COACH.WIN™
ELEVATING LEADING BUSINESS COACHES

2toLEAD

#VivaGoals

All-Star Academy: Microsoft Viva Goals

Wednesday August. 30, 2023 10:00 AM (EST)

2toLEAD

Richard Harbridge

2toLead Chief Technology Officer & Microsoft MVP

Speaker & Author

Super Friendly 🙂

My Twitter is @RHarbridge, I'm super friendly & proud to work at @2toLead.

Agenda

Module 1: Building A More Focused & Aligned Culture With Viva Goals

Module 2: Deep Dive Into OKR Best Practices & Viva Goals Advanced Configuration

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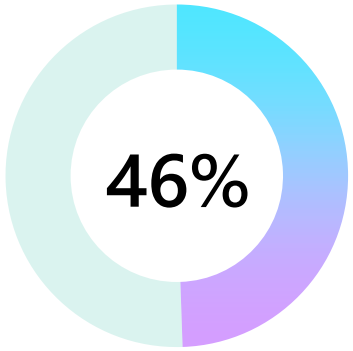
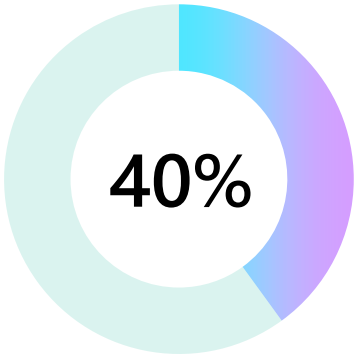
Driving Employee Experience AND Business Results

Employees want to know their work matters and makes an impact

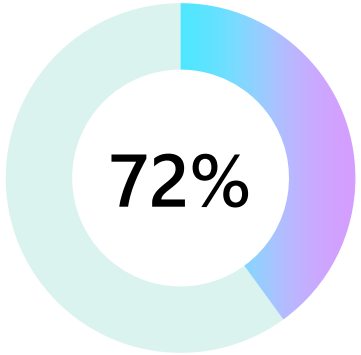


Positive culture

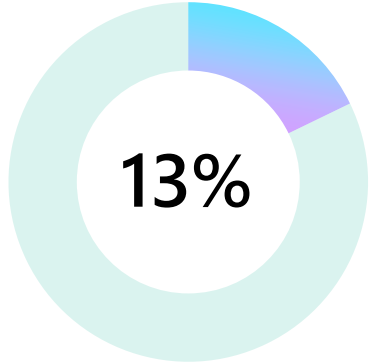


A sense of purpose and meaning

Leaders are struggling with strategic alignment and visibility in a new world



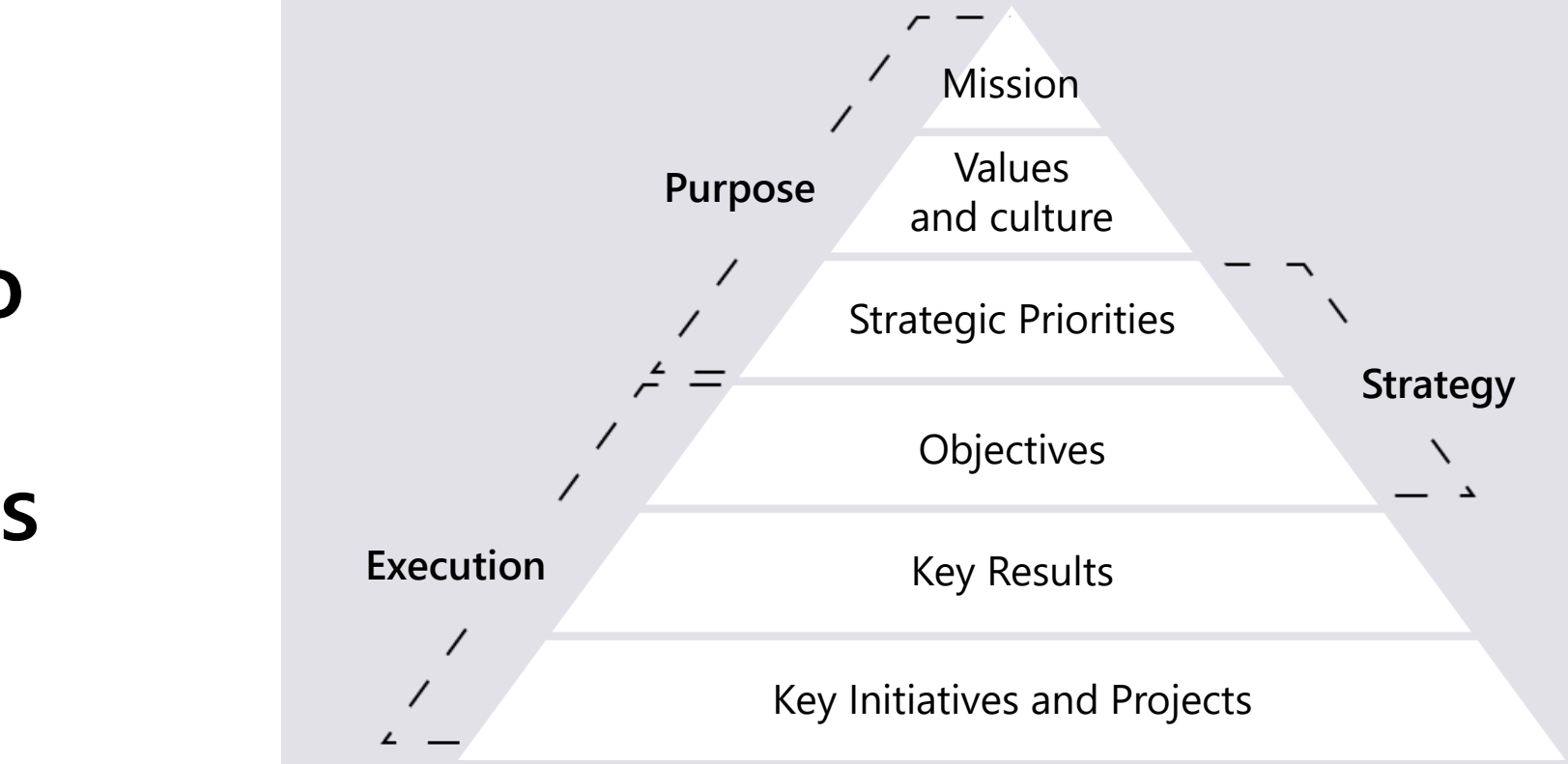
of leaders can't name their company's top three goals



of frontline managers even know how work contributes to strategy

Microsoft Work Trend Index 2022; "No one knows your strategy – not even your top leaders"

Leverage OKRs to align teams on a common business goal-setting and management methodology

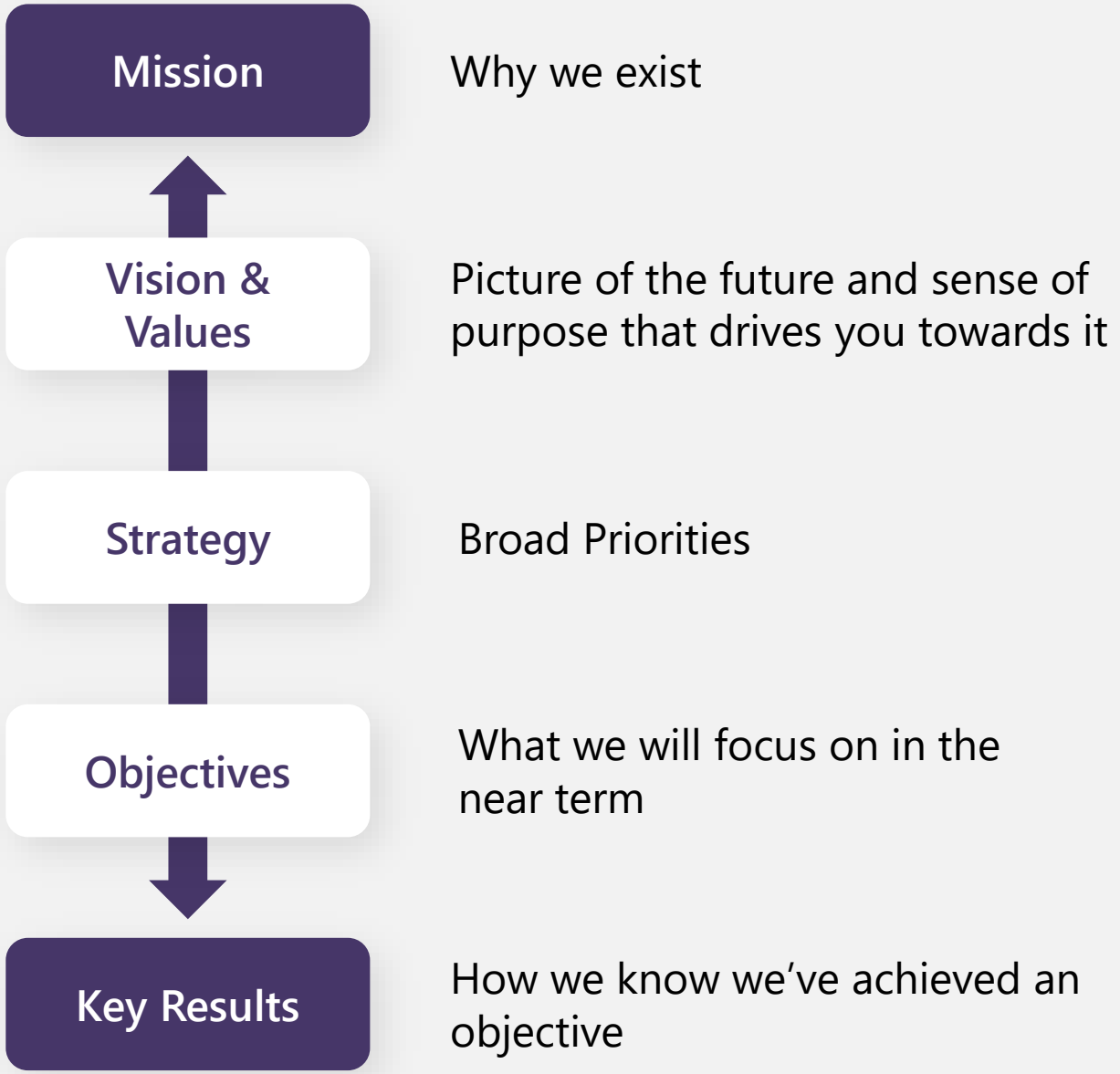


96% of employees who use OKRs understand how their work ties into broader company goals

Alignment is the foundation of impact

OKRs are a way to align your Mission all the way to your Strategy, Objectives, and Key Results.

It's a way to move quickly towards focused impact.



OKR definition

Objectives: What the team wants to accomplish

Objectives are clear, inspiring, public stretch goals shared across teams and organizations. To sharpen focus, limit to 5 objectives.

Key Results: How the team will measure success

Key results are the team or org's measurable objectives. They should be ambitious but achievable, and quantifiable enough to lead to objective scoring. Set 3-5 key results.

For example, 70% achievement is typically considered successful. Scoring higher may mean the aspirational goals are not being set high enough.

Key Initiatives and Projects: Activities which help the team achieve measurable outcomes

Key initiatives and projects are the path to impact for each key result. They are the activities whose execution will impact performance on the defined objectives.

Objectives and Key Results (OKRs)

Objectives

Qualitative, aspirational goal for an individual, team, or company

Key Results

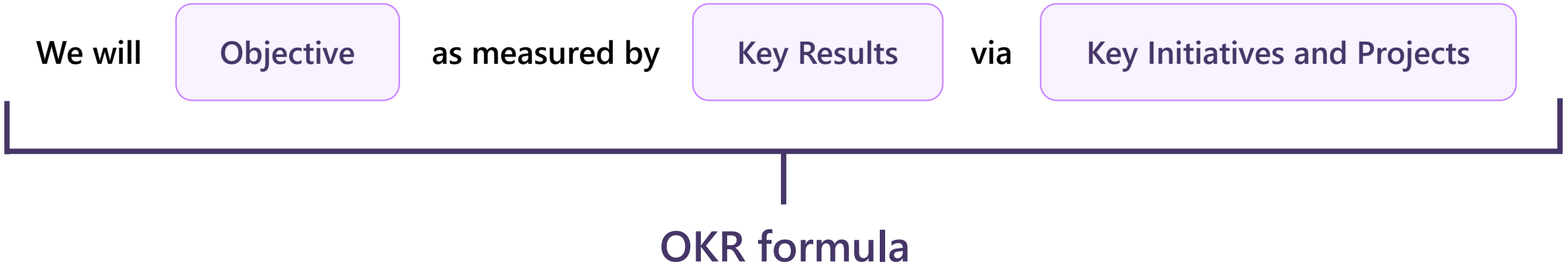
Measurable outcomes that contribute to the achievement of an objective

Key Initiatives & Projects

These are the core activities that will be taken to achieve an objective

Foundations of an OKR

How to write an OKR



An OKR Example

Objective:
Improve our marketing funnel to become the vendor of choice in the industry

Key Result 1:
Execute 6 targeted lead campaigns by Q1

Key Result 2:
Acquire 950 new MQLs for sales by Q1

Key Result 3:
Drive $10M in marketing-generated pipeline by Q1

- **Project 1:**
  Update marketing materials

Increase engagement and success with OKR benefits

Alignment
Ensuring everyone is rowing in the same direction across the organization and pulling on the same rope.

Focus
3-5 OKRs per team, per quarter. The power to say “no” and prioritize work effectively.

Transparency
Ownership of core outcomes across the organization creates clear accountability and surfaces dependencies and roadblocks.

Agility
Frequency of review is critical for agility, and dynamic real-time data enables faster decision making.

Growth
Striving for incredibly ambitious outcomes and reaching for what’s possible.

Follow a phased approach to fully embrace company-wide integration

1 Beginning

Starting your OKR journey

- No usage of OKR methodology
- No structured business rhythm
- Limited alignment of goals between levels

2 Piloting

Validating OKRs in your organization

- Organizational experimentation with OKR methodology via pilot group
- Small group learning OKR concept and building into business rhythm
- Small group trying to understand how OKRs will work for them at scale

3 Adopting

Committing to the OKR practice

- Executive Sponsorship
- Top levels of the organization are developing the OKR muscle and habit
- OKRs are expanding more widely into business rhythms
- OKR tool selection begins

4 Scaling

Rolling out OKRs broadly

- Executive Sponsorship
- OKRs are rolled out to the rest of the company and baked into large, organization-wide initiatives
- OKRs are firmly embedded in business rhythms throughout the organization, from top to bottom
- OKR tool is selected and used across the organization

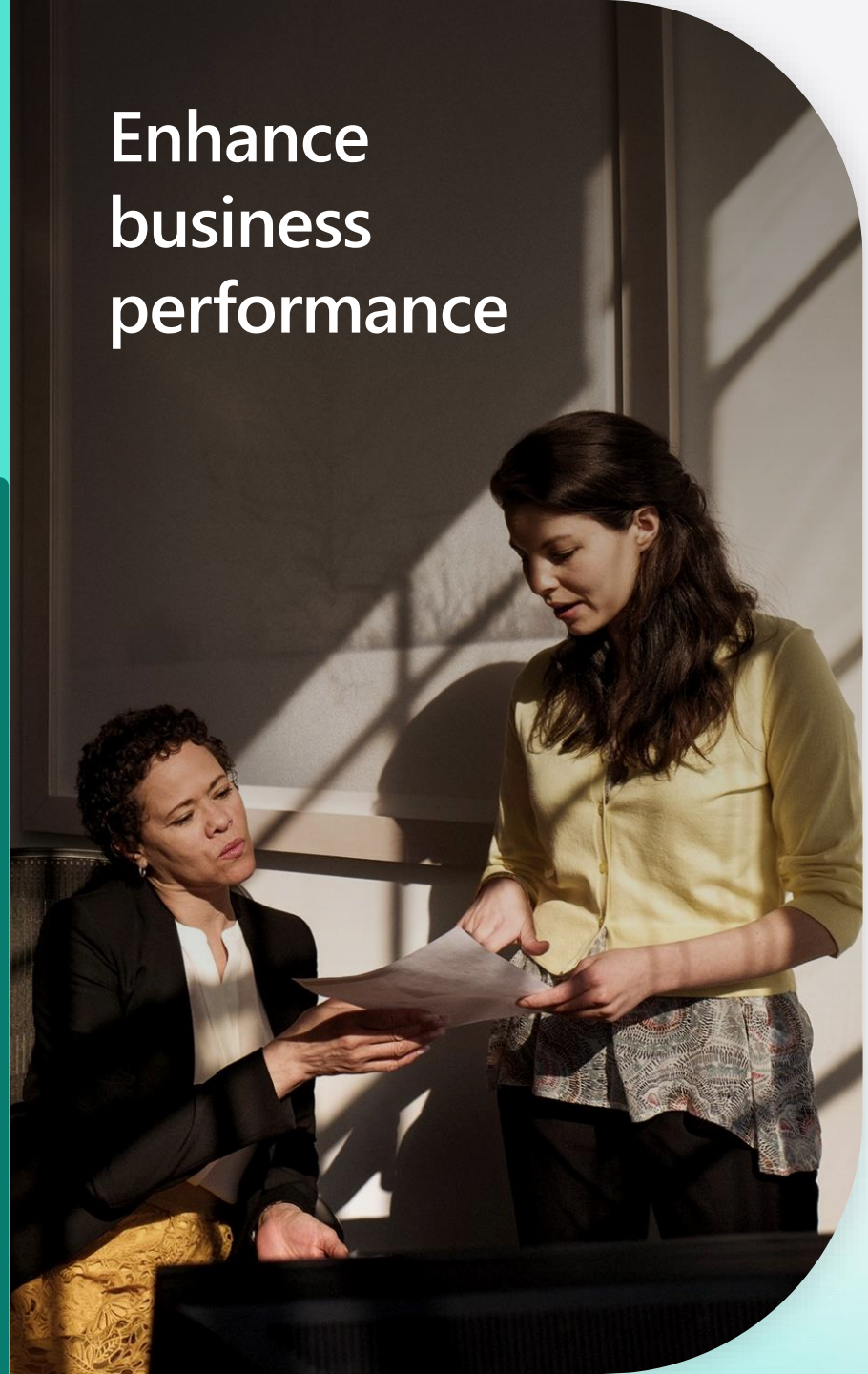
5 Centering

Unlocking cultural buy-in for OKRs

- Executive Sponsorship
- Team members reference OKRs in every decision, big and small
- OKRs are firmly entrenched in business rhythms, becoming a global mindset Of focus and alignment
- Employees feel there is purpose at the center of everything they do

Viva Goals Overview

Enhance business performance



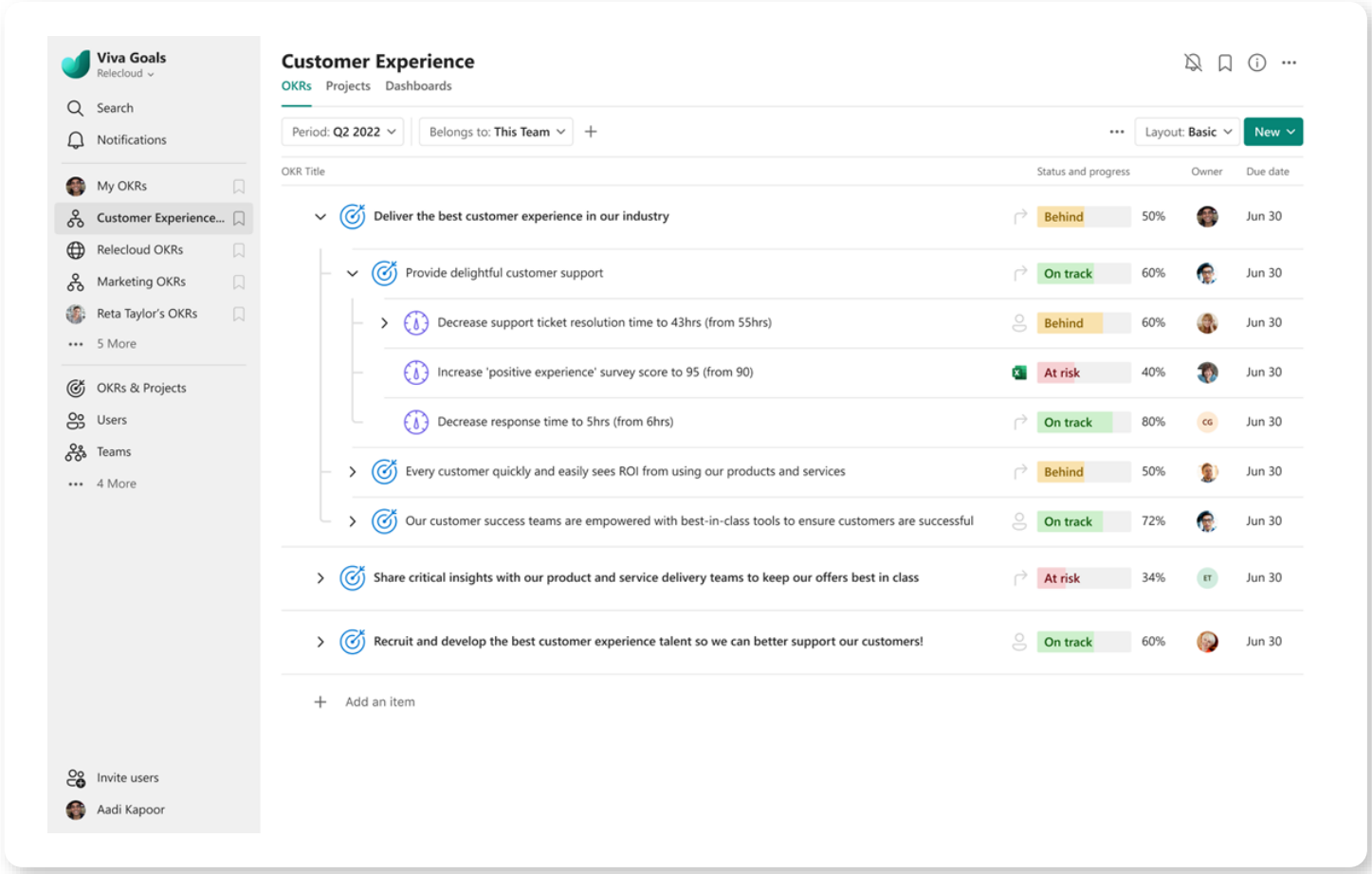
Features & capabilities

Viva empowers people and teams to align on business priorities, set clear goals, and accomplish more together.

- Goal clarity and alignment at scale
- Expert-developed goal-setting templates and best practices
- Effective meetings that meet business goals
- Targeted learning experience for organizational growth
- Powerful search across Microsoft 365 endpoints
- Organizational knowledge graph

What is Viva Goals?

An **integrated solution** to help organizations **align teams to their strategic priorities** and **drive measurable results**, as part of the Viva employee experience

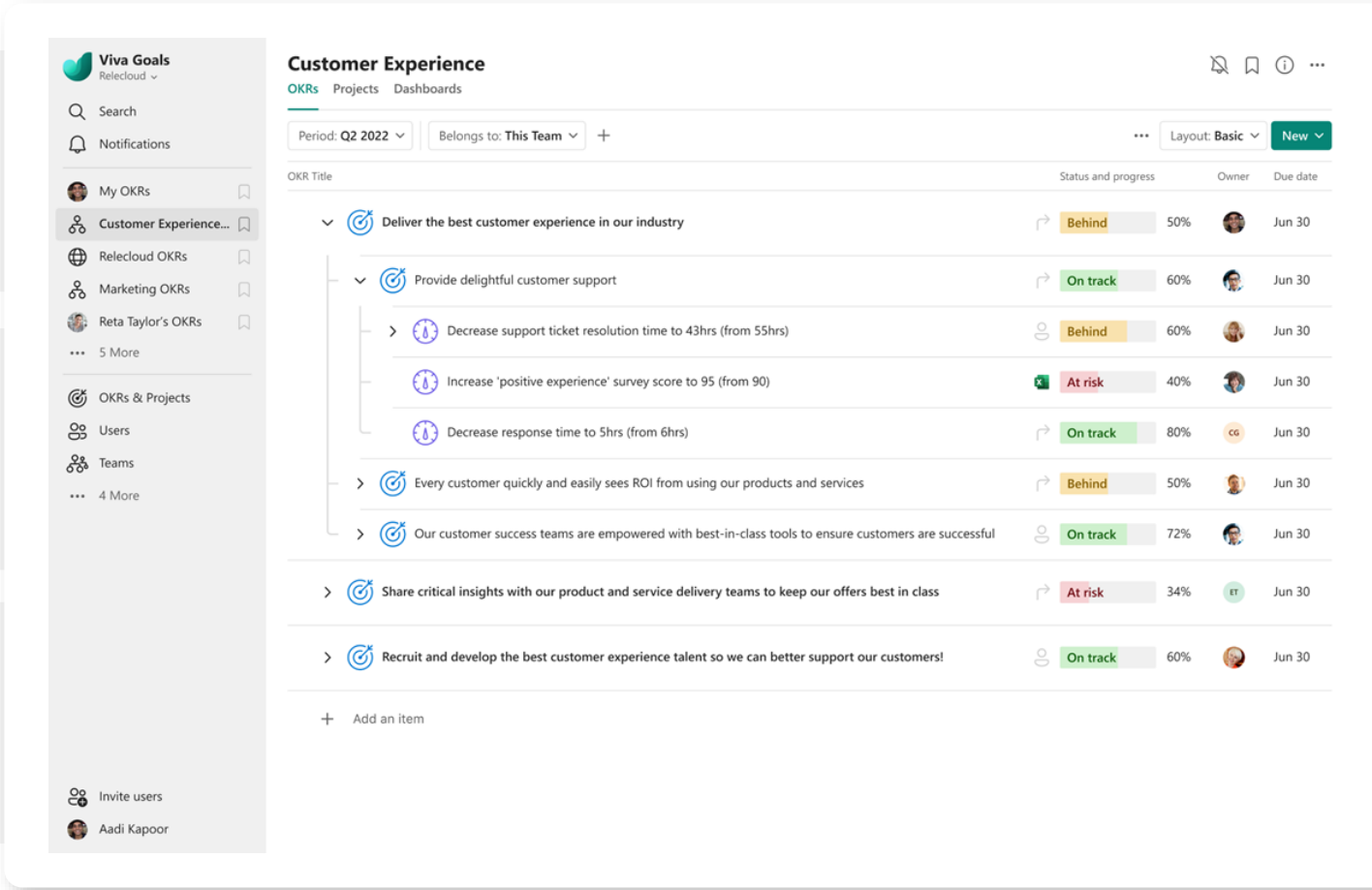


What is Viva Goals?

