



PROPOSAL FOR APPLYING THE OKR METHODOLOGY IN A MICROBREWERY

PROPOSTA DE APLICAÇÃO DA METODOLOGIA OKR EM UMA MICROCERVEJARIA

PROPUESTA DE APLICACIÓN DE LA METODOLOGÍA OKR EN UNA MICROCERVECERÍA

ABSTRACT

Objective: The study aims to propose a model for implementing the Objectives and Key Results (OKR) management methodology in a microbrewery.

Context: The case study method was applied to a microbrewery located in Americana/SP. The research covered the initial stages of implementing the OKR methodology, focusing on strategic planning, employee education and engagement, and defining organizational and departmental OKRs. Information was collected through structured interviews, document analysis, and meetings with managers.

Diagnosis: The initial implementation of the OKR methodology enabled greater alignment between the company's strategic objectives and departmental goals. An increase in employee engagement, clear definition of goals and performance indicators, and the structuring of a model for periodic monitoring of results were observed.

Limitations: The implementation of the OKR methodology in the object of study was restricted to the planning and development phases. Therefore, a complete analysis of the impact of the methodology will only be possible with the monitoring of future cycles.

Practical implications: It presents an applicable proposal for adapting the OKR methodology to the reality of small businesses, offering an implementation roadmap that can be replicated by managers of similar businesses.

Theoretical implications: The study contributes to the literature on the application of the OKR methodology in microenterprises, a topic that is still little explored, especially in the consumer goods sector such as microbreweries.

Originality/Value: This study fills a gap in the literature by exploring the application of the OKR methodology in microenterprises, especially in the beverage sector, where its adoption is still poorly documented.

Keywords: Goal management, OKR, Entrepreneurship, Strategic planning.

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RESUMO

Objetivo: O estudo tem como objetivo propor um modelo de implementação da metodologia de gestão Objectives and Key Results (OKR) em uma microcervejaria.

Contexto: Foi utilizado o método de estudo de caso aplicado a uma microcervejaria localizada em Americana/SP. A pesquisa abrangeu as etapas iniciais da implementação da metodologia OKR, com foco no planejamento estratégico, educação e engajamento dos colaboradores, e definição de OKRs organizacionais e departamentais. As informações foram coletadas por meio de entrevistas estruturadas, análise documental e reuniões com os gestores.

Diagnóstico: A implementação inicial da metodologia OKR possibilitou maior alinhamento entre os objetivos estratégicos da empresa e as metas departamentais. Observou-se aumento no engajamento dos colaboradores, definição clara de metas e indicadores de desempenho e estruturação de um modelo de acompanhamento periódico dos resultados.

Limitações: A implementação da metodologia OKR no objeto de estudo se restringiu as fases de planejamento e desenvolvimento. Sendo assim, uma análise completa do impacto da metodologia só será possível com o acompanhamento de ciclos futuros.

Implicações práticas: Apresenta uma proposta aplicável de adaptação da metodologia OKR à realidade de pequenas empresas, oferecendo um roteiro de implementação que pode ser replicado por gestores de negócios similares.

Implicações teóricas: O estudo contribui com a literatura sobre a aplicação da metodologia OKR em microempresas, um tema ainda pouco explorado, especialmente no setor de bens de consumo como o de microcervejarias.

Originalidade/Valor: Este estudo preenche uma lacuna na literatura ao explorar a aplicação da metodologia OKR em microempresas, especialmente no setor de bebidas, onde sua adoção ainda é pouco documentada.

Palavras-chave: Gestão metas, OKR, Empreendedorismo, Planejamento estratégico.

RESUMEN

Objetivo: El estudio pretende proponer un modelo para implementar la metodología de gestión de Objetivos y Resultados Clave (OKR) en una microcervecería.

Contexto: Se utilizó el método de estudio de caso, aplicado a una microcervecería ubicada en Americana/SP. La investigación cubrió las etapas iniciales de la implementación de la metodología OKR, centrándose en la planificación estratégica, la educación y el compromiso de los empleados y la definición de OKR organizacionales y departamentales. La información se recopiló mediante entrevistas estructuradas, análisis de documentos y reuniones con directivos.

Diagnóstico: La implementación inicial de la metodología OKR permitió una mayor alineación entre los objetivos estratégicos de la empresa y los objetivos departamentales. Se observó un aumento del compromiso de los empleados, una definición clara de objetivos e indicadores de desempeño y la estructuración de un modelo de seguimiento periódico de resultados.

Limitaciones: La implementación de la metodología OKR en el objeto de estudio quedó restringida a las fases de planificación y desarrollo. Por lo tanto, un análisis completo del impacto de la metodología sólo será posible mediante el seguimiento de los ciclos futuros.

Implicaciones prácticas: Presenta una propuesta aplicable para adaptar la metodología OKR a la realidad de las pequeñas empresas, ofreciendo una hoja de ruta de implementación que pueda ser replicada por directivos de negocios similares.

Implicaciones teóricas: El estudio contribuye a la literatura sobre la aplicación de la metodología OKR en microempresas, un tema aún poco explorado, especialmente en el sector de bienes de consumo como las microcervecerías.

