CODING Project Management

Best Practices

Product Documentation

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Best Practices
How to Use Objectives and Key Results (OKRs)

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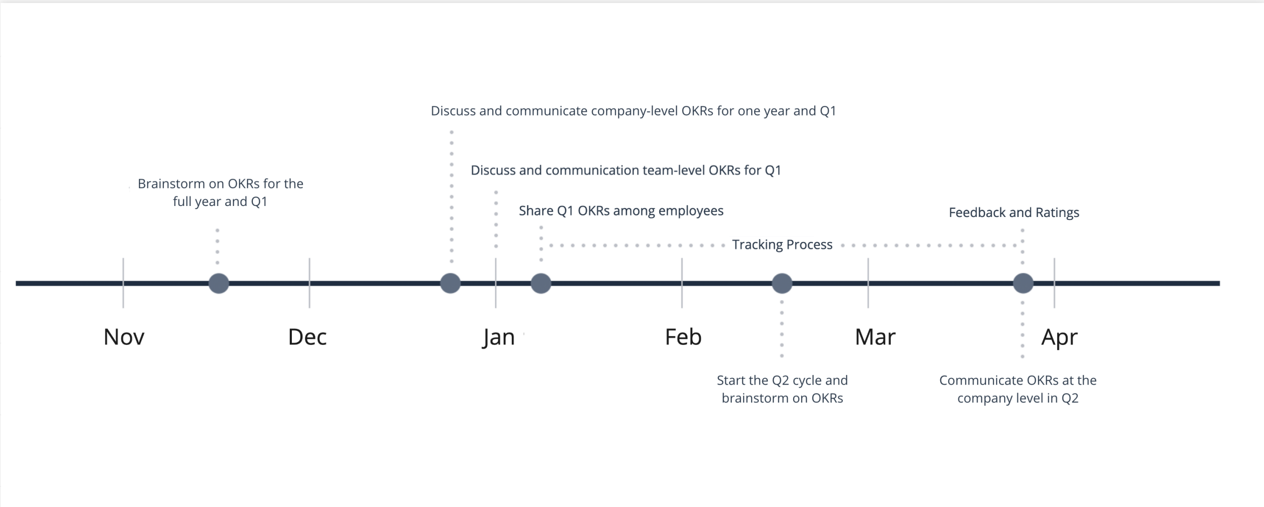
This document describes how to implement objective and key result (OKR) management in agile teams.

Open Project

1. Log in to the CODING Console and click **Use Now** to go to CODING page.
2. In the menu on the left of the homepage, click **Objectives** to go to the team objectives page.

A typical quarterly OKR cycle is as follows:



The main processes of an OKR cycle include:

Launch phase: Establish a special implementation team and formulate the specific implementation cycle and processes.

Drafting phase: Managers set team objectives with a clear hierarchy; members set their team-based individual objectives.

Tracking phase: Assignees update the progress in real time; the management tracks the mid-term progress of OKRs.

Retrospective phase: All members participate in retrospective meetings and communicate by department.

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Launch Phase

Teams implementing OKRs for the first time must confirm the implementation cycle and process, and organize OKR training for all members. If members cannot understand the OKR concept, OKRs may become another KPI tool.

Step 1: Establish a special implementation team

Establish an OKR implementation team (usually the human resources department and/or CEO) and organize OKR training for all members.