Connect employees to your organization's goals and drive business results

Build and manage your OKRs in one place with deployment and best practices guidance

Keep aligned with OKRs integrated into your workflow and automated updates from critical work systems

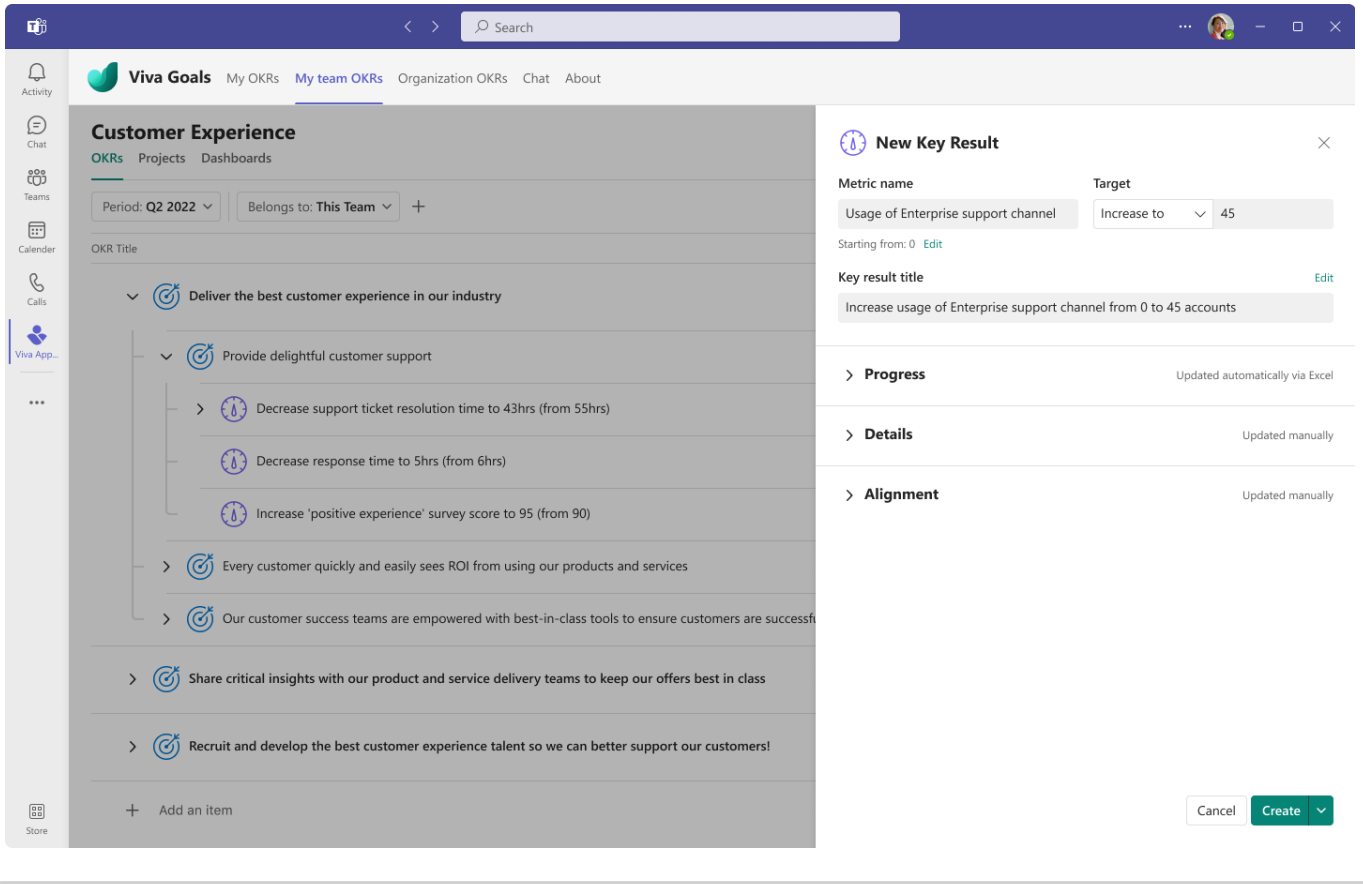


Viva Goals: OKRs at scale

Agility to build and manage OKRs at scale

Create the right rhythms to make the creation, approvals and reviews of OKRs a seamless process

Gain visibility across your organization with a central hub for end-to-end goal management at scale



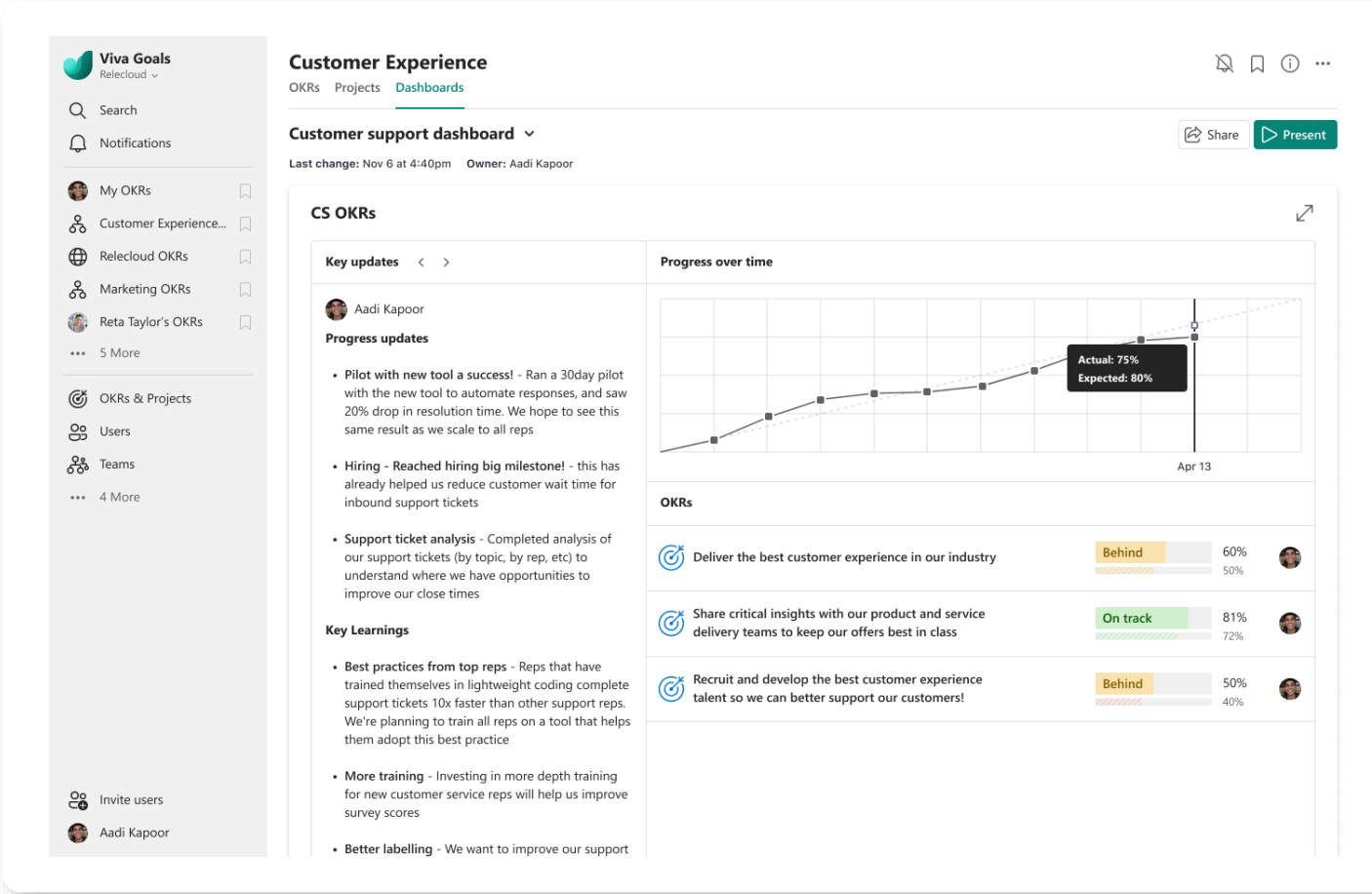
Viva Goals: Connecting daily work to big goals

Connecting daily work to business impact for your employees

Help individuals prioritize and perform with understanding of how their day-to-day work connects to organizational goals

Clarify roles and responsibilities and decrease friction with increased cross-organizational visibility

Establish a cadence and build employee habits needed to drive real results



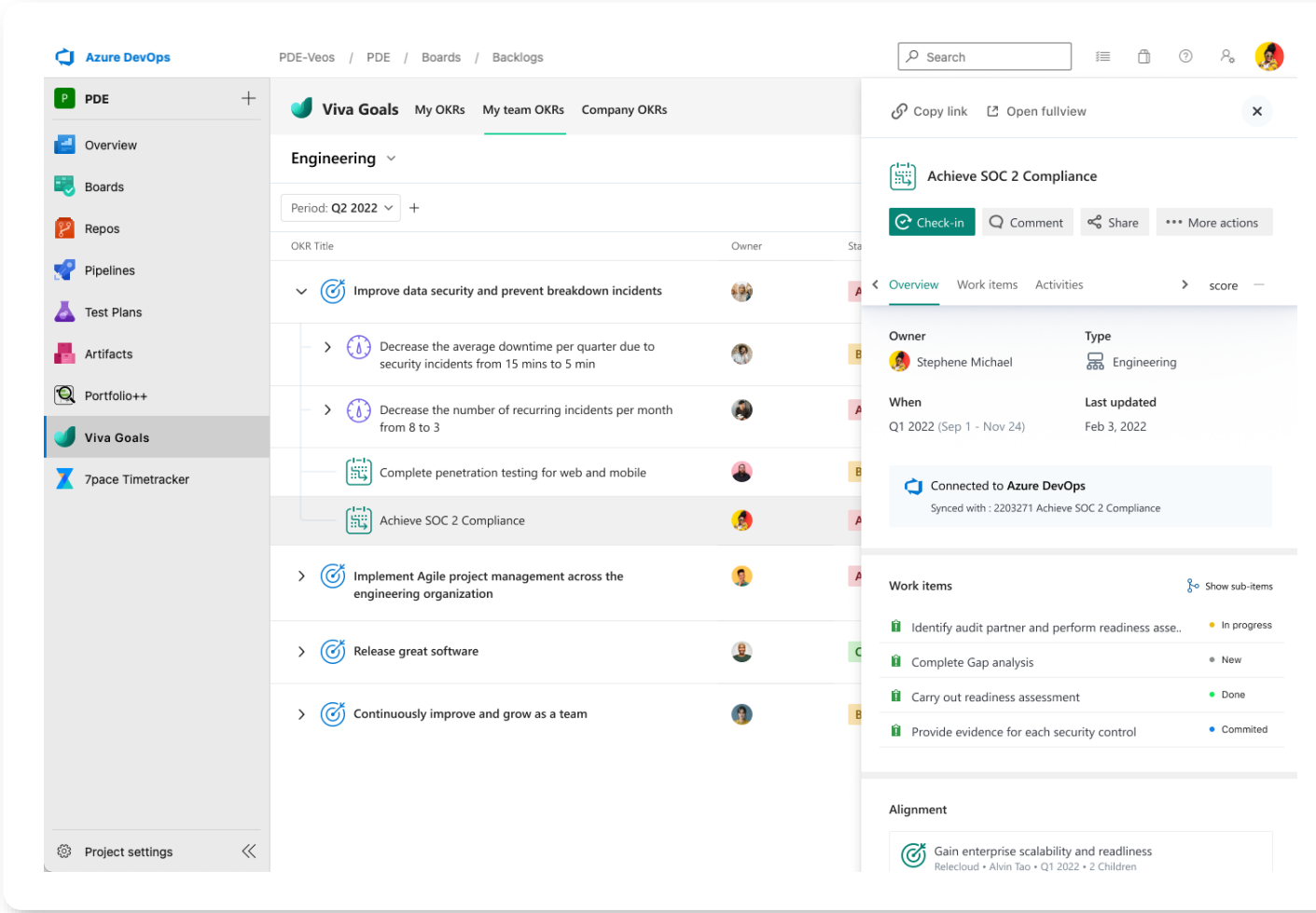
Viva Goals: Integrations with your existing toolset

Integrate into your everyday workflows

Stay in the flow of work with the Viva Goals app in Teams, Azure Dev Ops and more

Communicate, collaborate and check-in on goals with the message extension in Teams chat

Intuitive and agile product experience with in-product guidance and quick start guide to accelerate usage

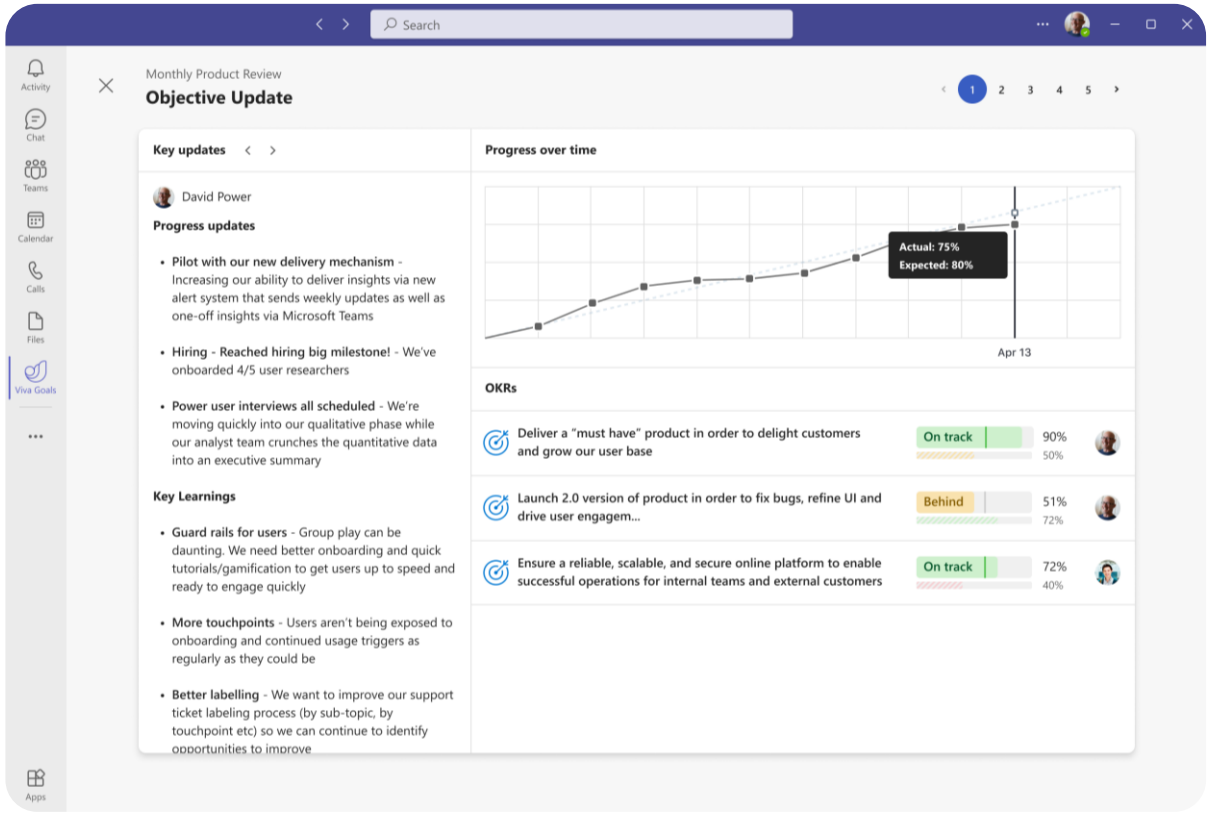


Viva Goals: Dashboards for easy review

Spend less time preparing presentations, more time achieving goals

Create dashboards in Viva Goals to run your review meetings seamlessly during your review cadences (ex: quarterly for company-wide reviews, weekly for team reviews)

- Customizable widgets for presenting OKR information
- Real time OKRs data with up-to-date progress
- Interactive interface for deep dive discussions
- Custom dashboards for each persona

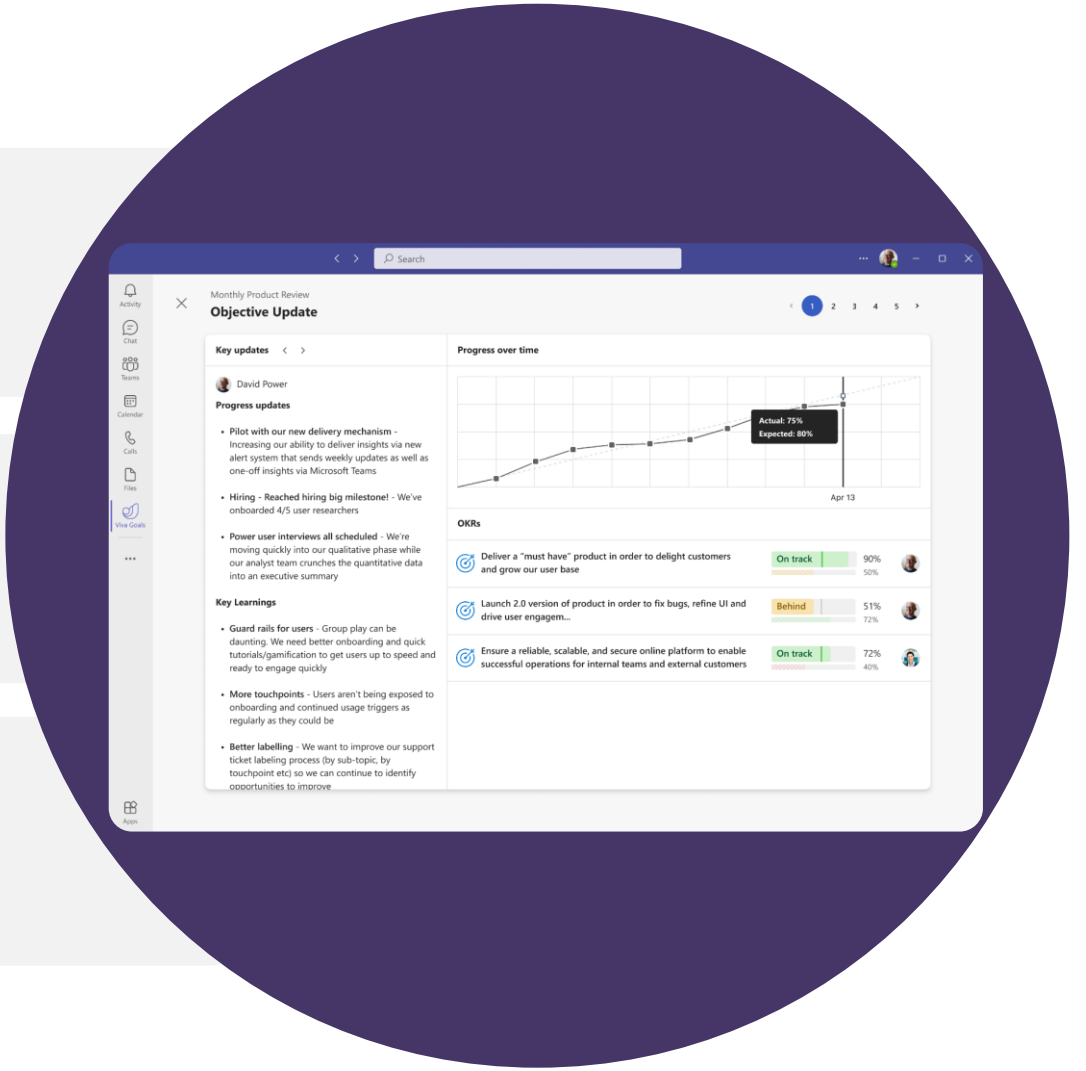


Viva Goals: Built with the enterprise in mind

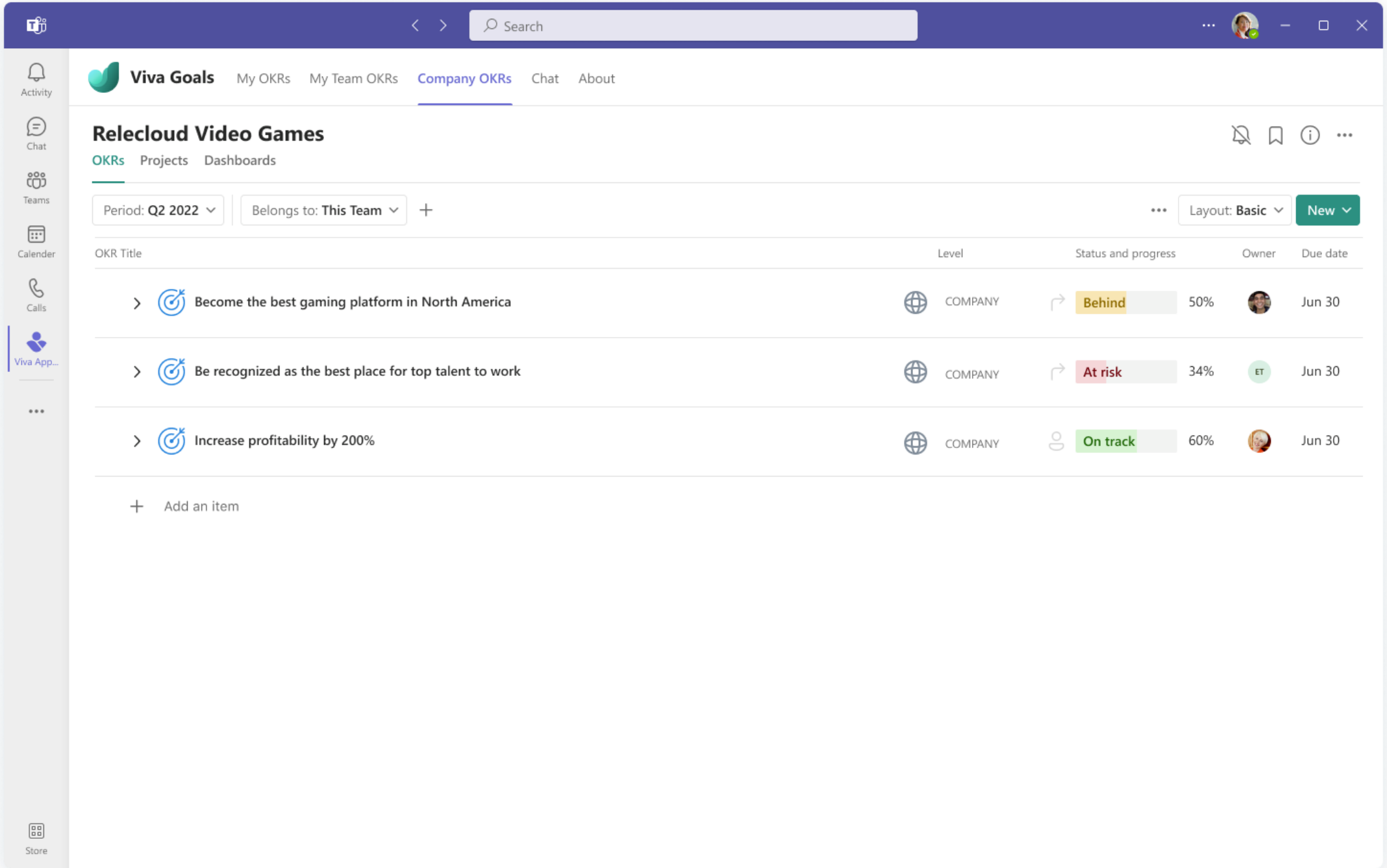
Privacy and security protections built-in (incl. conditional access, single-sign on, audit logs)