Originalidad/Valor: Este estudio llena un vacío en la literatura al explorar la aplicación de la metodología OKR en microempresas, especialmente en el sector de bebidas, donde su adopción aún está poco documentada.

Palabras clave: Emprendimiento. Gestión de objetivos. OKR. Planificación estratégica.



INTRODUCTION

The craft brewery segment in Brazil has experienced remarkable growth, as evidenced by a significant 128.12% increase in the number of companies between 2017 and 2021, according to data from the Ministry of Agriculture, Livestock, and Supply (MAPA). This phenomenon reveals a dynamic yet paradoxically challenging scenario for these emerging ventures. In the broader context, particularly in the state of São Paulo, where small businesses account for 90% of establishments, the survival rate of only 18.6% of new industries up to their second year of operation, as reported by Sebrae (2023), underscores the complexity and adversities faced by these entrepreneurs.

The disparity between the significant representation of small businesses in São Paulo's economy and their low survival rate highlights a critical gap, pointing to the urgent need to improve management practices in these companies. Previous studies indicate that the lack of technical support and adequate tools, particularly in the early stages, results in adverse consequences that directly affect the performance and sustainability of these emerging businesses (Dornelas, 2001; Sebrae, 2016; Silva, 2019).

Within this challenging context, a strategic opportunity emerges for the implementation of effective management tools capable of guiding these growing ventures by providing clarity, strategic alignment, and agility in execution. Through a case study, this paper aims to propose a model for implementing the "Objectives and Key Results" (OKR) methodology in a craft brewery located in Americana/SP, considering the specific challenges faced by such businesses. More specifically, this study presents a proposal focusing on the two initial stages of the methodology: (1) strategic planning; and (2) development (education, communication, engagement, and definition of organizational and departmental OKRs).

Created by former Intel CEO Andrew Grove, the OKR methodology is a management framework designed to help companies define measurable, crucial objectives while enabling

managers to monitor results in a simplified manner. This has made it highly effective and widely adopted by Google since 1999 (Michelon, 2022; Zhou & He, 2018). The OKR concept emphasizes the relationship between goals defined by employees in their personal OKRs and the company's overall OKRs. The methodology can be divided into two main components: objectives and key results. Objectives represent the goals the company intends to achieve, stemming from corporate strategy. Doerr (2019) argues that these objectives should be ambitious and inspire a certain degree of motivation among employees. Key results, on the other hand, define how these objectives will be achieved. They must be concrete, specific, measurable, and time-bound, as well as ambitious yet realistic.

The OKR methodology stands out for its agility and adaptability, being recognized for its effectiveness in simplifying processes and achieving results quickly (Zhou & He, 2018), which makes it particularly suitable for small businesses. OKR has become a popular tool within organizations because it fosters focus, alignment, engagement, and execution. Furthermore, the methodology encourages transparency within the company, which can enhance employees' perception of fairness and thus motivate them to improve their individual performance (Zhou & He, 2018). According to Bezerra (2021), although OKR originated in large technology companies, it is a framework of broad applicability that has been tested in firms of various segments, including medium-sized, small, and micro enterprises.

In light of the above, this study contributes to the still scarce body of literature on the application of the OKR methodology in small businesses, particularly in the consumer goods sector, as in the case of craft breweries (Michelon, 2022). From a practical perspective, this study contributes to applied knowledge regarding OKR methodology for small enterprises, thereby promoting the sustainable development of these emerging businesses. It offers valuable insights for craft brewery managers and other stakeholders interested in enhancing management practices in small businesses, with potential for adaptation



and scalability to other types of microenterprises, including those outside the beverage sector, provided they share characteristics such as flat organizational structures and limited resources.

It is important to note that this study is restricted to the initial phases of implementing the OKR methodology, not yet encompassing the stages of monitoring, evaluation, and cycle renewal. Although limited to the early phases of implementation, this choice is sufficient to offer a structured and replicable model for adopting the methodology in microenterprises, enabling the understanding of key challenges, necessary adaptations, and potential benefits at the time of its introduction. This delimitation is justified by the exploratory nature of the research and the need to understand the model's adaptation to the context of a craft brewery. Thus, a comprehensive evaluation of long-term impacts will only be possible in future studies, after the consolidation of new methodological cycles.

CONTEXT OF THE INVESTIGATED REALITY

This study focuses on the challenges faced by a specific company located in the city of Americana/SP. The company is classified as a small-sized, family-owned business in the industrial sector, engaged in the production of beer and draft beer, also referred to as a microbrewery. According to Sebrae, microbreweries are defined as small factories capable of producing up to 200,000 liters of beer per month, primarily aimed at local consumption or on-site sales. The company analyzed in this study, hereafter referred to as Company X, is composed of three partners and four additional employees, one working in the administrative area and three in production activities.

Company X has been operating for seven years and has a production capacity of up to 12,000 liters of beer per month, divided between draft beer packaged in kegs and beers bottled or canned. The company also has two additional branch units, which operate exclusively as sales outlets within the same city.

In Americana, there are two other microbreweries; however, due to differences in their production capacities and the low market share of craft beer as a niche within the overall beer market, it is not possible to determine the exact market share represented by Company X. Nevertheless, the premium beer market—which includes products from microbreweries, traditionally referred to as craft beer—accounts for 2.5% of the beer consumer market in Brazil, according to a study by Euromonitor International (2021). The same study projects market growth of 53.9% by 2025, which underscores both the potential of this market and the importance of preparedness and managerial training within the sector.