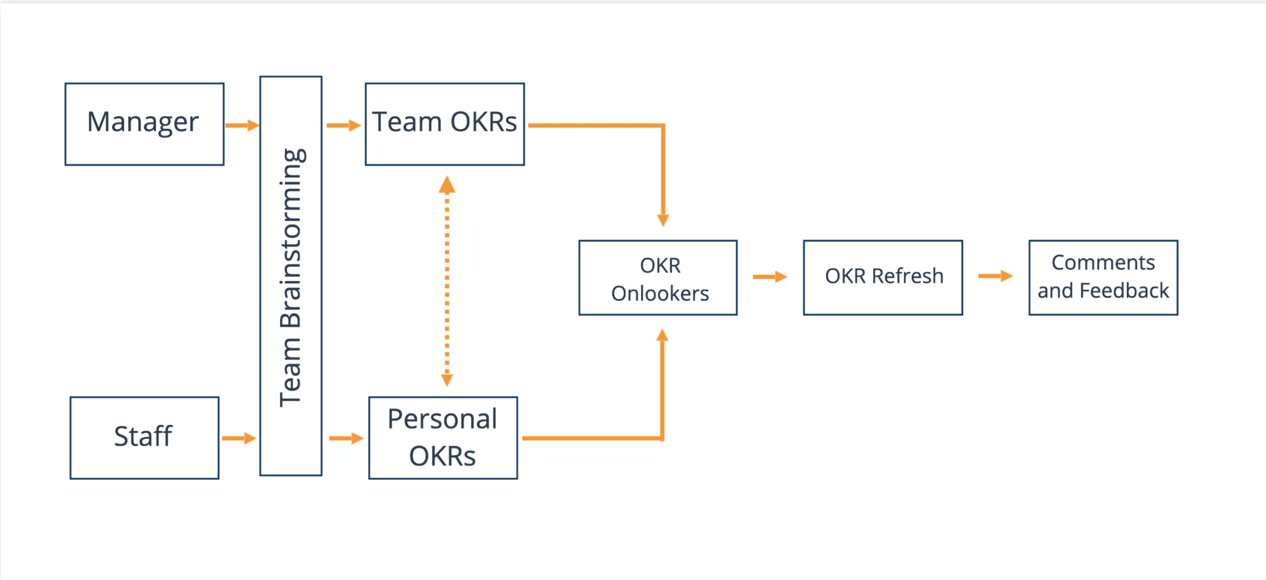
Step 2: Determine the implementation cycle

The OKR cycle is very flexible and simply needs to fit the business schedule. Faster-paced businesses such as Internet and gaming companies can set quarterly or short-term OKRs. Slower-paced businesses can set biannual or annual OKRs.

Step 3: Define an implementation process

All members need to understand OKRs and what they should do. Draw up all issues that need to be completed at specific OKR time points.

Drafting Phase



In the drafting phase, we need to start setting clear team and individual objectives. Objectives can be discussed through brainstorming or seminars. After the initial OKRs are set, all members can view all OKRs to stimulate new

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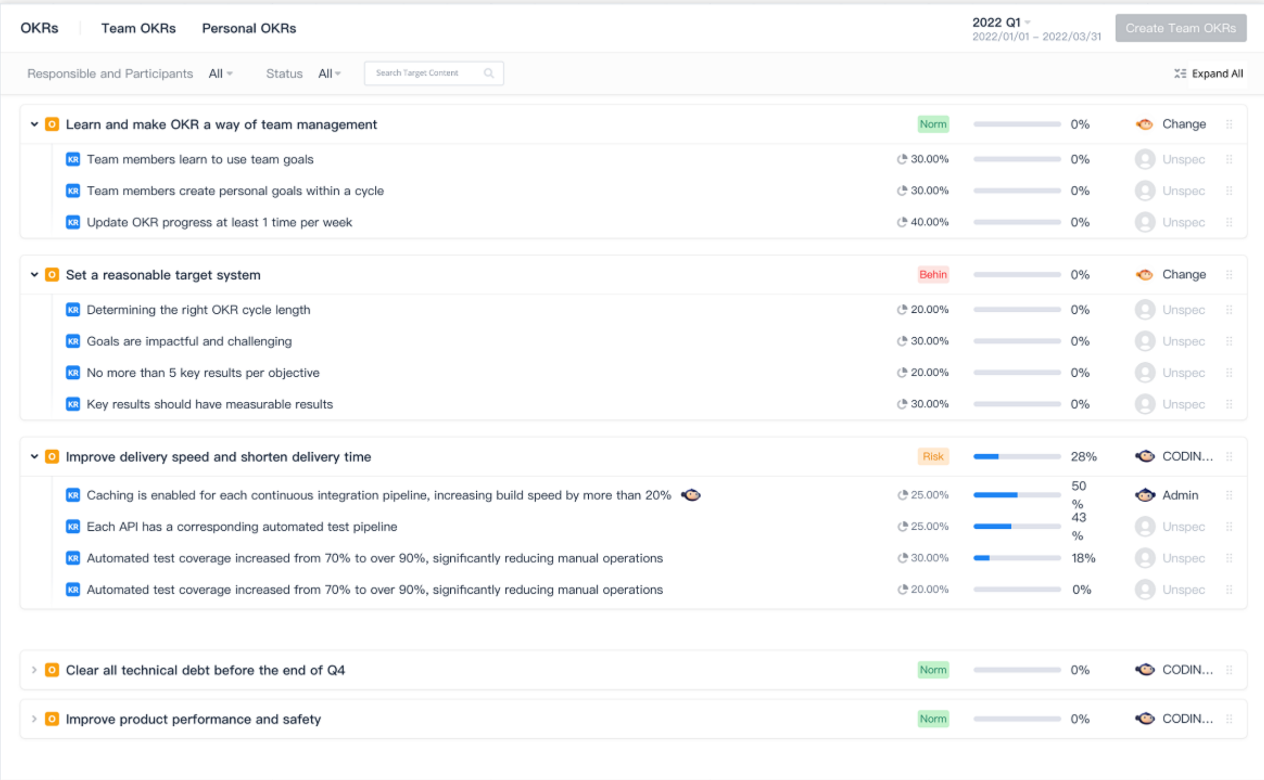
inspiration for collaboration or avoid duplicate work. Members can also update their individual OKRs after the discussions.

