HUMARESO

ENGAGE · ADMINISTRATOR GUIDE

Administering OKRs in Engage

How to launch a season, get measurable key results out of every owner, keep objectives current, read the health strip, run the season boundary, and build a rhythm the organization keeps.

people. with passion.

September 2026

Contents

1. Why OKRs, and why they fail
2. Roles
3. Set up seasons
4. Launch a season
5. Get measurable key results
6. Keep objectives current
7. Read the health strip
8. Reviews and scoring
9. The season boundary
10. Alignment and teams
11. External goals
12. The operating rhythm
13. Troubleshooting

This guide is for the person who runs objectives for an organization: the HR partner, the chief of staff, the operations lead. It assumes you have administrator rights in Engage. Everyone else on the team needs the shorter **OKRs 101**.

1. Why OKRs, and why they fail

Objectives and key results give an organization a short list of outcomes and a number for each one. The value is not the list. The value is the conversation the numbers start every week: are we moving, and if not, what changes.

Most OKR programs fail in one of four ways, and each one is visible in Engage before it becomes a problem.

Failure	What it looks like	Where Engage shows it
Key results written as tasks	"Fix the login page." Nothing to measure; the objective sits at 0%.	Measurable tile on the health strip; the task-shaped hint in the editor.
Numbers nobody updates	The objective looks fine in week one and is fiction by week six.	Updated in 14 days and Stale tiles; the Stale badge; nudge cards.
Too many objectives per person	Owners with seven objectives update none of them.	Owners over limit tile.
Seasons that never close	Objectives roll on forever; nobody learns anything.	Season summary with the change against last season; the rollover banner.

> **THE ADMINISTRATOR'S JOB**
>
> You do not write the objectives. You make it easy to write them well, hard to leave them stale, and impossible to end a season without looking at the numbers.

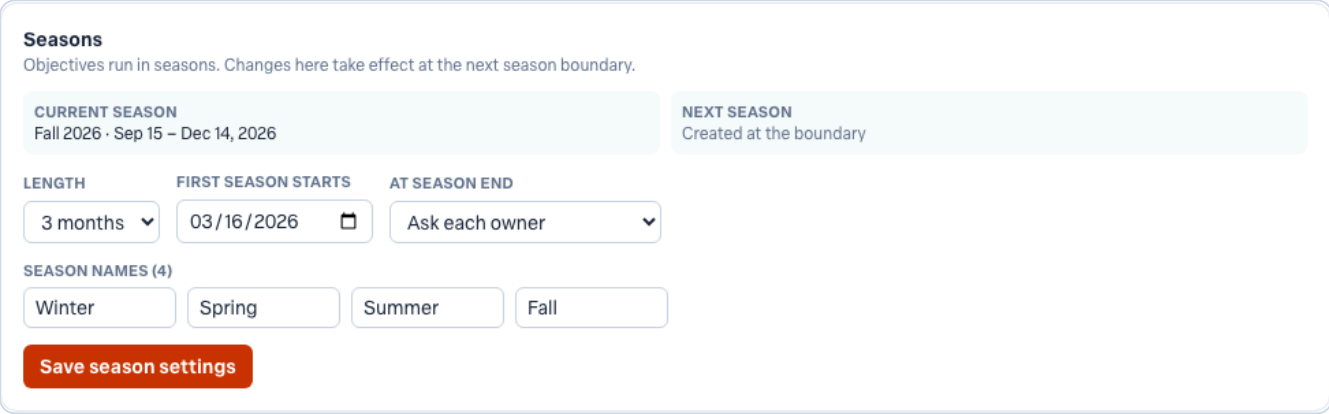
2. Roles

Role	What they do	What they can change
Owner	Accountable for the objective. Receives the check-in cards.	Everything on the objective, including key results and their values.
Key result owner	Accountable for one number.	That key result's value, even without rights on the rest of the objective.
Stakeholder	Follows the objective and reviews it at the end.	Key result values; the review score.
Team manager	Sees the team's objectives.	Values on objectives owned by their reports.
Administrator	Runs the program.	Every objective, the season settings, the Admin tab, exports and the platform connections.

Keep ownership with one person. An objective owned by a team has no one to send the check-in card to.

3. Set up seasons

Objectives run in seasons. Go to **Admin, Organization, Objectives** and find the Seasons panel.



The Seasons panel: current and next season, length, first season start, what happens at season end, and the season names.