Given that the OKR methodology is relatively easy to apply, can be adopted in microenterprises, and has the potential to enhance the decision-making process of companies, it was chosen for implementation in Company X. Doerr (2019) describes the steps necessary for executing the OKR methodology as consisting of two main stages: Planning and Development, complemented by secondary activities such as data collection and the practical execution of the management tool. This research is limited to the initial implementation stages of the OKR methodology, encompassing the execution of the Planning stage and part of the Development stage (Education, Communication, Engagement, and the definition of departmental/employee OKRs), culminating in a proposal for applying the OKR methodology in a microbrewery.

Initially, a meeting was held with the company's management (partners) to present the project, its objectives, and its stages. To begin the implementation of the methodology, internal company documents such as the Mission and Vision Statements and the Organizational Chart were analyzed. Additionally, a fully structured interview was conducted to collect general data about the company (Figure 01), with the purpose of providing a foundation and characterization of the object of study in this research (Gil, 2017). During this interview, data regarding the company's profile were collected. Subsequently, based on the company's mission and vision sta-

tements, a meeting with the managers—mediated by the researchers—was held to define the general objectives and key results, as recommended by the OKR methodology.

Figure 1
Data Collection Form of the Company Under Study

COMPANY DATA COLLECTION FORM	
1 CITY / STATE	Americana / SP
2 SECTOR	Industry
3 NUMBER OF EMPLOYEES	7
4 CLASSIFICATION (SIZE)	ME - EPP
5 FAMILY BUSINESS?	Yes
6 NUMBER OF PARTNERS	3
7 FIELD OF ACTIVITY	Beer and Draft Beer Manufacturing
8 UNITS	One (1) Factory and two (2) retail commercial units
9 PRODUCTION CAPACITY	12 thousand liters/month
10 FOUNDATION DATE	2016
11 MAIN COMPETITORS	Two other local competitors, also craft beer producers in the same city
12 MARKET SHARE	---
13 MAIN PRODUCTS SOLD	Draft beer packaged in Barrels
14 OTHER OBSERVATIONS:	Commercial operation only local, in the city where it is installed and neighboring cities, with an operating radius of approximately 50km. The company has a portfolio of 8 regular products and occasionally has seasonal single-batch products.

Source: Prepared by the Authors (2025)

DIAGNOSIS AND ANALYSIS OF THE PROBLEM SITUATION (PLANNING PHASE)

Identification of the company’s strategy

A fundamental aspect for implementing the OKR methodology is to develop or confirm the company’s mission, vision, and strategy. OKRs should translate the organization’s strategy into actionable goals, guiding the achievement of the vision while remaining aligned with the mission. It is crucial that these attributes are well established and kept up to date (Bezerra, 2020).

Muller (2003) emphasizes that the mission represents the very reason for a company’s existence and, therefore, should reflect its strategic purposes. The mission must fulfill both an internal and external communication role, as well as serve to motivate employees. Norton and Kaplan (2008) highlight the importance of conciseness in

defining it, since the mission is the statement that encapsulates the organization’s purpose.

The vision, on the other hand, represents a future projection of the company, although not bound to a specific timeframe. It should reflect how the company intends to be perceived externally in the medium and long term (Muller, 2003; Norton & Kaplan, 2008).

Based on the concept of strategic planning presented earlier, qualitative data concerning the company’s mission, vision, and values statements were collected to determine its main strategies and identify the general objectives necessary to guide the application of the proposed methodology. These data were gathered through the analysis of company documents and are summarized in the following figure.



Figure 2
Company Mission, Vision, and Values

Company Mission
Company X's mission is to democratize and disseminate quality craft beer through knowledge and beer education.
Company Vision
To be recognized as a regional reference and authority on quality and leadership in the local craft beer scene.
Company Values
Commitment to the customer and quality. We constantly strive to evolve and improve our actions, processes, and products every day.

Source: Prepared by the Authors (2025)

Setup

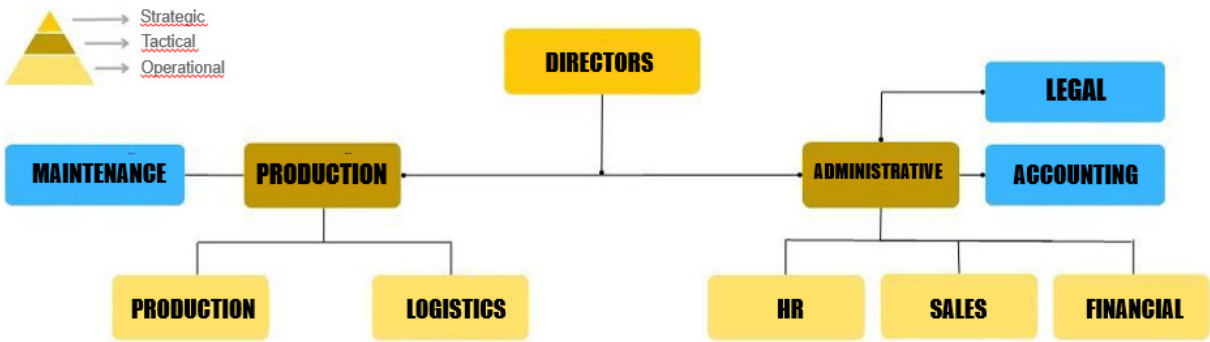
Doerr (2019) recommends preparing the “setup” of the methodology to ensure that its development is carried out in accordance with the assumptions outlined herein. To implement this setup, Bezerra (2021) underscores the importance of identifying and clearly defining the reason why the company intends to adopt the OKR methodology. This definition must be communicated clearly to the entire team so that members understand its significance and remain committed to achieving the established objectives.

