**Forest for the Trees**

Double your chances of achieving your goals by prioritizing your team’s top strategic objectives.

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| Type | Meeting |
| Purpose | Planning and strategy |
| Topics | Goal alignment, prioritization, decision-making, brainstorming, consensus building, OKRs, collaboration |
| Audience | General |

## **About this activity**

You’ve probably heard the expression that someone “can’t see the forest for the trees,” meaning that they are too buried in the details to see the big picture. This exercise flips this thinking and helps participants create the forest *from* the trees by branching out quarterly objectives and key results (OKRs) into actionable initiatives.

Findings from a survey of over 1,000 businesses conducted by Gtmhub revealed that 92% of those who regularly established and monitored OKRs expressed satisfaction with the outcomes of their efforts.

In this activity, participants will focus on a strategic objective and its key results by brainstorming a list of 12 initiatives from simplest to most complex that can be implemented during the next quarter to meet the defined OKRs. Participants will visualize their work using a tree diagram (or upright fishbone) that will visualize the actionable initiatives for the next quarter and grow successful business outcomes.

This activity is designed for a general audience and works best with up to 8 participants per group in an in-person setting, hybrid, or remote setting.

#### Important details

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| Best for groups of | 8, up to 48 total participants |
| Preparation time | 10 minutes |
| Duration | 90 minutes |
| Required materials | * Flip chart * Markers * Pen/pencil * Paper * OKR explanation slides * Objectives and key results worksheet * Forest for the Trees worksheet * Timer * Removable tape * Presentation equipment and screen * Access to meeting platform, if hybrid or remote * Whiteboard, if hybrid or remote |
| Required location | * Indoors * Blank wall for posting flip chart pages, if in-person * Access to Internet for virtual groups |
| Noise level | Medium |

## **How it works**

#### Instructions

Before conducting the activity (15 minutes):

The facilitator will reach out to the session organizer to determine the number of participants and the areas of responsibility for which each group should focus when defining their OKRs. The facilitator should ask if certain participants should be grouped together, or if cross-functional collaboration is best.

The facilitator will review the instructions and set up a flip chart for in-person groups or a whiteboard for virtual groups.

The facilitator will make copies of the Forest for the Trees Worksheet to distribute to in-person participants and an extra blank worksheet for each group. For virtual groups, the worksheet should be emailed ahead of the session.

The facilitator will decide how to divide into smaller groups with 4-8 participants per group and assign breakout rooms to virtual participants.

Conducting the activity:

Introduction (15 minutes):

The facilitator will provide participants with a brief overview of OKRs using the provided slides and explain that during the session, participants will be working in groups to define objectives, key results, and initiatives to implement during the next business quarter. The facilitator should divide participants into groups and have them assemble together, if in-person, or in the breakout rooms after the instructions if virtual.

Objectives Brainstorming (10 minutes):

The facilitator will instruct participants to create an objective related to their assigned topic that should answer the question of “where” the team is going and “what” the team is trying to achieve. Each group should write down all ideas. The group should then agree on the objective that best matches the team’s top priority and fill in the Team Objectives and Results Worksheet. Participants will have 10 minutes to complete this exercise and the facilitator should keep time and call out at 5 minutes, 2 minutes, 1 minute, and 30 seconds remaining.

Objectives Result Sharing (10 minutes):

The facilitator should ask a representative from each group to share their objective. The facilitator should write the objective on its own flip chart page or whiteboard (the facilitator will add to this in the next part of the activity) and ask participants to share how the objective could be improved to be more meaningful, audacious, or inspiring. The feedback should be used to help each group fine-tune their objective.

Key Results Brainstorming (10 minutes):

Once all groups have their finalized objective, the facilitator should instruct each group to generate a list of 4-5 key results for their objective and fill in the Team Objectives and Results Worksheet. Some key results should be leading, some lagging, and some counter. Each key result should be:

1. Specific and time-bound.
2. Aggressive yet realistic.
3. Measurable and verifiable.

Participants will have 10 minutes to complete this exercise and the facilitator should keep time and call out at 5 minutes, 2 minutes, 1 minute, and 30 seconds remaining.

Key Results Sharing (10 minutes):

The facilitator should ask a representative from each group to share their key results. The facilitator should write the key results on the flip chart page or whiteboard under the objective for each group and ask participants to provide feedback on how the key results could be improved to better meet the three characteristics listed above. The feedback should be used to help each group fine-tune their key results.

Initiatives Brainstorming (20 minutes):

The facilitator should encourage each participant to take their Forest for the Trees Worksheet and write the defined objective on the base of the tree trunk diagram. Participants should then individually brainstorm and write down 12 initiatives that could be carried out in the next quarter toward achieving the objective and key results.

Once the list is created, participants should then fill in their tree by listing one initiative on each branch. The participant should move up the tree, filling in the branches in order of the initiatives that are easiest to achieve near the bottom to hardest to achieve at the top.

Once participants have completed this exercise individually, the group should then collaborate to create a single tree on a new worksheet that represents the prioritized initiatives agreed upon by all group participants.

The facilitator can share the example of a completed tree based on the objective of increasing customer satisfaction by 20%.

Participants will have 20 minutes to complete this exercise and the facilitator should keep time and call out at 10 minutes, 5 minutes, 2 minutes, 1 minute, and 30 seconds remaining. At 10 minutes, the facilitator should urge groups to start working on building consensus and creating their combined tree. As groups are working, the facilitator should tape the flip chart pages up on the wall and add a blank page next to the one containing the objective and key results.

For in-person sessions, each group should select a leader to draw their finished tree on the blank flip chart page once the group achieves consensus. For virtual sessions, each group should upload a copy of their finished tree to the chat.

Final Results Sharing and Wrap-Up (25 minutes):

The facilitator should congratulate participants on their hard work in creating their OKRs and remind them that their trees are a visual reminder of their objective as a series of small, achievable tasks that can be accomplished, one at a time.

The facilitator should ask each group to share their finished tree and to talk about their process in selecting the initiatives they will focus on. The facilitator will offer all participants the opportunity to ask questions or comment on each group’s initiatives.

Once all groups have shared, the facilitator will ask each group to take the last five to ten minutes of the session to write on their team worksheet who will be accountable for follow-up and how this will be done. Team worksheets should be submitted to the facilitator at the end of the session.

#### Rules

All input is welcome in the brainstorming stages. Ideas will be evaluated by consensus as the activity progresses.

The final OKRs should reflect input from each participant.

Each group must define how they will be accountable for follow-up and results.

#### Example

See the completed Forest for the Trees diagram.

## **Materials**

#### For facilitator

Flip chart

Markers

OKR explanation slides

Timer

Removable tape

Presentation equipment and screen

Access to meeting platform, if hybrid or remote

Whiteboard, if hybrid or remote

#### For attendee

Pen/pencil

Paper, for brainstorming

Objectives and Key Results Worksheet

Forest for the Trees worksheet