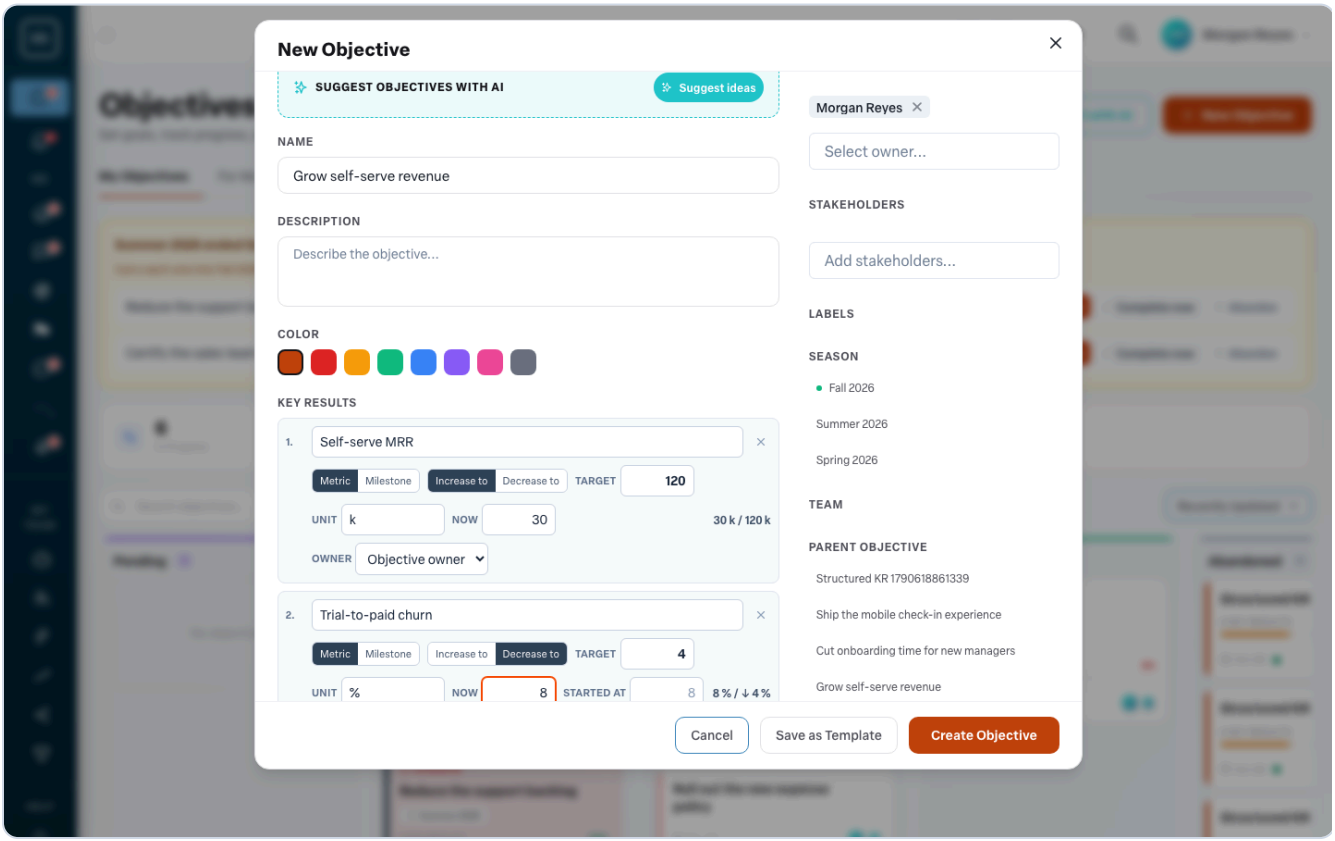
- **Length.** One, two, three, four or six months. Three is the default and the right answer for most organizations; anything shorter than two rarely leaves room for a number to move.
- **First season starts.** The anchor date every later season is counted from. Align it to your fiscal quarter if leadership reports on one.
- **At season end. Ask each owner** shows every owner a banner with carry forward, complete or abandon for each open objective. **Carry forward automatically** does the carrying for them. **Do nothing** leaves open objectives where they are. Start with Ask each owner; it forces the decision without making it.
- **Season names.** One per season in the year. Owners see the name in the objective and the banner, so make it something people say out loud.

Changes take effect at the next boundary. Engage never cuts the running season short.

4. Launch a season

1. **Two weeks before.** Publish the two or three company objectives. Every team objective will align to one, and the Aligned tile will tell you whether they did.
2. **One week before.** Ask each owner to draft their objectives in Engage as drafts. Send them OKRs 101 and the link to *How to write good objectives* in the support center.
3. **Day one.** Open the Admin tab and read the Measurable tile. Anything below 100% is an objective with task-shaped key results. Fix those in week one, while the owner still remembers what they meant.