According to Radonic (2017), it is essential to take the size of the organization into account. Small businesses generally have a flatter hierarchical structure, which allows direct communication between lower levels and top management.

Another important point inherent to the implementation of OKRs in an organization is transparency regarding what is being proposed, planned, and executed. In this regard, Betterworks (2015) recommends that the communication of indicators and progress be conducted through recurring meetings with all stakeholders or through illustrative boards displaying goals at each level alongside current metrics.

From an organizational standpoint, Company X can be described as a business with a well-defined structure but with few hierarchical levels (Figure 03), and a number of mapped functions that exceed the number of employees. Consequently, it was defined that, given its horizontalized structure, only two levels of OKRs will be developed: one general level for the company and another for employees and/or departments, as suggested by Radonic (2017).

Figure 3
Organizational Chart of Company X



Source: Prepared by the Authors (2025)



The departments identified as having the greatest representativeness and influence in achieving the company's current objectives were Production (which, in practice, is divided into three areas—brewing, cellar, and packaging—each corresponding to different stages of the process) and Sales/Marketing. Although the company's mission and vision are more closely aligned with external factors, it was reported that the organization struggles to achieve the desired excellence associated with its image due to recurring quality issues originating in the production sector. The Sales and Marketing department, in turn, is directly responsible for publicizing quality initiatives and shaping the company's market positioning. Thus, improvements in the performance indicators of these departments will directly influence the company's overall results.

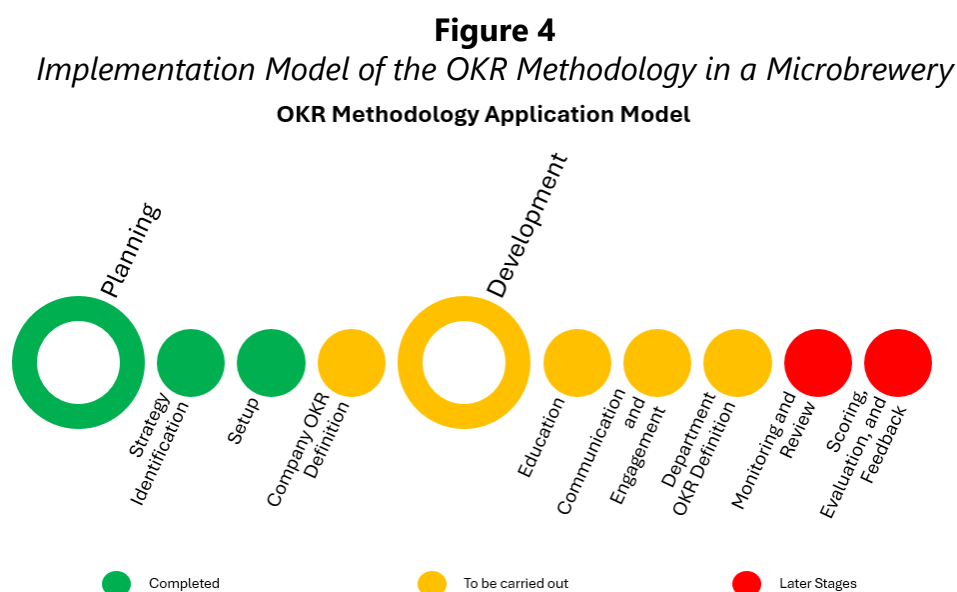
Regarding the organizational structure and the allocation of employees within each sector, it was observed that, in general, each sector is staffed by only one person, with some employees performing tasks across multiple related sectors. Therefore, for the development of secondary OKRs, it was established that they would be linked to sectors rather than to individual employees.

As an additional task associated with the "setup" stage, a meeting was held with employees to announce the implementation of the methodology and to briefly explain what it entailed and why the company was adopting it. This step is considered essential to fostering enga-

gement among those involved (Bezerra, 2021). Although the company's objective was clear and known by employees, it was not being achieved. Consequently, it was necessary to reintroduce and justify the implementation of OKRs based on the company's aspiration to gain recognition in the craft beer sector through quality.

In line with the principles of the OKR methodology concerning communication and transparency (Radonic, 2017), it was decided that the team would collectively discuss the progress of the process once a month during the monthly kickoff meeting. Additionally, all updated program data would be made available in a common area of the company on a physical board measuring 1.20m by 1.00m, designed according to the model presented in Appendix 01. The board would be updated weekly by the management team in accordance with the progress of the performance metrics.