Native integrations into Microsoft 365 and 3rd party tooling

EU Data Residency and full GDPR compliance by end of 2022



Viva Goals Demo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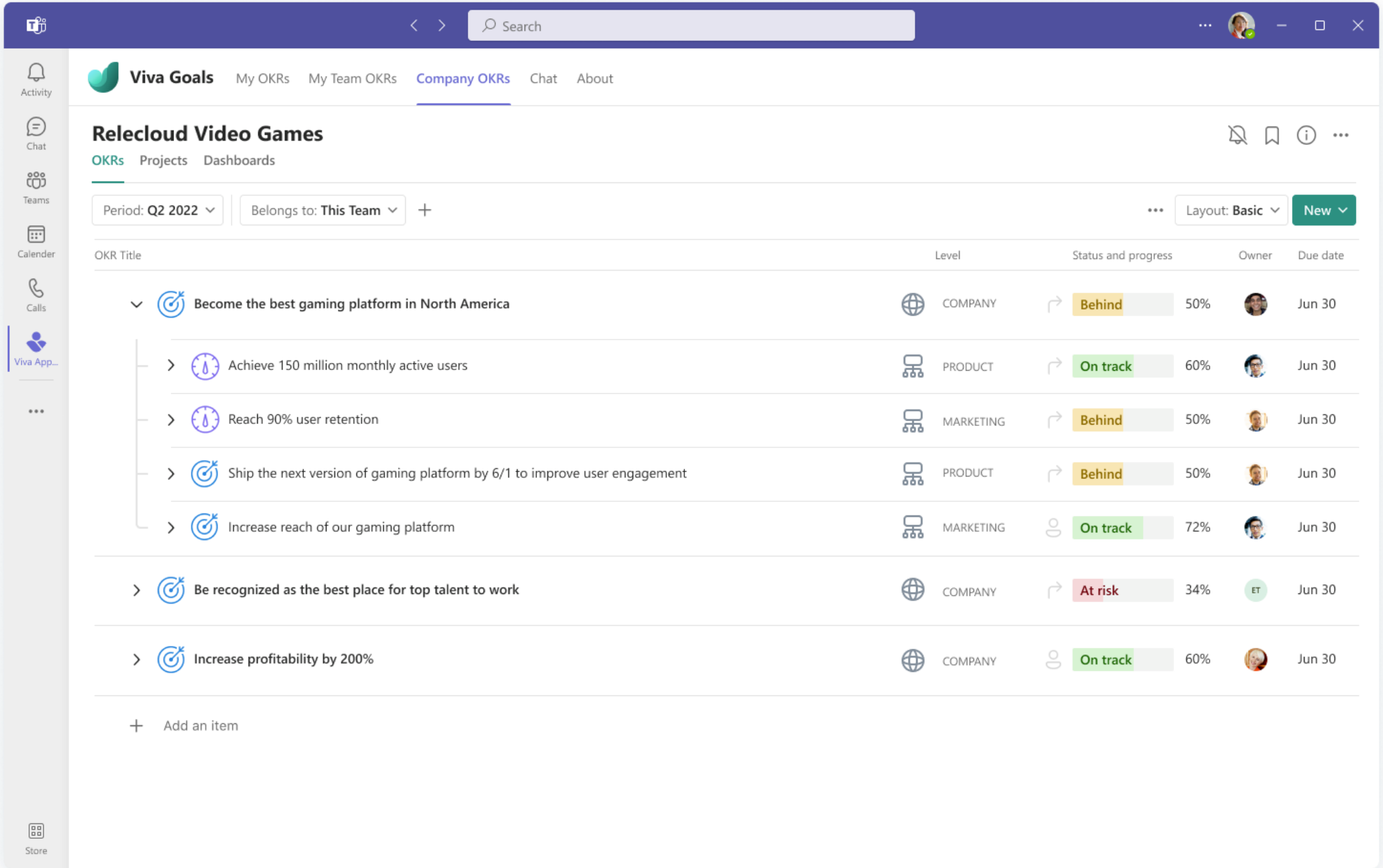
Period: Q2 2022
Belongs to: This Team
Layout: Basic
New
OKR Title
Level
Status and progress
Owner
Due date
Become the best gaming platform in North America
COMPANY
Behind
50%
Jun 30
Be recognized as the best place for top talent to work
COMPANY
At risk
34%
ET
Jun 30
Increase profitability by 200%
COMPANY
On track
60%
Jun 30
Add an item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Jun 30
Reach 90% user retention
MARKETING
Behind
50%
Jun 30
Ship the next version of gaming platform by 6/1 to improve user engagement
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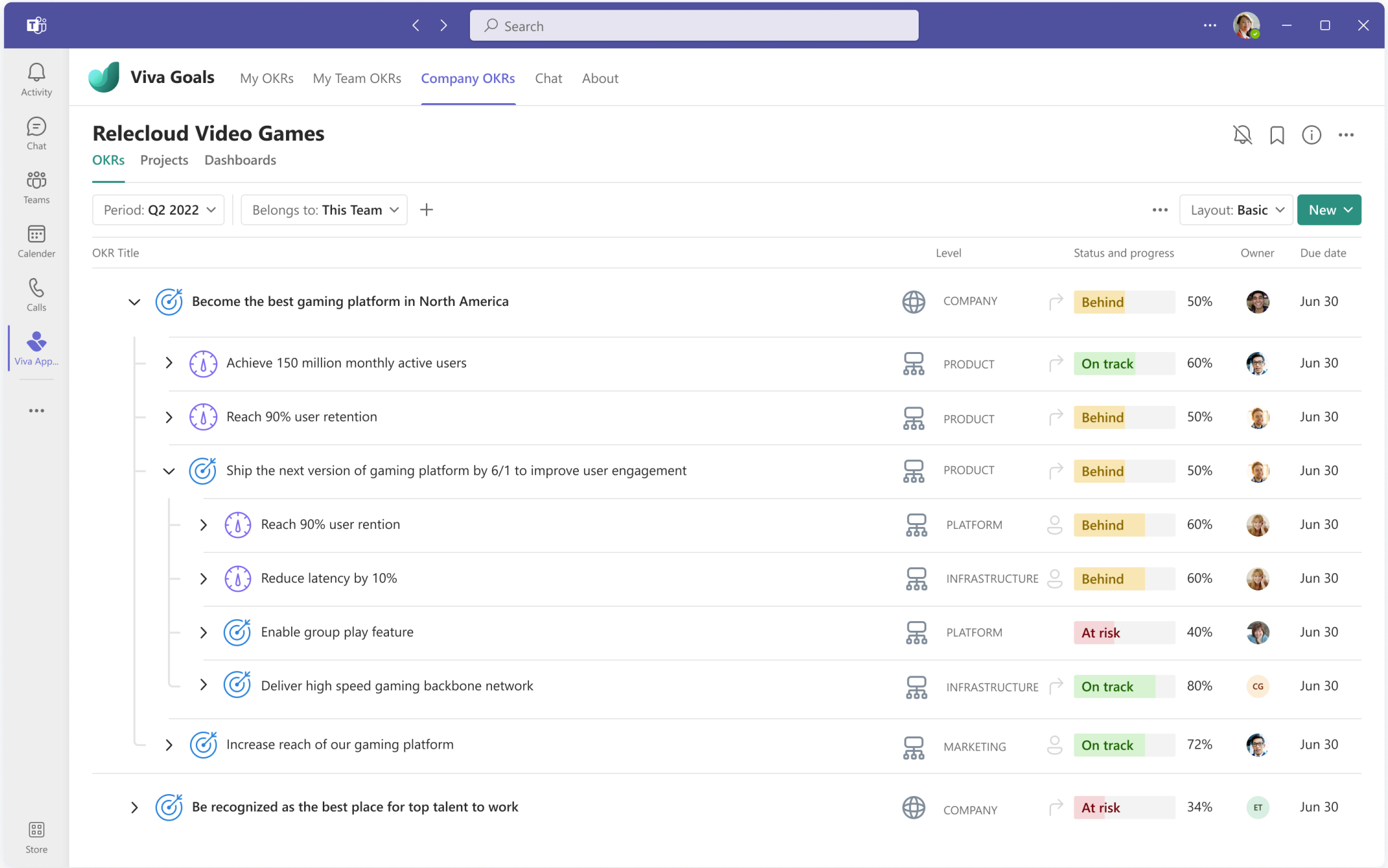
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PRODUCT
Behind
50%
Jun 30
Reach 90% user rention
PLATFORM
Behind
60%
Jun 30
Reduce latency by 10%
INFRASTRUCTURE
Behind
60%
Jun 30
Enable group play feature
PLATFORM
At risk
40%
Jun 30
Deliver high speed gaming backbone network
INFRASTRUCTURE
On track
80%
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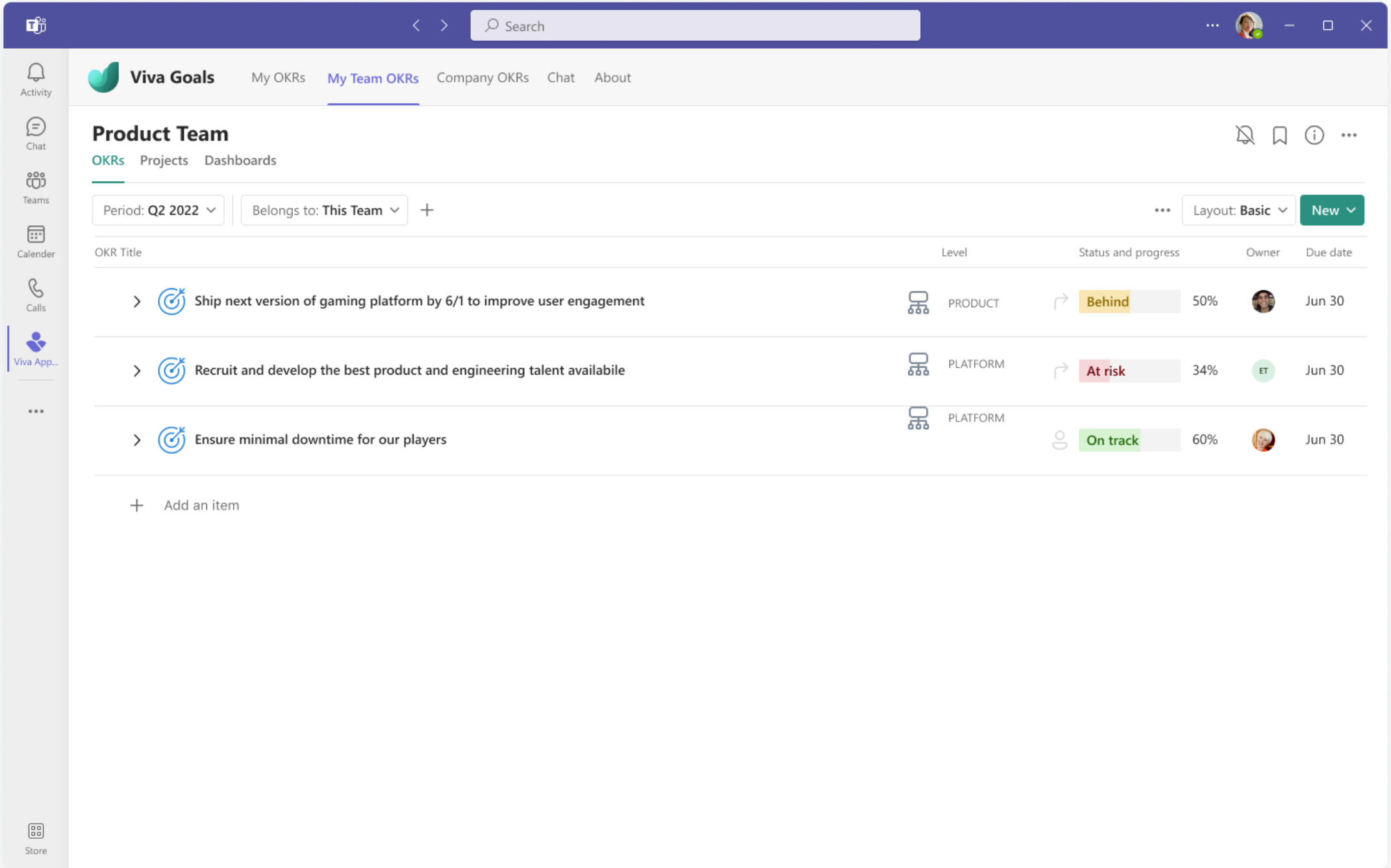
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Ensure minimal downtime for our players
PLATFORM
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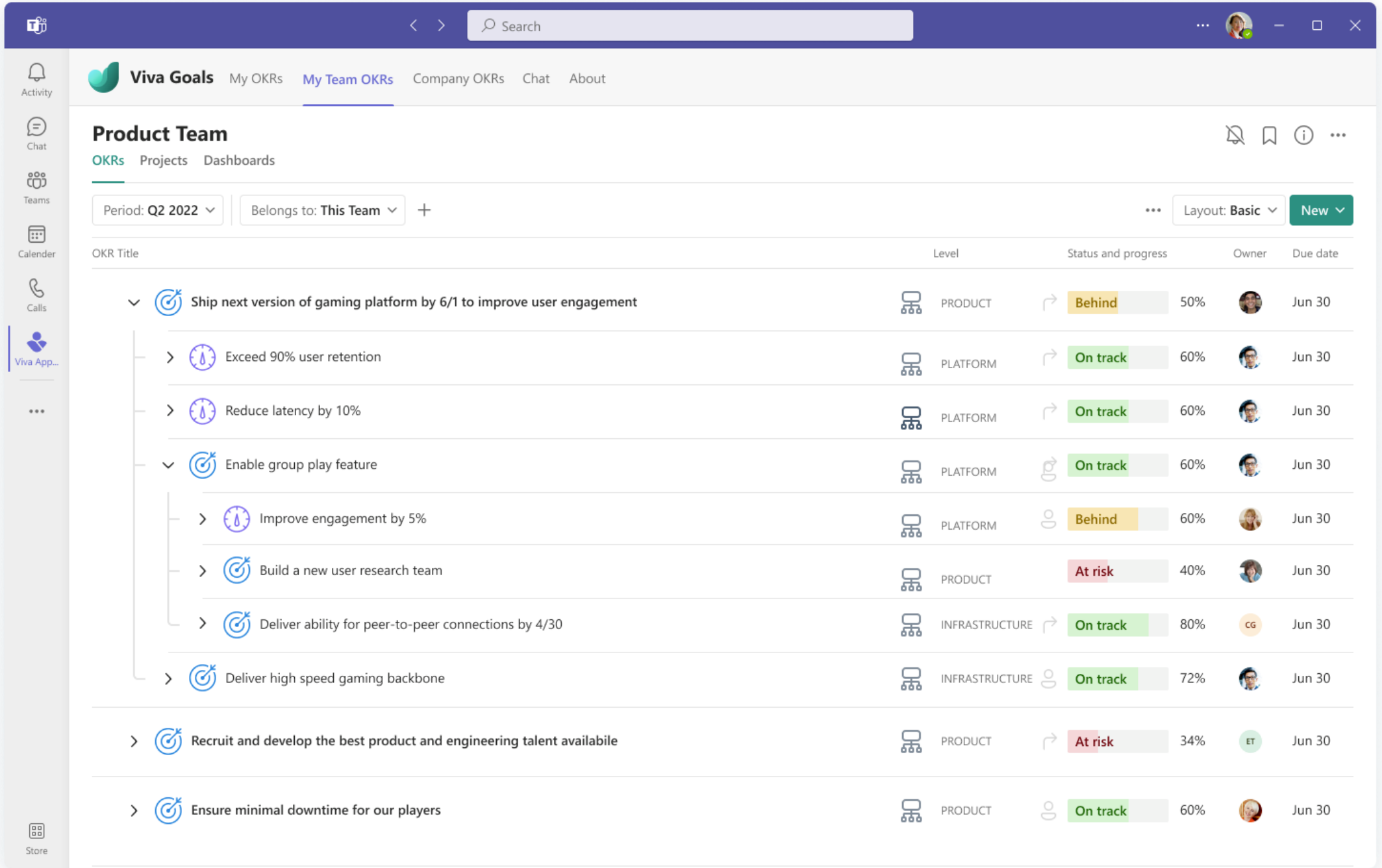
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60%
Jun 30
Improve engagement by 5%
PLATFORM
Behind
60%
Jun 30
Build a new user research team
PRODUCT
At risk
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Deliver ability for peer-to-peer connections by 4/30
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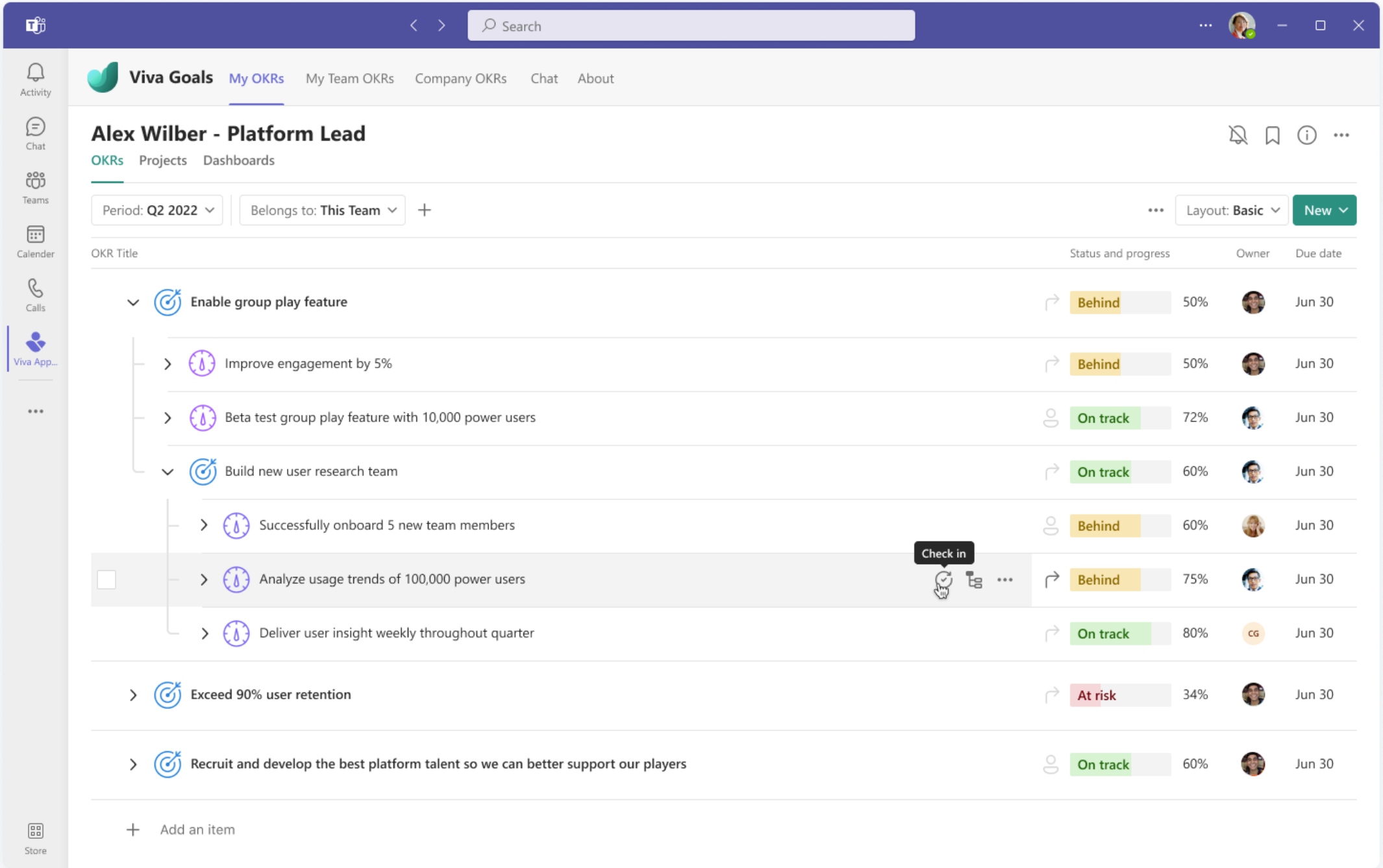
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Behind
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Beta test group play feature with 10,000 power users
On track
72%
Jun 30
Build new user research team
On track
60%
Jun 30
Successfully onboard 5 new team members
Behind
60%
Jun 30
Check in
Analyze usage trends of 100,000 power users
Behind
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Jun 30
Deliver user insight weekly throughout quarter
On track
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Exceed 90% user retention
At risk
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Jun 30
Recruit and develop the best platform talent so we can better support our players
On track
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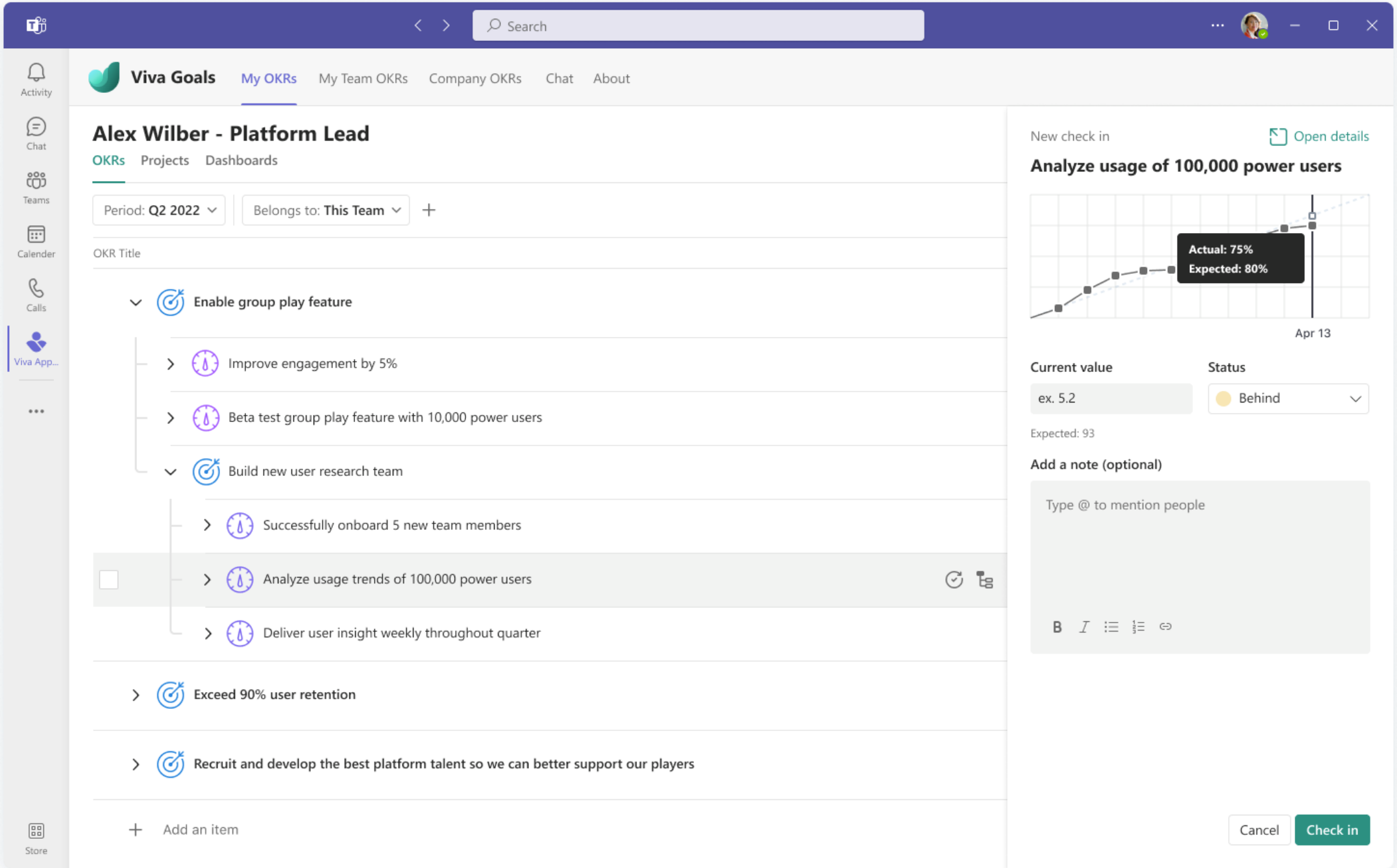
Jun 30
Add an item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Add an item
New check in
Open details
Analyze usage of 100,000 power users
Actual: 75%
Expected: 80%
Apr 13
Current value
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Behind
Expected: 93
Add a note (optional)
Type @ to mention people
Cancel
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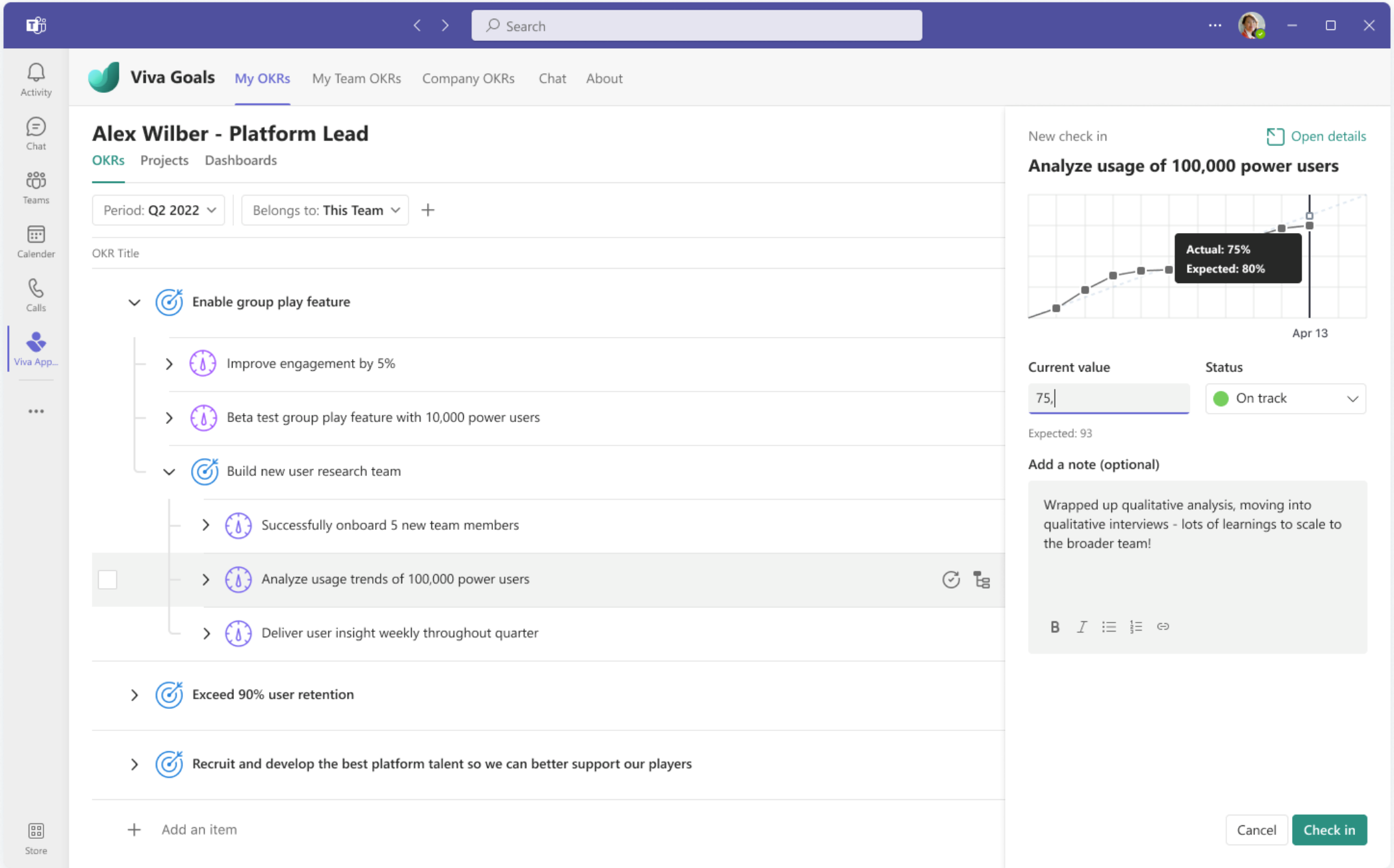
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Actual: 75%
Expected: 80%
Apr 13
Current value
75,
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On track
Expected: 93
Add a note (optional)
Wrapped up qualitative analysis, moving into qualitative interviews - lots of learnings to scale to the broader team!
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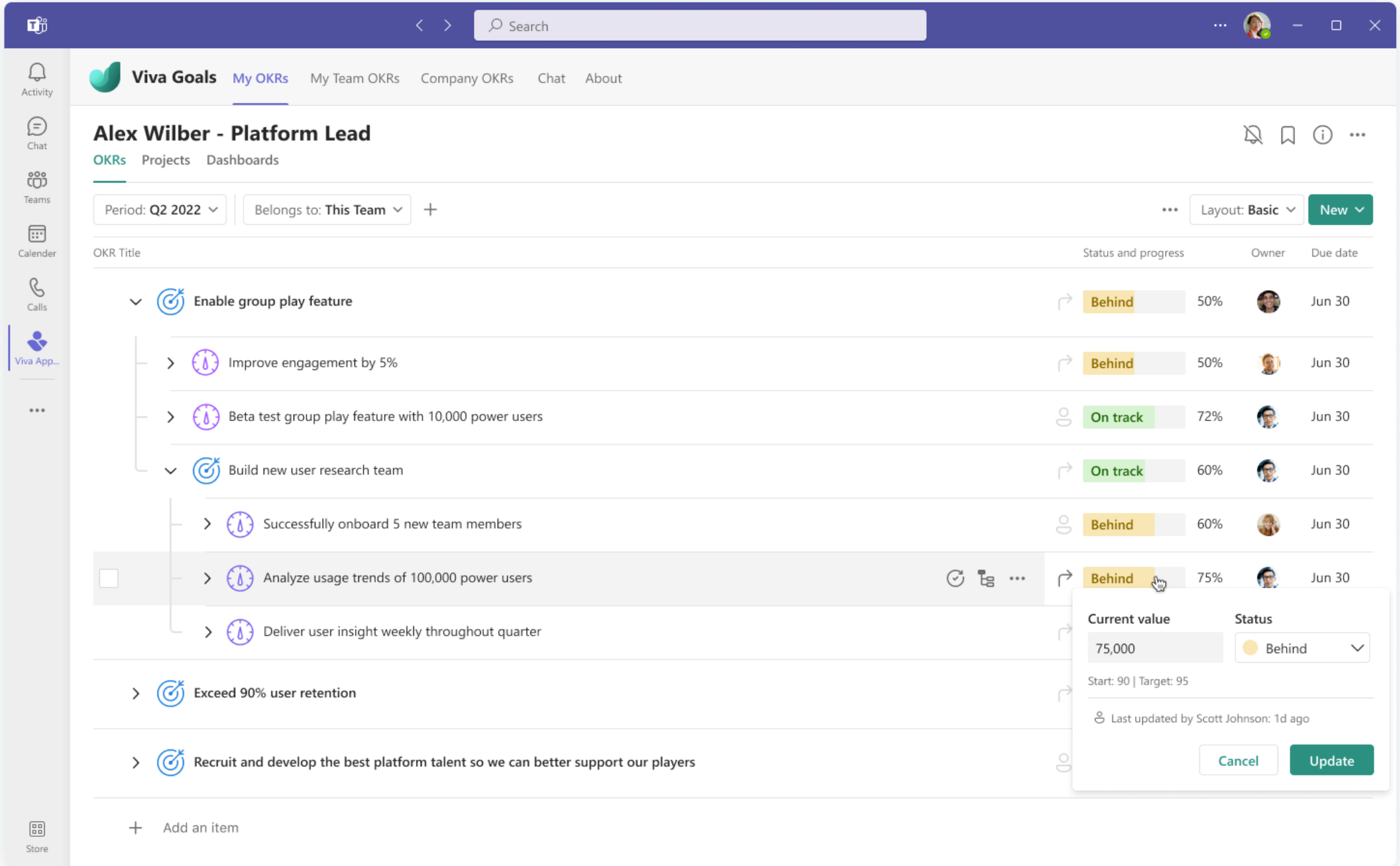
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Jun 30
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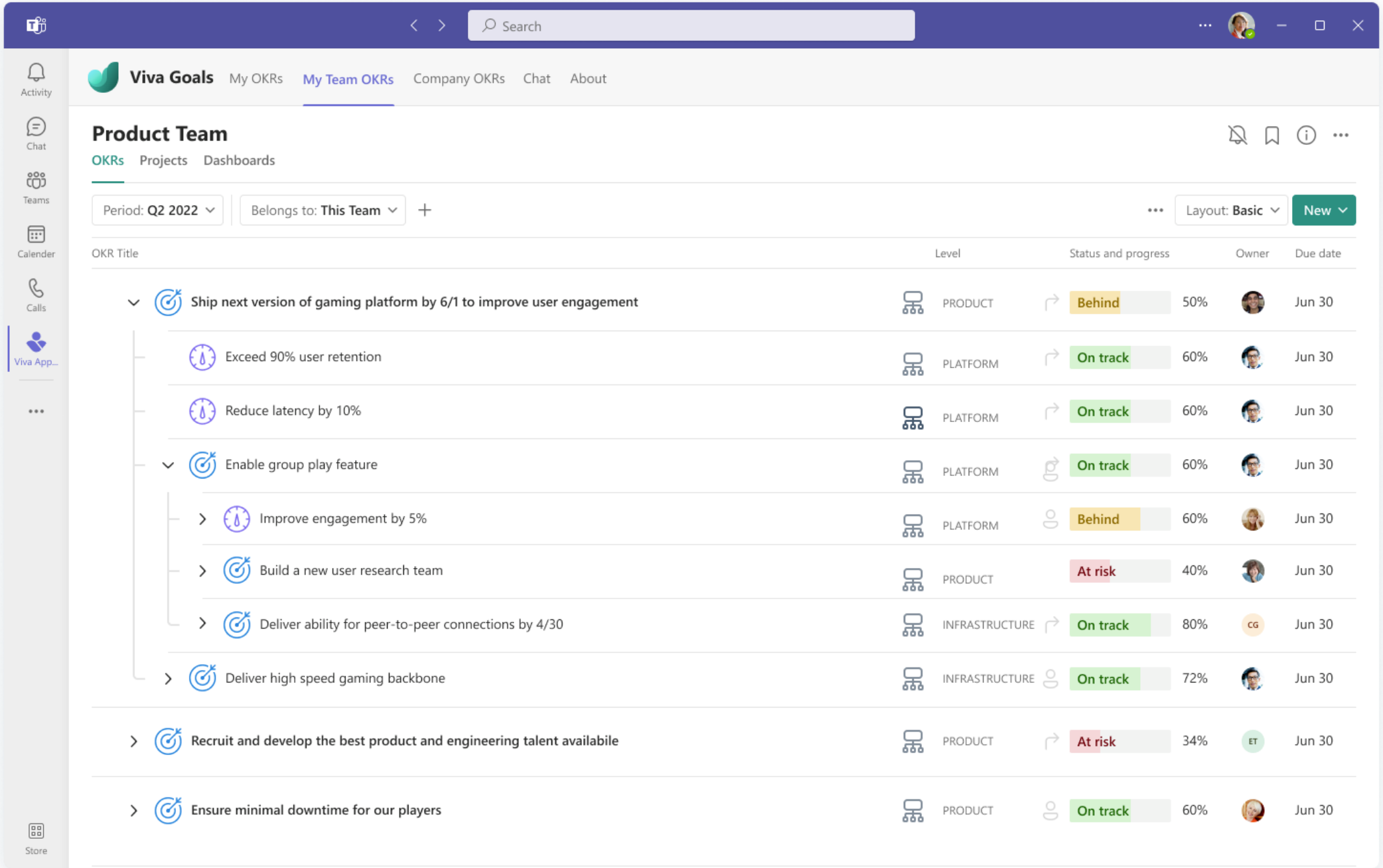
Behind
Start: 90 | Target: 95
Last updated by Scott Johnson: 1d ago
Cancel
Update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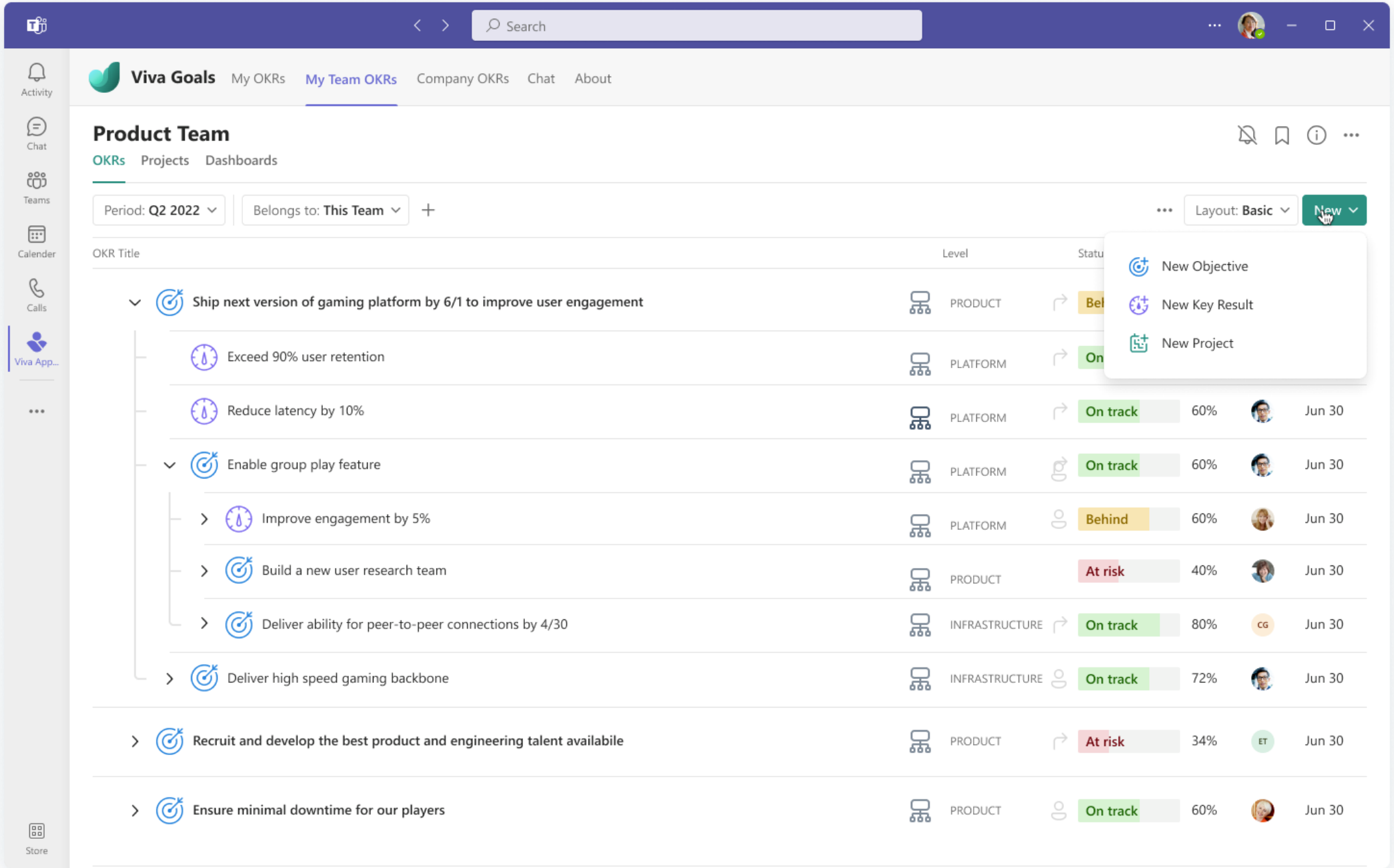
Due date
Ship next version of gaming platform by 6/1 to improve user engagement
PRODUCT
Behind
50%
Jun 30
Exceed 90% user retention
PLATFORM
On track
60%
Jun 30
Reduce latency by 10%
PLATFORM
On track
60%
Jun 30
Enable group play feature
PLATFORM
On track
60%
Jun 30
Improve engagement by 5%
PLATFORM
Behind
60%
Jun 30
Build a new user research team
PRODUCT
At risk
40%
Jun 30
Deliver ability for peer-to-peer connections by 4/30
INFRASTRUCTURE
On track
80%
Jun 30
Deliver high speed gaming backbone
INFRASTRUCTURE
On track
72%
Jun 30
Recruit and develop the best product and engineering talent availabile
PRODUCT
At risk
34%
Jun 30
Ensure minimal downtime for our players
PRODUCT
On track
60%
Jun 30