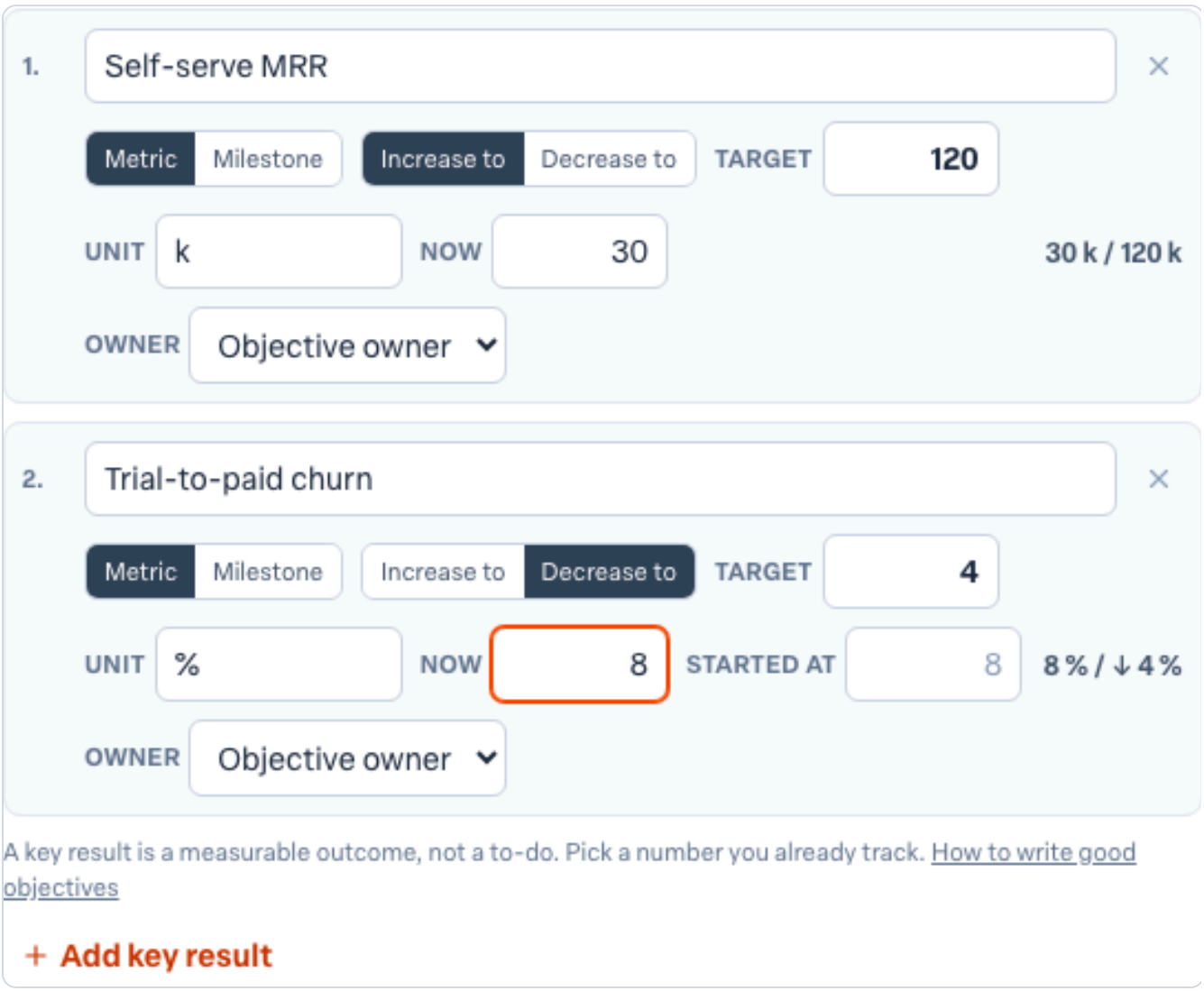
4. **Week one.** Confirm every objective has a season, an owner, two to four key results, and a check-in cadence that matches how fast the number moves. Weekly for revenue and support numbers; monthly for hiring and retention.



The New Objective dialog. Owners can start from Suggest ideas and edit rather than face a blank form.

5. Get measurable key results

A key result in Engage is a **metric** (a number moving from a start to a target, up or down) or a **milestone** (done or not done). The editor asks for everything it needs and flags a name that reads like a task.



Metric or milestone, increase or decrease, target, unit, current value, a starting value for a decrease, and an owner per key result.

What to insist on

- **A current value on day one.** A metric with no current value cannot show progress. If the owner cannot read the number today, the key result is wrong, not the owner.
- **A direction.** Churn, cost, time to hire and ticket backlog go down. Engage measures from the starting value toward the target in that direction, so a falling number reads as progress.

- **Two to four per objective.** One is the objective restated. Five is two objectives.
- **A milestone only for a launch, an approval or a decision.** Anything that can be half done is a metric.

Suggest a measure

When AI features are enabled for your organization, every key result row carries **Suggest a measure**. Engage proposes a metric, a direction and a target for the name the owner typed. The owner keeps, edits or discards it. Use it in the launch meeting when someone is stuck; it is faster than arguing about wording.