Upon completing the "setup" stage, greater clarity was achieved regarding the steps required for the implementation model in the microbrewery under study. Accordingly, Figure 04 presents each of the stages for full application, divided into two major blocks (planning and development). It should be emphasized that this study is limited to the initial phases of OKR implementation and does not yet encompass the stages of monitoring, evaluation, and cycle renewal.



Source: Prepared by the Authors (2025)



Definition of the company’s OKR

The definition of the company’s objectives must originate from top management and result from extensive discussion regarding strategic priorities. These objectives should be challenging and inspire employees to a certain degree (Doerr, 2019). When defining such objectives, the focus should be placed on those with the highest potential to drive outstanding performance, with a recommended balance between qualitative and quantitative key results. The inspiration for the organization’s general OKRs should directly reflect the company’s mission and vision statements, its strategic plan, or a broad theme chosen by leadership (Doerr, 2019).

According to Betterworks’ (2015) definition, objectives can be reaffirmed as answering the question: “What does the company want to achieve?” They must be significant, ambitious, and aligned both with the company and its departments. Key results, in turn, are the practical components of the defined objective, answering

the question: “How will the company achieve its objectives?” Key results must be specific, measurable, and time-bound.

Regarding the number of OKRs, Cardoso (2020) states that one general objective with three key results is an efficient way to enhance focus and prevent the dispersion of employees’ efforts and energy—an approach that can be particularly valuable for small businesses with a limited workforce. Furthermore, successful implementation of the OKR methodology requires assigning responsibility for each objective and its respective key results (Doerr, 2019).

Based on the data presented in the company’s “Mission, Vision, and Values” statement, together with discussions with management on the main challenges, the company’s general objectives, possible actions, and relevant performance indicators, the General Objective of the company’s OKR was defined, along with its three corresponding Key Results, as shown below.

Figure 5
Company-Wide OKRs

Company's General Objective
To establish itself as a regional benchmark for quality in the production of specialty beers.
Key Results
1. Win awards or medals in beer competitions for at least 50% of the products in the current portfolio, plus two additional awards for seasonal products.
2. Increase the seasonal product offering to one new product every 35 days.
3. Ensure a rate of less than 20% for deviations from quality standards and the need for rework, for the total number of production batches during the period.

Source: Prepared by the Authors (2025)

The defined general objective is aligned with the company’s vision of becoming a regional benchmark in beer production and service. As a small company with primarily regional operations, its assertion as a quality producer enables

consumers to recognize the brand and connect with it through a shared regional identity. This, in turn, strengthens consumer attachment to the brand and increases demand for its products in the local market.



Key Results 1 and 2 are associated with consumers' perception of quality, whether through external recognition in renowned competitions that validate product excellence or through the offering of diverse and innovative products in the market. Key Result 3, on the other hand, is more internally oriented and aims to minimize issues related to quality and efficiency within the production process.

IMPLEMENTATION PROPOSAL (DEVELOPMENT PHASE)

The development stage began with a contextual presentation of the OKR methodology in the form of expository slides delivered to all project participants (managers and other employees), thereby fulfilling the educational stage prescribed by the OKR framework. During this development stage, brainstorming sessions were conducted along with the definition of individual objectives and key results corresponding to each department. These sessions adopted a focused and semi-structured format, ensuring that employees were guided by the researchers in order to guarantee the collection of the necessary data in alignment with the company's strategy as stated in its mission and values declaration. Throughout these sessions, all inputs and decisions were recorded manually and subsequently tabulated in accordance with the parameters expected by the OKR methodology, for inclusion in this study.

Education

The first stage of OKR implementation was employee education. According to Doerr (2019), this stage is essential for introducing the methodology, reducing resistance, and creating a shared understanding of its purpose. Accordingly, a presentation of approximately one hour was conducted with all employees, explaining the origin of the OKR framework, its key concepts, and the expected benefits for the company.

As supporting material, posters containing basic definitions and the company's overarching OKRs were prepared and displayed on common-use bulletin boards. The objective was to keep the information visible on a daily basis and facilitate gradual assimilation of the content. This initiative also served as reinforcement for employees who do not fully absorb explanations provided exclusively during formal meetings.

In addition to presenting concepts, the training sought to clarify initial questions regarding how the methodology would be applied to the microbrewery's daily operations. This approach proved fundamental in reducing perceptions of complexity, strengthening trust in the process, and highlighting the importance of each employee's participation for the success of the project. Thus, the educational stage played a strategic role in aligning expectations, preparing the team for subsequent phases, and fostering initial engagement.

Communication and engagement

Once the organizational OKRs were defined, it became necessary to communicate and engage all employees around the proposed model. The literature emphasizes that transparency and clarity in disseminating objectives are critical for the methodology's success (Doerr, 2019; Betterworks, 2015). To this end, multiple channels were employed to democratize access to information: posting OKRs on bulletin boards, including them in a physical "dashboard" designed for continuous monitoring, and conducting a collective meeting to present each objective and key result in detail.

This initial meeting aimed to explain the rationale behind each goal, highlighting its connection to the company's overall strategy. The practice was intended not only to inform but also to inspire employees to assume an active role in the process. Bezerra (2020) suggests that such communication, when conducted regularly, contributes to strengthening the sense of belonging and increasing commitment to collective goals.



