

# Mid-Year Review Template

Decision session · 90 minutes · Leadership team

OKRs Tool  
okrstoool.com

ORGANIZATION

FACILITATED BY

DATE

ATTENDEES

## PRE-WORK — SEND 3 DAYS BEFORE THE SESSION

Each team lead completes before attending. Finance provides H1 actuals vs plan.

### EACH TEAM LEAD SUBMITS:

- H1 OKR scores (0.0–1.0 per Key Result)
- One-paragraph assumption audit per objective
- Top 1–2 proposed H2 priority changes

### FINANCE PROVIDES:

- H1 actuals vs plan — revenue, costs, headcount
- H2 budget position
- Any material variance explanations

00:00–00:20

### BLOCK 1: H1 OKR SCORECARD

Score every company-level Key Result 0.0–1.0. Flag anything below 0.5 for Block 3 decisions.

OBJECTIVE / KEY RESULT	H1 SCORE	STATUS	CARRY TO H2?

00:20–00:45

### BLOCK 2: STRATEGIC ASSUMPTION AUDIT

For each company objective: what did we assume in January? What has changed? What does that mean for H2?

OBJECTIVE	ASSUMPTION (JAN)	STILL VALID? (Yes / Partially / No)

00:45–01:15

### BLOCK 3: H2 PRIORITY DECISIONS

For each flagged item: carry forward unchanged / revise target / formally close / add new priority. Each decision gets a named owner.

DECISION	OWNER	FIRST CHECK-IN DATE

01:15–01:30

**BLOCK 4: RESOURCE AND OWNERSHIP ALIGNMENT**

Are the right people on the right H2 priorities? What needs to move — headcount, budget, external support?

WHAT NEEDS TO MOVE

ACTION + OWNER + DATE

**POST-SESSION — WITHIN 48 HOURS**

· Revised H2 OKRs published with updated owners

· Decision log distributed to all team leads

· Cascade updated to reflect H2 priorities