



# Strategy Worksheet

Company Name:  
Strategy:

Date:  
Version:



BASED ON WORK DONE BY RALLY SOFTWARE

PAST PERFORMANCE (GOALS, ACTUALS, AND GAPS) AND MOMENTS (EVENTS, ACTIONS, ETC)			
PREVIOUS PERIOD'S OKRS AND RESULTS			
Objective	Primary:	Secondary:	Secondary:
Expected Key Result			
Actual Result			
Gap			
What objective data (events, actions, etc.) tells the story of how you got to your current situation?			

REACTIONS AND LEARNINGS
Reflect on the above past performance and moments. What did it feel like to go through those moments and achieve those results? What did you learn?

RATIONALE GOING FORWARD
What do these reactions and learnings imply about how to move forward?

PRIMARY OBJECTIVE	SECONDARY OBJECTIVE	SECONDARY OBJECTIVE
What primary objective will help you achieve your strategy?	What objective will help you achieve your strategy?	What objective will help you achieve your strategy?
KEY RESULTS	KEY RESULTS	KEY RESULTS
What specific, measurable, achievable, relevant and time-bound metrics will indicate you have achieved your primary objective?	What specific, measurable, achievable, relevant and time-bound metrics will indicate you have achieved your objective?	What specific, measurable, achievable, relevant and time-bound metrics will indicate you have achieved your objective?
ACTIONS	ACTIONS	ACTIONS
What sequence of major actions will accomplish your primary objective and key results?	What sequence of major actions will accomplish your objective and key results?	What sequence of major actions will accomplish your objective and key results?
UNRESOLVED ISSUES	UNRESOLVED ISSUES	UNRESOLVED ISSUES
What further learnings are necessary to gain before you can achieve your primary objective and key results?	What further learnings are necessary to gain before you can achieve your objective and key results?	What further learnings are necessary to gain before you can achieve your objective and key results?

RISKS AND DEPENDENCIES
What things may prevent you from achieving your objectives or key results?