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Objectives and Key Results.

A model: how an organization is built around its numbers — the anatomy, the cascade from strategy to the individual, the rhythm of the year, and the weekly check-in that makes any of it work.

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Model · Version 1.2
NOVEMBER 1, 2026

CONTROL

A model for the whole company.

A model says how the organization is built. This one says how it is built around its numbers: who sets which, how a company's objective becomes a department's and then a person's, and what happens every week so that the numbers move. It opens the shelf's Business Transformation section because it is the one I have used in every transformation I have led, as an executive and as a consultant.

VERSION	DATE	AUTHORITY	NOTES
1.2	November 2026	Juan Carlos González II	A real set as the worked example: a 2018 quarter at a hospitality-software company in the Vista Equity portfolio, scored, and read with the model; the next quarter's draft, re-set from it. The numbers are rounded and illustrative; every outcome is the one the quarter scored
1.1	October 2026	Juan Carlos González II	First public edition, rebuilt from the 2023 workshop as a Juan.co model; the cascade and the rhythm drawn out; the check-in and the stand-up written from the rhythm
1.0	March 2023	Juan Carlos González II	The on-site workshop — "Mission Control" — built for a diagnostics company through my consulting practice, while leading its organizational-management initiatives

HOW TO USE THIS MODEL

Read pages 4–5 once, for why the bar is set where it is. Pages 6–7 are the anatomy — the five questions and the three parts. Pages 8–9 are the cascade, which is where most OKR programs go wrong. Pages 10–11 are the rhythm and the check-in; page 12 is the first year, and the checklist; pages 13–14 are a real set, scored and read with the model. It assumes nothing else on the shelf. The Operating Model and the instruments supply the numbers; this model supplies the organization that owns them.

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I · WHY

Two letters struck through.

Objectives and key results are not new, and they are not complicated. They are management by objectives with the ceiling removed. The whole method fits in one acronym with two letters crossed out.

1954
PETER DRUCKER
Management by objectives: every manager has goals, agreed in advance, reviewed after.

1971
ANDY GROVE · INTEL
"iMBOs" — objectives with measurable key results, set quarterly, scored honestly.

1980
GROVE & DAVIDOW
Operation Crush: the whole of Intel pointed at one objective for a year. It worked.

1999
JOHN DOERR · GOOGLE
OKRs introduced to a company of forty. The method that scaled with it.

S	Specific
M	Measurable
~~A~~	~~Achievable~~
~~R~~	~~Realistic~~
T	Timely

Everyone was taught to set S.M.A.R.T. goals, and two of the five letters are the reason most goals do nothing. **Achievable** and **realistic** cap a goal at what the person setting it already knows how to do. A goal set that way is met, reported, and forgotten; nothing about the organization had to change to meet it.

An objective is specific, measurable and timely — and deliberately set past what is known to be achievable. The bar is not where you expect to land. The bar is where you would land if everything went right, and **seventy percent of the way there is a success**. That one rule changes everything downstream: how people write their numbers, how managers coach to them, and what a quarterly review is for.

WHAT THAT BUYS

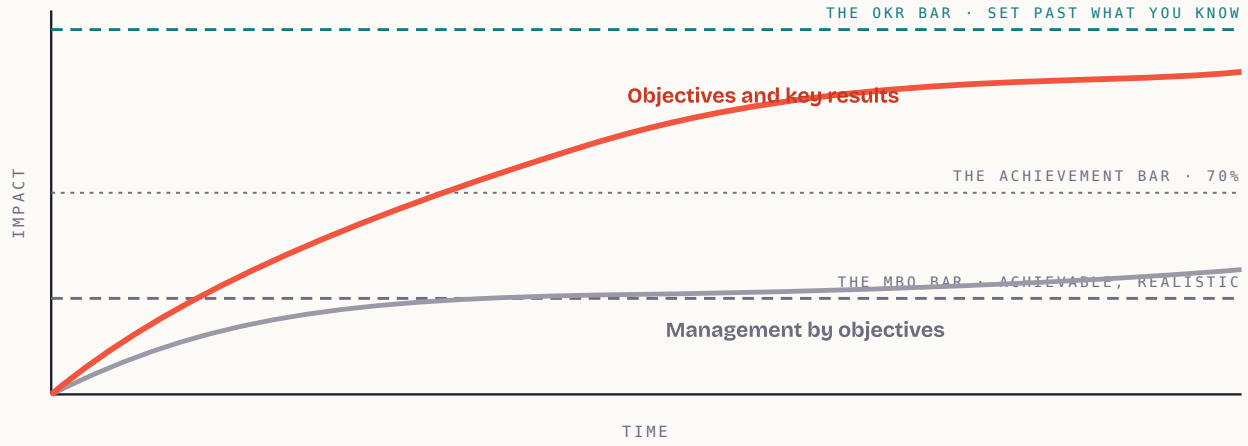
Abstracting the company's goals into pieces that teams and individuals can influence builds cohesion and drives outcomes. It counters the passive acceptance of a hierarchy — "those are their numbers" — with active alignment: everyone owns a number, everyone can see everyone else's, and everyone is given the resources to make theirs. The practice is simple: annual objectives, quarterly results, and the rest of this model.