Search
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Teams
Calender
Calls
Viva App...
Store
Viva Goals
My OKRs
My Team OKRs
Company OKRs
Chat
About
Product Team
OKRs
Projects
Dashboards
Period: Q2 2022
Belongs to: This Team
Layout: Basic
New
New Objective
New Key Result
New Project
OKR Title
Level
Ship next version of gaming platform by 6/1 to improve user engagement
PRODUCT
Exceed 90% user retention
PLATFORM
Reduce latency by 10%
PLATFORM
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Jun 30
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PRODUCT
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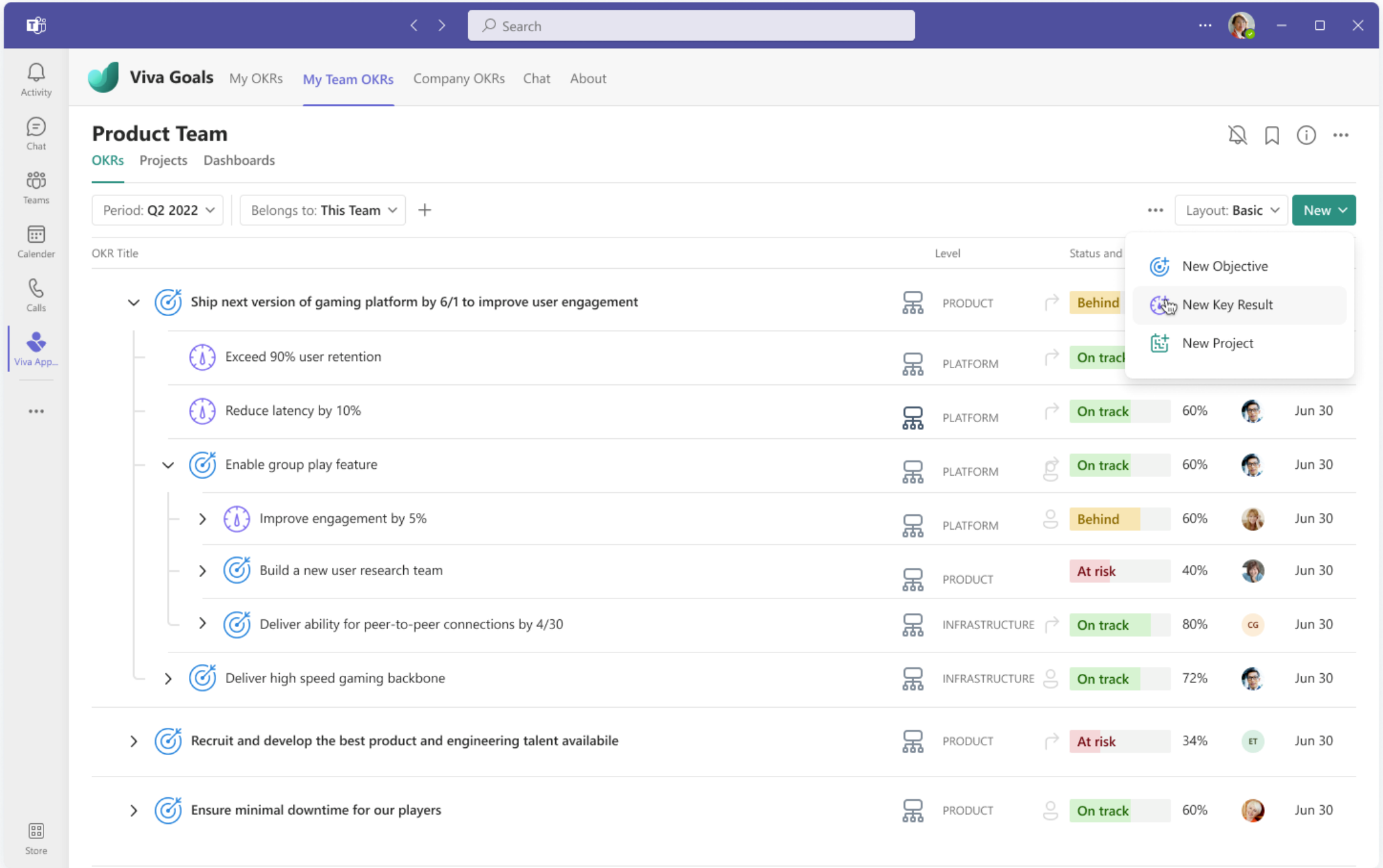
Jun 30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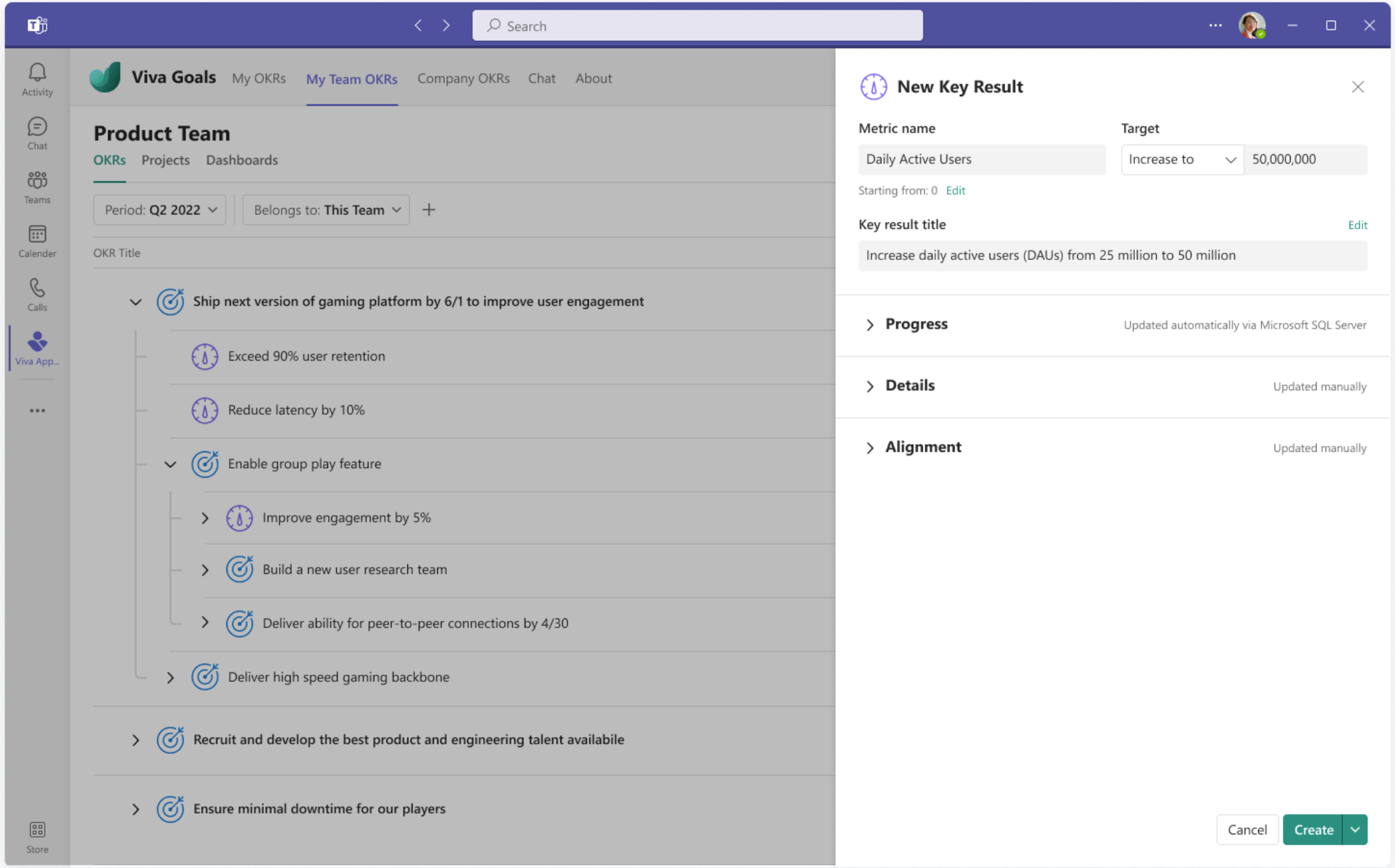
Search
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Exceed 90% user retention
Reduce latency by 10%
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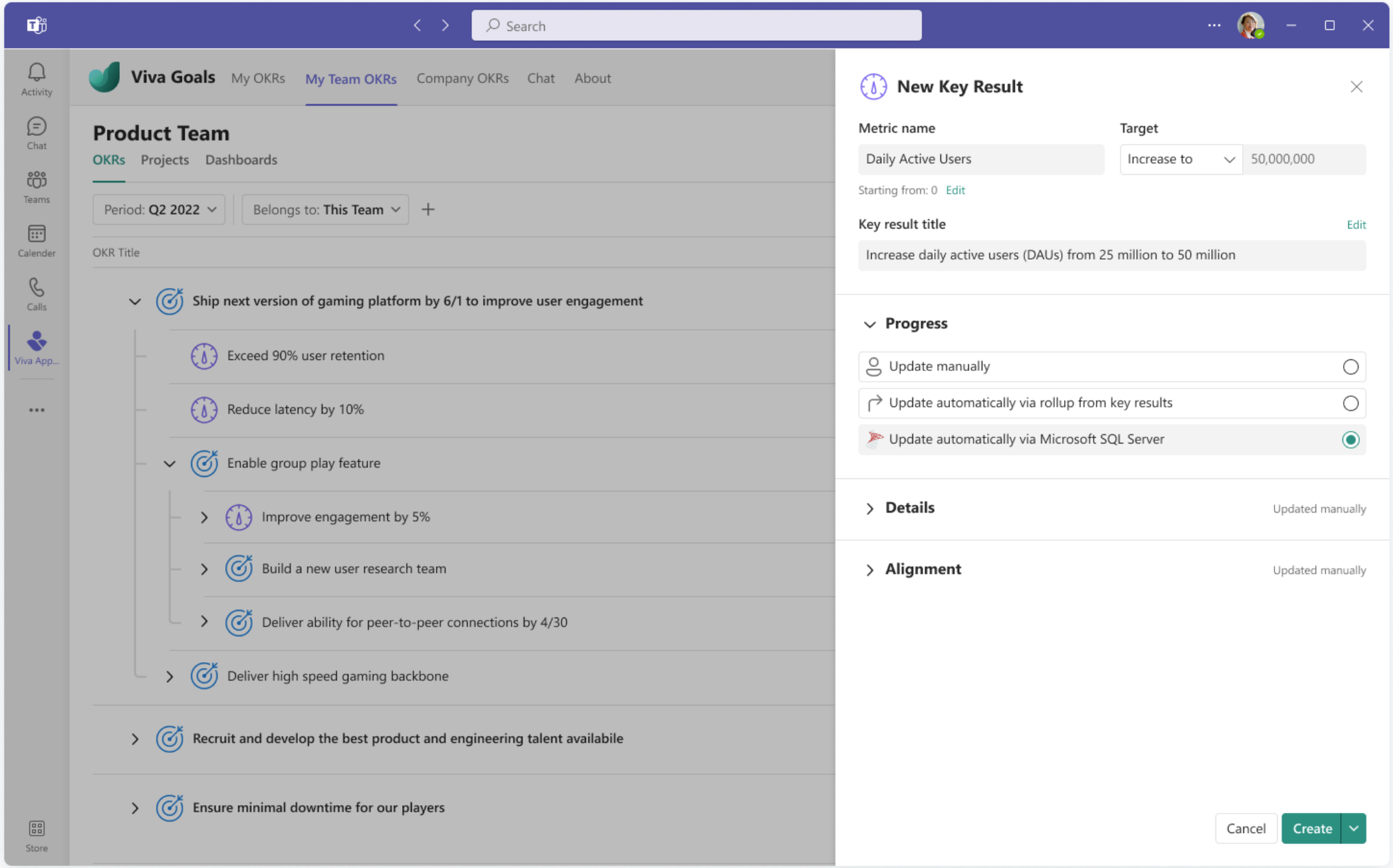
Improve engagement by 5%
Build a new user research team
Deliver ability for peer-to-peer connections by 4/30
Deliver high speed gaming backbone
Recruit and develop the best product and engineering talent availabile
Ensure minimal downtime for our players
New Key Result
Metric name
Daily Active Users
Target
Increase to
50,000,000
Starting from: 0
Edit
Key result title
Edit
Increase daily active users (DAUs) from 25 million to 50 million
Progress
Updated automatically via Microsoft SQL Server
Details
Updated manually
Alignment
Updated manually
Cancel
Create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Starting from: 0
Edit
Key result title
Edit
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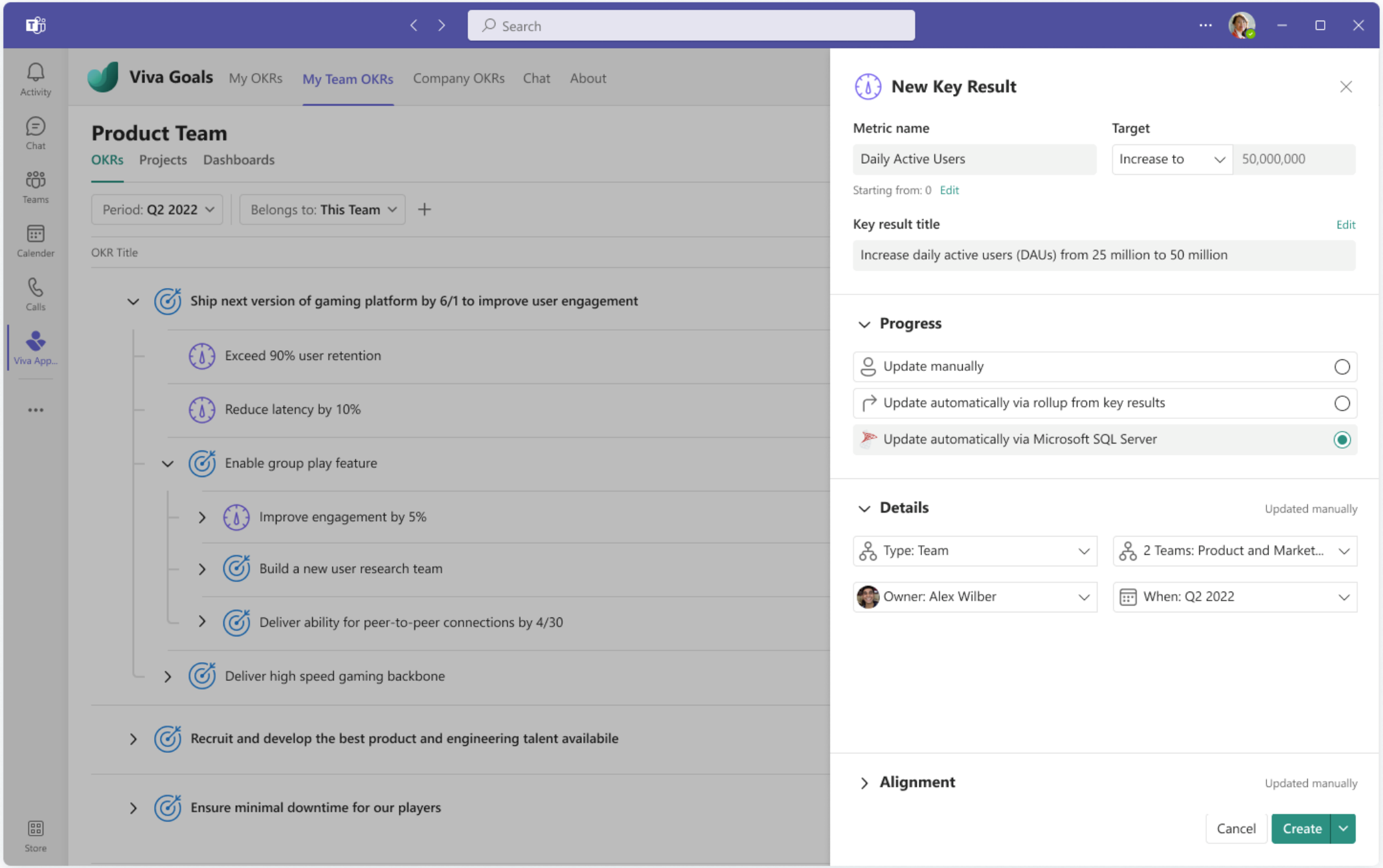
Progress
Update manually
Update automatically via rollup from key results
Update automatically via Microsoft SQL Server
Details
Updated manually
Alignment
Updated manually
Cancel
Create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Edit
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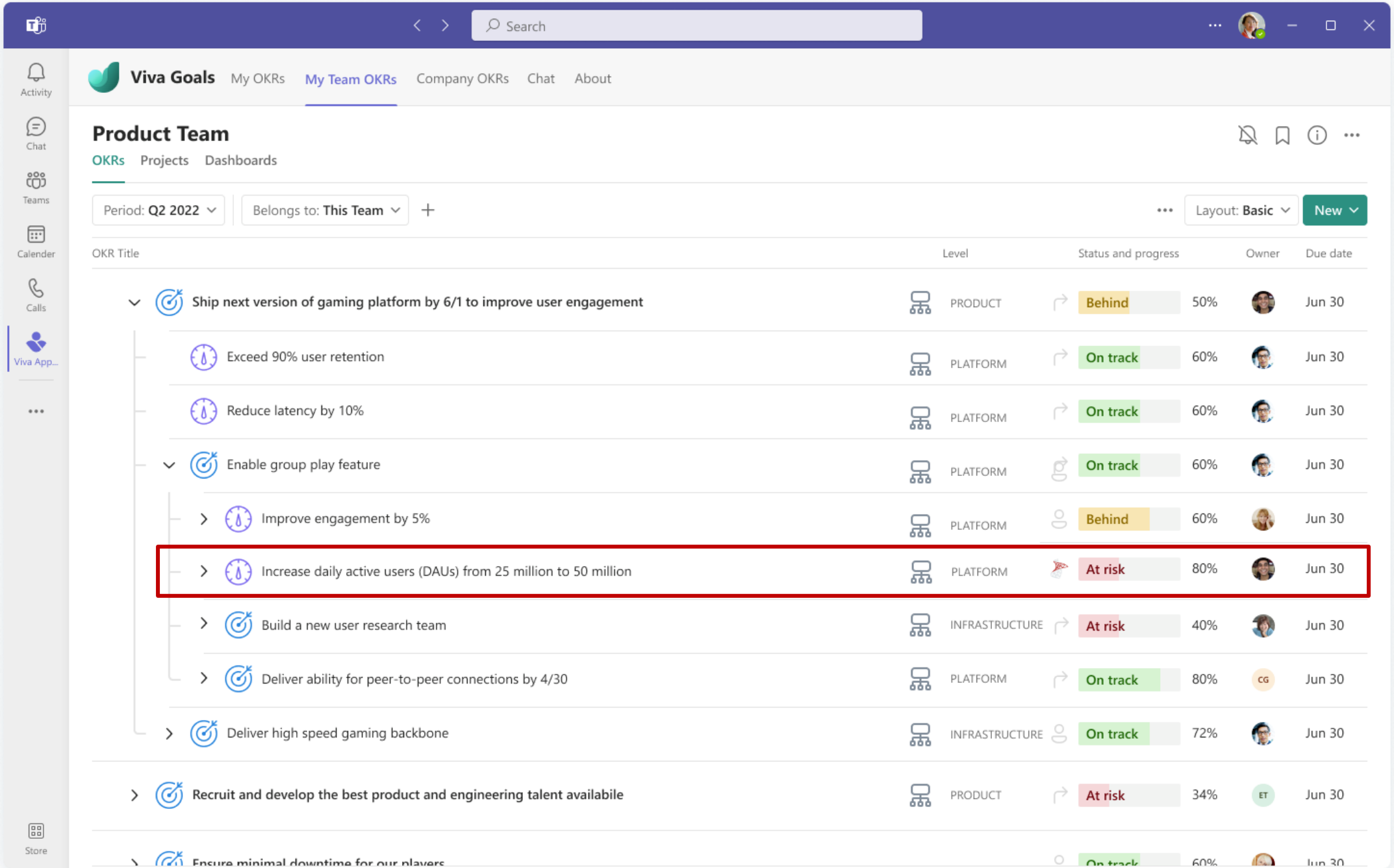
Progress
Update manually
Update automatically via rollup from key results
Update automatically via Microsoft SQL Server
Details
Updated manually
Type: Team
2 Teams: Product and Market...
Owner: Alex Wilber
When: Q2 2022
Alignment
Updated manually
Cancel
Create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Dashboards
Period: Q2 2022
Belongs to: This Team
Layout: Basic
New
OKR Title
Level
Status and progress
Owner
Due date
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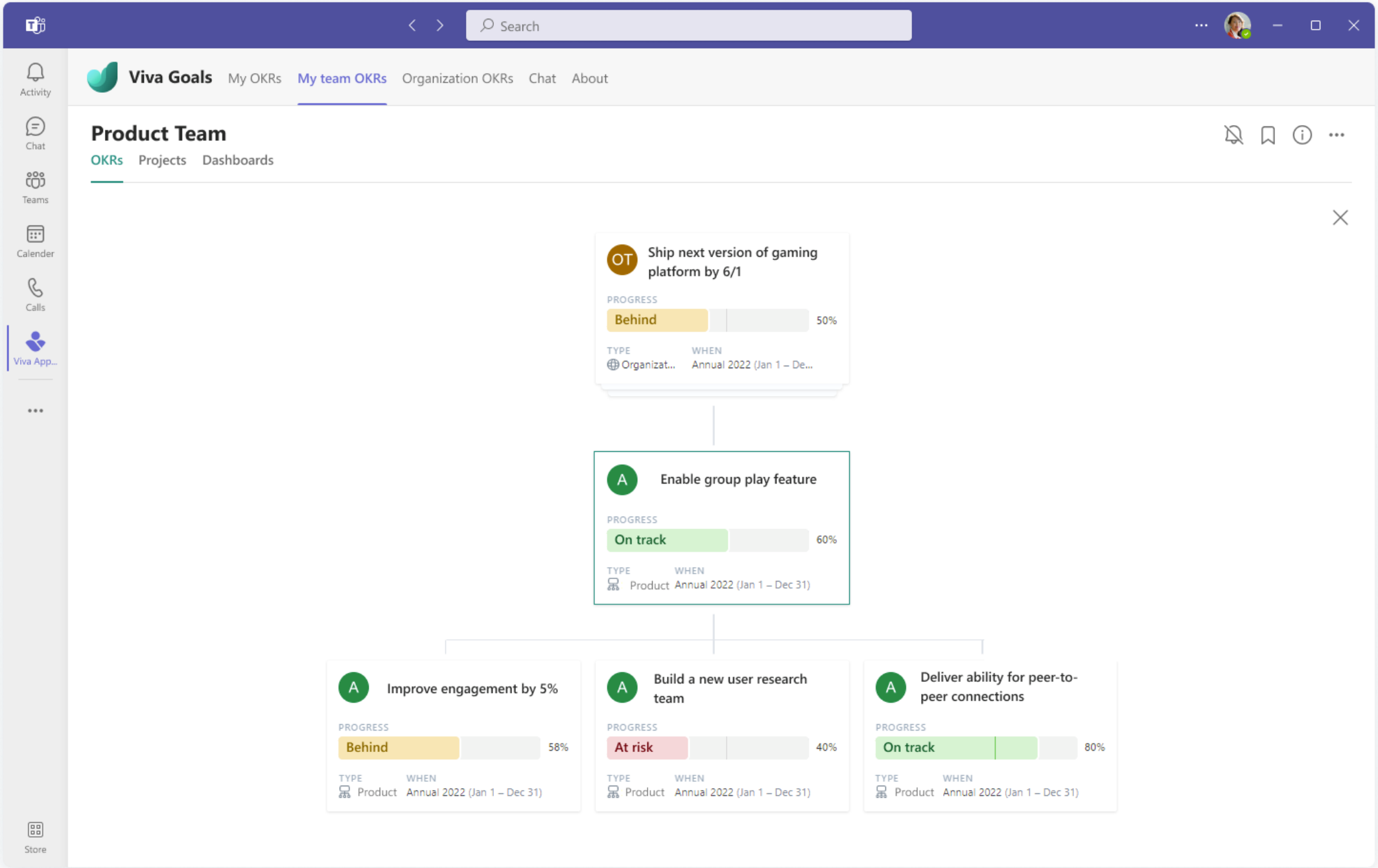
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My OKRs
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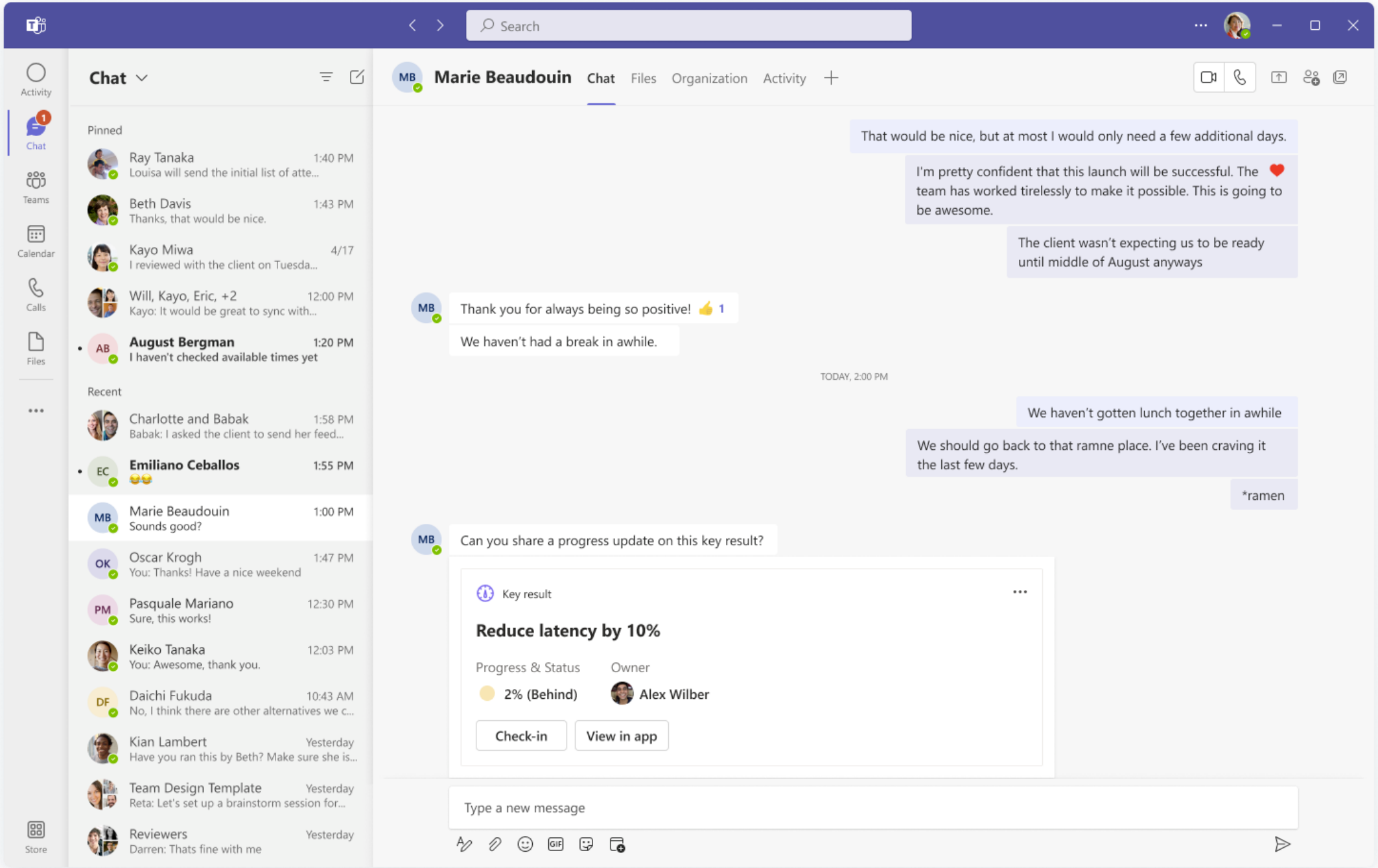
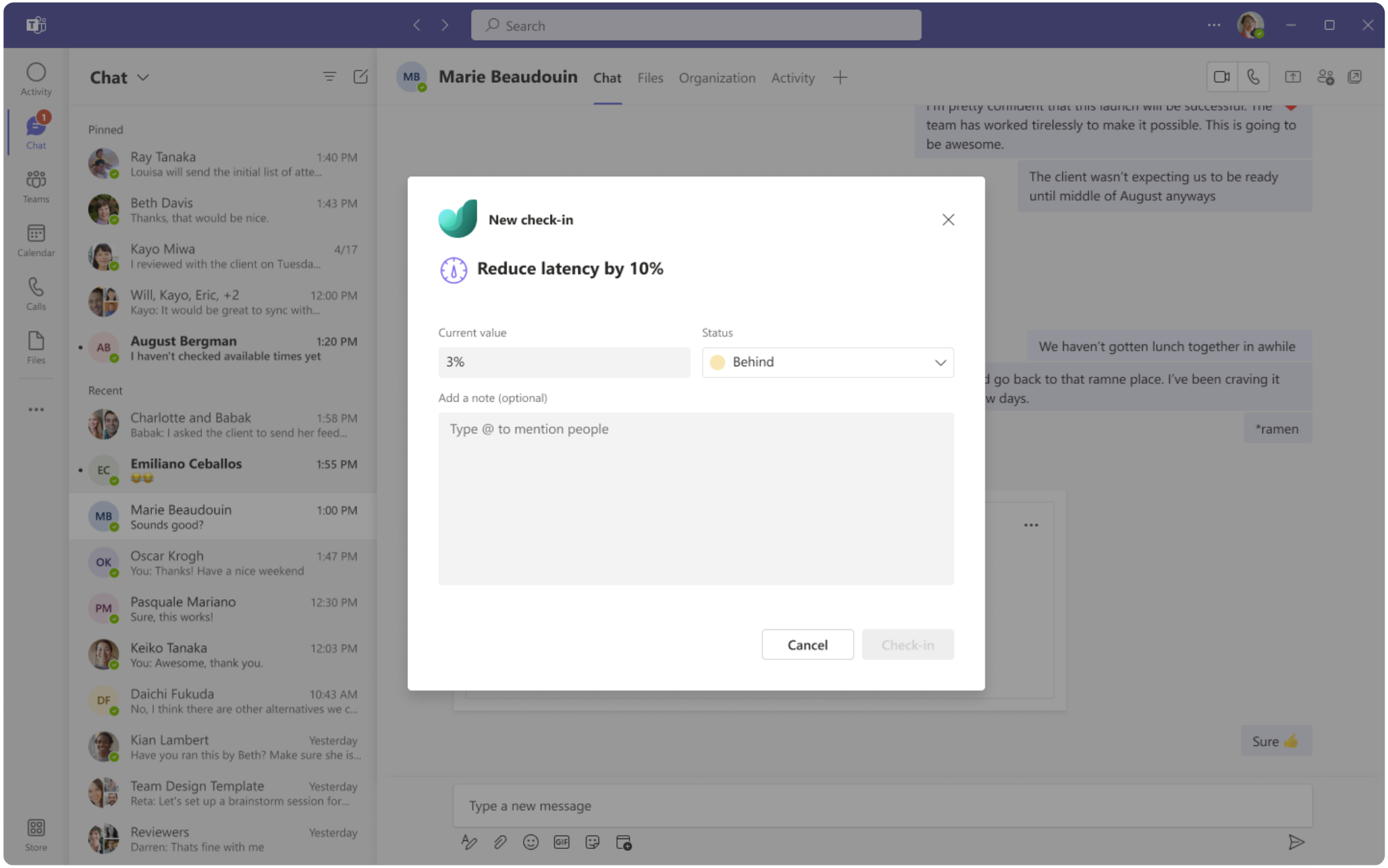
Organization OKRs
Chat
About
Product Team
OKRs
Projects
Dashboards
OT
Ship next version of gaming platform by 6/1
PROGRESS
Behind
50%
TYPE
Organizat...
WHEN
Annual 2022 (Jan 1 – De...
A
Enable group play feature
PROGRESS
On track
60%
TYPE
Product
WHEN
Annual 2022 (Jan 1 – Dec 31)
A
Improve engagement by 5%
PROGRESS
Behind
58%
TYPE
Product
WHEN
Annual 2022 (Jan 1 – Dec 31)
A
Build a new user research team
PROGRESS
At risk
40%
TYPE
Product
WHEN
Annual 2022 (Jan 1 – Dec 31)
A
Deliver ability for peer-to-peer connections
PROGRESS
On track
80%
TYPE
Product
WHEN
Annual 2022 (Jan 1 – Dec 31)


