



Suhas Bhairav

AI Quarterly OKR Goal Alignment Audit Checklist

**A practical, data-driven check for aligning
department OKRs with company strategy.**

Automate and standardize quarterly OKR audits to
flag wasteful projects and preserve strategic focus.

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Align OKRs to Company Mission

Define the top-level mission and quarterly targets. Map lower-tier department OKRs to those targets to identify misalignment and potential waste. Use AI to score alignment.

Key move Audit the top 5 costliest initiatives this quarter first.

PRACTICAL CHECKLIST

- 01** Inventory all lower-tier OKRs with owner, metrics, and time horizon.
- 02** Attach an Alignment Score per OKR, 0–100 scale.
- 03** Link each OKR to at least one top-level objective and key result.
- 04** Flag weak or redundant OKRs for potential sunset.
- 05** Capture required data sources: budgets, spend, milestones, and ownership.
- 06** Define approval workflow: owners, reviewers, and decision thresholds.
- 07** Document guardrails: spending limits, cadence, data freshness.

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AI Tools, Data, and Roles

Identify what to automate, what to keep human-reviewed, and what data to collect. Propose AI agents to monitor alignment and flag drift weekly.

Key move Never auto-decide budget changes; require human sign-off for reallocations.

PRACTICAL CHECKLIST

- 01** Automate data gathering: pull budgets, headcount, milestones from PM tools and ERP using AI agents (e.g., Claude, ChatGPT).
- 02** Use AI to compute alignment scores and identify misaligned resources.
- 03** Set automated alerts for score drops below threshold.
- 04** Establish human review points at quarterly cadence; AI handles routine checks.
- 05** Define data requirements: ERP, finance systems, PM tools, and OKR metadata.
- 06** Assign ownership: who approves shifts and budget reallocations.
- 07** Plan a 4-week pilot: initial data connections, AI scoring, first review.

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Adoption, Measurement, and Ownership

Set adoption cadence, define metrics, and assign owners for ongoing governance. Use weekly check-ins to tighten alignment and learn.

Key move Ensure executive sponsor signs off on all material budget reallocations.

PRACTICAL CHECKLIST

- 01** Define success metrics: alignment score, waste reduction, time-to-decision.
- 02** Track weekly AI-authorized changes vs. human-approved shifts.
- 03** Create a dashboard that aggregates top-level and department OKRs.
- 04** Assign a quarterly reviewer and an executive sponsor.
- 05** Implement guardrails for data freshness and escalation timelines.
- 06** Document approval matrix and decision rights for reallocations.
- 07** Pilot activities: Week 1–2 data connections, Week 3 scoring, Week 4 review.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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