Set team objectives

By aligning objectives, the management sets team objectives and key results (KRs) with a clear hierarchy. KRs are assigned different weights according to their importance and priority, which will affect the subsequent calculation of the overall progress toward objectives.



Assign KRs to assignees and participants for management. With OKRs in CODING, an assigned individual objective is associated by default to the current KR. A KR can be associated with multiple individual objectives.

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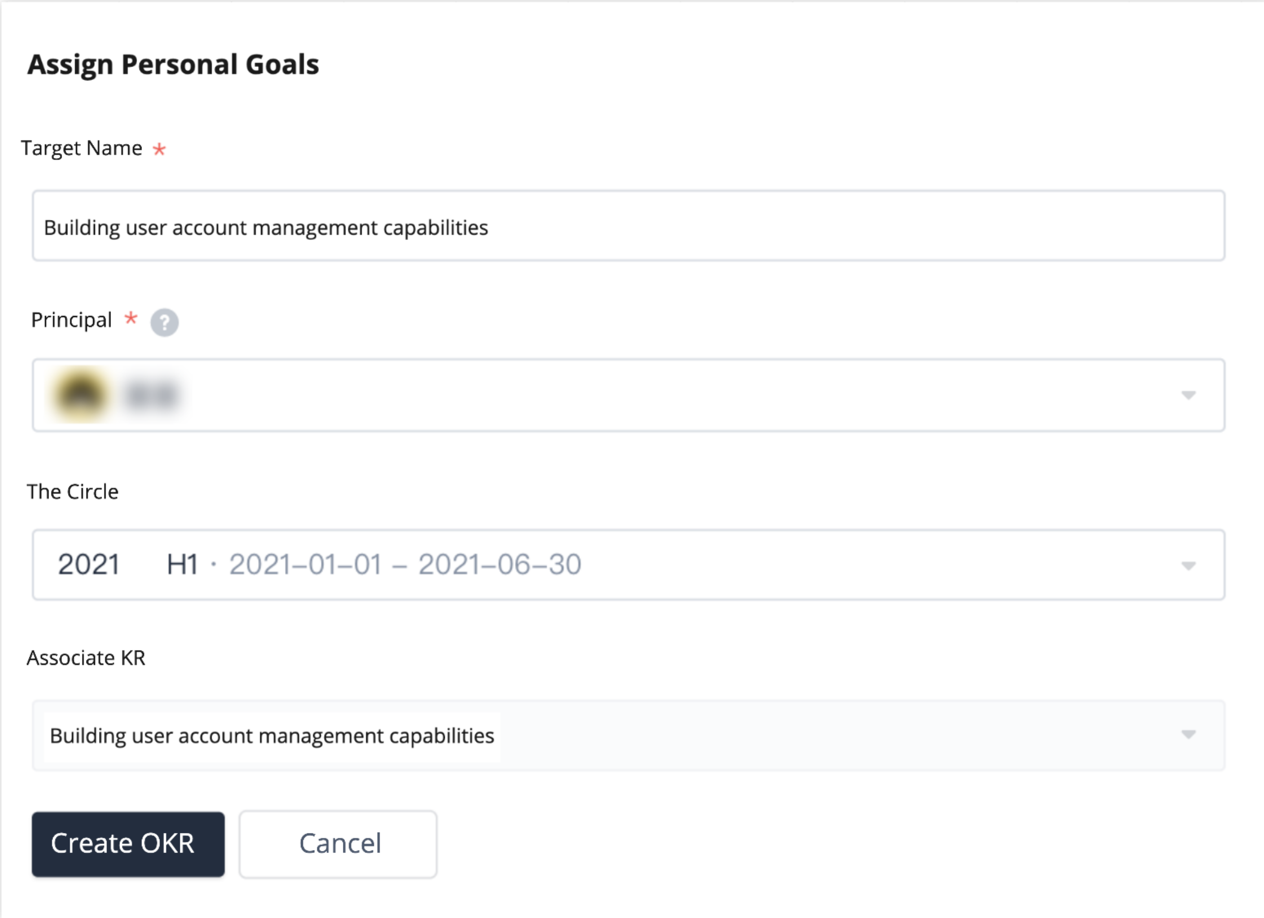