Search
Activity
Chat
Teams
Calendar
Calls
Files
Store
Chat
Pinned
Ray Tanaka 1:40 PM
Louisa will send the initial list of atte...
Beth Davis 1:43 PM
Thanks, that would be nice.
Kayo Miwa 4/17
I reviewed with the client on Tuesda...
Will, Kayo, Eric, +2 12:00 PM
Kayo: It would be great to sync with...
August Bergman 1:20 PM
I haven't checked available times yet
Recent
Charlotte and Babak 1:58 PM
Babak: I asked the client to send her feed...
Emiliano Ceballos 1:55 PM
Marie Beaudouin 1:00 PM
Sounds good?
Oscar Krogh 1:47 PM
You: Thanks! Have a nice weekend
Pasquale Mariano 12:30 PM
Sure, this works!
Keiko Tanaka 12:03 PM
You: Awesome, thank you.
Daichi Fukuda 10:43 AM
No, I think there are other alternatives we c...
Kian Lambert Yesterday
Have you ran this by Beth? Make sure she is...
Team Design Template Yesterday
Reta: Let's set up a brainstorm session for...
Reviewers Yesterday
Darren: Thats fine with me
Marie Beaudouin
Chat
Files
Organization
Activity
That would be nice, but at most I would only need a few additional days.
I'm pretty confident that this launch will be successful. The team has worked tirelessly to make it possible. This is going to be awesome.
The client wasn't expecting us to be ready until middle of August anyways
Thank you for always being so positive! 1
We haven't had a break in awhile.
TODAY, 2:00 PM
We haven't gotten lunch together in awhile
We should go back to that ramne place. I've been craving it the last few days.
*ramen
Can you share a progress update on this key result?
Key result
Reduce latency by 10%
Progress & Status
2% (Behind)
Owner
Alex Wilber
Check-in
View in app
Type a new message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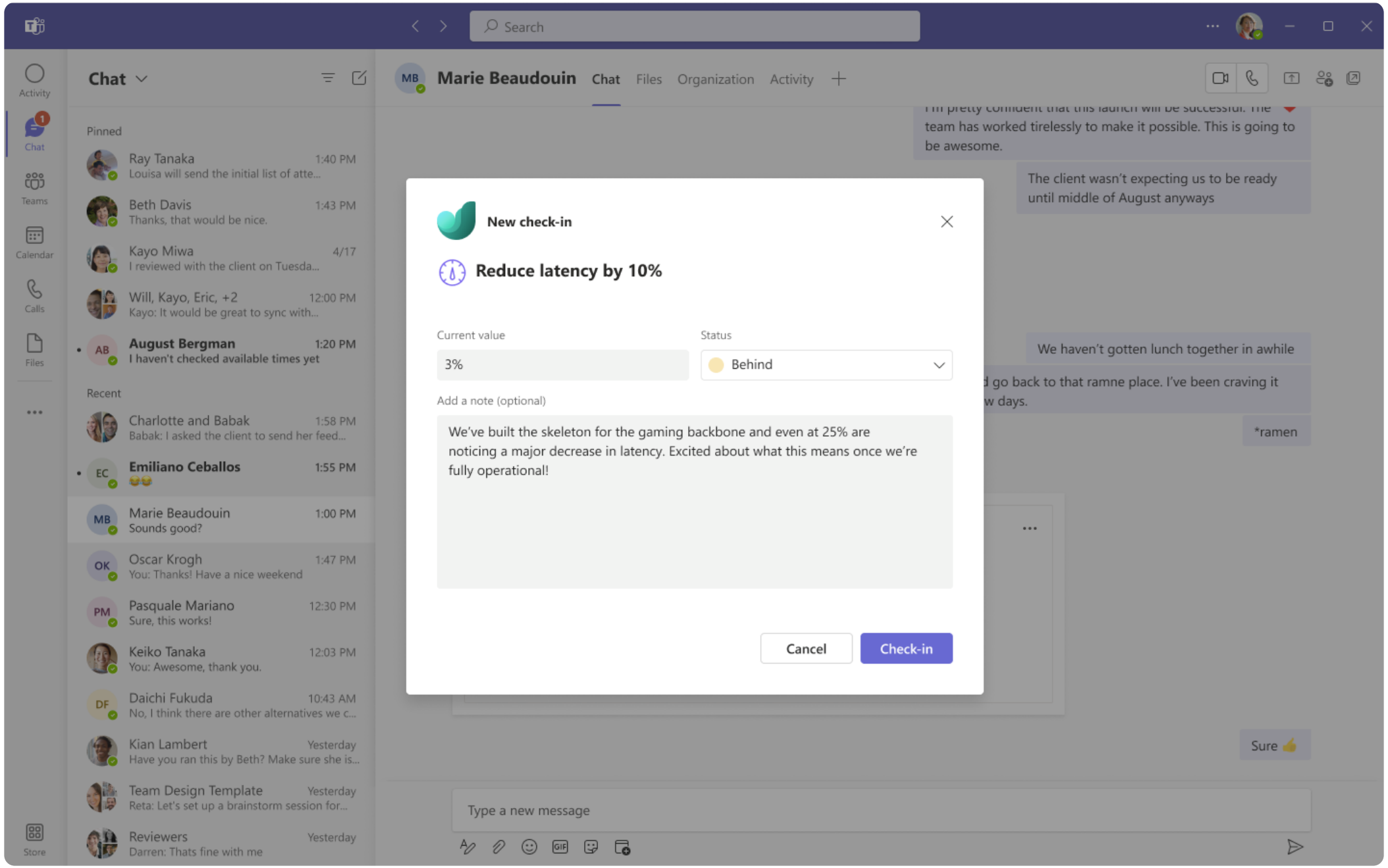
We haven't gotten lunch together in awhile
go back to that ramne place. I've been craving it
w days.
*ramen
Sure
Type a new message
New check-in
Reduce latency by 10%
Current value
3%
Status
Behind
Add a note (optional)
Type @ to mention people
Cancel
Check-in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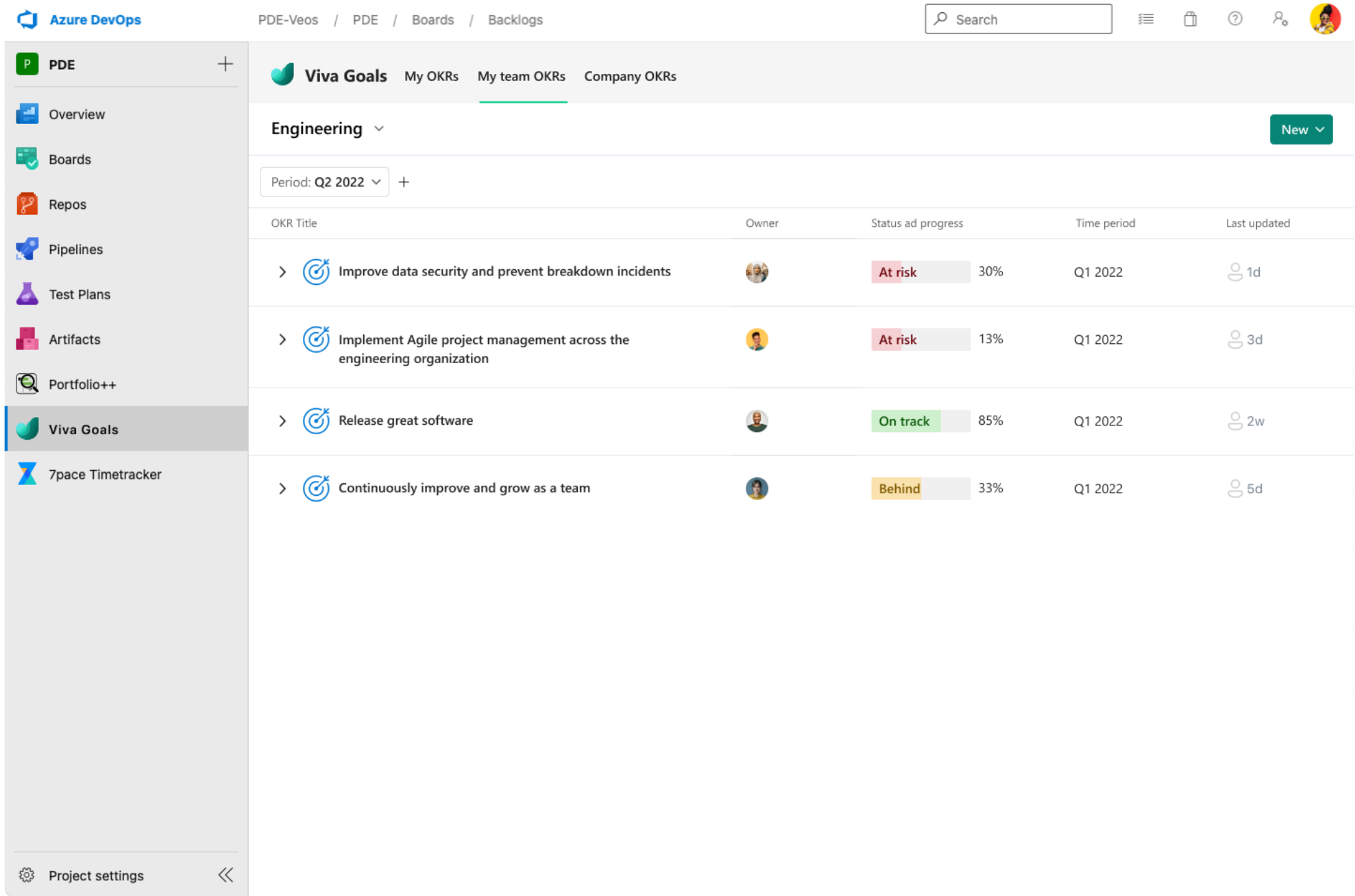
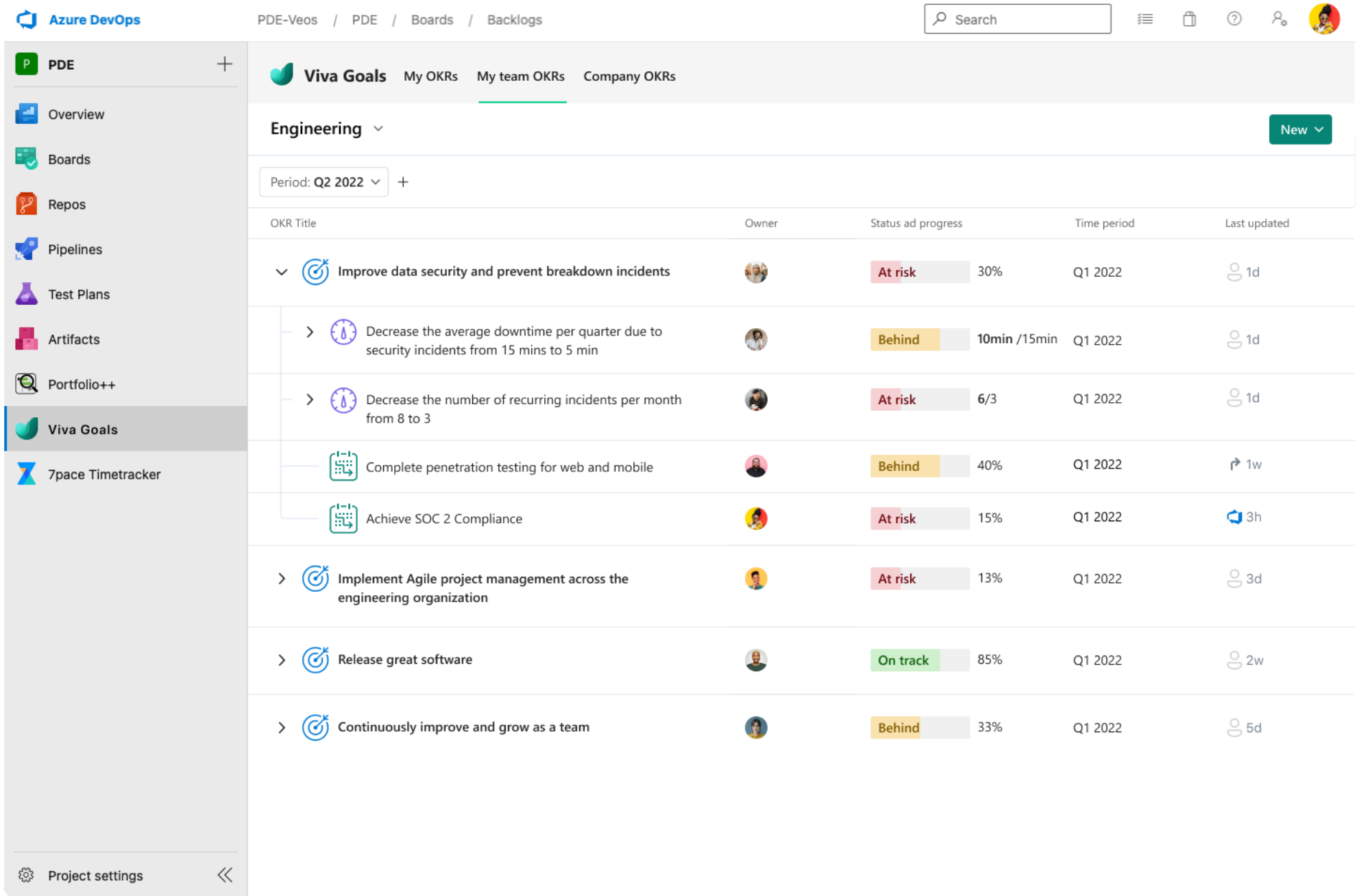
*ramen
Sure
Type a new message
New check-in
Reduce latency by 10%
Current value
3%
Status
Behind
Add a note (optional)
We've built the skeleton for the gaming backbone and even at 25% are noticing a major decrease in latency. Excited about what this means once we're fully operational!
Cancel
Check-in


