



Annual People Review Process

Global Step-by-step Guide
with resources to take you
through the process





Aim with OKRs, achieve with Virtues

Why an Annual People Review Process?

1

Your OKRs



At Joe & the Juice, we use OKRs to support everyone moving in the same direction and drive business performance. Cascading OKRs help us align individual objectives with Team-, Department- and Company Objectives

Here's how it works:

Objectives (O): What we want to achieve

Key Results (KR): Measurable outcomes

We set OKRs both top-down (from company strategy) and bottom-up (from teams and individuals)

This approach creates:

Transparency – everyone knows what matters

Alignment – goals fit together across the business

Engagement & Ownership – people feel part of the bigger picture

2

Your Virtue Behavior



Our four company virtues:

Positive Attitude

Inclusion

Social Ties

Growth

represent the behaviors and actions we strive to live by each day. They are carefully selected by us all, ensuring they reflect all of us and stay true to our legacy

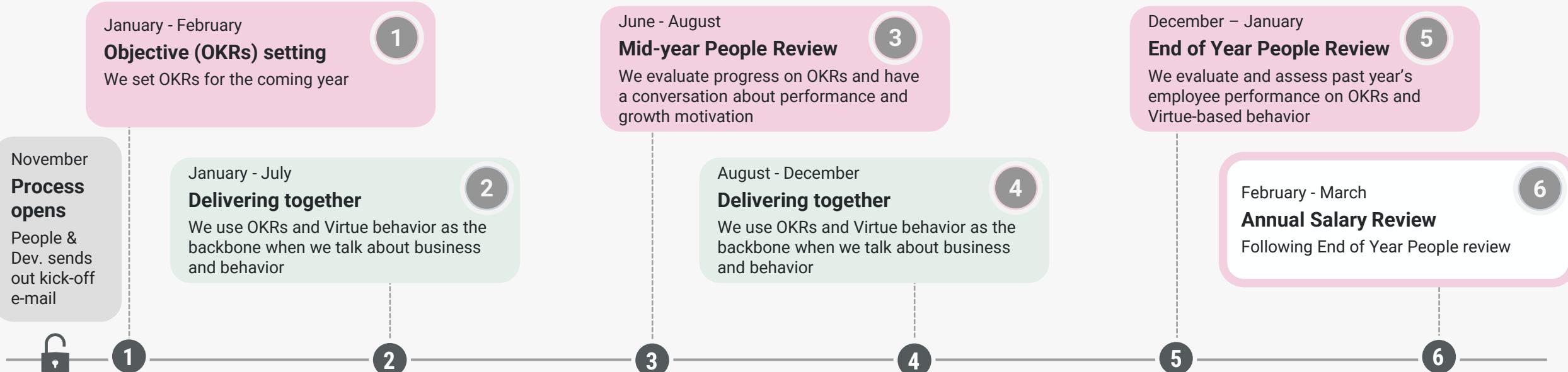
This is why we inspire each other to strive further living our Virtues



We want you and the business to grow together



The Annual People Review process content – step by step



- ✓ 1.1 Manager shares Department-/Team OKRs and invites employees for OKR setting meeting
- ✓ 1.2 Employees prepare by drafting OKRs
- ✓ 1.3 OKR setting meeting between Employee and Manager

- ✓ Manager follow-up with employees in 1-2-1s
- ✓ Manager reports on Department/Team OKRs regularly

- ✓ 3.1 Manager Invites employee for Mid-year People Review meeting
- ✓ 3.2 Mid-year People review meeting between Employee and Manager

- ✓ Manager follow-up with employees in 1-2-1s
- ✓ Manager reports on Department/Team OKRs regularly

- ✓ 5.1 Manager invite employee for End of Year People Review meeting
- ✓ 5.2 Employee prepares by updating status of OKRs and completing self-assessment
- ✓ 5.3 End of Year Review meeting between Employee and Manager

