

Goals FAQ

1. Why does a certain page say “goals overview” when we have objectives and key results listed?

Answer: It depends on which page you’re looking at. There’s different verbiage to choose from for the Goals tool, and you can also change the language for your key results and objectives. You may want to head to the settings to update your verbiage. [Here are instructions](#) on how to change the verbiage of the Goals tool in Lattice.

2. What’s the benefit of setting group goals?

Answer: Group goals are useful when a cross-functional project team is working together on a common overarching objective and different individuals are owning key results. They promote collaboration and progress toward a shared goal.

3. Can you create a public goal that is not available to be linked and stands alone?

Answer: There currently isn’t a way to completely prevent someone from linking another goal to a public goal.

4. What’s the best way to remind goal owners to update their goals in Lattice?

Answer: You can turn on [goal update reminders](#) in your Goals settings, choosing from the following notification options: weekly, once every two weeks, once a month, or once a quarter. If employees are struggling to update their goals on a regular basis, try providing them with resources to get on track. Here are some helpful tips from the Lattice Library:

- **For managers:** [How to Keep Your Employees on Track With Their Goals](#)
- **For managers:** [5 Creative Ways to Celebrate Goals \(Even When Remote\)](#)
- **For employees:** [How to Stay on Track With Your Goals](#)

5. Would there ever be a case where a department objective would flow up to a company objective without the company objective having key results?

Answer: Absolutely! Objectives can align into other objectives that don’t have any key results.

6. What is the difference between a goal, objective, and key result in Lattice?

Answer: Objectives are considered qualitative goals and will inherit the progress of their quantitative supporting goals. Key results are considered quantitative goals and will roll up progress to their objectives. If you see the term “goals” in Lattice, it’s just referring to all objectives and key results. But you can always change this verbiage in your [Goal settings](#).

7. How many goal owners can a goal have?

Answer: At the moment, there’s no limit!

8. Can you share a personal goal with your manager without making them an owner?

Answer: Yes! Managers will automatically have visibility into their direct reports’ goals (both public and private). There’s no need to make them an owner.

9. Can departmental goals cascade from group goals?

Answer: Yes, you can have a department goal cascade from a group goal.

10. Should company “key results” be “objectives” for departments/individuals?

Answer: If you have a company objective with key results that you want to align to department goals, we recommend keeping the alignment as: company objective < company key results <

department objective < department key results, and so on. This allows department objectives to be inspired by company key results without being strictly limited to the delivery of that particular measure. Download our guide to OKRs [here](#) for more information!

11. If a company is using KPIs *and* OKRs, would you recommend adding both to Lattice? KPIs are used in our organization as “minimum requirements” or lists of monthly tasks that need to be performed, whereas our OKRs are aspirational and push us out of our normal day to day.

Answer: Generally, it’s recommended to stick to one methodology in the platform, but you absolutely can have both. In this case, individuals would need to enter or update those KPIs on a monthly basis. You could set these as standalone KPIs, for example.

12. What is the best practice for differentiating 2022 vs. 2023 goals in the system? How can we have a clean slate for 2023 and not mix any old goals? Is it the date that differentiates?

Answer: You can set up a goal cycle for each year so you can easily report on goals and differentiate them. Instructions on how to set-up a goal cycle can be found [here](#).

13. Can you explain the status in Goals? When should I use “off track,” “progressing,” and “on track?”

Answer: You can check out goal status definitions [here](#), or customize goal statuses [here](#).

14. How do group goals roll up to overall objective/goal progress?

Answer: Updating the progress of group goals is the same as any other goal. As long as those group goals have key results to be aligned to, the key results should update the overall progress of the objective. [Here](#) is more information on rolling up goal progress.

15. All Objectives are binary; Key Results have measurement choices. How will the Objectives be displayed with respect to completion? Will it be just yes/no? How do you know your progress and not just if it was fully completed?

Answer: If an Objective is standalone, the progress will show as “incomplete” until the goal is finished and marked as completed by the owner. Goal owners can always update the Objective to track specific progress or milestones made towards completing the Objective. If an Objective has Key Results aligned to it, then the Objective will display a progress bar measured by percent and update automatically as the Key Results are updated.

16. When a goal has been saved as a draft, who can publish?

Answer: The goal owner can publish the goal from the draft state.

17. How do you add employees to groups?

Answer: [Here](#) are instructions on how to create groups and add employees to them.

18. What are best practices around aligning OKRs to annual goals that last longer than the cycle?

Answer: You can set quarterly OKRs alongside annual OKRs, but it’s important to make them distinct in function. Annual goals are typically set at the company level and are broader in scope, while quarterly goals are more specific to that time period. Quarterly goals can be set at the company level and/or at the department level. We do not recommend cascading quarterly from annual goals in Lattice, as it can get messy when goals are being cascaded from the same parent goal quarter over quarter. That being said, you can create multiple goal cycles and align annual goals to one cycle, and quarterly to another. [Here](#) are instructions on how to create goal cycles in Lattice.

19. What’s the best way for the team to digest updates to OKR progress? Is there a feed that aggregates these trends?

Answer: Lattice has a Goal Digest notification that goes out to employees the week after your goal update reminder notification is scheduled to send. [Here is more information](#) on what the digest looks like and the information it contains.

20. What is the best way to handle OKRs with multiple levels? For example, C-suite, VP level, department lead, individual on the team.

Answer: OKRs should be created from the top down, beginning at the company level and flowing down to the team and finally individual level. Typically, strategic objectives are set at the executive level and used as a guide for setting team- and individual-level objectives. You don't need to replicate the full reporting hierarchy of your organization. OKRs should also be supported from the bottom up. This means individual and team objectives should be connected to high-level company objectives via measurable key results. This interplay of business goals boosts employee engagement and creates overall business alignment.

21. What's the best way to roll out OKRs for a team that may be new to setting goals?

Answer: Start by kicking off your goal-setting cycle about six weeks before the start of a new quarter (if you're opting for quarterly OKRs). While brainstorming, actively seek insights from employees at all-hands meetings or through individual feedback requests. Draft and share company OKRs first, then encourage all employees to create at least one individual OKR without worrying too much about how it aligns for that first quarter. Starting off simple will help instill the habit. Once OKRs have been set, continue to check in with teams regularly on what's working, what's not, and how you can optimize the OKRs moving forward.

22. Can you have SMART goals and OKRs together? How would you handle it?

Answer: Generally, it's recommended that you use one methodology for the company, but theoretically you could have these together. One idea might be to encourage everyone to have OKRs, and coach them to write their Key Results in a format that is SMART. SMART then doesn't become the type of goal — rather, it's the formula for crafting a specific, measurable Key Result. You can read more about creating SMART goals in the [Lattice Library](#).

23. Can you make someone an Admin for just the OKR/goal setting function and not the rest of the platform?

Answer: You can assign a custom role to an employee that gives them admin privileges for only the Goals tool in Lattice. Here are instructions on how to set this up.

24. Can an OKR and a Growth area be linked?

Answer: OKRs and Growth areas can't be linked. The primary use case for the Goals tool in Lattice is for company operations, while Grow is used for employee growth and development, so currently we don't link those two tools.