Azure DevOps
PDE-Veos / PDE / Boards / Backlogs
Search
PDE
Overview
Boards
Repos
Pipelines
Test Plans
Artifacts
Portfolio++
Viva Goals
7pace Timetracker
Project settings
Viva Goals
My OKRs
My team OKRs
Company OKRs
Engineering
New
Period: Q2 2022
OKR Title
Owner
Status ad progress
Time period
Last updated
Improve data security and prevent breakdown incidents
At risk
30%
Q1 2022
1d
Implement Agile project management across the engineering organization
At risk
13%
Q1 2022
3d
Release great software
On track
85%
Q1 2022
2w
Continuously improve and grow as a team
Behind
33%
Q1 2022
5d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Period: Q2 2022
OKR Title
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Status ad progress
Time period
Last updated
Improve data security and prevent breakdown incidents
At risk
30%
Q1 2022
1d
Decrease the average downtime per quarter due to security incidents from 15 mins to 5 min
Behind
10min /15min
Q1 2022
1d
Decrease the number of recurring incidents per month from 8 to 3
At risk
6/3
Q1 2022
1d
Complete penetration testing for web and mobile
Behind
40%
Q1 2022
1w
Achieve SOC 2 Compliance
At risk
15%
Q1 2022
3h
Implement Agile project management across the engineering organization
At risk
13%
Q1 2022
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Release great software
On track
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2w
Continuously improve and grow as a team
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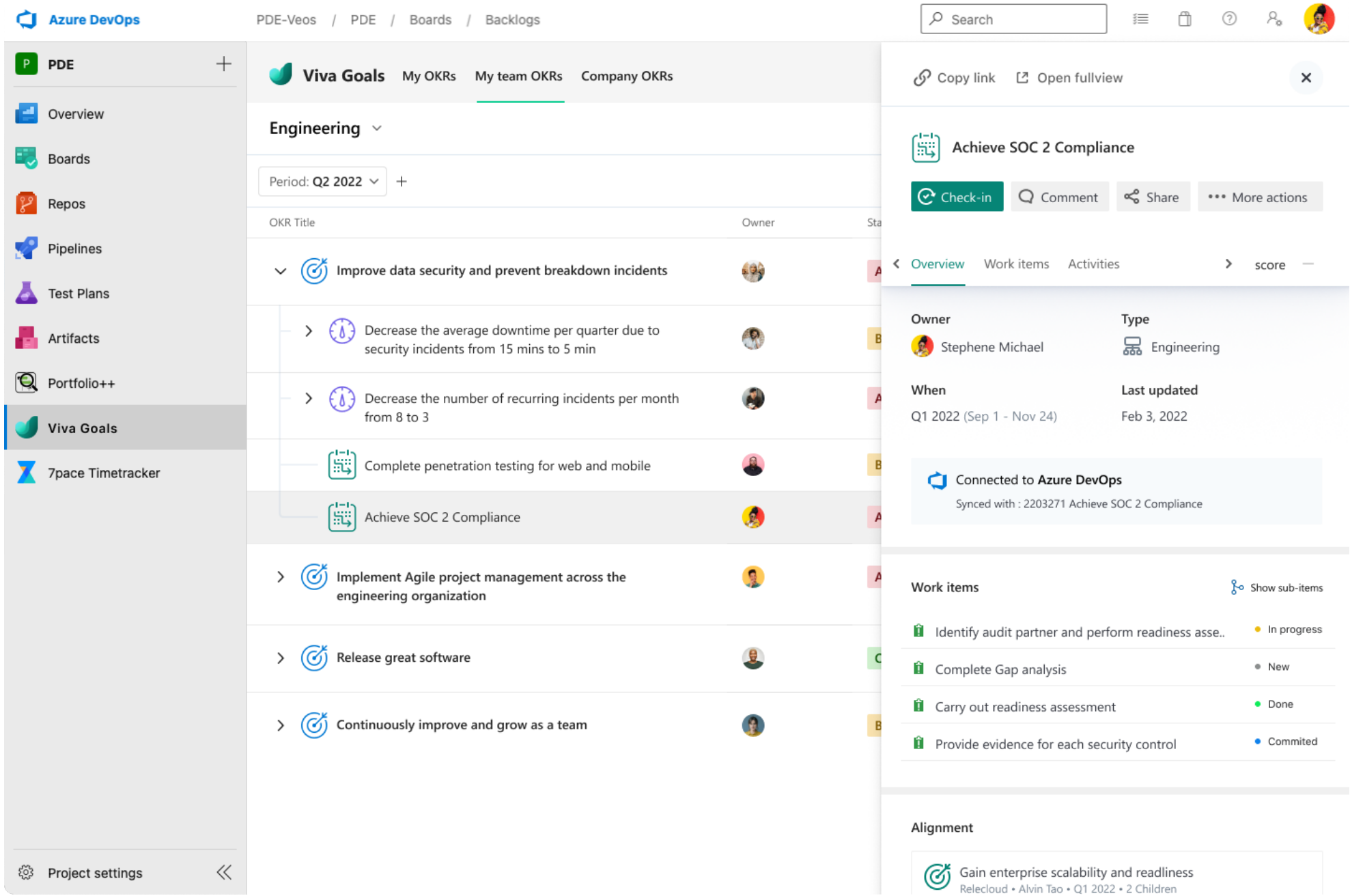
Azure DevOps
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Test Plans
Artifacts
Portfolio++
Viva Goals
7pace Timetracker
Project settings
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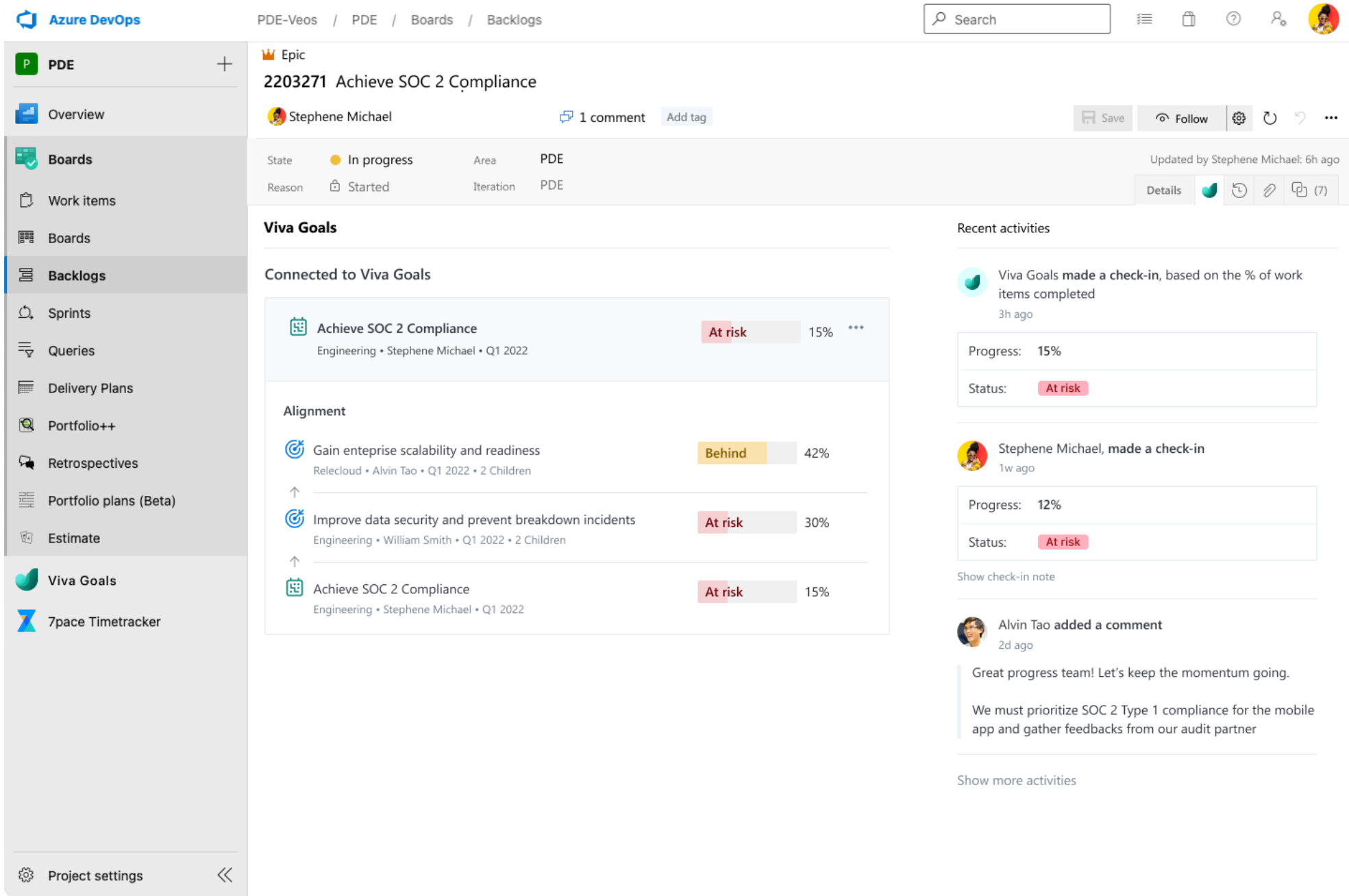
My OKRs
My team OKRs
Company OKRs
Engineering
Period: Q2 2022
OKR Title
Owner
Improve data security and prevent breakdown incidents
Decrease the average downtime per quarter due to security incidents from 15 mins to 5 min
Decrease the number of recurring incidents per month from 8 to 3
Complete penetration testing for web and mobile
Achieve SOC 2 Compliance
Implement Agile project management across the engineering organization
Release great software
Continuously improve and grow as a team
Copy link
Open fullview
Achieve SOC 2 Compliance
Check-in
Comment
Share
More actions
Overview
Work items
Activities
score
Owner
Stephene Michael
Type
Engineering
When
Q1 2022 (Sep 1 - Nov 24)
Last updated
Feb 3, 2022
Connected to Azure DevOps
Synced with : 2203271 Achieve SOC 2 Compliance
Work items
Show sub-items
Identify audit partner and perform readiness asse..
In progress
Complete Gap analysis
New
Carry out readiness assessment
Done
Provide evidence for each security control
Commited
Alignment
Gain enterprise scalability and readliness
Relecloud • Alvin Tao • Q1 2022 • 2 Children


Azure DevOps
PDE-Veos / PDE / Boards / Backlogs
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Boards
Work items
Boards
Backlogs
Sprints
Queries
Delivery Plans
Portfolio++
Retrospectives
Portfolio plans (Beta)
Estimate
Viva Goals
7pace Timetracker
Project settings
Epic
2203271 Achieve SOC 2 Compliance
Stephene Michael
1 comment
Add tag
Save
Follow
State
In progress
Reason
Started
Area
PDE
Iteration
PDE
Updated by Stephene Michael: 6h ago
Details
(7)
Viva Goals
Connected to Viva Goals
Achieve SOC 2 Compliance
Engineering • Stephene Michael • Q1 2022
At risk
15%
Alignment
Gain enteprise scalability and readiness
Relecloud • Alvin Tao • Q1 2022 • 2 Children
Behind
42%
Improve data security and prevent breakdown incidents
Engineering • William Smith • Q1 2022 • 2 Children
At risk
30%
Achieve SOC 2 Compliance
Engineering • Stephene Michael • Q1 2022
At risk
15%
Recent activities
Viva Goals made a check-in, based on the % of work items completed
3h ago
Progress: 15%
Status: At risk
Stephene Michael, made a check-in
1w ago
Progress: 12%
Status: At risk
Show check-in note
Alvin Tao added a comment
2d ago
Great progress team! Let's keep the momentum going.
We must prioritize SOC 2 Type 1 compliance for the mobile app and gather feedbacks from our audit partner
Show more activities

Product Team

Platform Team Dashboard

Share to Teams | Present

Last change: Nov 6 at 4:40pm **Owner:** Alex Wilber

Platform Team OKRs

Key updates

Alex Wilber

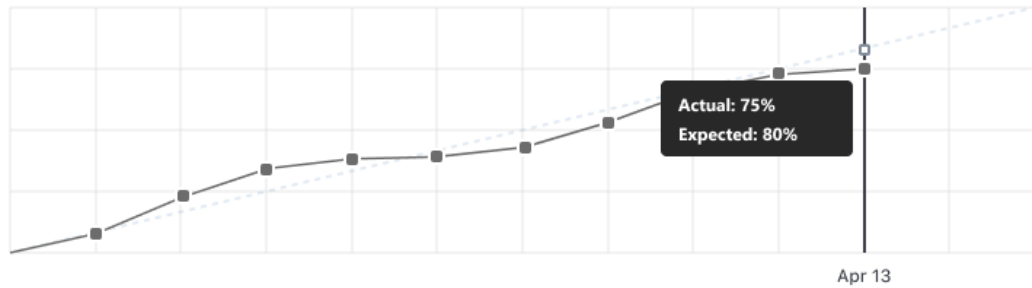
Progress updates

- **Pilot with new delivery mechanism** - Increasing our ability to deliver insights via new alert system that sends weekly update as well as one off insight via MS Teams
- **Hiring - Reached hiring big milestone!** - we've onboarded 4/5 user researchers
- **Power user interviews all scheduled!** - We're moving quickly into our qualitative phase while our analyst team crunches the quantitative data into an exec summary

Key Learnings

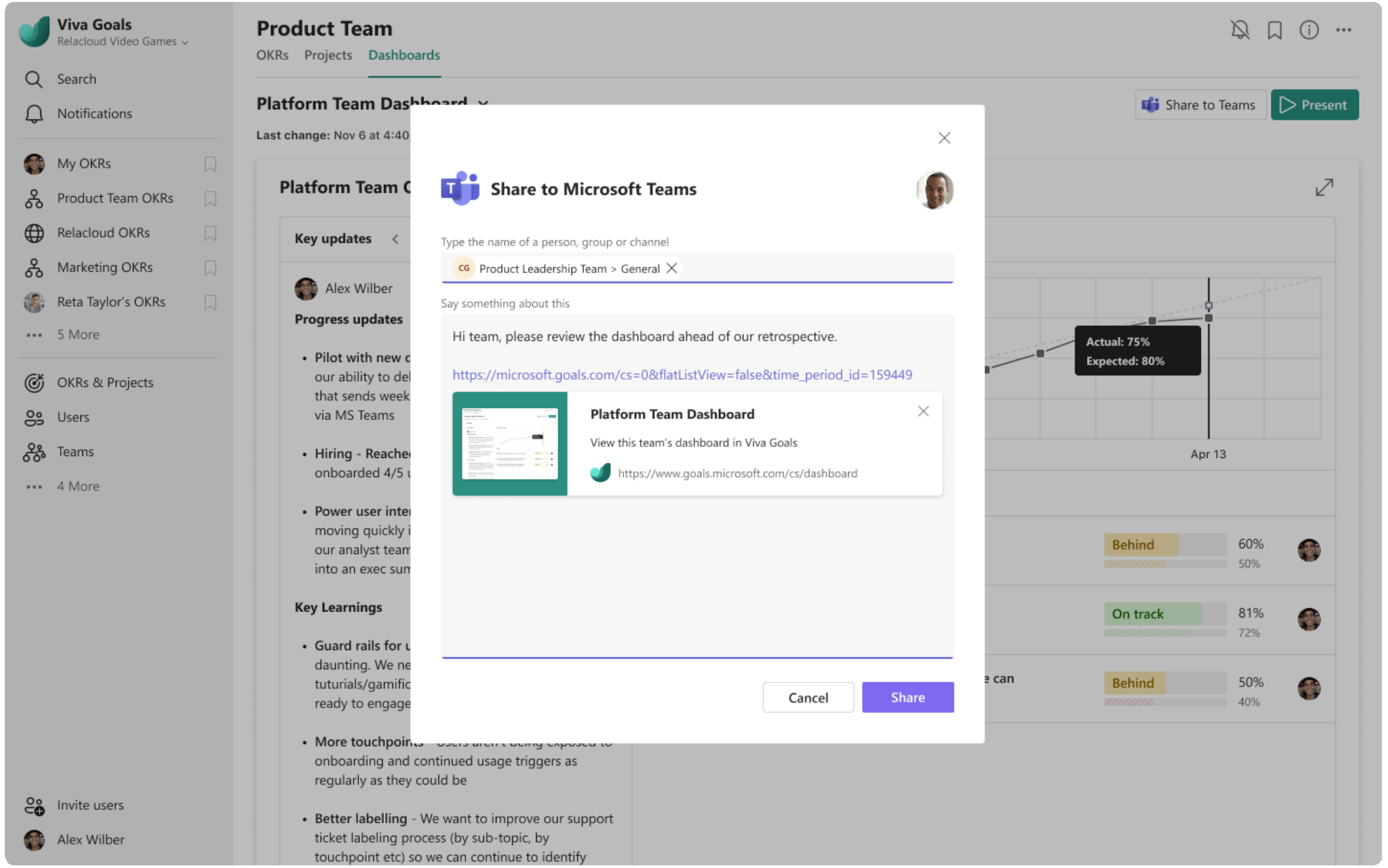
- **Guard rails for users** - Group play can be daunting. We need better onboarding and quick tuturials/gamification to get users up to speed and ready to engage quickly
- **More touchpoints** - Users aren't being exposed to onboarding and continued usage triggers as regularly as they could be
- **Better labelling** - We want to improve our support ticket labeling process (by sub-topic, by touchpoint etc) so we can continue to identify

Progress over time



OKRs

Enable group play feature	Behind	60%	50%
Exceed 90% user retention	On track	81%	72%
Recruit and develop the best platform talent so we can better support our players	Behind	50%	40%


Viva Goals
Relacloud Video Games
Search
Notifications
My OKRs
Product Team OKRs
Relacloud OKRs
Marketing OKRs
Reta Taylor's OKRs
5 More
OKRs & Projects
Users
Teams
4 More
Invite users
Alex Wilber
Product Team
OKRs
Projects
Dashboards
Platform Team Dashboard
Last change: Nov 6 at 4:40
Share to Teams
Present
Platform Team C
Key updates
Alex Wilber
Progress updates
Pilot with new c
our ability to del
that sends week
via MS Teams
Hiring - Reache
onboarded 4/5
Power user inte
moving quickly i
our analyst team
into an exec sum
Key Learnings
Guard rails for u
daunting. We ne
tuturials/gamific
ready to engage
More touchpoint
onboarding and continued usage triggers as
regularly as they could be
Better labelling - We want to improve our support
ticket labeling process (by sub-topic, by
touchpoint etc) so we can continue to identify
Share to Microsoft Teams
Type the name of a person, group or channel
CG
Product Leadership Team > General
Say something about this
Hi team, please review the dashboard ahead of our retrospective.
https://microsoft.goals.microsoft.com/cs=0&flatListView=false&time_period_id=159449
Platform Team Dashboard
View this team's dashboard in Viva Goals
https://www.goals.microsoft.com/cs/dashboard
Cancel
Share
Actual: 75%
Expected: 80%
Apr 13
Behind
60%
50%
On track
81%
72%
Behind
50%
40%

Search

Activity
Chat
Teams
Calendar
Files
Store

Teams

Pinned

Product Team
Overview

Your teams

Product Leadership Team
- General
- Marketing
- Overview
- **Performance** 1
- **Shiproom**
- Telemetry
- 32 hidden channels

New Games

Account Teams
- General
- Accounting
- Finance
- **Fiscal Year Planning**
- **Strategy**
- 6 hidden channels

General

Posts | Files | OneNote

Meet

mentioned she got the budget approved for July. Here is the deck where we last left off. **Daniela** can speak more to it.

JulyPromotion.docx
box.com/s/w9eo6eua89keqh/JulyPromotion.doc

Reply

Alex Wilber 11:00 AM

4 6

Hi team, please review the dashboard ahead of our retrospective.

https://microsoft.goals.com/cs=0&flatListView=false&time_period_id=159449

Platform Team Dashboard

View this team's dashboard in Viva Goals

https://www.goals.microsoft.com/cs/dashboard

Kadji Bell 10:23 AM

Will do!

