



Objective & Key Results (OKR) Professional Certification

SYDNEY 14 - 16 February 2024

MELBOURNE 4 - 6 December 2024



Attend In-Person

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Course Information

Course Overview

It is critical that organizations have a certified OKR professional coaching their teams to ensure that OKRs are balanced, focused on results, effectively implemented, and aligned with strategy. Without the guidance of a trained professional, OKR implementations can turn into glorified to-do lists, include long laundry lists of trivial metrics, or get ignored over time.

Created by the Balanced Scorecard Institute and offered in association with the George Washington University Center of Excellence in Public Leadership, the OKR Professional Certification program provides participants with the tools they need to coach their teams through the successful development and implementation of OKRs.

This course trains participants on setting and working with **Objectives and Key Results (OKRs)**. OKR Professionals are certified in accordance with standards set by **Balanced Scorecard Institute in association** with the **George Washington University Center for Excellence in Public Leadership** and developed through decades of knowledge and experience in Performance Management and Objective Setting best practices.

Education Partner



The Balanced Scorecard Institute provides training, certification and consulting services to commercial, government, and non-profit organizations worldwide.

The Institute applies best practices gained from hundreds of consulting assignments and 5,000 trainees in Balanced Scorecard, strategic performance management and measurement, strategic planning, and change management to help executives, managers and analysts transform their organizations into "performance excellence" organizations.

The Institute also provides, through the balancedscorecard.org website, extensive resources, including case studies, white papers, articles, and other information based on lessons learned from extensive experience in building strategic management and performance measurement systems using our awardwinning Nine Steps to Success Balanced Scorecard methodology.



Course Information

Who Should Attend

This course is recommended for those interested in learning best practices in the facilitation of OKR development and implementation.

Courses are taught by highly experienced instructors with backgrounds in private, public, and nonprofit-sector organizations.

Learning Style

This course will be delivered through theory and practice and learning will be achieved through case studies, exercises, and by individual reflection. Examples of how learning will be consolidated include:

- Practical sessions
- Role play
- Completing relevant exercises based on realworld situations
- Providing responses to questions and reflecting on our experiences
- Assessment by multiple choice questions

Competencies

The course will cover the following competencies from the Global IIA Competency Framework:

Performance:

- Engagement outcomes:
- Communication quality
- Conclusions
- Recommendations
- Reporting
- Residual risk and risk acceptance
- Management action plan
- Results monitoring

Leadership & Communication:

- Communication:
- Reporting
- Relationships
- Innovation

Professionalism:

- Individual objectivity
- Due professional care



Course Information

What Is An OKR?

The Objectives and Key Results (OKRs) goal-setting framework is used by organizations that want to engage employees to achieving results. Often associated with technology companies in Silicon Valley (such as Google, Twitter, Spotify, Airbnb and LinkedIn) or those that focus on Agile methodologies, the OKR model can be used by any sized organization in any sector. OKRs create an analytical basis for decision making and help focus attention on what matters most.

In the OKR model:

- Objectives capture what you want to accomplish (a broad goal) in a qualitative sense (Example: Improve the Customer Experience)
- Key Results capture/measure how you will accomplish the objective in a quantifiable manner (Example: 10% increase in our Net Promoter Score by the end of the quarter)
- Everyone in the organization sets their own
- OKRs, from leadership down OKRs are set individually but should be aligned with strategy
- All OKRs are shared transparently and reported on a regular cadence, typically quarterly

Course Requirements And Certificates

Certifications are offered through BSI and The George Washington University Center for Excellence in Public Leadership.

Delegates must meet two criteria to be eligible for an Informa Certificate of Completion:

- Satisfactory attendance – Delegates must attend all sessions of the course.

Delegates who miss more than 1 hour of the course sessions will not be eligible to sit the course assessment

- Successful completion of the course assessment

Delegates who do not meet these criteria will receive an Informa Certificate of Attendance. If delegates have not attended all sessions, the Certificate will clearly state the number of hours attended.

