



Talk Strategy

Strategy to OKRs and Leading Indicators





website: heyCASEy.io
troy@heyCASEy.io
chris@heyCASEy.io

Chris and Troy starting working together over a decade ago. Chris had cofounded LeanKit (acquired by Planview) a SaaS work tracking tool, and Troy had some weird forecasting and process simulation technology looking for a commercial setting. We both had a desire to help companies better manage their planning and work. Little has changed. We reconnected in 2023 and decided there was more to do.

Companies still struggle in setting and communicating strategy, and the success of turning that strategy into reality is dismal. We think a fresh approach to strategy is needed, and heyCASEy.io is our newest contribution to solve that challenge.

	Chris	Troy
Years in Software Industry	 20+	 20+
Nerdiness	 low	



Today's Topic

- Turning strategy into OKRs and Leading Indicators
- Format
 - 8 minutes introducing the terms OKR and KPI and Leading Indicators
 - 7 minutes showing an example
 - Take strategies from the group and work them into OKRs and Indicators
- Questions throughout

Per Gothelf, Jeff; Seiden, Josh

Defining OKRs (Objectives and Key Results)

Customer
(those who
feel change)

Who?

Objectives:

- Goals
- Inspire
- Share why

Key Results:

- Progress
- Evidence
- Share how

Behavior
change

Does what?

Amount of
change

By how much?

Rate of
change (by
when)

Per Gothelf, Jeff; Seiden, Josh

Defining OKRs (Objectives and Key Results)

North Star / Vision / Ambition / BHAG

In 5 years, Uber will transform cities

by making personal car ownership a thing of the past

and creating more space for people to live, work, and play.



OKRs somewhere between here...

Tactics

In 3 months, Uber will

have an Android application for ride hailing

Leading Indicators (KPIs?)

“Key Results”

- Customer behavior change
- Strong correlation to Objective
- Behavior (mostly) observed after objective being met
- Help selection of objectives (what to invest more/less in)

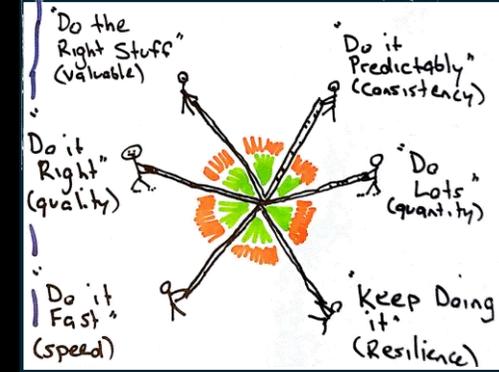
“Leading Indicators”

- Change in ...
- Speculative correlation to Objective
- Change observable before objective being met
- Help selection of tactics

Leading Indicators...

- Start with a Customer (Objective) Key Result
- Ask
 - “For that to come true, what needs to happen” (finding tactics)
 - “What would increase the odds of that coming true” (finding confidence)
 - “When its not true, how do we know now?” (finding reverse indicators)
 - “For that to come true what might need to stop/change” (finding sacrifice)
 - “If we achieve that, where might we pay the price?” (finding tradeoffs)
- ...

Leading Indicators



Smaller Changes

(Change size / Diff Size)

Better Staging Testing

MTRR:

faster rollbacks

Better Code Review

Pull request comments?

Quality:

No production downtime

Automated Testing Coverage

Fewer Rollbacks

Vision: In 5 years, CASEY, Inc. will be the leading SaaS provider enabling companies to transform their strategy into a continuous, collaborative process that dynamically adapts to real-time insights from all staff and customer interactions

Ensuring scalability and reliability as the user base grows, avoiding performance bottlenecks and downtime.

Code merge frequency
(> 10 /w)

Change size
(<500 diff)

Deployment Frequency
(> 5 per w)



1. Indicator: Successful load tests. Success is when we see a value above 95%. Regular load tests can simulate a growing user base and ensure the system can handle growth without performance degradation.

2. Indicator: Response time. Success is when we see a value below 100 milliseconds. Monitoring response times during peak traffic can help identify performance issues before they impact users.

3. Indicator: Error rates. Success is when we see a value below 0.1%. Tracking error rates in production can help identify issues that could lead to downtime or user dissatisfaction.

4. Indicator: Server utilization. Success is when we see a value below 75% during peak hours. Monitoring server resource utilization can help identify capacity headroom to handle growth without degrading performance.

5. Indicator: Database query performance. Success is when we see a value above 95%. Ensuring database queries are optimized can prevent slow data retrieval, which impacts system scalability.

more about reliability like using DORA

Certainly, incorporating DORA metrics provides additional granularity and insight into system reliability and performance of your systems. Here are some leading indicators based on DORA metrics that signal improvements as we work towards our goals:

1. Indicator: Deployment Frequency. Success is when we see a value above two deployments per week. Frequent deployments demonstrate continuous integration and delivery practices that improvements and fixes are pushed to production.

2. Indicator: Lead Time for Change. Success is when we see a value below one hour. Short lead times indicate that code changes are being tested and deployed quickly, which contributes to faster identification and resolution of issues before they impact users.

3. Indicator: Mean Time to Recovery (MTTR). Success is when we see a value below 30 minutes. A low MTTR indicates effective incident management and quick resolution of issues, minimizing downtime.

Continue chat

REGENERATE COPY

more developer metrics like change size, number of reviews, etc

1. Indicator: Change size. Success is when we see a value below 500 lines of code per change. Smaller changes are easier to review, test, and deploy, which reduces the risk of introducing new issues as the system scales.

2. Indicator: Number of reviews. Success is when we see a value above 2 reviews per change. Multiple reviews ensure that code quality and performance are thoroughly vetted, which is essential for maintaining reliability and scalability.