Reply

Type a new message

Viva Goals Software Training Topics

Navigation

- Search
- My OKRs
- Org OKRs
- Pinning
- Users
- Teams

Cascade

- Alignment
- Multi-alignment

Create

- Objective
- Key Result
- Projects
- Multi-Owner
- Delegate
- Check-In Owner

Check-in

- Integrations
- Commentary
- Tagging

Check-in

- Integrations
- Commentary
- Tagging

Close

- Retrospective Commentary
- Postpone
- Clone

Dashboards

- Widget Types

Team Settings

- Adding a member
- Notification Schedule

OKRs & Projects

- Viewing a Report
- Creating a Report
- Exporting

Viva Goals in Teams

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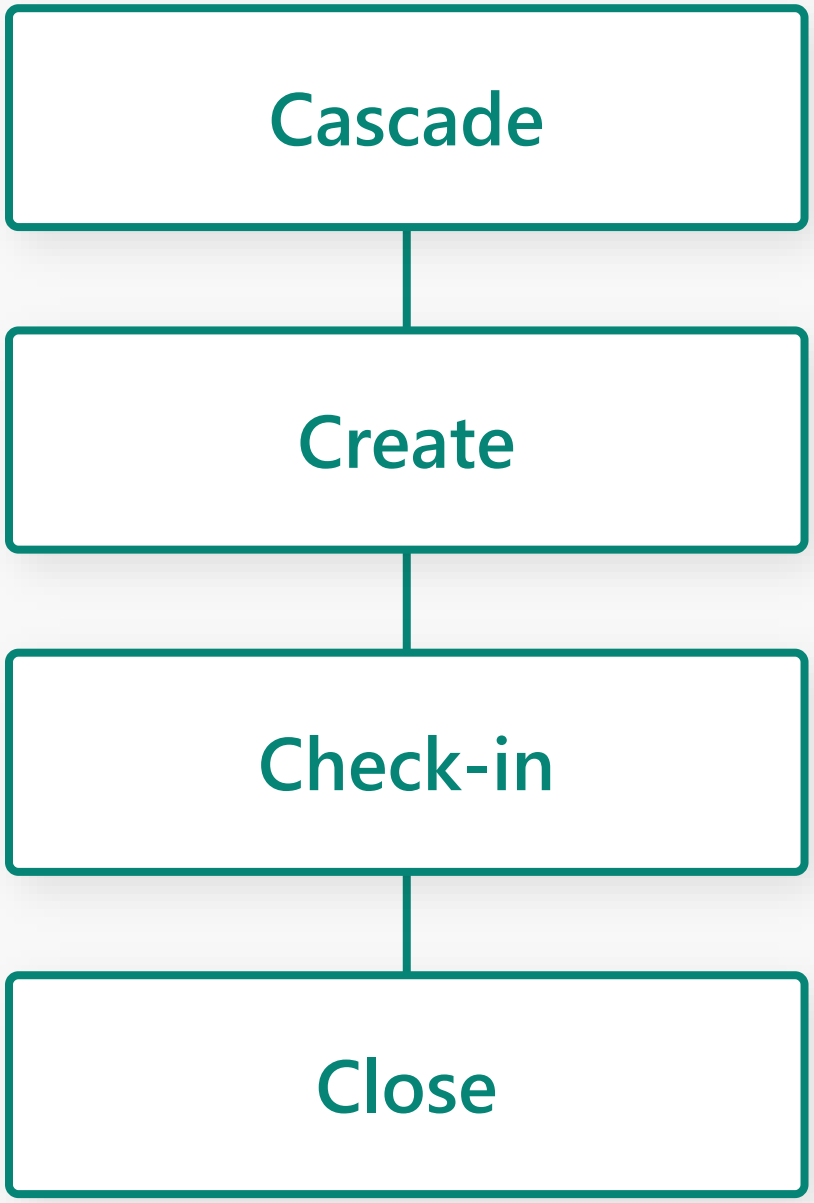
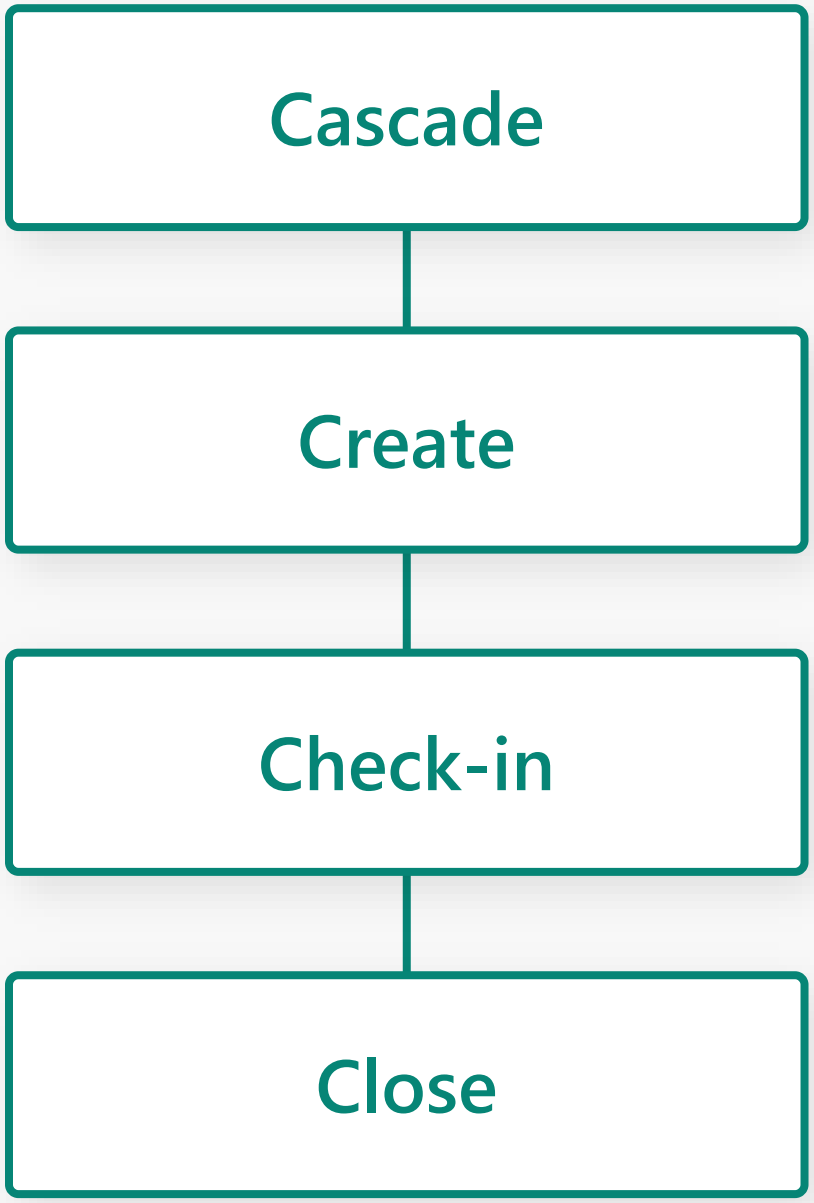
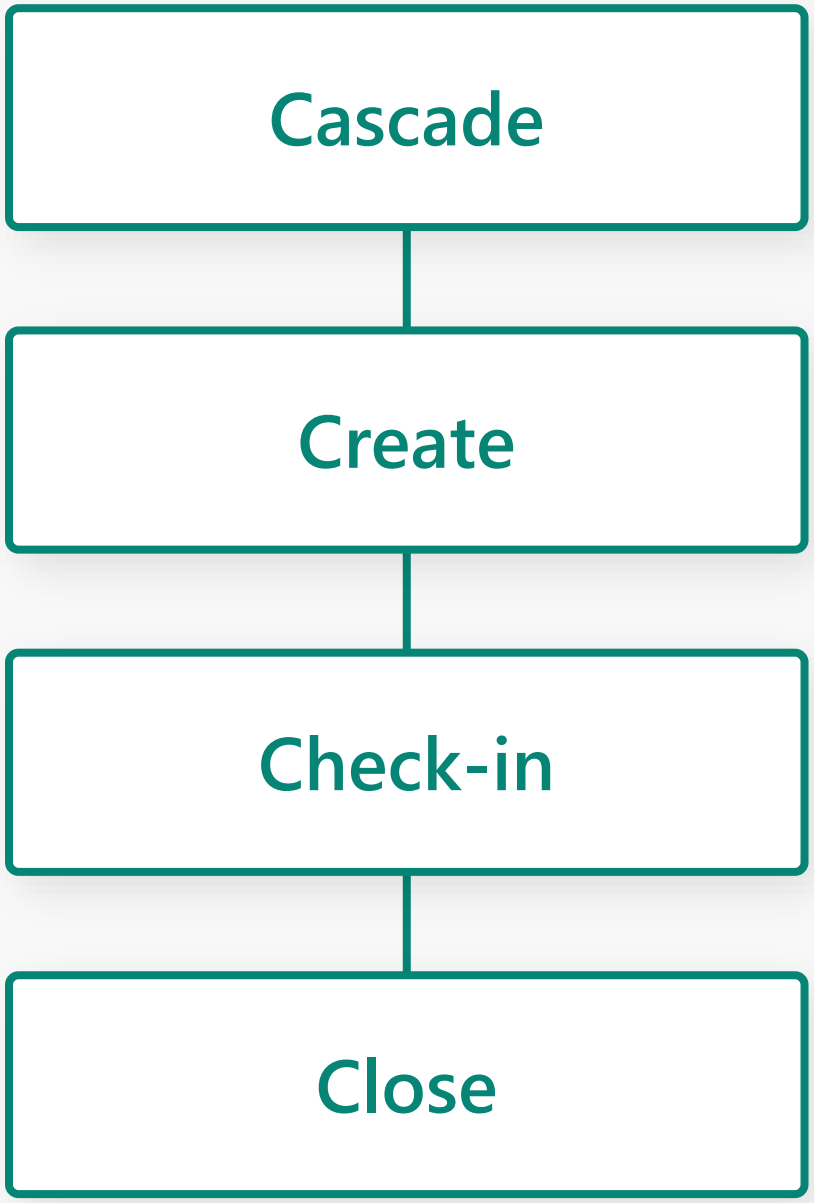
Viva Goals in Teams

Navigate Software and Align, Create, Track and Close OKRs


Cascade
Create
Check-in
Close

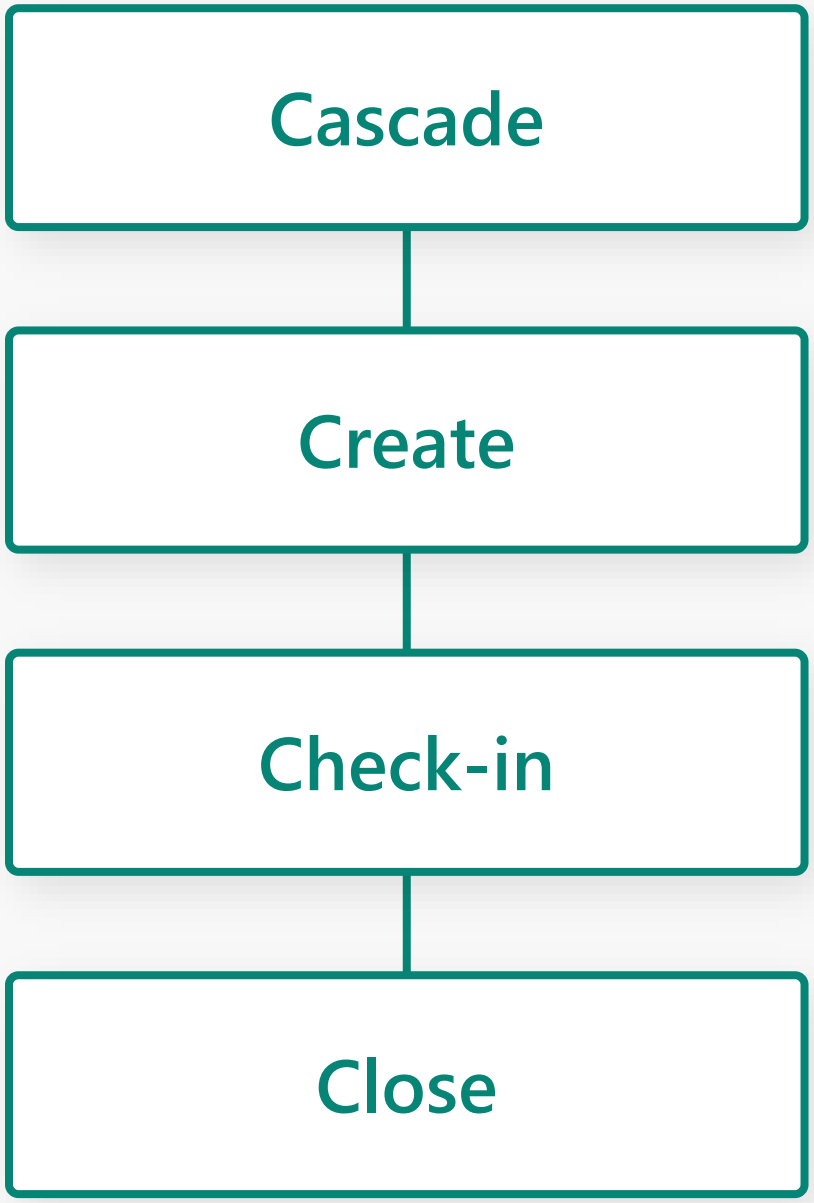


How to align



How to align

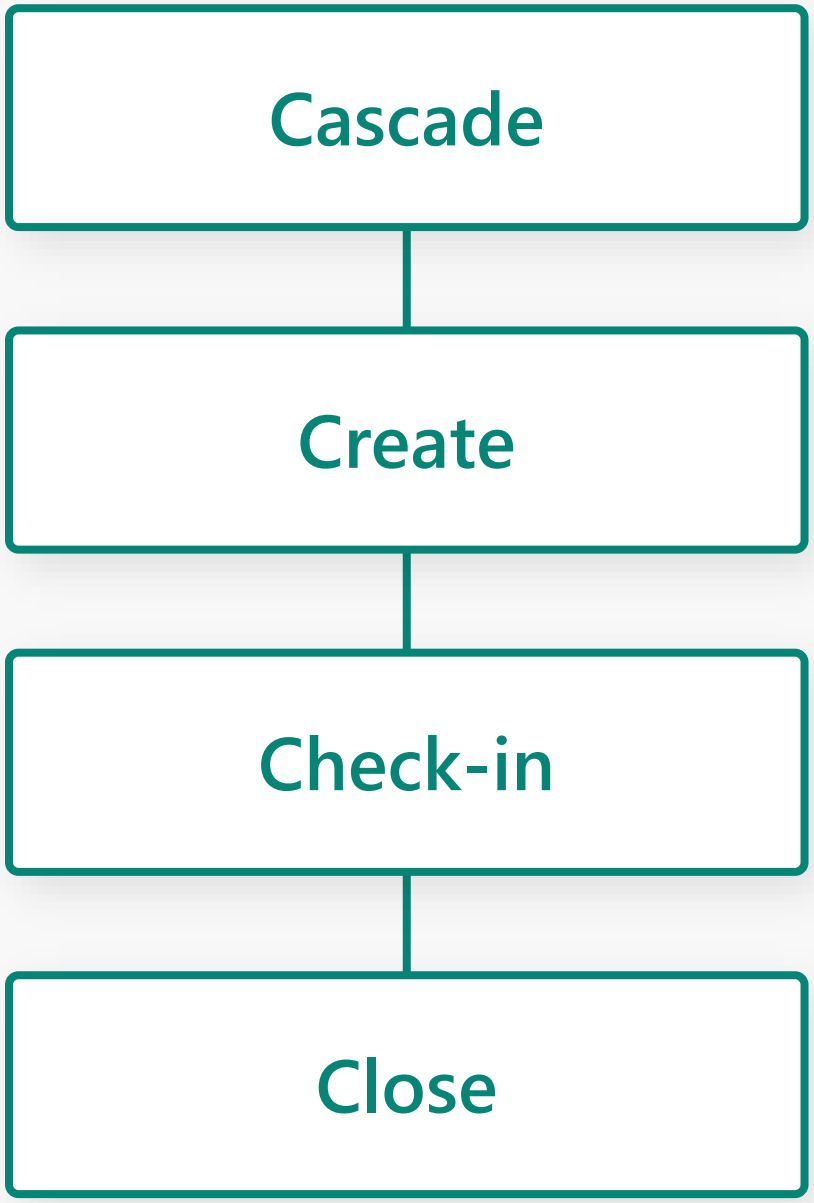
How to enter



How to align

How to enter

How to track progress



How to align

How to enter

How to track progress

How to score progress

Concept in Platform

Cascade:

- How to visualize Alignment

Create:

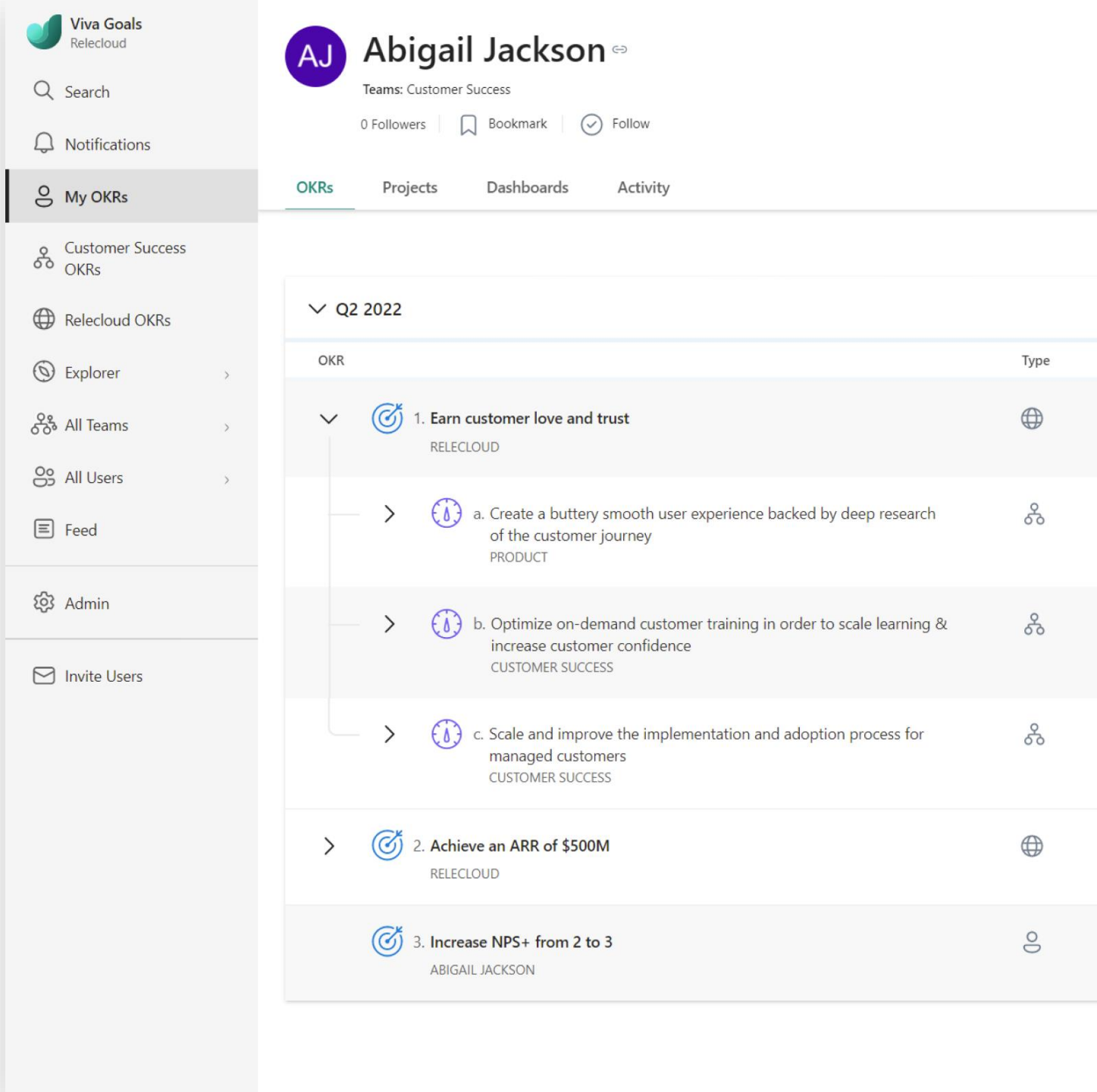
- How to enter Objectives and Key Results

Checkin:

- Three ways to update progress

Close:

- How to reflect and score



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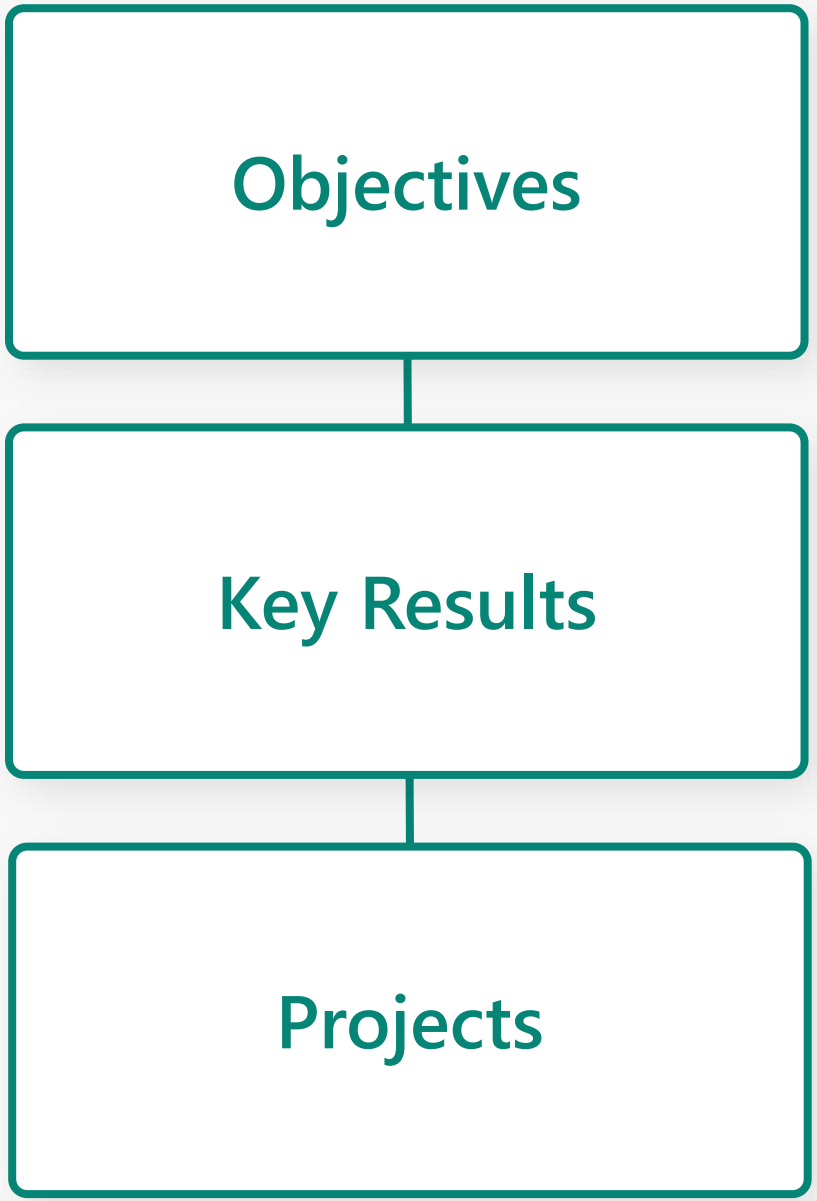
Viva Goals in Teams

Projects



“Where do I want to go?”

“How will I know I am getting there?”

“What do I have to do to get there?”

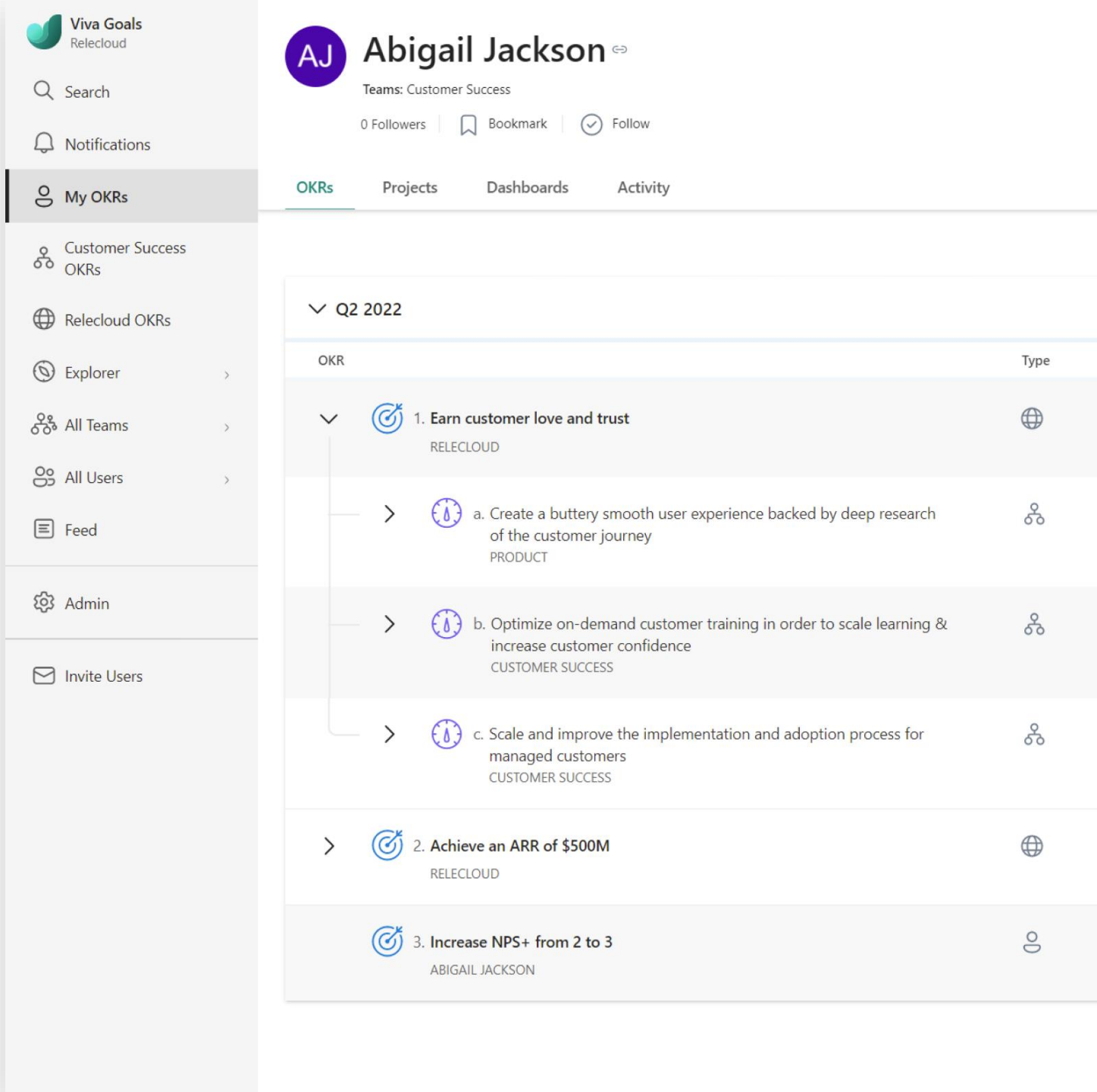
Concept in Platform

Locate:

- “Where can I find projects?”

Create:

- “How do I make a project?”



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Viva Goals in Teams

Integrations

What are integrations?

Integrations allow you to build efficiency when using OKRs by allowing you to use the platforms you already use in your day to day.

