



The Team Leader's OKRs Tool Playbook

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Team Leaders are the bridge between company strategy and team execution. This guide shows you how to use OKRs Tool to:

- Keep your team's OKRs updated
- Assign ownership and manage permissions
- Communicate progress clearly
- Report effectively to your OKR Manager or Org Admin

Who it's for

- Team Leaders managing OKRs for their department or squad
- New managers learning the OKR process
- Leaders responsible for reporting to an OKR Manager or Org Admin

What you'll get

- A practical checklist for updating OKRs
- Best practices for adding team members & assigning KRs
- Permission rules for Team Leaders vs. Team Members
- Reporting workflows inside OKRs Tool
- Pro tips to keep your team accountable and motivated

The Team Leader Workflow

1) Create & Own Team OKRs

- **Work with your team** to define Objectives (1–3 max) and measurable Key Results (2–4 each).
- Ensure each KR has a clear **owner**.
- Use the **Initiatives tab** to capture the “how.”

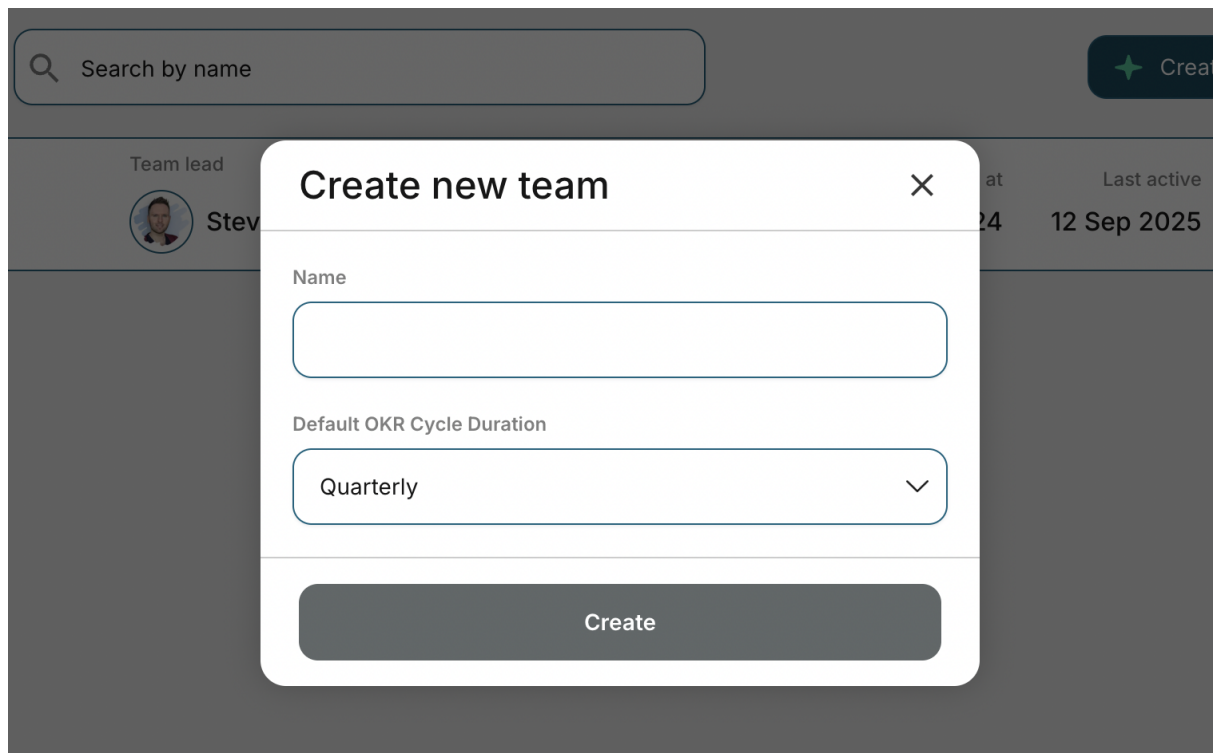
Pro tip: Avoid writing all the OKRs yourself — involve your team so ownership is shared.

2) Add New Team Members

As a Team Leader, you can grow your team directly in OKRs Tool:

1. Go to **Teams** in the sidebar.
2. Click **+ Create New Team** (or add members to an existing team).
3. Invite members via email.

Once added, you can assign them to specific KRs.

A screenshot of a web application interface showing a 'Create new team' modal. The modal is a white box with rounded corners and a close button (X) in the top right corner. It contains two input fields: 'Name' and 'Default OKR Cycle Duration'. The 'Name' field is a simple text input. The 'Default OKR Cycle Duration' field is a dropdown menu currently showing 'Quarterly' with a downward arrow. At the bottom of the modal is a dark grey button labeled 'Create'. The background is a dark grey sidebar and header area. The header has a search bar with the text 'Search by name' and a green plus icon followed by 'Crea'. The sidebar shows a 'Team lead' section with a profile picture and the name 'Stev'. Below this, there are some partially visible text elements like 'at', 'Last active', '24', and '12 Sep 2025'.

3) Assign KRs to Team Members

Clear ownership drives accountability:

1. Open a **Key Result**.
2. Click **Assign Owner**.
3. Type/select the teammate's name → **Assign**.

The KR is now linked to that person, so updates are their responsibility.

Best practice: Only one owner per KR — shared ownership often leads to confusion.