Set individual objectives

When adopting team objectives, employees can think about the aspects in which they can contribute to the team while taking into account their personal interests, and set their **team-based individual objectives**.

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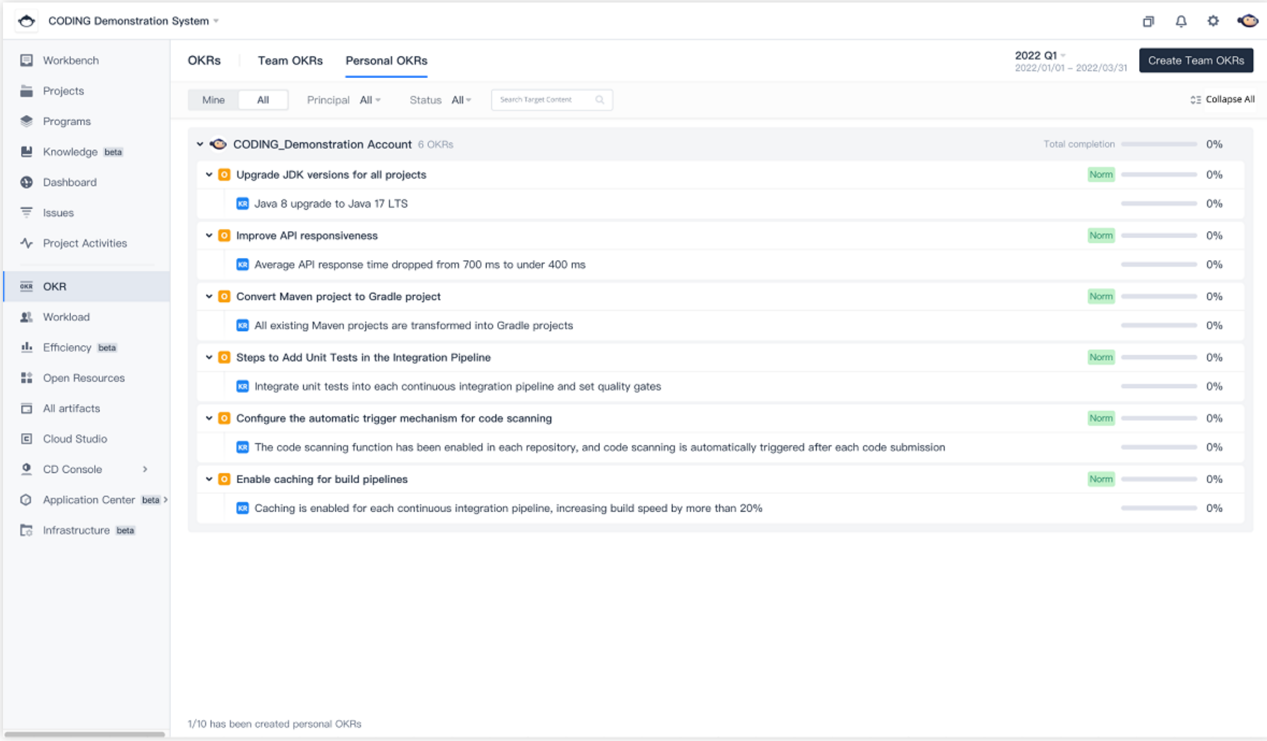

Key points for crafting OKRs

When **setting objectives**, make sure they are:

Aligned with the company vision or strategy.