In addition to communication efforts, a weekly update cycle of the indicators on the monitoring panel was established, carried out by the project manager at the management level. Updates were subsequently shared via the company's messaging group, with emphasis placed on positive results as well as alerts regarding areas requiring greater attention. This procedure functioned both as a motivational reinforcement and as a mechanism of collective monitoring, allowing all employees to follow the project's progress.

Definition of departmental OKRs

According to Doerr's (2019) model for constructing OKRs, once the company's macro OKR has been defined, the next step is to establish OKRs at lower organizational levels. At this stage, general key results are transformed into objectives for the subsequent hierarchical level. This ensures that each level assumes responsibility for achieving the key results set at the higher level as their own main objectives. In this way, the organization's alignment and focus remain centered on the "how" defined to achieve the company's overarching OKR.

As noted by Radonic (2017), the size of the company and the complexity of its hierarchical structure should determine the number of OKR sublevels within the organizational framework. Small-sized firms with flatter structures typically do not require more than two OKR levels. Thus, each employee develops their subsequent OKRs with the purpose of addressing the objectives imposed by the superior level, thereby connecting with the company's overall OKR (Muller, 2003).

As delimited in this study, the decision was made to develop secondary objectives and key results linked to the production and sales/marketing departments. According to the functions performed in each department, specific OKRs were established (Figures 06 and 07), derived from the key results of the higher-level OKRs. Some objectives are shared across departments; however, it is crucial that each department's contribution through its key results not be redundant, but rather complement efforts in distinct ways to achieve the higher-level goals (Doerr, 2019).

The production department's OKRs are associated with three objectives, each derived from the company's overarching OKR key results, with three key results established for each objective.

Figure 6
Production Department OKRs
Department: Production

Objective 1	Objective 2	Objective 3
Improve the company's technical quality indices.	Get Company X on the "talk of the town."	Increase the perceived quality of the product by your audience.
Key Results	Key Results	Key Results
1. Ensure the structuring of at least 80% of mapped production processes.	1. Plan, develop, and implement a new product every 45 days.	1. Ensure the expected visual appearance (color and clarity) in 100% of batches produced.
2. Execute production batches with a maximum deviation of 3% from the analytical quality standards predetermined by the product specifications.	2. Ensure 100% satisfaction of outsourcing clients with product quality.	2. Ensure visual integrity and cleanliness in all packaging delivered to customers.
3. Promote or participate in at least one technical training session per month.	3. Study and assimilate at least one new technique or market trend every 3 months.	3. Obtain awards or medals in beer competitions for at least 30% of the products in the online portfolio, plus an additional 1 award for seasonal products.

Source: Prepared by the Authors (2025)

In Objective 1, the first expected key result is the “structuring of at least 80% of the processes already mapped in production.” Although Company X has mapped the processes carried out in production, not all of them are yet fully defined and documented—an essential condition for improving efficiency and ensuring quality in the final output. The second key result establishes a maximum deviation of 3% in quality parameters during production, aiming to ensure repeatability and predictability in the quality of the batches produced. Finally, the third key result for this first objective stipulates that employees must either participate in or deliver at least one relevant technical training session on beer production per month, thereby enhancing knowledge dissemination and raising the technical standards of all staff members.

The second objective concerns the brand’s presence in its operating market. Within the production department, activities contributing to this objective begin with the development of new products, with a target of launching a new product every 45 days. The company also manufactures products for external clients on a contract-brewing basis, and these clients, being part of the industry, were reported as excellent referral sources for attracting new business. Consequently, an ambitious goal of achieving 100% satisfaction among contract-brewing clients was established. The third key result for this objecti-

ve refers to learning, assimilating, and, whenever possible, immediately applying new techniques and market trends, which strengthens technical expertise and enhances the potential to deliver innovative products with added value.

The third objective focuses on improving the perceived quality of the product, that is, the extent to which customers recognize its value. The first key result aims to ensure that the product’s visual aspects, particularly the characteristics of the liquid (beer), conform to predefined standards—whether clear, hazy, light, or dark, and with the correct color. The second key result pertains to the visual integrity of packaging, which occasionally reaches customers dirty, with misapplied labels, or dented, thereby undermining the product’s perceived quality. The third key result challenges employees to create recipes faithful to the intended beer style and to guarantee compliance with quality standards, thereby increasing the likelihood of earning medals in beer competitions—an achievement that reinforces the product’s quality in the eyes of consumers through recognition by reputable institutions.

As previously mentioned, the other department selected to contribute to the project’s development was the marketing and sales department, which is responsible for actions related to two objectives (Figure 07).

Figure 7
Sales and Marketing Department OKRs
Department: Marketing and Sales

Objective 1	Objective 2
Get Company X on everyone's lips.	Increase the perceived quality of the product by your audience.
Key Results	Key Results
1. Increase social media engagement by 50%.	1. Develop a collaborative initiative with a local brand that offers added value and high perceived quality.
2. Promote three in-person or online educational events with beer-related content.	2. Develop two digital media initiatives that reinforce the unique qualities of the products.
3. Give at least one lecture or workshop at an external event.	3. Publish at least four positive reviews monthly on social media channels as social proof from customers.