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I · WHY

The achievement bar.

Draw impact against time for the two methods and the argument makes itself. Management by objectives reaches its bar early and flattens; objectives and key results keep climbing, because the bar was set past where anyone could see.



The dotted line in the middle is the achievement bar — seventy percent of the objective — and it sits *above* the whole of the MBO curve. A team that reaches seventy percent of an ambitious key result has done more than a team that reached a hundred percent of a safe one, and the model says so out loud, in the scoring, in the review, and in how the next quarter's numbers are set.

Two things follow for how the method feels inside an organization. First, performance management becomes feedback rather than judgment: teams want alignment to the company's strategy and want to see their share of its success, and individuals want to understand the value of their contribution to the growth. The numbers give both. Second, the whole company becomes a team sport. Every department has a role in every outcome the customer experiences — sales in the promise, delivery in the project, support in the ticket, finance in the invoice — and a cascade of interdependent numbers is the only honest way to say so.

> **THE TRAP ON THIS PAGE**
>
> A bar set past what is known is not a bar set past what is possible. An objective nobody believes in produces the same shrug as one nobody had to stretch for. The test is whether the people who own the key results can describe, today, what would have to go right to hit a hundred — and whether some of it is in their hands.

II · THE ANATOMY

Five questions.

Objectives and key results sit at the bottom of a pyramid, and they only make sense if the three layers above them have been answered. Five questions, top to bottom; the organization should be able to answer each in one sentence.



Vision and mission rarely change; strategy changes when the market does; objectives are set for a year and key results for a quarter. The pyramid is also the first rule of the cascade: **set objectives only at the company level.** Every other level — business unit, department, team, individual — sets and aligns key results within the structure the company already has. An organization that lets every department write its own objectives has five pyramids and no company.

> WHERE TO START WHEN THE TOP THREE ARE MISSING
>
> Most companies that ask for OKRs do not have a strategy sentence, and some do not have a mission that anyone can say. Do not write objectives on top of a blank. Spend the first session on the three questions above the line; the objectives fall out of the third one, and they are the first year's.

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II · THE ANATOMY

Objective, key result, initiative.

Three parts, and each has rules. Most of the difficulty in the method is people writing one when they mean another.

OBJECTIVE · WHERE DO I NEED TO GO?

Memorable, qualitative

A short, inspirational description of achievement — engaging, aspirational, meant to motivate and challenge.

- Aligned with the vision
- Derived from the mission
- Each a part of the strategy
- High-level; set annually

KEY RESULT · HOW DO I KNOW I AM GETTING THERE?

Metrics measuring outcomes

Numeric, specific and timebound. Two to five per objective, so they can be tracked and remembered.

- Specific, measurable, timely
- Progress tracked as a percentage
- Seventy percent is success
- Easily attributable and quantified

INITIATIVE · WHAT WILL I DO TO GET THERE?

Projects are outputs

Tasks, lists, engagements and projects assigned to teams and adjusted as needed to keep the results moving.

- Chartered monthly and reviewed
- Only as valuable as the result
- Broken into individual tasks
- Changing week over week

Outcomes, not outputs

The commonest mistake is a key result that is really an initiative — a thing to do, dressed as a thing to achieve. One objective, two lists:

Objective: build our reputation as the industry's leading expert

Good key results — outcomes

Ninety percent of attendees stay to the end of a webinar.

Ten thousand unique visits to the site.

Recurring participation rate up from twenty to sixty percent.

The same objective, written wrong

Bad key results — outputs

Organize five great webinars to engage the audience.

Create amazing content for the blog.

Follow up with the participants of the previous event.

