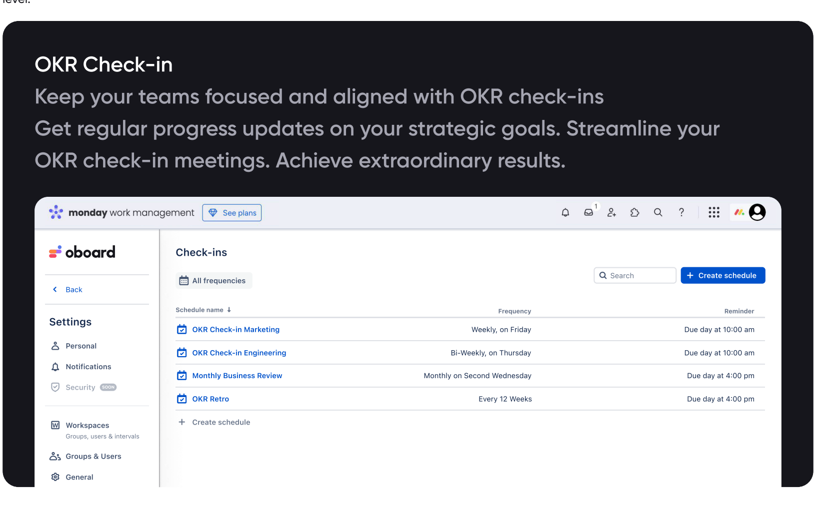


You can have multiple Dashboards for different types of reports – an Executive report dashboard, a Team dashboard that showcases the Atlassian OKRs you are focusing on this Sprint, etc.

To learn more, check out our feature article on Custom OKR Dashboards.

Step 6. Schedule Check-in sessions for your teams

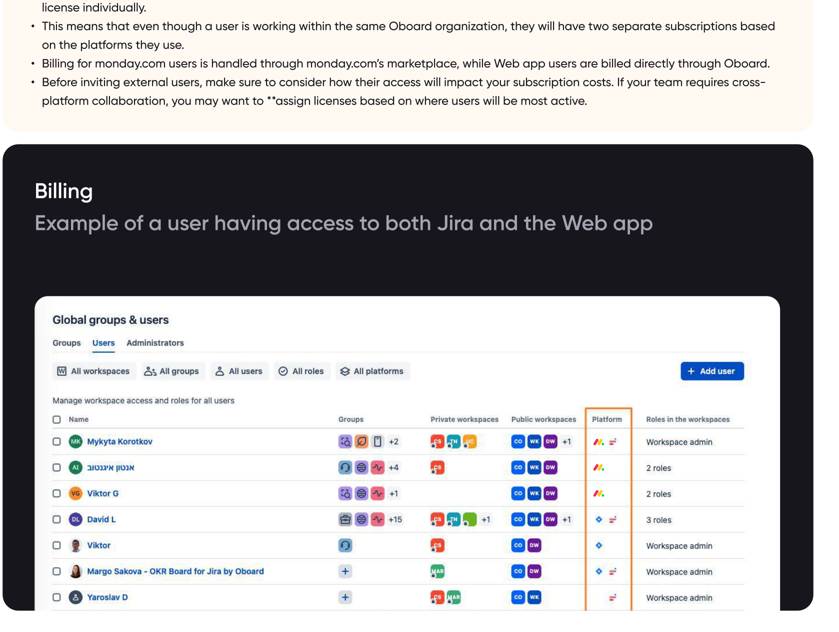
Remind your collegues to share updates on time. OKR Board for monday.com allows you build custom schedules for company department or team level.



Important: Billing Notice for External Users

Oboard is a comprehensive goal-tracking solution available across multiple platforms: Web, Jira, monday.com, and Salesforce. This allows monday.com users to collaborate seamlessly with Web, Jira or Salesforce users within a single Oboard account, ensuring alignment across different teams and tools. Because of this cross-platform integration, a single user can have access to multiple Oboard apps simultaneously—for example, both the Web app and the monday.com app. As a result, there are a few important things to keep in mind when managing users across platforms:

- monday.com Admins can invite external users who are not part of their monday.com instance. These users will gain access to the Web version of OKR Board, enabling them to collaborate on the same OKRs.
- Each platform is billed separately—if a user has access to both the monday.com app and the Web app, they will be charged for each license individually.
- This means that even though a user is working within the same Oboard organization, they will have two separate subscriptions based on the platforms they use.
- Billing for monday.com users is handled through monday.com's marketplace, while Web app users are billed directly through Oboard.
- Before inviting external users, make sure to consider how their access will impact your subscription costs. If your team requires cross-platform collaboration, you may want to **assign licenses based on where users will be most active.



Conclusion

Implementing OKRs in monday.com is a powerful way to drive performance across your organization, bridging your strategy and execution together.
To make it possible, you need OKR Board for monday.com – our powerful OKR platform featuring automated progress tracking and reporting tools.

If you want to learn more about OKRs – consider signing up for Basic OKR Coaching with Oboard. This course features a lot of real-world examples and case studies that help you understand the logic behind OKRs and the best practices for implementing them.

Alternatively, click the button below and set up a demo for the OKR Board for monday.com, where we will help you finetune your OKR process to your company's needs and guide you through the entire OKR pipeline. And if you don't like talking to people, grab a free 30-day trial of OKR Board for monday.com and go wild!