Source: Prepared by the Authors (2025)



The first objective, titled "Putting Company X on everyone's lips," aims to increase brand presence and embed it in consumers' subconscious. Accordingly, the first expected key result is a 50% increase in the company's social media engagement levels during the evaluation period of this OKR cycle, which can be measured using the analytical tools provided by the platforms themselves. The second key result requires the organization of at least three events to provide consumers with content and information about beer, thereby raising their awareness and familiarity with the product and equipping them with knowledge that supports purchasing decisions. The third key result aspires to have a company representative participate in at least one lecture or external event, thus enhancing brand exposure in media channels beyond the company's own social networks.

Objective 2 focuses on increasing the perceived quality of the product by consumers. To achieve this, the first key result calls for the development of a collaborative initiative with another brand or company already recognized for its quality, providing an opportunity to share audiences of customers with potentially similar interests. The second target requires the department to design two digital media campaigns, either through videos or presentations, highlighting the quality attributes of the products. Finally, the third key result requires the monthly publication of at least four positive customer reviews from individuals who purchased a product and shared their impressions on digital platforms. This type of disclosure generates social proof for consumers, who tend to trust the opinions of others who have already purchased the products.

The literature on industrial SMEs has documented, through related approaches such as Lean (Pearce, Pons & Neitzert, 2018; Acachanga et al., 2006), critical success factors that align closely with the adoption of OKR: leadership sponsorship, training, visual management, short improvement cycles, and monitoring routines. In SME studies, these factors emerge as decisive for the implementation of management practices under conditions of limited resources and high

demands for operational-level engagement. The transposition to OKR is straightforward: leadership and communication support the definition of objectives, visual management ensures transparency of key results, and short cycles foster learning and course correction. In manufacturing contexts, practical guidelines for quarterly planning reinforce this sequencing, as proposed for the case of a microbrewery.

The distinction between OKR and agile methods such as Scrum is also relevant for industrial SMEs: OKR focuses on business outcomes and organizational alignment, whereas Scrum structures the cadence of deliveries (sprints, backlog, retrospectives). Recent studies show integration between OKR and agile approaches to strengthen strategic alignment in complex projects, with OKR defining the desired outcome and the agile method structuring execution (Zierock, Blatz & Karcher, 2024). This study deliberately addresses only the initial phases (planning and development/education) but already provides evidence of the alignment and engagement necessary for, in future cycles, integrating monitoring and review routines with agile execution practices in the day-to-day operations.

Guidelines and Next Steps

The indicators established in the company's general OKRs and in the Production and Marketing/Sales departments constitute the foundation for the Monitoring and Review stages. These indicators include quantitative metrics, such as the percentage of structured processes, deviations in quality parameters, number of new product launches, social media engagement, and customer satisfaction, as well as qualitative metrics, such as packaging visual integrity and perceived value by consumers. In the Monitoring stage, they will enable weekly and monthly tracking of progress, allowing for rapid adjustments and strategic alignment. In the Review stage, they will serve as objective criteria to evaluate the performance of each cycle, assess achieved results, and provide the basis for defining new objectives and targets. Thus, the indicators make the model re-



plicable and measurable, reinforcing the methodological robustness of the study, even though it remains limited to the initial stages of implemen-

tation. Table 01 presents a summary of the OKR indicators to be used as defined in the previous stages.

Table 1
Indicators and Targets Associated with the OKRs

Department	Indicator	Target
Company (General OKR)	Awards in recognized competitions	Achieve ≥ 1 award during the cycle
	Launch of new products	Carry out 2 new launches within the cycle
	Reduction of quality issues	Reduce by $\geq 20\%$ compared to the previous cycle
Production	Documented and structured processes	Ensure $\geq 80\%$ of processes are mapped
	Deviation from quality parameters	Limit to $\leq 3\%$ of productions
	Technical training	Conduct 1 monthly training session per employee
	New products launched	Launch 1 new product every 45 days
	Satisfaction of outsourced clients	Achieve 100% satisfaction
	Adoption of new techniques/trends	Implement ≥ 1 technique or trend per cycle
	Product visual compliance	Ensure 100% compliance with standards
	Packaging integrity	Ensure 100% integrity
	Style-consistent recipes	Develop recipes with award-winning potential
	Social media engagement	Increase by +50% during the cycle
Marketing and Sales	Consumer events	Organize ≥ 3 events
	Participation in external events	Participate in ≥ 1 event/lecture
	Collaborative actions	Carry out ≥ 1 collaborative initiative
	Digital content on quality	Create ≥ 2 contents
	Positive reviews published	Publish ≥ 4 reviews per month

Source: Prepared by the Authors (2025)

As delimited in this study's methodology, the implementation of the OKR framework is carried out up to the stage of developing departmental OKRs. However, Doerr (2019) emphasizes that project success can only be achieved through its continued application, which implies performing the stages of Monitoring and Review as well as Scoring, Evaluation, and Feedback. These ensure a comprehensive understanding of the effectiveness of OKR implementation and provide a foundation for renewing objectives and targets for a new cycle.

Since these stages are beyond the scope of this study's implementation, the activities to be developed by the company's management are outlined here to ensure continuity of the work.