- ✓ 6.1 Manager invites employee for Annual Salary Review meeting



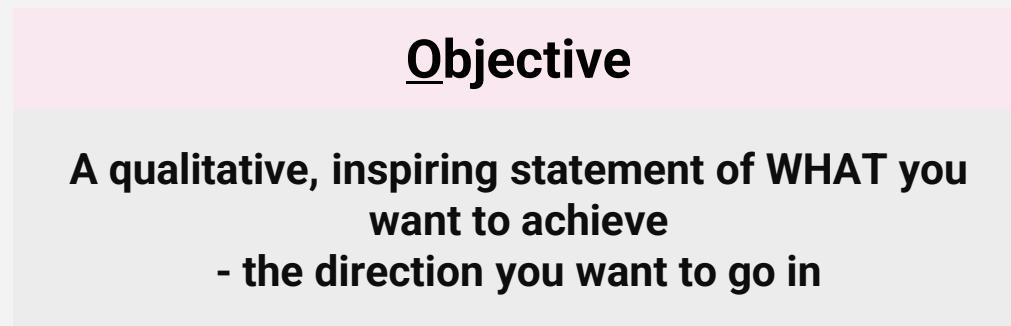
1. Objective (OKRs) setting

January – February

We set OKRs for the coming year



What is an OKR?



Setting direction!
"Aim for the stars. while you may not hit stars – you surely will not shoot yourself in the foot"

- Key Result**
Measurable outcome that show **HOW** you will achieve your Objective
- Key Result**
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- Key Result**
Measurable outcome that show **HOW** you will achieve your Objective

Zooming in and focusing!
"If it cannot be measured, it cannot be celebrated"

One OKR consists of one O=Objective and 2-5 KR=Key Results



How to check that your OKRs are well thought out and clear?

Can you answer YES to all?

1

Are your OKRs clearly aligned to the OKRs of your department or team?



2

Objective...

- ✓ Is it describing the direction, you want to drive the business in?
- ✓ Is it a qualitative, ambitious and inspiring statement of what you want to achieve?
- ✓ Is it expressed clearly and to the point?

3

Key Result...

Have you made 2-5 Key Results?

- ✓ Is it a measurable outcome that shows how you will achieve your Objective?
- ✓ Is it ticking the boxes as being SMART..