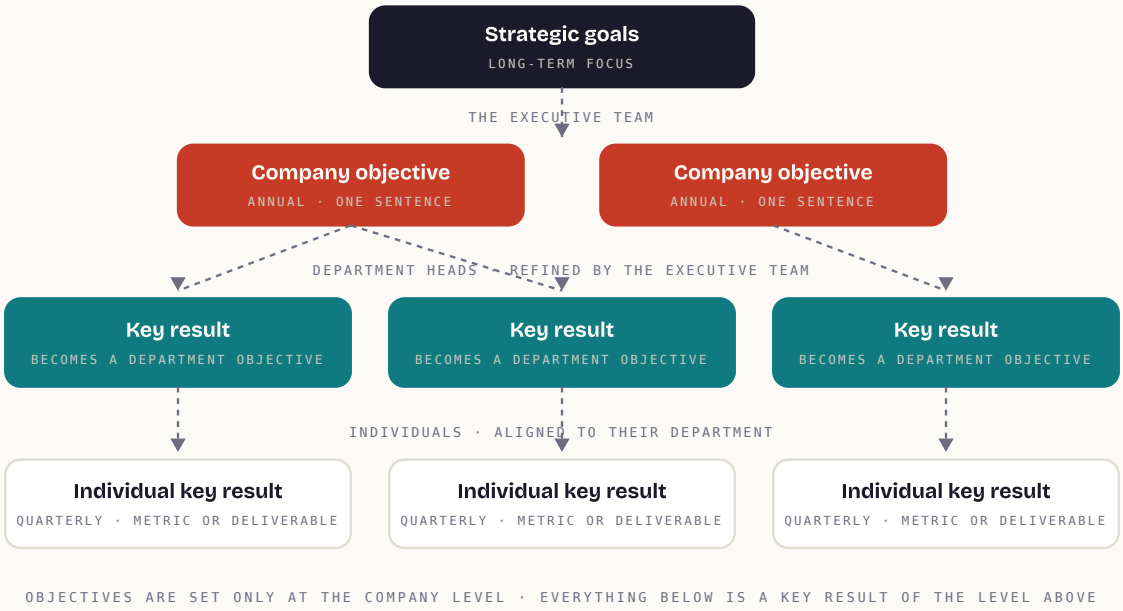
The right-hand list is not useless. It is the initiative list for the left-hand key results — and it belongs under them, chartered monthly, not beside them as the thing being scored.

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III · THE CASCADE

From strategy to the individual.

The structure is what makes the method a model rather than a goal-setting tip. Four levels, each written by different people, each level's key results becoming the next level's objectives.



WHAT · THE COMPANY OBJECTIVE

Annual, one sentence

- Starts with a verb
- Has impact: says what to achieve and why
- Written by the executive team
- Three to five, for the year

HOW · KEY RESULTS THAT BECOME DEPARTMENT OBJECTIVES

Championed by a manager

- Starts with a verb; a KPI can be named
- Drafted by department heads, refined by the executive team
- **Metric results:** an annual metric with a quarterly target — *or*
- **Effort results:** an initiative with a quarterly milestone

HOW · INDIVIDUAL KEY RESULTS

Written by the person

- Starts with a verb; created by the individual, aligned to the department
- Quarterly results as a metric or a deliverable
- **Aspirational:** a stretch, to create the future — *or*
- **Committed:** realistic, and expected

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III · THE CASCADE

Interdependent numbers.

Owning a number is the quickest way to alignment in the team sport of business. The numbers must be interdependent and must cascade, so that an individual's target is visibly the same fact as the leader's metric and the Board's expectation for the year.

Here is one chain, drawn from a Customer Success organization, because that is where I have run it most. The company sets an objective; a department's key result becomes its objective; a person's key result is the piece of it they can move. Read it bottom-up and every line explains the one above it.

COMPANY OBJECTIVE	**Make every customer a reference.** Annual; set by the executive team; starts with a verb; says why — references are how this company grows.
KEY RESULT → CS OBJECTIVE	**Raise gross revenue retention from 90 to 94 percent.** A metric result: an annual metric with a quarterly target. Championed by the head of Customer Success; it is now that department's objective.
KEY RESULT → SUPPORT OBJECTIVE	**Close every incident with a satisfaction reply, and hold the rating above 85 percent.** The same company objective, a different department's piece of it. The two departments' numbers are interdependent: nobody retains an unhappy customer.
INDIVIDUAL KEY RESULT	**Finish the quarter with no unplanned churn in my book, and two accounts moved to green.** Committed, quarterly, written by the Customer Success Manager; a metric and a deliverable. The number on this line is the number on the second line, cut to one person's size.
INDIVIDUAL KEY RESULT	**Pilot the new onboarding checklist with three accounts and publish what we learned.** Aspirational, an effort result: a deliverable with a milestone. It does not move the metric this quarter; it is how the metric moves next year.