Before

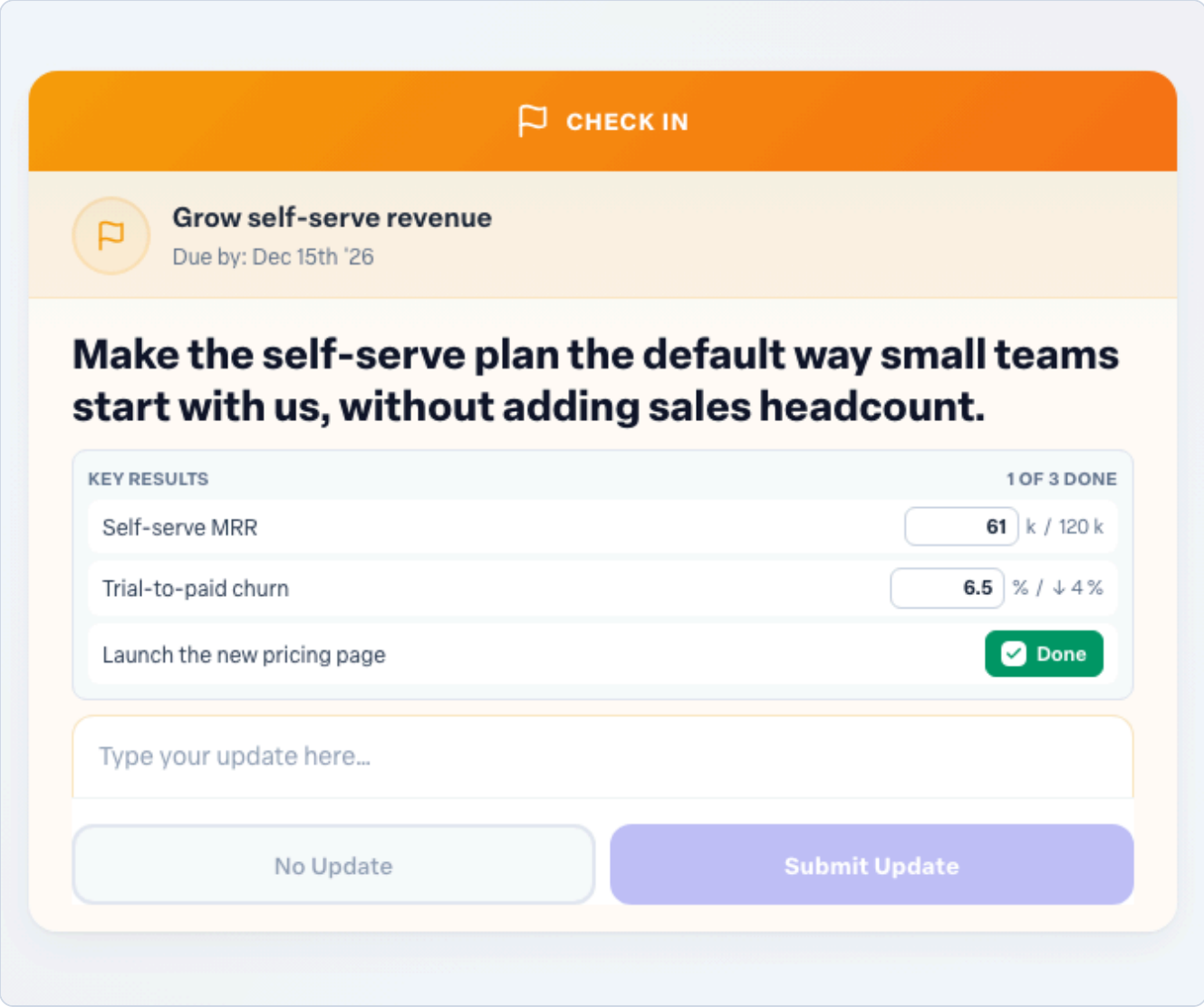
- Improve the website
- Talk to customers

After

- Self-serve signups per week from 40 to 90
- Customer interviews completed from 0 to 25
- Launch the new pricing page (milestone)

6. Keep objectives current

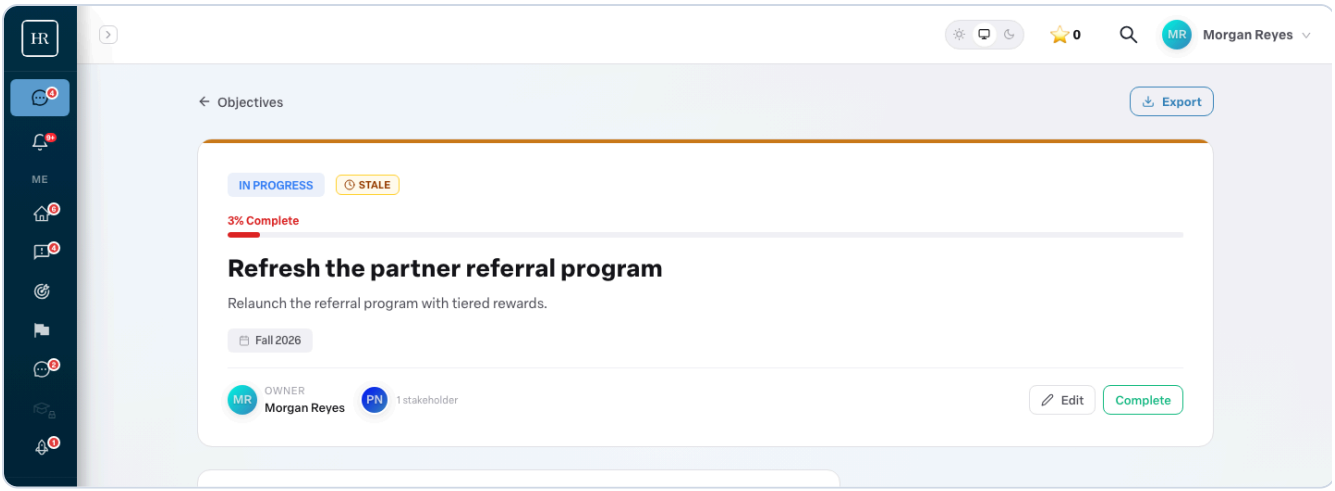
Every objective has a check-in cadence. On that cadence the owner gets a card on the dashboard with the key results on it: move the numbers, answer on track or off track, done.