Transparent to all members.

Set with the full participation of employees.

-..Challenging.

When **setting key results**, make sure they:

Always promote the achievement of objectives

Focus on 3 to 5 results

Are objective and measurable to accurately measure their impact on objectives.

Tracking Phase

In the course of OKR implementation, leaders need to communicate with employees regularly to identify and assist in clearing obstacles, and adjust and align OKRs as required. The management also needs to track progress regularly.

Ongoing communication

Leaders should communicate with employees on the following five key areas:

1. Objective setting and reflections
2. Ongoing progress updates

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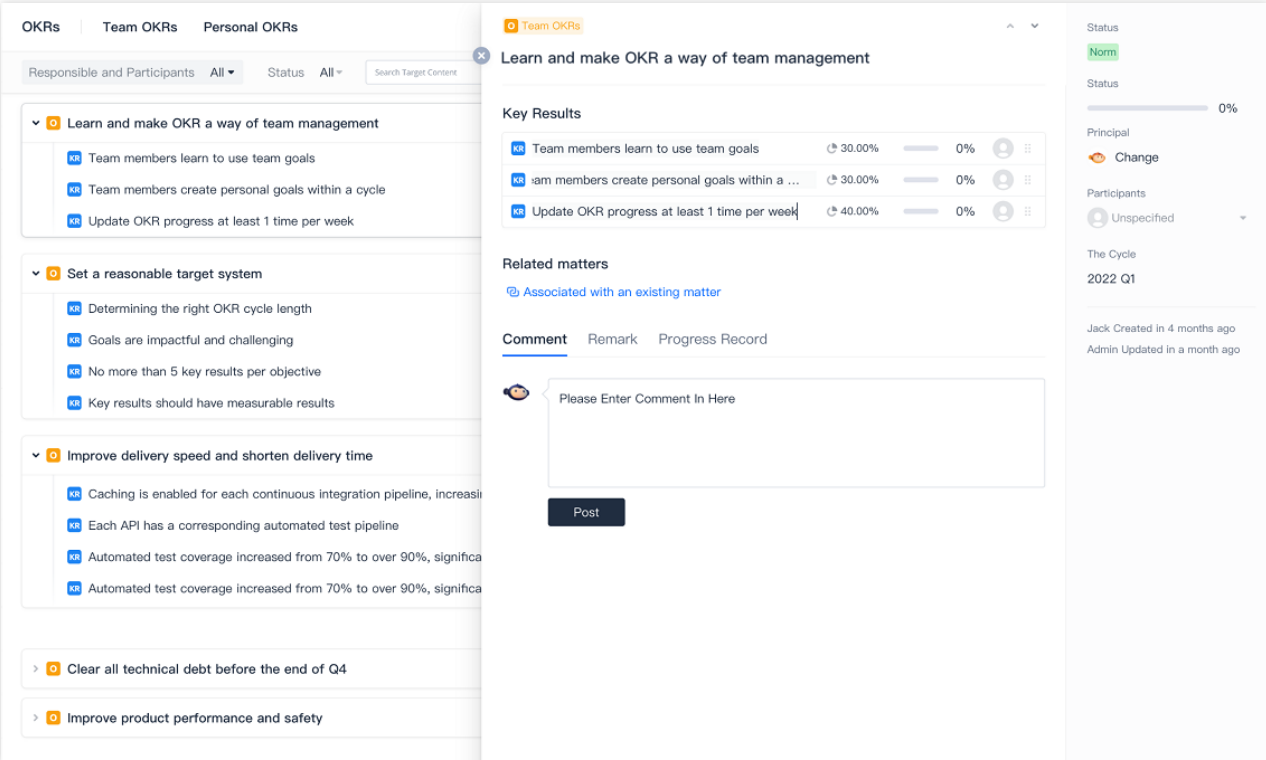
3. Two-way coaching
4. Career development
5. Lightweight performance appraisals

During the communication, the role of managers has changed from a supervisor to an instructor, a mentor, or a leader. The key points can be recorded on the objective details page, helping teams and individuals review the objective progress and growth path.



