



CFO

Goals

As measured by

Set us on the right track with 3 year strategic plan by December 20

1. Meet with 10 departmental stakeholders by October 20
2. Set revenue targets with VP of Sales by November 17
3. Approve company-wide hiring plan by November 30
4. Receive approval on strategic plan from the executive team and board by December 10

Close mezzanine financing round by December 20

1. Create list of potential debt and equity partners by October 21
2. Receive approval from CEO on investor deck by November 5
3. Procure terms by December 15

Take a big leap in operational excellence by December 20

Betterworks Can Help Your Business Create a Goals Process That Drives Results

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Adopting OKRs for goal creation ensures employees in every department and function are aligned and working toward the organization's top priorities.

Every organization is unique and there is no one-size-fits-all approach to Continuous Performance Management. You want to understand all the learnings and best

practices, and then use them to craft the unique program that best fits your organization's culture and business needs.

If you're ready to learn more about OKRs within Continuous Performance Management, [see *Betterworks in action* and get your free copy of John Doerr's *Measure What Matters*.](#)



Finance Manager

Goals

As measured by

Create the rolling four quarter operating forecast by December 20

1. Finalize bookings outlook with VP Sales by October 22
2. Confirm budgeted hiring with all 8 department heads by end of November
3. Receive approval on updated model from CEO by December 5

Ensure financial visibility by helping departments finalize their annual plans by December 20

1. Finalize Marketing's annual pricing review by October 20
2. Complete Product's 2017 roadmap prioritization by November 5
3. Finalize the Customer Success budgeting plan by December 7
4. Share new dashboard with 8 department heads by December 15

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Financial Analyst

Goals

As measured by

Help improve profitability with focus on new product performance by December 20

1. Gather reports from Accounting on profitability in Q1, Q2, and Q3 by October 15
2. Finalize analysis presentation on key drivers of gross margin by November 5
3. Present CFO recommendations for improvements to key operating cycles to drive profitability by December 10

Ensure successful launch of product X with precise pricing options by December 5

1. Create report on pricing of top 5 competitors and present to CFO by October 15
2. Finalize analysis of budgeted cost rollup by end of November 10
3. KPI report shared with Finance Manager by November 25
4. Receive approval from CEO by December 5

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Accounting Manager

Goals

As measured by

Maintain operational health by closing financial statements by October 21

1. Obtain inventory quantity reports from all 31 warehouse managers by October 21
2. Receive balance sheet reconciliations from Accounting by October 21
3. Approve month-end journal entries by October 21
4. Reconcile cash and credit cards by October 21

Protect our business by finalizing accounts payable by October 21

1. Collect 100% invoices from departments by October 15
2. Receive approval from all 8 departmental heads by October 17
3. Send to Finance Lead for approval and payment by October 10

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