Radical transparency is the condition. Everyone can see everyone's numbers — up to the Board's and down to the newest hire's — because an interdependent number that is hidden is just a target. The transparency is what makes "we are all Customer Success" a fact rather than a poster: the person in finance can see that the invoice they chased is the satisfaction reply that is the retention rate that is the company's objective.

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IV · THE RHYTHM

Annual, quarterly, monthly, weekly.

Five things to manage, each on its own cadence. Most programs fail on the cadence, not the content: objectives reviewed monthly become noise; key results reviewed annually become history.

WHAT	IT IS	SET · REPORTED	REVIEWED · COACHED
Objective	Reflective of the company strategy. Three to five, one sentence each.	Set annually	Reviewed quarterly
Key results	S.M.T. outcomes — specific, measurable, timely. Two to five per objective.	Reported quarterly	Reviewed monthly
Target	Seventy percent of the key result is success; the score, in progress.	Reported weekly	Coached in the one-to-one
Focus	Alignment — every key result traceable to a team, a department, a business unit and the company.	Checked at every level	Re-aligned when the structure changes
Quarter	Periodic accountability: the quarterly review, the annual assessment, the bonus.	Scored at quarter end	Assessed annually

Three meetings carry the rhythm, and none of them is new. **Departments** meet periodically — monthly is right for most — to review their key results and re-charter initiatives. **The company** meets at least monthly to celebrate what moved, focus on the major priorities, and tell the story of its purpose in words everyone can relate to. And every manager meets every direct report **weekly**, which is the next page, because it is the one that matters.

> ON BONUSES
>
> The quarter row says bonuses, and they belong there — at the *annual* assessment, against committed key results, after the scores are in. Tie a bonus to an aspirational key result and nobody will write one; tie it to the weekly target and the check-in becomes a negotiation. Pay for the year; coach for the week.

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IV · THE RHYTHM

The check-in.

I have used this model as an executive and as a consultant, with tools and without, and the best correlating factor I have found for whether people make progress on the numbers they own is the simple, humble practice of the weekly, human-centric check-in.

WHEN · WHO

Weekly, one to one

Every manager with every direct report, thirty minutes, the same slot. Not a status meeting and not a performance review: a conversation about the numbers the person owns and what they need to move them.

THE THREE QUESTIONS

Achieving, help, risk

What are you achieving against your key results? Where do you need help? What cross-functional or big-picture risks do you see to your slice of the business? The manager asks; the report answers; the manager leaves with the actions.

THE INSTRUMENT

A shared agenda

One running document per pair, open to both, with the key results at the top and the week's three answers beneath. Tools exist that do this well; a shared document is sufficient, and the muscle memory matters more than the software.

The check-in is where the model touches a person. Above it, the cascade and the rhythm are structure; below it, there is nothing — just someone deciding, on a Tuesday, whether the number they own is going to move this week. The manager's job in the meeting is not to inspect but to resource: if the person is challenged to make progress, the conversation turns back toward the manager and what they will bring to bear. That is servant leadership with a number attached, and it is the reason the model works in organizations where the posters never did.

The leadership team needs the roll-up: one view of how the whole organization is progressing toward its key results, assembled from the check-ins rather than from a separate reporting exercise. Officers should be able to see, with reasonable certainty, that their decisions are moving teams — and the check-ins are the instrument that shows it.

WHEN THE NUMBER IS NOT MOVING

Confront it in the check-in, openly, early. First as a resourcing question — what is missing? — and, if the trend holds for a quarter against clear agreements, as a role question. Tolerating a number that never moves, when everything has been aligned and the support has been given, is toxic to every other number in the cascade. The rarity of that conversation is the model's achievement; its availability is the model's integrity.

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IV · THE RHYTHM

The first year, and the checklist.

Written from the rhythm: a quarter to set, a quarter to run, a year to trust.

QUARTER ZERO · SETTING

Top down, then bottom up

The executive team answers the five questions and writes three to five company objectives. Department heads draft key results against them; the executive team refines; the key results become department objectives. Individuals write their own, aligned to their department — one committed, one aspirational is a fine start. Targets at seventy; everything visible to everyone.

QUARTER ONE · RUNNING

The rhythm, every week

Weekly check-ins begin, with the shared agenda, and do not skip. Key results reviewed monthly in departments; initiatives re-chartered. The company meets monthly and tells the story. Targets roll up weekly from the check-ins. The first quarterly review scores every key result honestly: seventies celebrated, hundreds examined for sandbagging.

QUARTERS TWO–FOUR · TRUSTING

Re-set, re-align, assess

Each quarter re-sets the key results under the same objectives and re-aligns what the structure changed. The second quarter is when individuals stop writing outputs; the third is when managers stop inspecting and start resourcing. The year ends with the annual assessment against committed results, the bonus, and next year's objectives written from what the cascade taught.