4) Manage Permissions (Roles)

In OKRs Tool, there are two key roles at the team level:

- **Team Leader**
 - Can add/remove team members in their team
 - Full permissions on their team's OKRs
 - Can create OKR cycles
 - Can create new teams
- **Team Member**
 - Can view all team members in their team
 - Can view and update KRs they've been assigned
 - Cannot create teams or cycles

Pro tip: Keep leadership distributed — promote more **Team Leaders** only when they genuinely need to manage people or cycles.

The screenshot shows the 'Teams' management interface in the OKRs Tool. At the top, there's a search bar and a 'Create new team' button. Below this is a table listing teams. The first team, 'OKRs Tool', is led by Steven Macdonald and has 2 members. A dropdown menu is open for Steven Macdonald's role, showing 'Team Lead' (selected) and 'Team Member'. Below the team summary, a list of team members is shown: Steven Macdonald (Team Lead, Active, Created at 28 Dec 2024, Last active 12 Sep 2025) and Filipe Souza (Team Member, Active, Created at 30 Jun 2025, Last active 05 Aug 2025).

Team name	Team lead	Members	Default OKR cycle	Created at	Last active	
OKRs Tool	Steven Macdonald	2	Quarterly	28 Dec 2024	12 Sep 2025	+ Add Team Member

	Role	Status	Created at	Last active	
	Team Lead	Active	28 Dec 2024	12 Sep 2025	
	Team Member	Active	30 Jun 2025	05 Aug 2025	

5) Weekly Updates

Consistency is the secret to OKR success. Here's how to manage weekly check-ins:

- **Remind your team** → Everyone gets an automated Friday email. Encourage updates and comments.
- **Batch update** if needed → Use **Select KRs** → **Update selected** → **Update all** to capture multiple updates in one go.
- **Add context** → Short comments make progress meaningful.

Best practice: Aim for **70%+ check-in frequency**. Anything lower signals engagement or alignment gaps.

The screenshot shows a modal titled "Update Your Progress" overlaid on a dashboard. The dashboard background displays "Q4 2025" and "Progress 0%". The modal contains the following elements:

- Key result:** Drive 7,000+ website visitors
- Progress:** 6312 / 7000 completed (90.17%)
- Progress bar:** A green bar showing 6.31K out of 7K.
- Current value update:** A text input field with the placeholder "Enter Value".
- Instructions:** "This Key Result uses a **numeric value**. Enter the current number (e.g., 25 leads, 12 tasks completed)."
- Buttons:** "Cancel" and "Submit".

6) Communicate with Your OKR Manager

Your role is to make progress **visible and understandable**:

- Use the **progress chart + status labels** (*On Track*, *At Risk*, *Behind*) to explain team health.
- Flag any **AI Signals** or Insights showing risks (e.g., stalled KRs).
- Share **Alignment Score** and **check-in frequency** for your team.

Pro tip: How is the Alignment Score calculated?

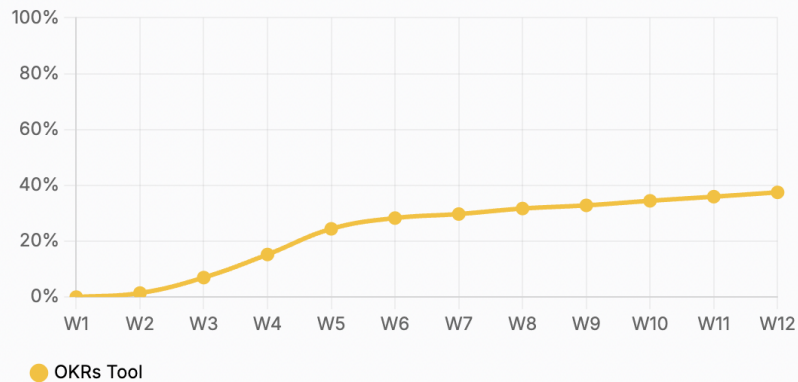
It's the average progress across all active OKRs in your team. For example:

- If one OKR is at **75%** and another is at **25%**, your team's Alignment Score will be **50%**.
- Think of it as your **baseline OKR health score** — the higher it is, the more aligned and effective your team is.

Overall Alignment Score ↑ +37.5%

37.5%

Weekly Progress Trends



7) Reporting

As a Team Leader, you feed into org-level reporting:

- **Friday updates** → Team updates roll into the system.
- **Sunday summary** → Org Admins get a weekly digest.
- **Share externally** → Use **email/URL sharing** for view-only OKRs.

Pro tip: Before reporting, check the **Activity Log** — it shows who updated what, when, and how values changed.

Quick Checklist for Team Leaders

- ☐ Review Objectives with your team at cycle start
- ☐ Add/invite all relevant team members
- ☐ Assign each KR to an individual owner
- ☐ Set correct permissions (Leader vs. Member)

- ☐ Nudge your team on Fridays to update
- ☐ Add context to updates (not just numbers)
- ☐ Monitor AI Insights weekly
- ☐ Share risks/highlights with your OKR Manager
- ☐ Reflect at cycle end with the Feedback Loop

Final Gut Check

Ask yourself weekly:

- Does every KR have a clear owner?
- Is check-in frequency healthy (70%+)?
- Are roles/permissions set correctly?
- Have I flagged risks early enough?
- Is the story behind progress clear to my OKR Manager?

If yes — you're leading your team the right way.