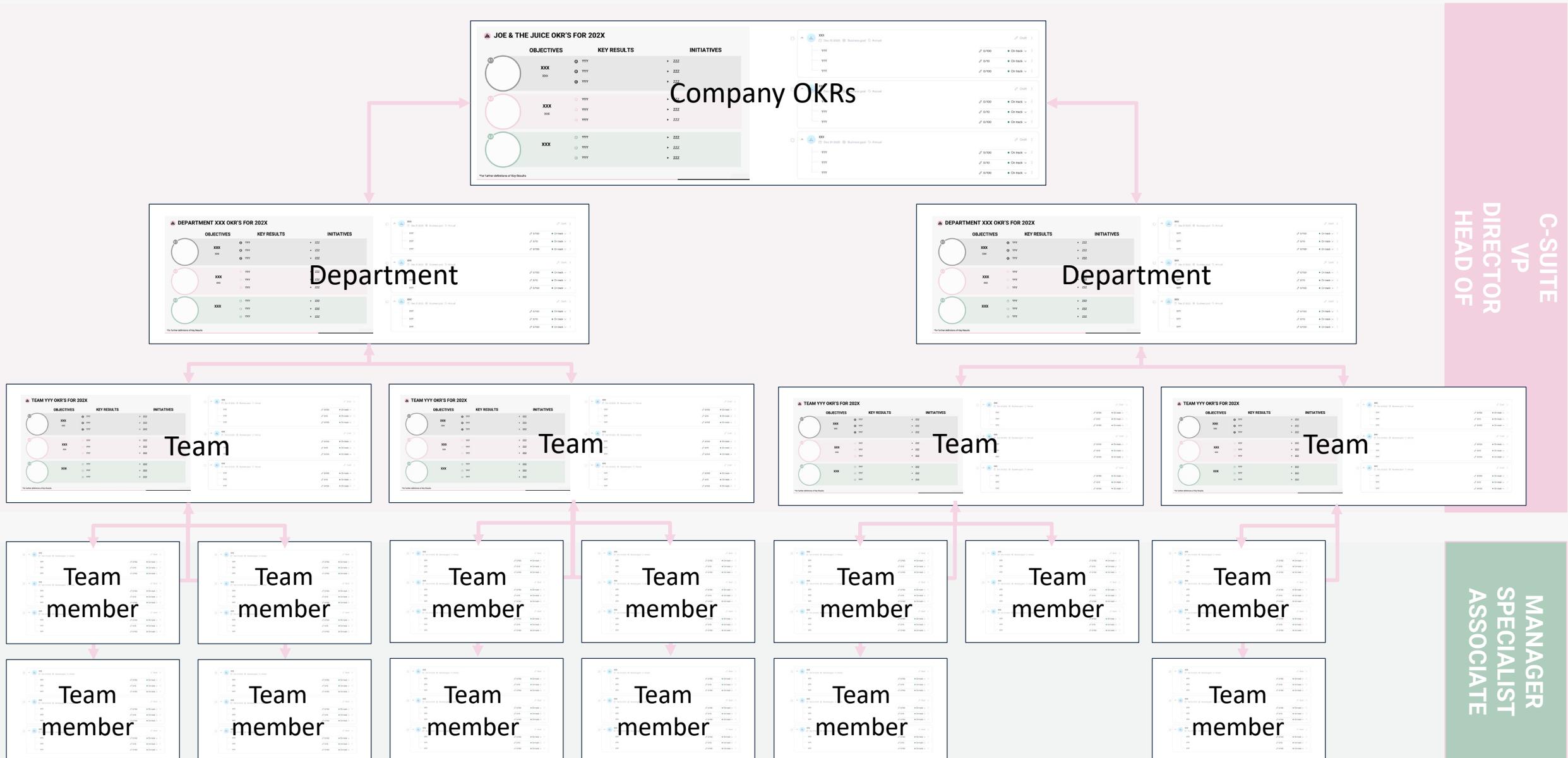


- ✓ Specific – What do you want to do?
- ✓ Measurable – How will you know when you've reached it?
- ✓ Achievable – Is it in your power to accomplish it?
- ✓ Realistic – Can you realistically achieve it?
- ✓ Timely – When exactly do you want to accomplish it?