The check-in card carries the key results, so the update and the answer happen in one place.

Stale

An in-progress objective is **Stale** when there has been no check-in answer and no key result update for two check-in intervals, and at least 14 days. The badge appears on the board, the list and the objective, and the Stale chip filters to them.

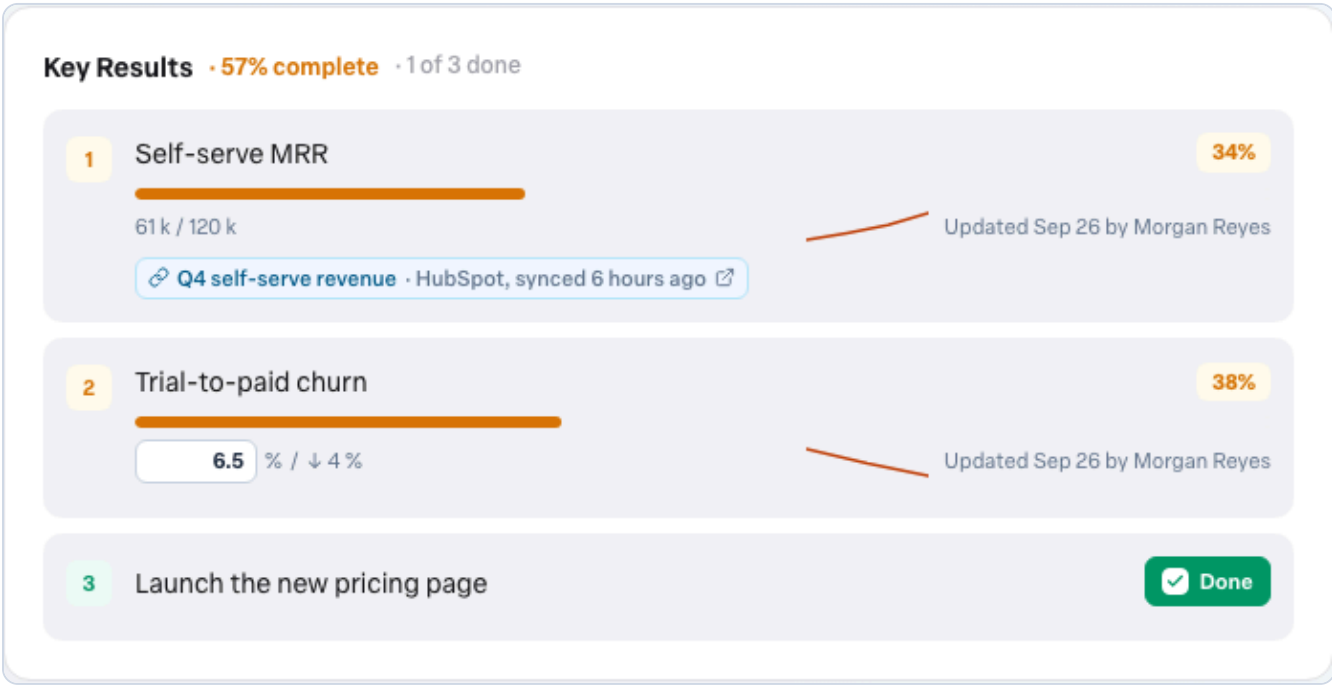


The Stale badge on an objective. Hover it to see the window.

Each weekday morning Engage gives the owner of every stale objective one extra check-in card. It never stacks a card on one already waiting, and it honours the organization's nudge setting and any season snooze the owner set. You do not need to chase; the card does. Your job is the second conversation, when a card has not worked.

