



OKRs Tool Features Overview

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OKRs Tool is designed to make setting, tracking, and managing OKRs simple. But with multiple features packed in, it helps to have one place where everything is explained clearly. This guide walks you through every major feature — what it does, where to find it, and how to use it effectively.

Who it's for

- New users learning the platform
- Team Leaders and OKR Managers introducing OKRs Tool across departments
- Org Admins overseeing adoption and reporting

What you'll get

- A breakdown of all key features
- Step-by-step on how to use them
- Clarification on emails, notifications, and integrations
- Quick references for permissions, reporting, and cycle management

Feature Breakdown

1) OKRs

- **Create OKR:** Add objectives and measurable key results (choose timeframe + cycle first).
- **Assign Owners:** Each KR should have a single owner.
- **Edit OKRs:** Use the 3 dots → Edit OKR to refine wording or add new KRs.
- **Link Initiatives:** From a KR or Initiatives tab, choose AI-suggested or custom initiatives.

2) Hierarchical OKRs

- **Create parent OKRs:** Start with company- or department-level OKRs.
- **Add child OKRs:** Link team-level OKRs beneath parent OKRs to show contribution.

- **View hierarchy:** See how objectives align across levels in a clear tree structure.
- **Edit hierarchy:** Use the 3 dots to re-link, adjust, or remove child OKRs.

3) Initiatives

- Link initiatives directly to KRs to connect strategy with execution.
- Choose **AI suggestions** or create your own.
- Manage and track initiatives separately in the Initiatives tab.

4) Teams & Users

- **Teams tab:** Add new teams, rename, invite teammates, and assign permissions.
- **Users tab:** Manage individuals across your org, assign them to teams, and see last active time.
- **Roles:**
 - **Org Admin** → Full org control (billing, users, teams, cycles, reporting).
 - **Team Leader** → Manage OKRs + users within their team, create teams/cycles.
 - **Team Member** → View and update KRs they own.

5) Progress Tracking

- **Charts:** Visualize progress over time.
- **Status labels:** *On Track, Behind, At Risk, Completed.*
- **Update KRs:**
 - Comment only
 - Update progress + comment
 - Manually override status
- **Batch updates:** Toggle *Select KRs* → choose multiple → *Update all.*
- **Activity Log:** See every update with who, when, and what changed.

6) Cycles & Vault

- **Close cycle:** Moves cycle into the Vault (read-only).
- **Clone cycle:** Duplicate into a new one.
- **Edit cycle:** Adjust name, timeframe, or ownership.
- **Delete cycle:** Hard delete (permanent).
- **Vault:** Search and reopen cycles if needed.

7) Insights & Alignment

- **AI Insights:** Suggestions for resource allocation, engagement, risks, and reflection.
- **Alignment Score:** Average progress across active OKRs.
- **Check-in frequency:** Weeks with check-ins ÷ total weeks (aim for 70%+).
- **Team Performance Comparison:** Compare alignment across teams.

8) Notifications & Emails

- **Friday** → All users receive a reminder to update their OKRs.
- **Sunday** → Org Admins receive a weekly report email with team progress.
- **Slack integration:** Updates and reminders also available in Slack.

9) Exporting & Sharing

- Share OKRs externally by **email** or **URL link** (view-only).
- Use for board reports, investors, or cross-functional partners.

10) Settings & Account

- **Account Settings:** Manage org info, logo, industry, and cycle duration.
- **Billing & Subscription:** Update payment details, view invoices, and upgrade/downgrade plans.
- **Delete account:** Contact **info@okrstool.com** (permanent deletion).
- **Assign new Org Admin:** Contact **info@okrstool.com** (for security reasons).

Quick Reference Checklist

- ☐ Create OKR → Choose cycle → Add Objective → Add KRs → Assign owners → Save
- ☐ Add teammates → Teams tab → Invite via email
- ☐ Update KRs → Weekly progress updates + comments
- ☐ Review progress → Charts + status labels + Activity Log
- ☐ Report → Use Insights, Alignment, and weekly reports
- ☐ End cycles → Close, clone, edit, or delete

Final Gut Check

With these features, you can:

- Keep goals measurable and visible
- Ensure every KR has an accountable owner
- Track consistency via check-in frequency
- Report with confidence to execs, boards, or partners

OKRs Tool isn't just software — it's your system for clarity, accountability, and alignment.