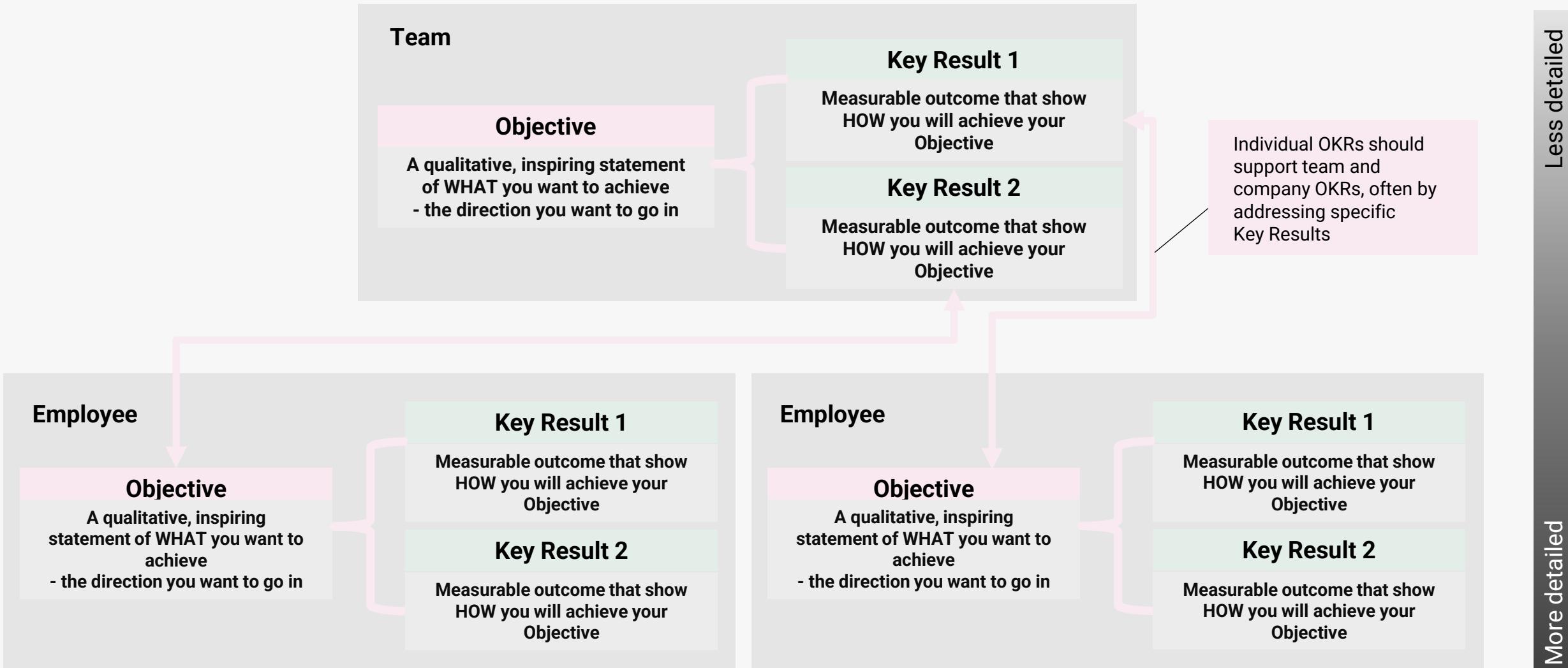
We use OKRs to support everyone moving in the same direction and drive business performance

Cascading OKRs help us align individual objectives with Team-, Department- and Company Objectives





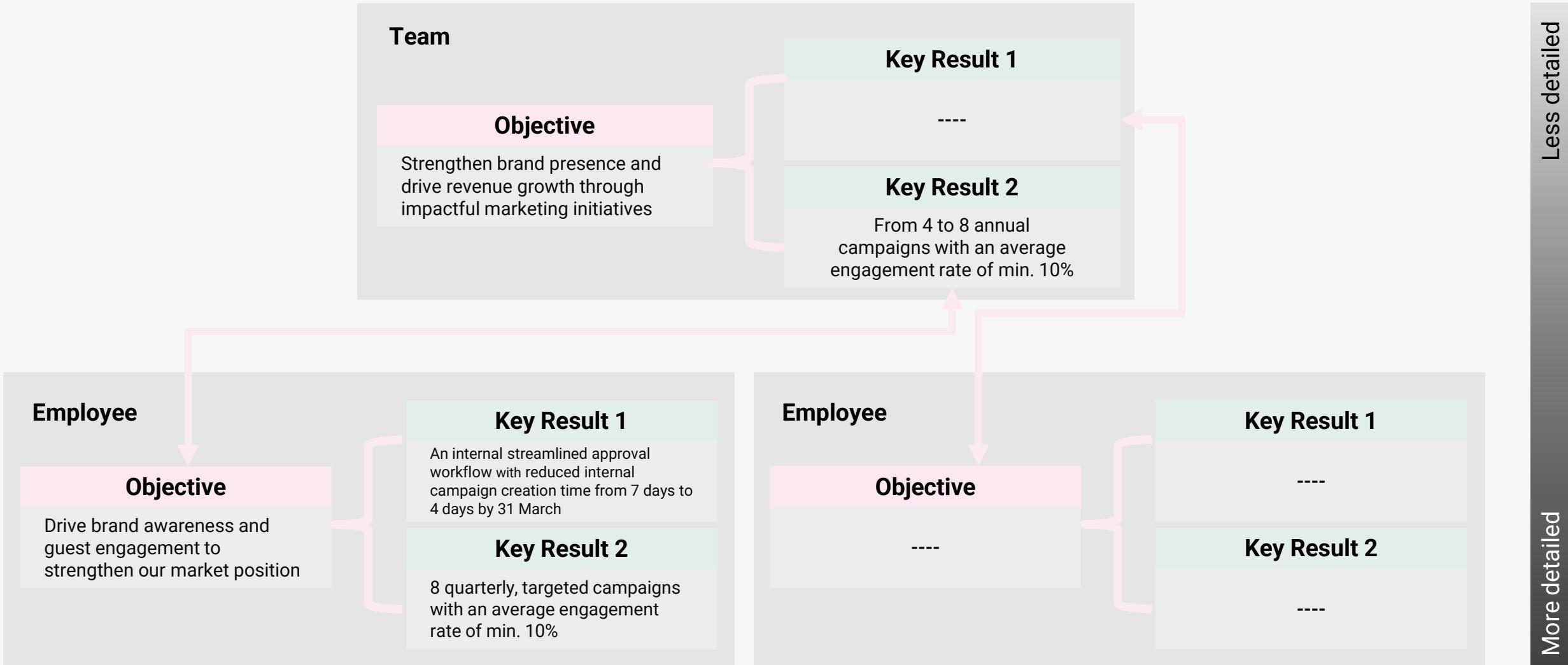
How does the cascading and alignment work?