Every change is recorded

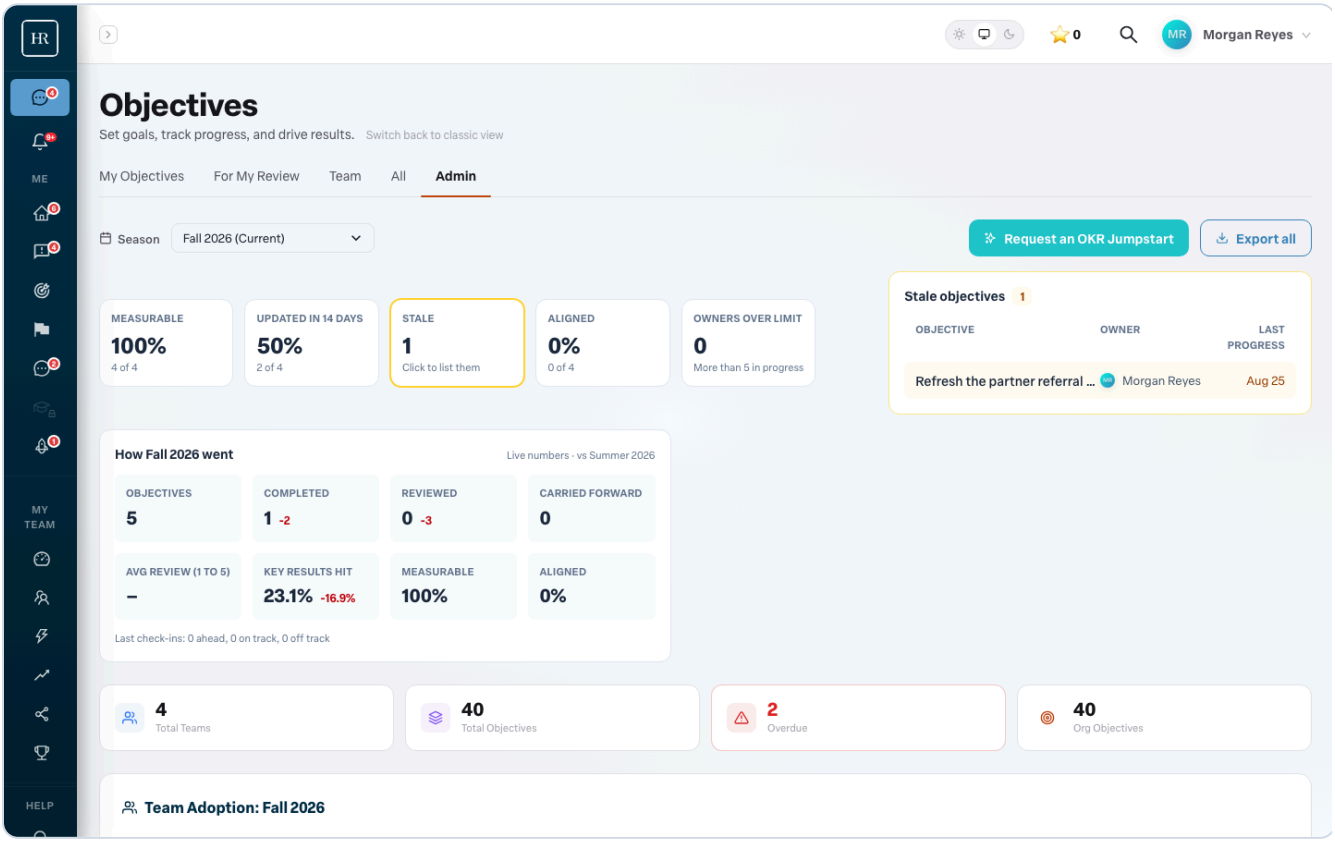
Every key result update is stored with who made it, from where, the old and new values and any note. Under each metric the objective page shows the values it has been through and who last moved it. When a number looks wrong, the history says who to ask.



Progress toward each target, the count of key results done, and the update history under each metric.

7. Read the health strip

Open **Objectives** and choose **Admin**. The strip reads the in-progress objectives for the selected season.



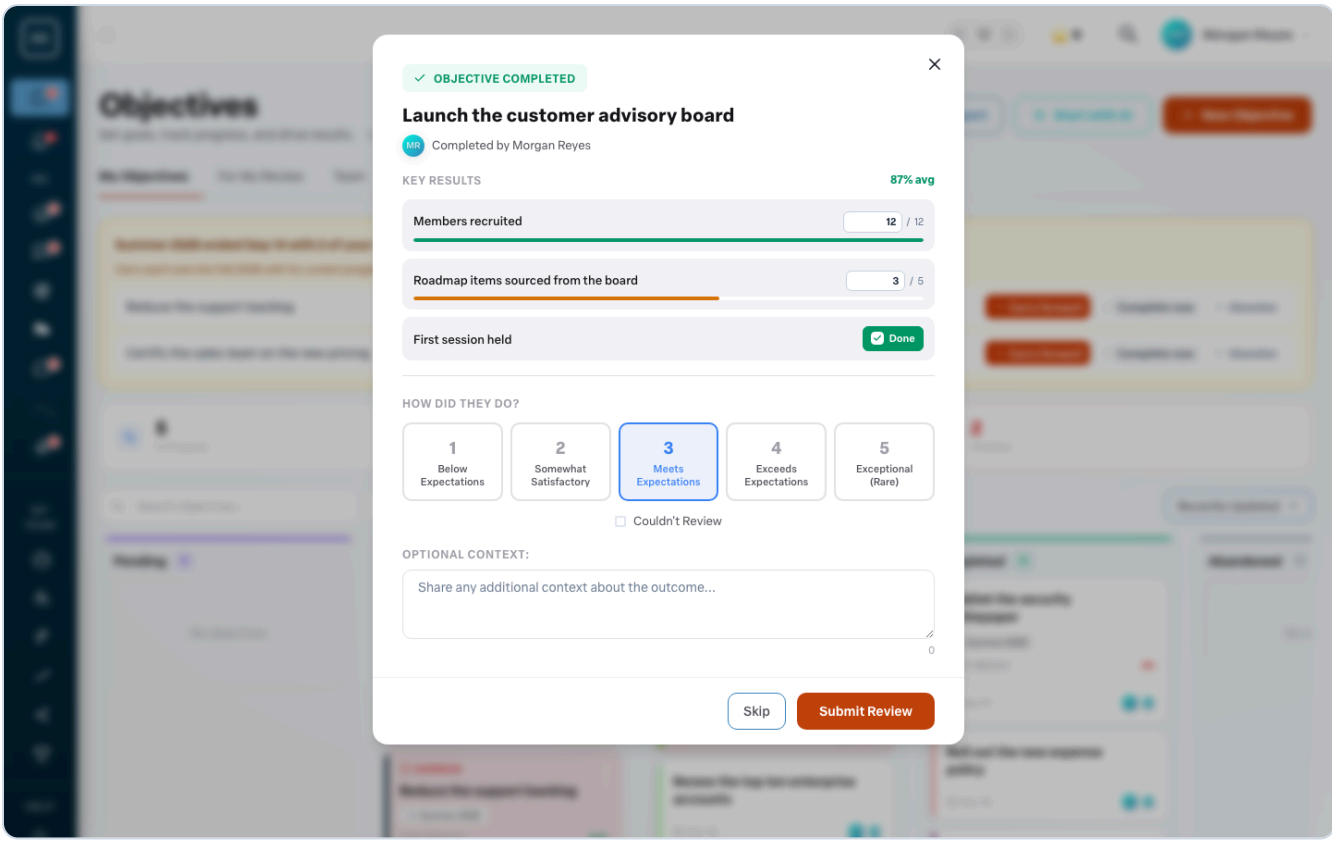
Measurable, Updated in 14 days, Stale, Aligned and Owners over limit, with the stale list open below.