3. Indicator: Code merge frequency. Success is when we see a value above 10 merges per week. Frequent merges indicate an active and engaged development team, enabling continuous improvements and faster responses to issues.

4. Indicator: Deployment success rate. Success is when we see a value above 95%. High deployment success rates suggest that new features and updates are being integrated smoothly, contributing to system stability.

5. Indicator: Mean Time to Recovery (MTTR). Success is when we see a value below 30 minutes.

Your examples



Objective to Leading Indicators

?

?

?

?

?

?

Objective

Objective to Leading Indicators

?

?

?

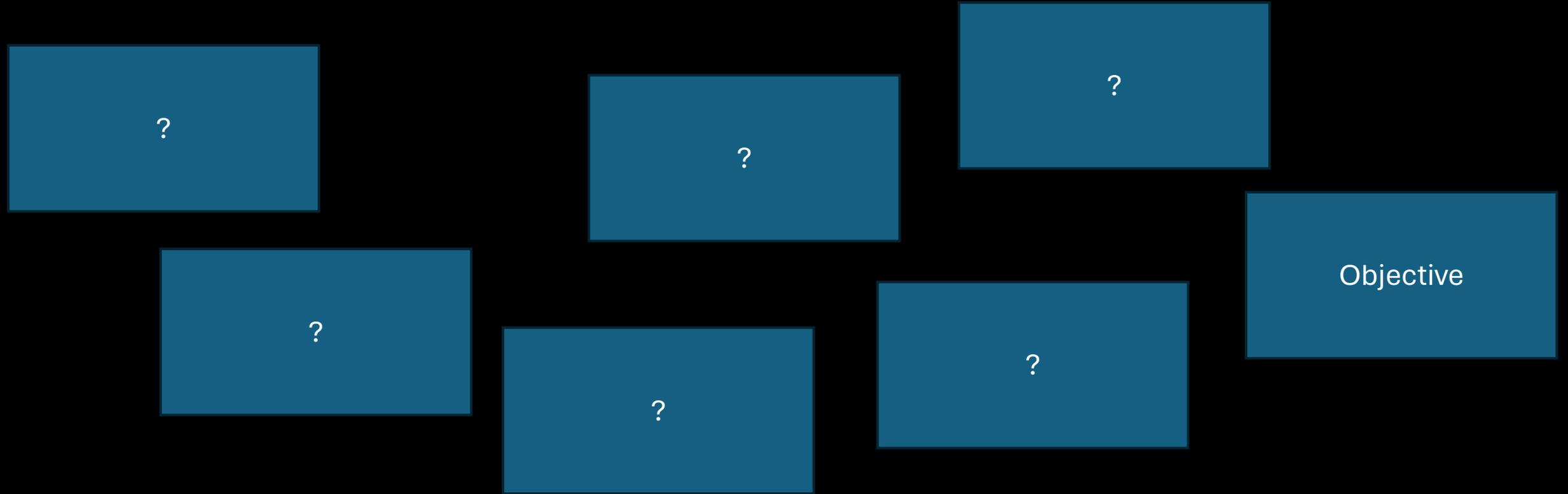
?

?

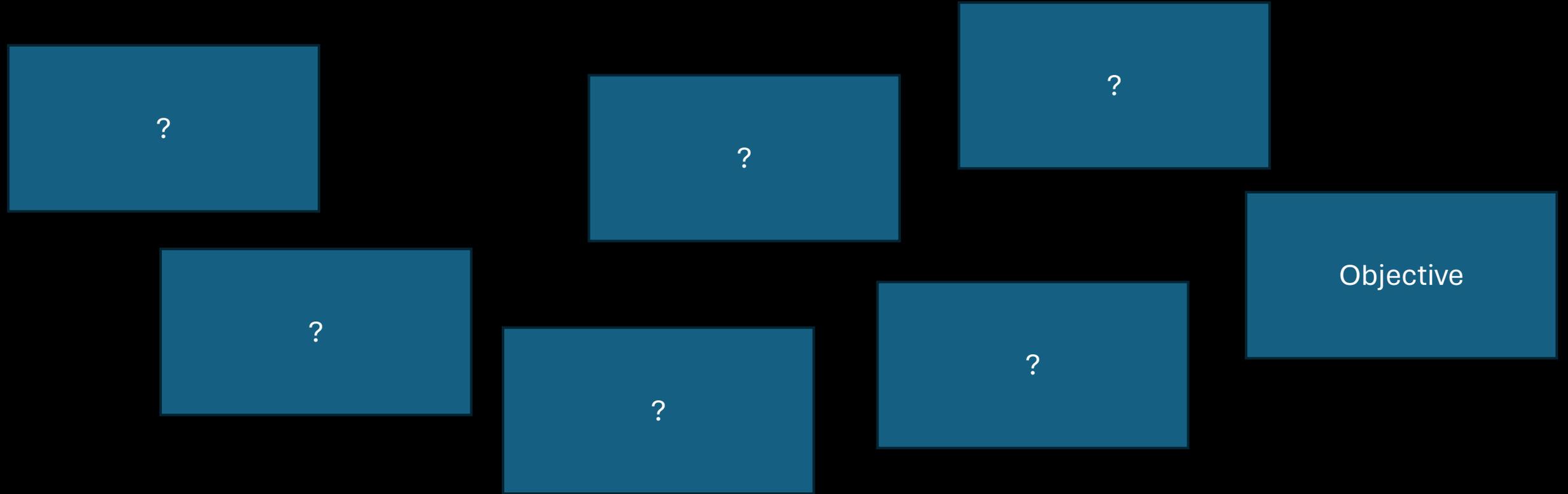
?

Objective

Objective to Leading Indicators



Objective to Leading Indicators



Objective to Leading Indicators