Progress tracking

Different progress modes are needed for different objective types. For example, percentage or numerical progress can be used for operational indicators, such as feature penetration rate, user growth rate, payment rate, sales, and internal efficiency. Milestones can be used for development indicators, such as feature release and DevOps pipelines. Teams can mark the current implementation status as normal, risky, falling behind, or postponed. Statuses are displayed for improvement rather than accountability. A team should analyze the factors for a lag together and adjust the countermeasures in time.

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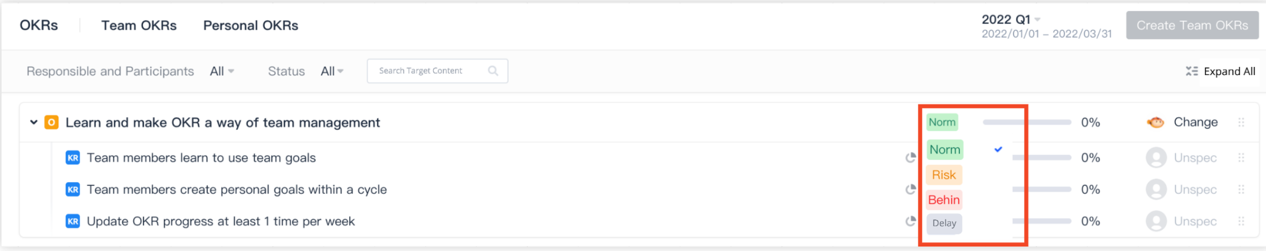
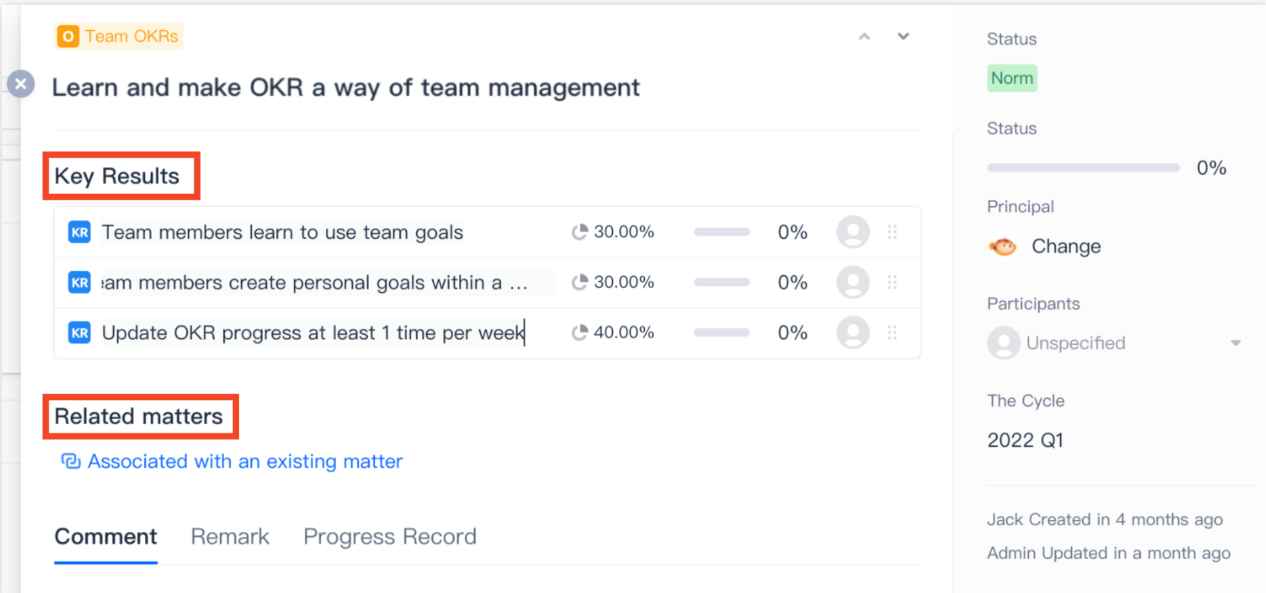