The team OKR is the destination, and the employee OKR is the route each person takes to help the team arrive there



How does an example of the cascading and alignment look?



The team OKR is the destination, and the employee OKR is the route each person takes to help the team arrive there



Things to keep in mind about cascading and alignment

It can be done in many ways...

ENSURE OKRs supports the OKRs of the level above*. Every OKR should connect to the bigger picture

*Not all OKRs are aligned directly with the OKR of the level above, instead they could align to Department OKR - and/or Dotted line Team- or Department OKR

Some KRs are easily cascaded – “20% growth, you deliver 15% and you deliver 25%”

Other KRs requires more work to cascade – “from this situation to this situation, you do this part of what it takes, and you do this part”



1.2 Employee prepare by drafting OKRs

What do I need to do?

How do I do it?

1

Familiarize yourself with the team- or department OKRs

Your Manager shared them with you in a meeting or in the invite

Do not hesitate to reach out to your Manager if you have questions or need anything clarified

2

Draft 2-3 Objectives and 2-5 Key Results for each Objective in Leapsome

Open Leapsome [Link](#)

- 1) Consider connection and alignment with the team- or department OKRs
- 2) Consider your role and your understanding of our business and what you think you can contribute with to the business
- 3) Consider your own personal development and how your draft OKRs contribute to your own personal development

See examples of OKRs and how they are connected and aligned throughout the company as well as how to draft them in Leapsome on the next slides

3

Double check that your OKRs are well thought out and clear before submitting your draft in Leapsome

- 1) Are your OKRs clearly aligned to the OKRs of your department or team?
- 2) Are your Os (Objectives) a qualitative, inspiring statement of what you want to achieve - the direction you want to go in
- 3) Have your defined 2-5 KRs (Key Results) for each O? And are the defined as a measurable outcome, that shows how you will achieve your Objective

See more on how to set OKRs on [this slide](#)



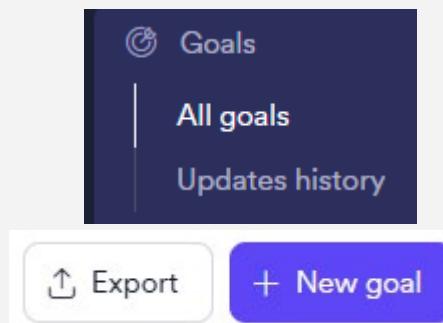
This is a collaborative process aimed at fostering both your professional and personal growth. Your preparation and active engagement are key to making the most of this process



How to draft OKRs in Leapsome

Leapsome

1 On the left hand select 'Goals'
2 On the top right-hand side select '+ New goal'



2 Title your Objectives (goals)

Title & description

Title *

What do you want to accomplish?