SETTING

- [ ] Vision, mission, strategy: one sentence each
- [ ] Three to five company objectives, annual, verb-first
- [ ] Two to five S.M.T. key results per objective
- [ ] Department key results drafted by their heads
- [ ] Every individual's key results written by them
- [ ] Every key result traceable to the company objective above it
- [ ] Targets at seventy; scores visible to all

EVERY WEEK

- [ ] Every check-in held; none skipped
- [ ] The three questions asked and the answers written
- [ ] Targets rolled up for leadership

EVERY MONTH

- [ ] Key results reviewed in each department
- [ ] Initiatives re-chartered
- [ ] Company meeting: celebrate, focus, story

EVERY QUARTER

- [ ] Every key result scored
- [ ] Hundreds examined; seventies celebrated
- [ ] Key results re-set; alignment re-checked

EVERY YEAR

- [ ] Annual assessment against committed results
- [ ] Bonuses paid on the year, not the week
- [ ] Next year's objectives from what the cascade taught

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V · A REAL SET

A quarter, scored.

The first quarter of 2018, at a hospitality-software company where I led Customer Success inside a Customer Operations team of three: Support, Services and Success. One company objective; each team's key results under it; the score each line earned at the quarter's end.

COMPANY OBJECTIVE

Improve operational performance, and reduce churn by twenty percent this year.
Annual; set by the executive team; every line below is a piece of it.

TEAM	KEY RESULT, AS WRITTEN	SCORED	PROGRESS
Support	Raise first-contact resolution from 60 to 63 percent	63 percent — hit	100%
Support	Cut average handle time by five percent	Hit, phone and chat	100%
Support	Cut mean time to resolve email cases from 150 to 130 hours	130 hours — hit	100%
Support	Answer 80 percent of Tier 1 contacts within the service level, phone and chat	Chat 95, phone 75	Partial
Support	Raise customer satisfaction from 7.0 to 7.5, out of ten	7.3	60%
Support	Cut mean time to resolve phone and chat cases from 36 to 30 hours	36 hours — flat	0%
Support	Implement standardized resolution codes	Not started	0%
Support	Deploy a satisfaction survey to every team	Done	100%
Support	Productize an on-site support offering	Pushed to Q2	—
Services	Hold the kick-off call within two business days of signature, from 30 to 60 percent of new accounts	Not recorded	—
Services	Take accounts live within 60 days of signature, from 70 to 75 percent	Not recorded	—
Success	Generate 100 referrals and 90 expansion leads	Not recorded	—
Success	Deliver business reviews to 75 percent of A and B accounts	Not recorded	—
Success	Document the survey program	Done	100%
Success	Define platform signals from survey scores	Pushed to Q2	—

The numbers are rounded and illustrative, and the platform, product and system names are taken out; every outcome is the one the quarter actually scored. "Not recorded" means the scored copy left the line blank.

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V · A REAL SET

Read with the model.

The set did real work: the metrics with a baseline and a target scored cleanly, and the misses were written down rather than explained away. Read with this model, five things would be written differently — and the next quarter's draft shows the bar already moving.

1
THE BAR

Satisfaction moved 60 percent of the way to its target: under the seventy-percent bar, and worth a conversation, not a shrug. Resolution time stayed flat: zero, and worth a harder one. Three metric hundreds in one team's column are the other signal on page 5 — examine them; the bar may have been set where it was already known.

2
OUTPUTS

"Deploy a satisfaction survey," "document the survey program," "implement resolution codes": three initiatives scored as key results. Each belongs under the result it serves — the survey under satisfaction, the codes under resolution time — chartered monthly, not scored quarterly.

3
PUSHED

"Pushed to Q2" is not a score. Score it zero, then decide in the open whether it carries into the next quarter or comes off the list.

4
BLANKS

Four key results reached the end of the quarter with no score. A number nobody reads at the quarter's end was never a key result; the weekly check-in is where that is caught, in week two, not week thirteen.

5
OWN PYRAMIDS

Elsewhere in the set, two teams wrote the same objective of their own — develop high-performing teams — with no line to the company's. Set objectives only at the company level; a team's growth is a key result under one of them, or an initiative.

The next quarter's draft

The draft for the third quarter re-set the key results under the same idea and raised the bar where the first quarter had cleared it: business reviews from 75 to 100 percent of A and B accounts; first-contact resolution to 80 percent; weekly-active customers from 40 to 60 percent and monthly-active from 55 to 75.

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