Associate issues

To sort out the individual or team path for implementing objectives, individuals or teams can associate relevant issues in **Project Collaboration** to the OKRs. For example, an objective at the organizational level may require different teams to collaborate. By associating issues, tasks scattered across projects can be observed centrally in the objective view. The task assignees can understand the significance, value, and context of the task, and the team can see the progress toward the objective.



Retrospective Phase

Retrospectives should include OKR reviews at the organizational, department, and individual levels. Performance appraisals are separated from the objective completion rate in the OKR model. Performance appraisals should be a step in another closed loop process.

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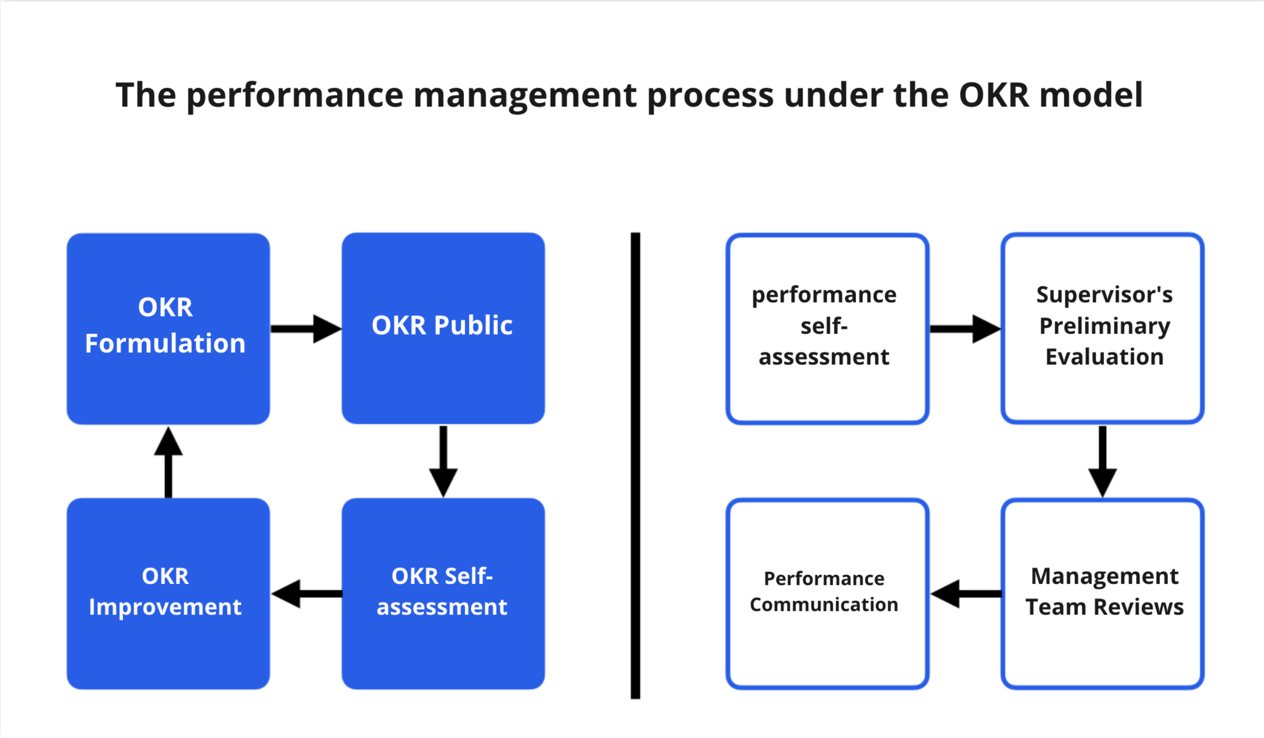

Focus on the following points during retrospectives:

Objective achievement rate

Problems found in this cycle and ways to improve

Key direction and content of work for the next cycle

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How to Use Story Points

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This document describes how to use story points in CODING.