+ Add description General Goal

3 Select the applicable Employees as Contributors to your goals

Owners & contributors

Owned by *

Nanett Nissen

Contributors

Type to select from dropdown...

Remove contributors

4 Select the type of Objective (goal) as 'Business' and the Tag, Annual or which quarter

Additional settings

Goal purpose

Business goal

Tags *

Annual Attributes for better goals distinction

5 Connect the Objective (goal) with the Department-/Team OKR (parent goal)

Parent goal & progress

Connect with parent goal

Calculate progress automatically based on child goals

6 Add in 2 to 5 key results to track progress on your goal, and select the metric type for completion, add in the starting point and target as well

Key results

Edit key result

How do you measure success?

Metric type

Percentage

7 Select 'Save as draft' in the bottom right

Save as draft Publish



One OKR consists of one O = Objective and 2-5 KR = Key Results
Objectives are called goals in Leapsome



How to check that your OKRs are well thought out and clear?

1

Are your OKRs clearly aligned to the OKRs of your department or team?



2

Objective...

- ✓ Is describing the direction, you want to drive the business in?
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3

Key Result...

Have you made 2-5 Key Results?

- ✓ Is a measurable outcome that shows how you will achieve your Objective?
- ✓ Is ticking the boxes as being SMART..



- ✓ Specific – What do you want to do?
- ✓ Measurable – How will you know when you've reached it?
- ✓ Achievable – Is it in your power to accomplish it?
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- ✓ Timely – When exactly do you want to accomplish it?



1.3 OKR setting meeting between Employee and Manager

What do I need to do?

How do I do it?

Determine the Department-/Team OKRs where the employee's contribution will create value for both the employee and the business

1 ● Manager prepares

Open Leapsome – [Link](#)

Consider if employees draft OKRs align with your expectations. Are they connected with Department-/Team OKRs and are they well thought out and clear

Identify the areas you want to discuss and focus on in the meeting

2 ● Manager hosts the meeting and sets the scene

Set the scene

Tip! Be curious about how your employee is doing and how they feel about the meeting. Make sure you both intend a to have a collaborative meeting, looking into the coming year.

3 ● Employee and Manager collaboratively adjust and align Employee's OKRs

Agenda

- Welcome – setting the scene
- Employee presents draft OKRs
- Collaborative adjustment of OKRs
- Conclude

4 ● Employee adjusts in Leapsome

Either in the meeting or following the meeting - and publishes in Leapsome

5 ● Manager signs-off in Leapsome

Check in Leapsome - and sign



This is a collaborative process where Manager and Employee together explore how you and the business can grow together to grow together the next year



FAQ

What do I do with my OKRs if the business priorities change?

Consider if your Objectives are still relevant, and if your KRs are still realistic. During your mid-year review and reflect on whether they still make sense to keep or revise, or if they need to be removed.

What do I do with my OKRs if the organization changes?

Consider if your Objectives are still relevant, and if your KRs are still realistic. Within 4 weeks you should have reflected on whether they still make sense to keep or revise, or if they need to be removed.

What is the connection between OKR setting, End of Year People Review and Annual Salary Review?

To ensure that we reward performance at Joe & the Juice, we are strengthening the link between performance and compensation.

Going forward, your OKR progress and thereby your End of Year performance rating will influence your Annual Salary Review.

This means that:

- Your End of Year rating of your OKRs will play a key role in determining your salary adjustment.
- Strong performance and clear achievement of OKRs will be recognized and rewarded.

This creates a performance-driven process for everyone.





GLOBAL STEP BY STEP GUIDES

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