Tile	What it measures	Healthy	What to do when it is not
Measurable	Share of objectives whose key results all have targets or are milestones.	100%	Open each unmeasurable objective in week one and fix the key results with the owner.
Updated in 14 days	Share with a check-in answer or key result update in two weeks.	Above 80%	Check the cadence. Monthly cadences will always read low here; that is fine if it is deliberate.
Stale	Count that have gone quiet for two intervals.	0	Press the tile. Talk to each owner it lists. Ask whether the objective still matters; if not, abandon it.
Aligned	Share attached to a company objective.	Above 70%	Unaligned objectives are not wrong, but ask why. A team pulling in a different direction should be a decision, not an accident.
Owners over limit	People owning more than five in-progress objectives.	0	Redistribute or merge. Five is already generous.

Below the strip, the per-team table shows the same measures by group, then overdue objectives and team adoption. **Export all** gives you a CSV of every objective or a PDF with comments, filtered to the selected season, for the leadership pack.

8. Reviews and scoring

When an objective reaches its delivery date, or the owner sends it, it moves to **Awaiting Review**. Stakeholders open it from the board, see every key result and its completion, correct a number if one is wrong, and score the objective.



The review shows the key results and their average completion before the score.

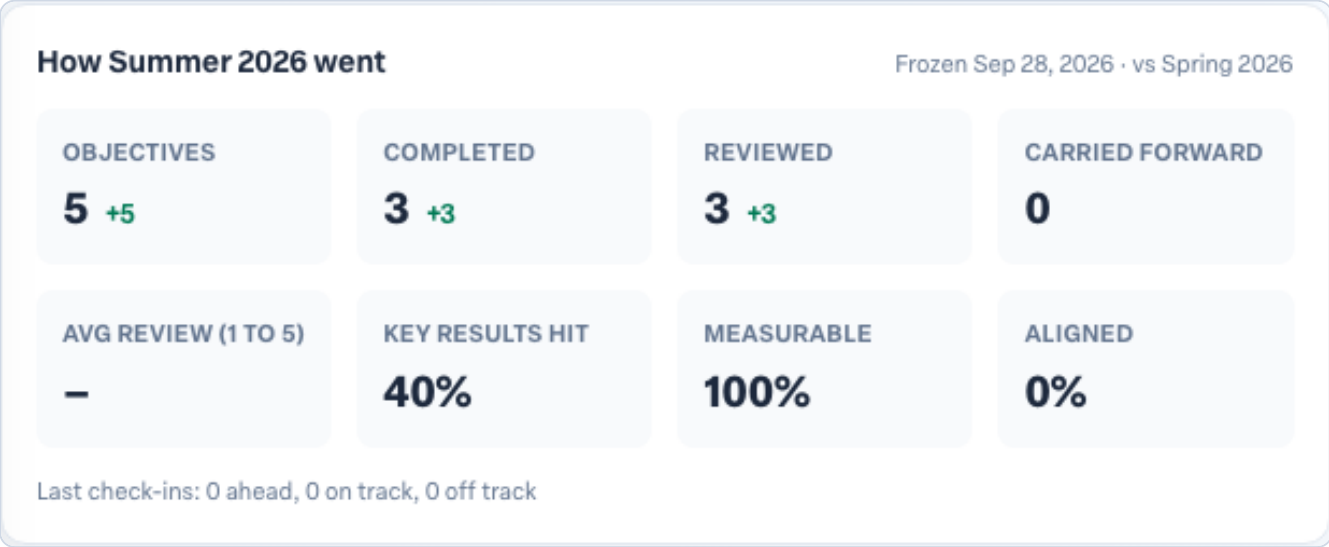
> **SCORE THE REACH, NOT THE MISS**
>
> On a stretch target, 70% is a good season. If every objective scores 100%, the targets were too safe. Say this out loud at the start of the season so nobody sandbags in week one.

9. The season boundary

Every morning Engage checks for a season that has just ended. For each one it does two things.