What Is a Story Point?

In traditional IT projects, the project manager often needs to estimate the costs for an upcoming project, including the workload, software and hardware costs. At the end of a project, most teams will find that the cost estimates that took a long time to prepare are often very different from the actual costs when reviewing the project. Traditional software teams usually estimate workload with time. Time is an **absolute value** that is usually estimated with historical empirical information. Time estimation works for teams with a fixed process and stable requirements. However, these meticulous estimates often restrict teams that are facing changing complexities. Every step of the way, a team has to check back with the original plan: Have we exceeded the estimated time? Are we up against the deadline? Have we achieved the original plan?

A core difference between agile estimation and traditional time estimation is the concept of **relative value**. Agile estimates are based on story points rather than absolute estimates in days or hours. Story points are a common **relative value** in agile development. In other words, given two requirements, we can estimate that one is larger than the other by a number of times, but we are unsure of the exact workload of each requirement.

What Are the Benefits of Story Points?

Team members often have an emotional attachment to dates, and relative estimation removes the emotional attachment.

The workload estimate of each team differs slightly, meaning that their speed (in points) will differ.

Once a consensus has been reached on the relative value (or difficulty) of a story point, the point can be assigned quickly without debate.

Story points allow teams to resolve problems based on difficulty rather than time. Team members can focus on creating value instead of the amount of time spent.

In practice, estimation with time and story points each have their own advantages and disadvantages in different scenarios. In summary, good estimation practices help teams stay on top of project costs and profitability and reach a consensus on the effort, priority, and value of requirements to be delivered, leading to better business decisions. Let's take a look at how to estimate with story points.

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How to Use Story Points

Prerequisites

Teams using story points should:

Use fixed iteration durations (usually 2 weeks).

Maintain a relatively stable team.

Using story points for the first time

When using story points for the first time, a team should establish a benchmark by determining a previous requirement of equivalent effort to 1 story point.

For example, a "Create xxx page" function counts as 1 point. Accordingly, a "Modify xxx" function would also count as 1 point, and a simple search function would count as 2 points. In other words, the search function requires twice as much effort.

Note:

Story points are measured using the Fibonacci sequence: 1, 2, 3, 5, 8. (CODING uses an improved model.) In the approximate Fibonacci sequence, the difference between adjacent numbers increases as the numbers increase, allowing the difficulty of requirements to be easily identified and compared. For example, a 34-point requirement is different from a 21-point one, but it would not be very agile to debate over whether a feature is 34 or 35 points.

Steps

Before a new iteration starts, all members need to meet to assess the story points of requirements.

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Suppose the team has agile planning poker cards (each with a story point on the back).
Each team member (except the product owner) picks a card of a certain color.
The product owner describes a backlog item to be estimated and addresses questions from team members.
The team discusses the backlog item.
Each team member makes an estimate according to their judgment and puts the estimation result face down on the table.
When all team members have completed their estimate, everyone reveals their card at the same time.
If everyone has the same estimate or similar ones, the value is the consensus for the backlog item.
If the difference in value is relatively large, the estimation results need to be discussed.
Repeat the process above until a consensus is reached.
The product owner selects the next backlog item to estimate.
The estimation results are put face down initially to avoid the herd effect (or deference to authority) that may result in random changes to one's result during the assessment.

After an iteration

At the iteration retrospective meeting, check the total number of completed story points and record them.
Use the total number of points completed in the iteration as a reference to plan the next one. Usually, each iteration will have slightly more story points than those completed in the last iteration, so the team can gradually become more efficient.

Conclusion

During actual agile development, the estimated number of points may be different from the actual situation due to business uncertainty, new changing factors, and subjective factors. We hope the following suggestions can help you improve story point estimation efficiency:
Involve all relevant members in the estimation. With more comprehensive information comes more mature results. During the estimation process, team members can share their logic, experience, and hypotheses, creating synergy.
Reference previous work. In the iteration retrospective, review and reflect on the accuracy of the estimate to improve the next iteration estimate.
Choose the right estimation method for story points. Estimation methods differ for projects of different types and effort. Popular estimation methods include planning poker, T-shirt size, and dot vote.

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