Monitoring and review

Bezerra (2020) asserts that OKR is a dynamic methodology; therefore, once defined and initiated, it cannot be disregarded. All indicators and the progress of key results must be monitored in line with the cycle plan established during the setup stage.

As conditions evolve throughout the process, Doerr (2019) recommends revising goals and adding or eliminating OKRs as appropriate. Key results are not static and may be adjusted if indicators demonstrate that proposed objec-

tives are unattainable due to specific business constraints. It is counterproductive to persist with goals that have become irrelevant to the current scenario.

In the monitoring and review of OKR progress, attention must be given to the relevance of each objective and its associated key results. Based on their performance and outcomes, it should be determined whether certain OKRs ought to be abandoned or replaced with others that better contribute to the organization's general objectives.

Scoring, evaluation, and feedback

This stage requires the responsible manager to evaluate the OKRs and communicate the results across the organization (Bezerra, 2020). At this point, scores are assigned to each key result, providing a quantitative measure of the extent to which objectives have been achieved. It is essential, however, to develop a scoring system capable of assessing the success of each indicator. Success is commonly measured on a scale of 0 to 1 (or 0% to 100%), although each company may establish a scale it deems most appropriate (Radonic, 2017). At the end of each cycle, the classification of each OKR should be combined with subjective self-assessments of achievement levels to evaluate performance and plan the subsequent OKR cycle (Doerr, 2019).



Muller (2003) highlights that it is critical for every evaluation to include an understanding of the causes behind unmet goals, so that an action plan can be designed to overcome such difficulties. At the same time, objectives that were achieved with excessive ease must be reassessed to increase their ambition. Since the purpose of the OKR methodology is to enhance the organization's potential for success, critical analysis of achieved results must always be present in evaluation and feedback meetings.

At the end of the evaluation cycle, each key result and objective should be assessed using Doerr's (2019) scoring method, performed with the aid of the scoring and monitoring dashboard (Appendix 01). Scores should follow a 0–100% criterion for each departmental key result indicator. Finally, with the involvement of the project team, each point should be discussed, reflecting on the impact of results on the company, assessing whether they were satisfactory and aligned with expectations. Decisions should then be made to either maintain the same objectives and key results for the next cycle or update the model by incorporating new objectives and results in line with the company's current context. The same evaluation and discussion process should subsequently be carried out for higher-level key results, associated with the company's general objectives (Doerr, 2019).

FINAL CONSIDERATIONS AND CONTRIBUTIONS OF THE PROPOSAL

This study presented the application of a specific management methodology designed to assist a small beverage industry in achieving greater assertiveness and engagement in the pursuit of its strategic objectives, as well as in utilizing the OKR framework to unfold these objectives into goals and indicators involving both management and employees. The chosen methodology proved to be agile, easy to implement, and highly effective in supporting decision-making within the company. It enabled clearer definition and stronger involvement of employees around their targets, thereby achieving the overall objective of this research.

The successful implementation of the proposed methodology provided the company with a structured tool and documentation of all procedures necessary for its execution and maintenance in daily operations. Furthermore, it demonstrated potential for continuous improvement through its evaluation and review model, which allows new cycles to be initiated.

The tools for monitoring project progress were also applied effectively, enabling a horizontal flow of information across the project, thereby fulfilling this premise of the methodology in line with the theoretical framework analyzed. They clearly defined the targets to be pursued and their respective performance indicators.

One challenge identified was the development and maturity of lower-level key results, as this stage required greater involvement of employees, many of whom were still adapting to the integration of the tool into their daily work routines. Given that many of these employees were directly engaged in standardized production tasks, it was difficult for them to associate their performance with potential improvements in the proposed objectives.

This study presents some important limitations. First, the analysis was intentionally restricted to the initial phases of the OKR implementation (planning and development), without advancing to the stages of monitoring, evaluation, and cycle renewal. This delimitation limited the possibility of assessing the quantitative and long-term impacts of the methodology on the microbrewery studied, preventing triangulation with secondary data or robust quantitative performance indicators. Moreover, employees' lack of familiarity with the tool may have influenced their level of engagement in the early stages of its application. Despite these limitations, it is expected that the continued use of the methodology in future cycles will broaden the positive results observed, providing a foundation for more comprehensive and comparative analyses, including organizational performance metrics and studies in other business contexts.

The proposal to implement the OKR methodology in a microbrewery constitutes a re-



levant technological contribution by adapting a strategic management tool originally developed for large corporations to the context of a small enterprise, employing accessible and easily replicable resources. The structuring of performance indicators and the use of simple instruments, such as physical tracking boards and indicator dashboards, demonstrate that it is possible to incorporate modern management practices with low technological investment. Thus, this study offers a practical model for the systematic monitoring of goals and results, fostering greater professionalization of management in small businesses within the industrial sector.

From a social perspective, this study contributes to strengthening organizational culture and employee engagement around common objectives, promoting an environment of enhanced communication and cooperation. The inclusion of employees in goal-setting and result visualization encourages the appreciation of both individual and collective work, which can generate positive impacts on motivation, productivity, and sense of belonging. Additionally, by promoting better management practices in microenterprises, the application of the OKR methodology contributes to business growth and indirectly to job creation, local development, and the promotion of entrepreneurship in the beverage sector.

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