It freezes the summary

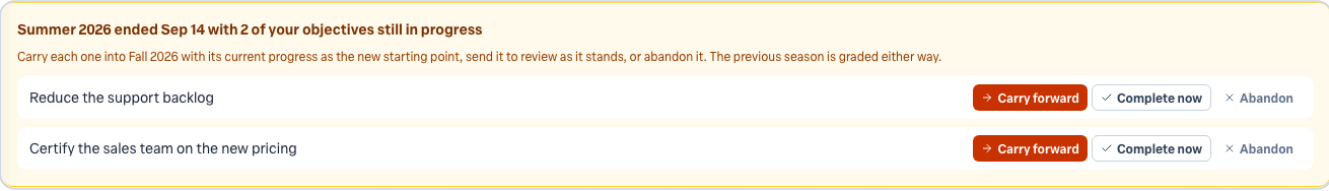
How many objectives ran, how many completed, the average key result completion, and the same by team. The summary appears on the Admin tab with the change against the previous season, and it never changes afterwards, even if someone edits an old objective. This is the number you report.



The frozen summary for a closed season, with the change against the season before it.

It handles open objectives

Objectives still in progress when the season ends are handled by the **At season end** setting. With **Ask each owner**, the owner sees this banner:



Carry forward, Mark complete or Abandon, for each open objective from the season that ended.

- **Carry forward** copies the objective into the new season. Each key result keeps its shape; its current value becomes the new starting value; the delivery date moves to the end of the new season; the new objective links back to the original, which goes for review so the closing season is still scored.
- **Mark complete** closes it and sends it for review.

- **Abandon** drops it. Abandoning is a legitimate outcome; an objective that stopped mattering should not be carried out of politeness.

With **Carry forward automatically**, Engage does the carrying for every open objective the morning after the boundary. Use it only when owners have shown they decide the same way every time.

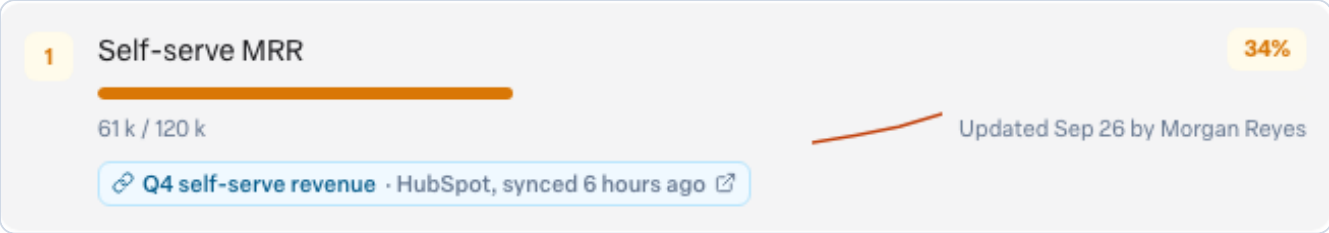
10. Alignment and teams

An objective can name a **parent objective**. Company objectives sit at the top; team objectives align to them; the Aligned tile counts the share that do. Attach each objective to a **team** as well, so the per-team table on the Admin tab and the team adoption card can read it.

Do not force alignment. An unaligned objective is a signal to have a conversation, not a rule broken.

11. External goals

Some numbers already live elsewhere: a revenue goal in HubSpot, a delivery goal in Atlassian, a people goal in BambooHR. Under **Admin, Organization, Objective Marketplace** you connect a platform once with its credentials and press Test. When a connected platform can be read from, owners see **Link to a goal** under an unlinked key result, pick the goal, and Engage pulls the value at once and every night after.



A linked key result: the chip names the goal, the platform and the last sync; the value is read-only in Engage.

A failed pull turns the chip amber and names the error. A rejected credential pauses the connection until you re-save it. Reads are enabled platform by platform; if the button does not appear, that platform cannot be read from yet.

12. The operating rhythm

When	Administrator	Owners
Two weeks before a season	Publish company objectives. Confirm the season settings.	Draft objectives.
Week one	Measurable tile to 100%. Every objective has an owner, a cadence and a season.	Enter current values.
Every week	Read Stale and Updated in 14 days. Follow up on the stale list.	Answer the check-in card.
Mid-season	Read the per-team table. Ask the teams reading low what changed.	Retarget a key result if the world changed.
Last week	Remind owners the banner is coming.	Send finished objectives for review.
Morning after	Read the frozen summary. Share the change against last season.	Carry forward, complete or abandon.

13. Troubleshooting

Symptom	Cause	Fix
Objective reads 0%	No key result has moved, or a metric has no target.	Enter current values; add the target.
Owner cannot type a value	Not owner, creator, stakeholder, key result owner, manager or admin; or the key result is linked to a platform.	Add them as a stakeholder, or unlink the key result.
Stale badge on an active objective	Updates were made to the description, not the numbers.	Answer the check-in or move a key result.
Summary missing for a closed season	The boundary run has not happened yet; it runs each morning.	Check again after 06:30 Eastern.
No rollover banner	The setting is not Ask each owner, or the owner has no open objectives in the ended season.	Check the Seasons panel.
Link to a goal is missing	No connected platform can be read from yet.	Check the Objective Marketplace page; contact Humareso support for the platform's status.

Humareso Engage. Companion guide: OKRs 101. Support articles: humareso.com/hub/support/engage.