Meet Your Course Director



Alan Fell is a UK-based independent consultant and management trainer, specialising in the Balanced Scorecard and the wider disciplines of Strategy Execution.

After a successful career with a major London-based bank, during which he led a pioneering Balanced Scorecard application in 1994-96, Alan has operated across the world for the last 20+ years, combining management training and implementation consultancy.

Alan has focused especially on the GCC markets in the last 20 years, spending well over half of his work time in the region, with involvement in innumerable training programmes and consulting assignments. In total Alan has led more than 300 training courses across the world during this period.

For many years, Alan has led his own Certificate in Strategy Execution training programme, in conjunction with Informa. In addition, Alan is also a Senior Associate of the Balanced Scorecard Institute and has been the course leader many times for the “BSP certified Bootcamp” scorecard training programme.

In total, Alan brings well over 30 years of hands-on strategy management experience, including 24 years of the Balanced Scorecard. He has been a frequent past chairman of many of Informa’s Balanced Scorecard / strategy conferences.

Course Outline

INTRODUCTION: COURSE OVERVIEW AND LOGISTICS

- Learning objectives
- Expectations

OKR Overview: Understanding OKRs

- What are OKRs?
- History of OKRs
- OKRs and strategic agility
- Benefits of OKRs
- Case studies and examples

SESSION 1 - HOMEWORK

Introducing the On Demand 1-Hour OKR Online Tutorial (to be viewed separately)

- The 1-Hour OKR Online Tutorial
- Introduction to OKRs
- What is an Objective?
- What is a Key Result?
- What is an Action/Activity or Initiative?
- Building OKRs step by step:
 - Understand strategic context
 - Develop objectives
 - Develop key results
 - Align and adapt
 - Identify and implement initiatives and actions
 - The OKR reporting cycle:
 - Develop or revise
 - Share, review and check in
 - Grade and reflect

- Examples of OKR
- Exercise: Build your own OKRs
- Quiz
- Mastering OKRs
 - OKR online tutorial review
 - How to use the OKR template
 - Common mistakes and how to avoid them
 - Using OKRs in different organizational types
- Understanding Strategic Context
 - Strategic agility
 - Developing objectives

SESSION 2 EXERCISES

- Facilitating online with Miro
- OKR development basics
 - Developing Objectives
 - Describing objectives and intended results
- Different types of OKRs: Strategic versus tactical or operational, aspirational versus committed
- Scoring OKRs and managing expectations
- Key result best practices
- Creating measurable results using concrete language
- Differentiating activities, initiatives, outputs and outcomes

SESSION 3 EXERCISES

Developing key results

- Aligning OKRs
- OKR Reporting and review process
- Facilitating OKR development

- Facilitation best practices
- Facilitating leaders and managers
- Coaching teams to differentiate between results and activities
- Principles in change management
 - Managing the program roll out
 - No-judgment accountability
 - Engagement
 - Gamification

SESSION 4 EXERCISES

- Developing aligned objectives
- Managing performance over time
 - OKRs and Other Frameworks
 - OKRs versus MBO
 - OKRs versus KPIs
 - OKRs with Agile
 - OKRs with Balanced Scorecard
- Perspectives
- Strategy Maps

SESSION 5 EXERCISES

- Developing an agile reporting cycle
- Developing a strategy map
- OKR Automation
- Application Presentation
- Course Review
- Certification Exam

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Easy Ways to Register



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ON-SITE & CUSTOMISED TRAINING

Informa Connect Academy has a long-standing track record of delivering very successful customised learning solutions achieving real and measurable value for our clients through our senior training consultants. If you have 8+ interested people, an on-site course can be the ideal solution – giving you the opportunity to customise our course content to your specific training needs, as well as attracting significant savings compared to public course costs.

WHY CHOOSE ON-SITE WITH INFORMA CONNECT ACADEMY?

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- 3. On-site training** is a cost effective way to train your people and achieve your defined outcomes.

Speak with **Sushil Kunwar** on **+61 (2) 9080 4370** to discuss your customised learning solution, or email training@informa.com.au



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