Semi-Manual

Update your goals through a messaging app, e.g., MS Teams

Automatic

Automatically update your goals by connecting to a source of truth, e.g., Azure DevOps

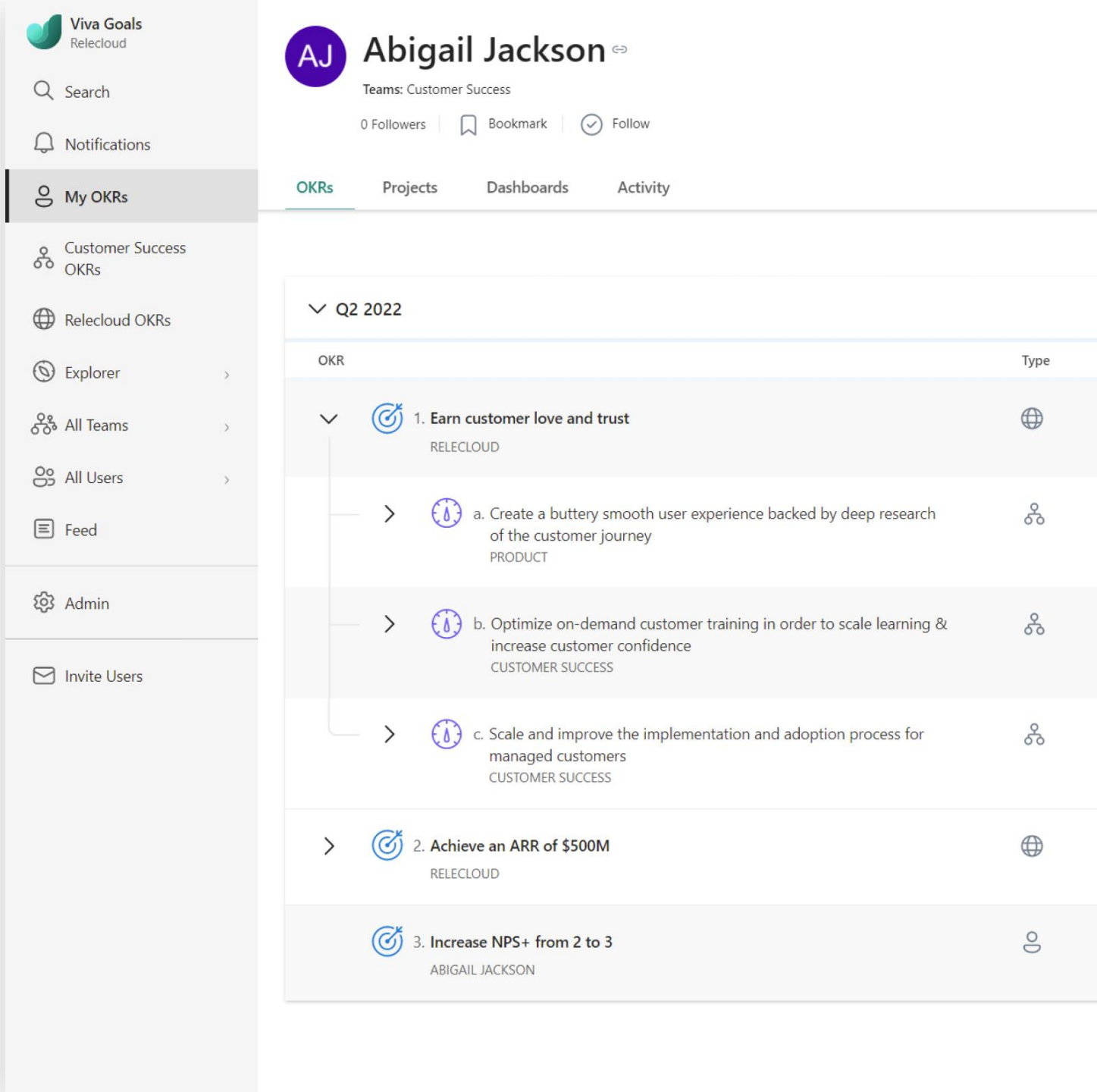
Concept in Platform

Semi-Manual Integrations:

- View OKRs in MS Teams

Automatic Integrations:

- Connect data source to an OKR



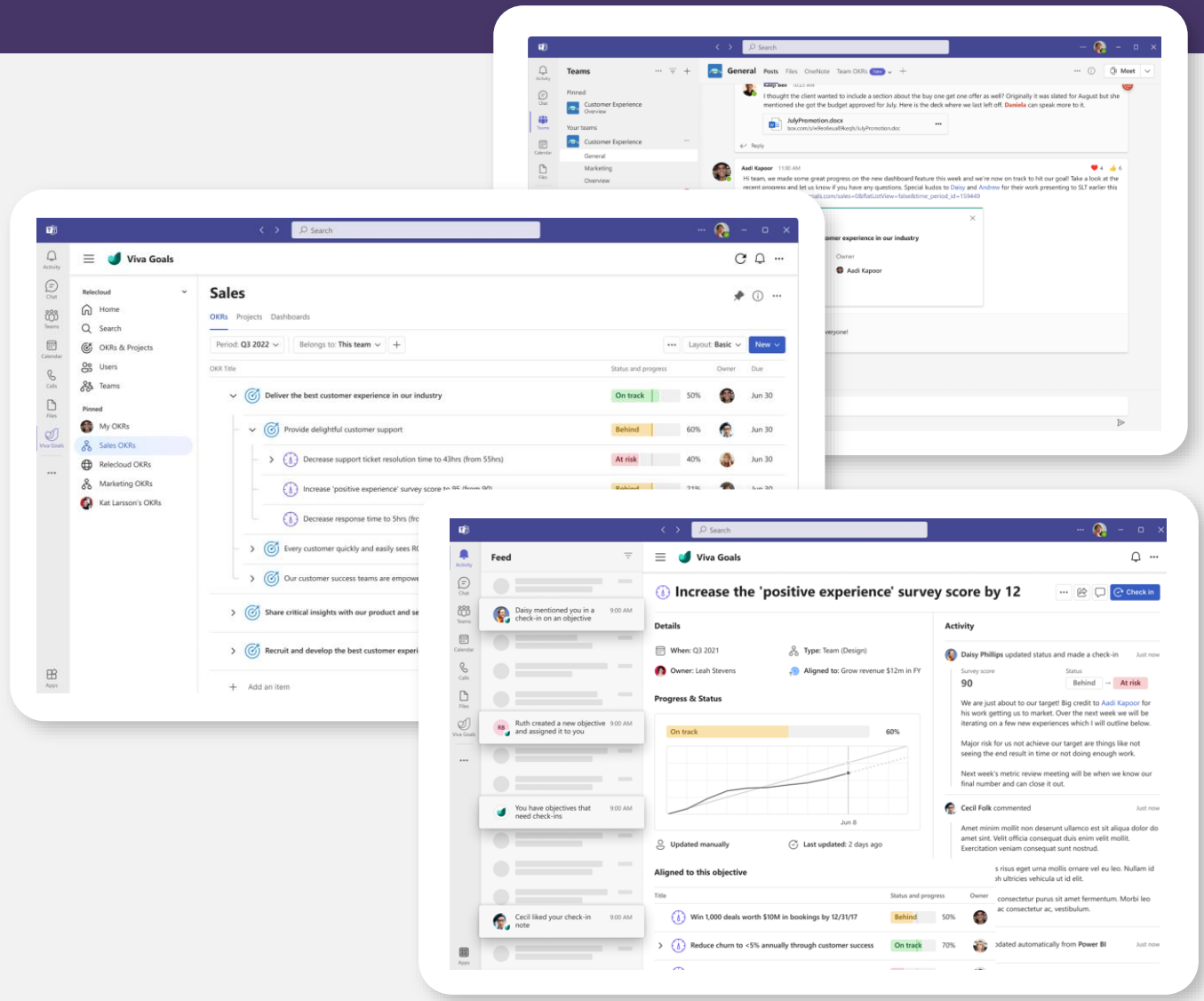
Viva Goals and Teams Integration

Bring Viva Goals into your Teams workflow

Create a collaborative Teams experience for purpose-driven teams to communicate effectively

Align and focus on the strategic priorities through OKRs with relevant context, notifications, check-ins within Teams

Provide enhanced search, navigation, dashboards and richer admin experiences

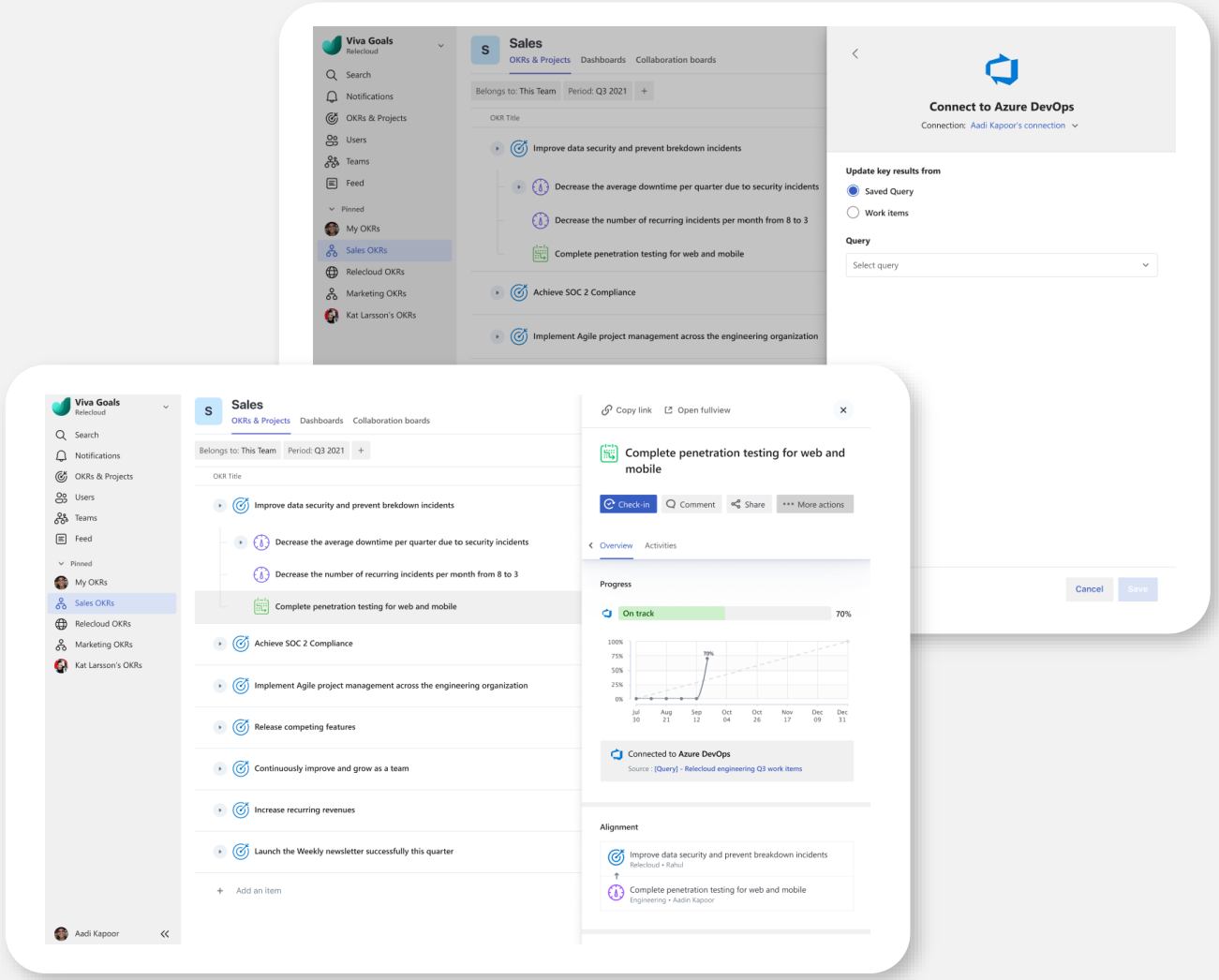


Viva Goals and Azure DevOps Data Integration

Engage in agile project management for initiatives

Connect shared queries and work items in ADO to Viva Goals within a single view in your Viva Goals environment

View automatic updates of Viva Goals initiatives and Key Results as work items progress



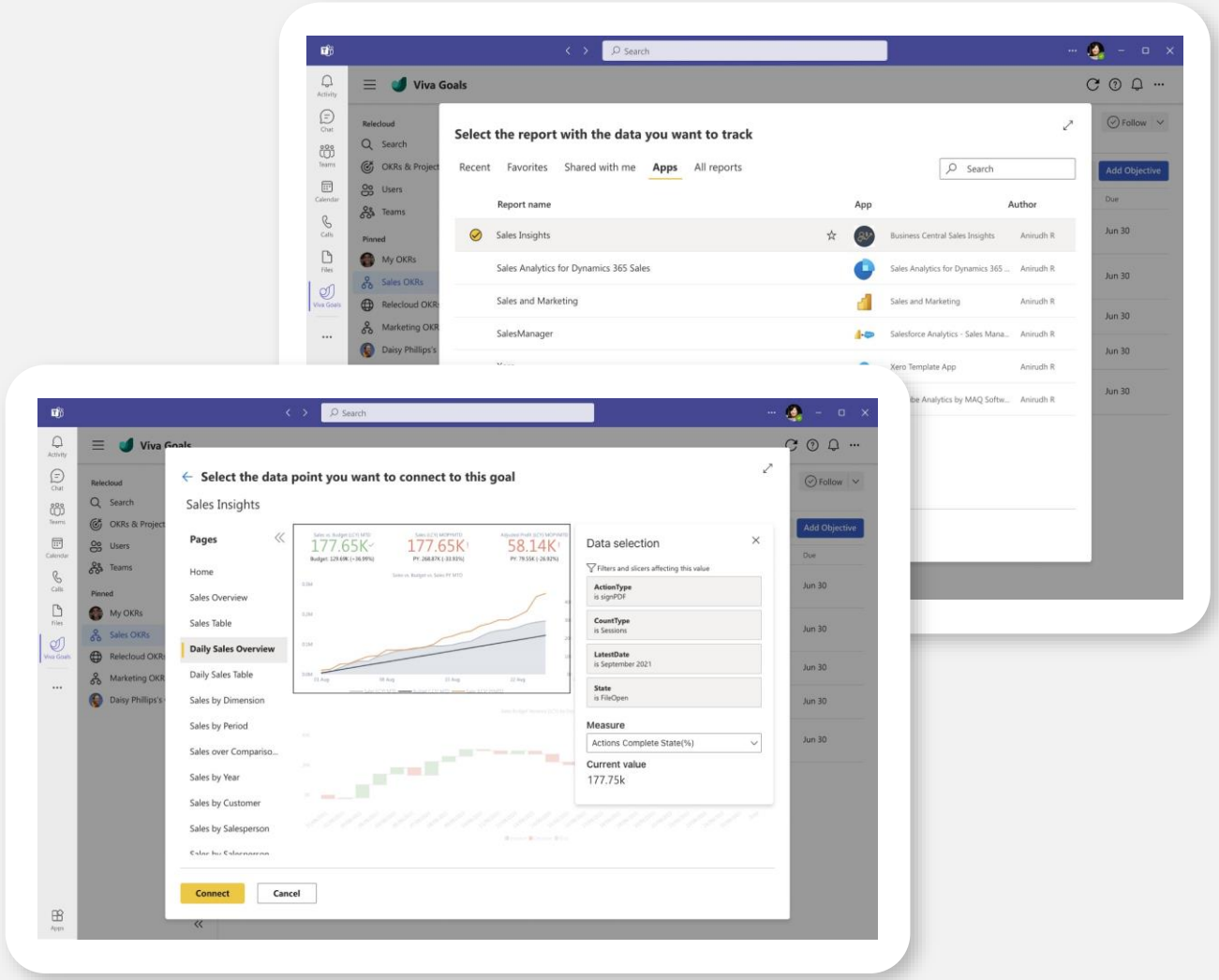
Viva Goals and Power BI Integration

Visualize the status of your OKRs with Power BI

Automatically update Key Results with data from Power BI

Quick one-click access to Power BI reports to make informed decisions

View the progress of your goals with powerful data visualization



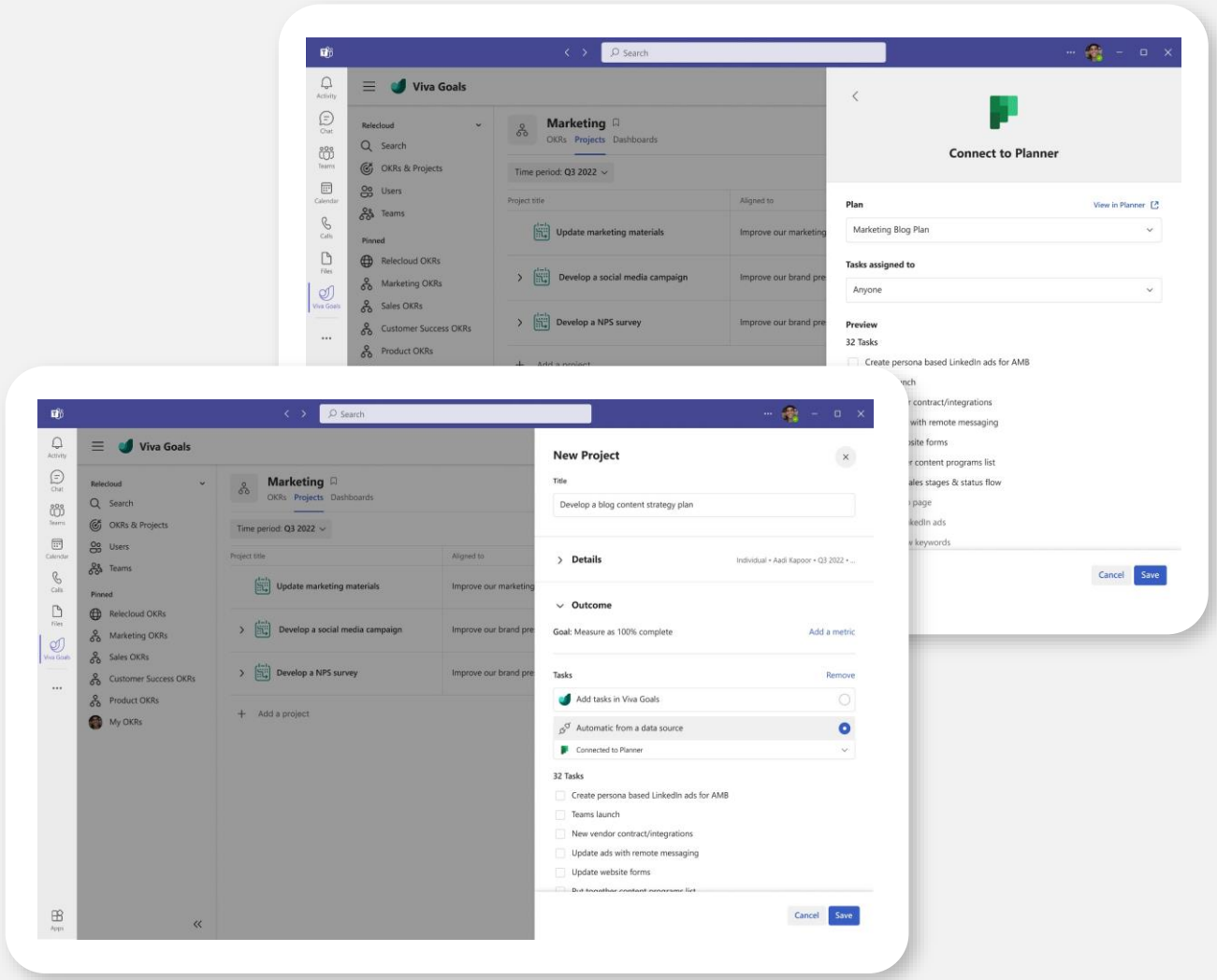
Viva Goals and Microsoft Planner Integration

Integrate task tracking in Microsoft Planner into OKR progress

Connect tasks to Viva Goals projects and Key Results to maintain a single source of truth

Align the daily tasks to the bigger picture

Have the most up to date information with automatic progress check-ins as Tasks are completed in Microsoft Planner



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Dashboards

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- Notification Schedule

OKRs & Projects

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- Exporting

Viva Goals in Teams

Engaging with Activity

Follow/Bookmark

How to track and save

Like/Comment

How to support and engage

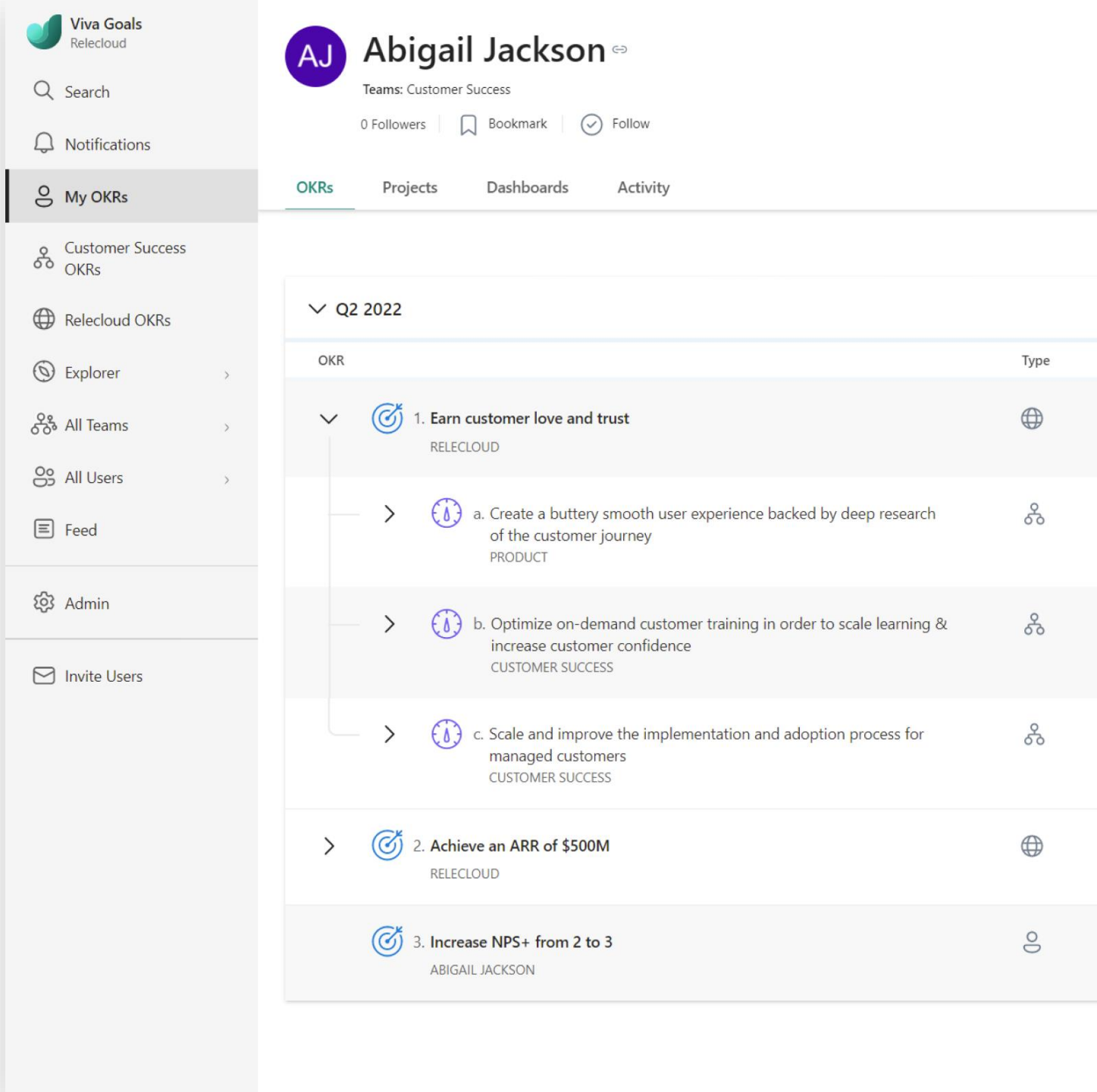
Concept in Platform

Follow/Bookmark:

- Individuals, Teams, and Reports

Like/Comment:

- All types of Activities



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Viva Goals in Teams

Reporting

The Important Questions

“How do I find OKRs that meet a certain set of criteria?”

“How do I share information that matters with teams and individuals?”

The Important Questions

Explorer	“How do I find OKRs that meet a certain set of criteria?”
Review Dashboard	“How do I share information that matters with teams and individuals?”

The Important Questions

Explorer

"How do I find OKRs that meet a certain set of criteria?"

- All Viva Goals OKR content
- Filterable
- Exportable

Review Dashboard

"How do I share information that matters with teams and individuals?"

- Real-time Data updates
- Customizable Panels and Widgets
- Interactive
- Is NOT exportable

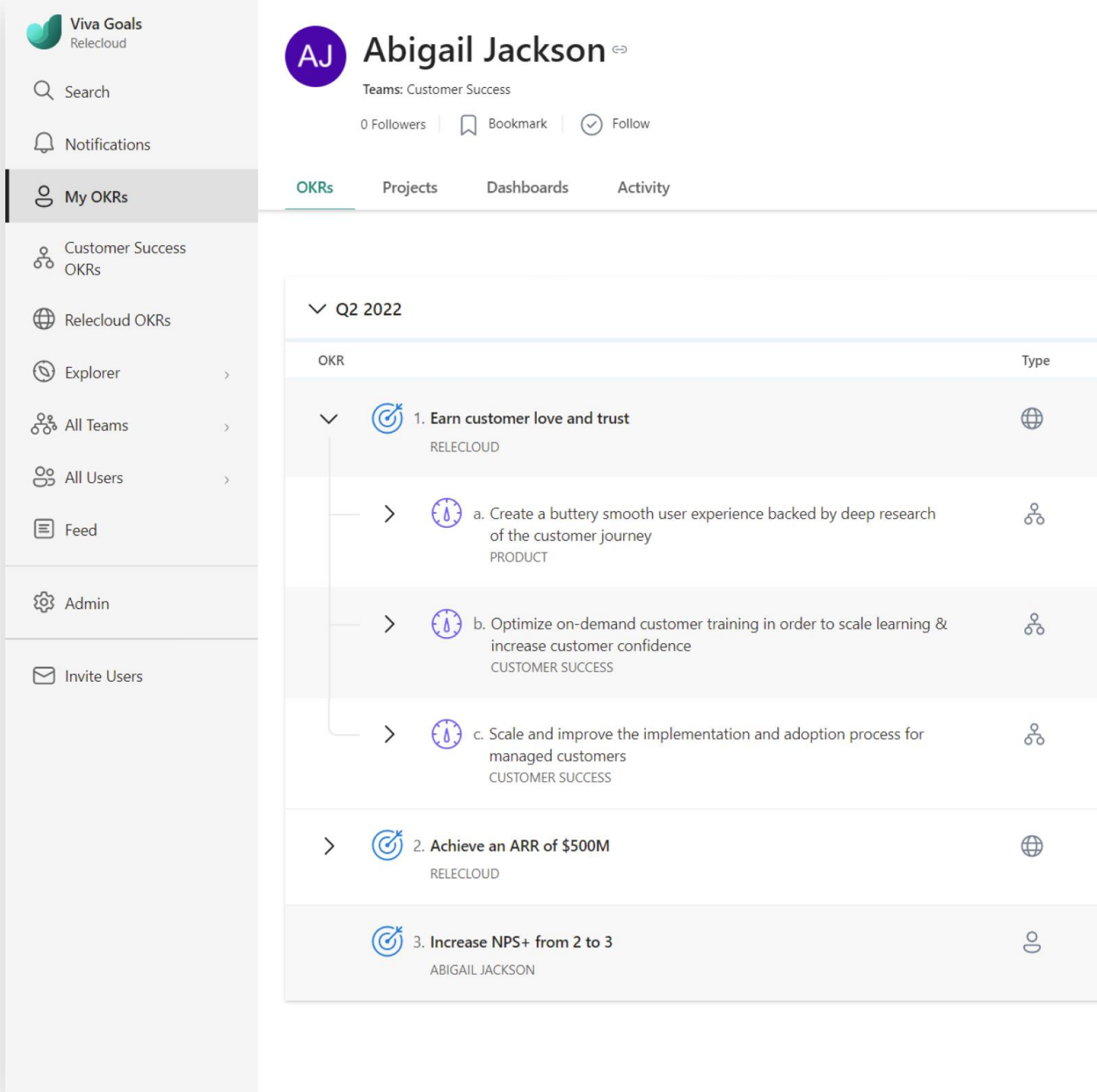
Concept in Platform

Objective Explorer:

- “How do I find OKRs that meet a certain set of criteria?”

Review Dashboard:

- “How do I share information that matters with teams and individuals?”



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Viva Goals in Teams

Agenda

Module 1: Building A More Focused & Aligned Culture With Viva Goals

Module 2: Deep Dive Into OKR Best Practices & Viva Goals Advanced Configuration

2toLEAD

Agenda

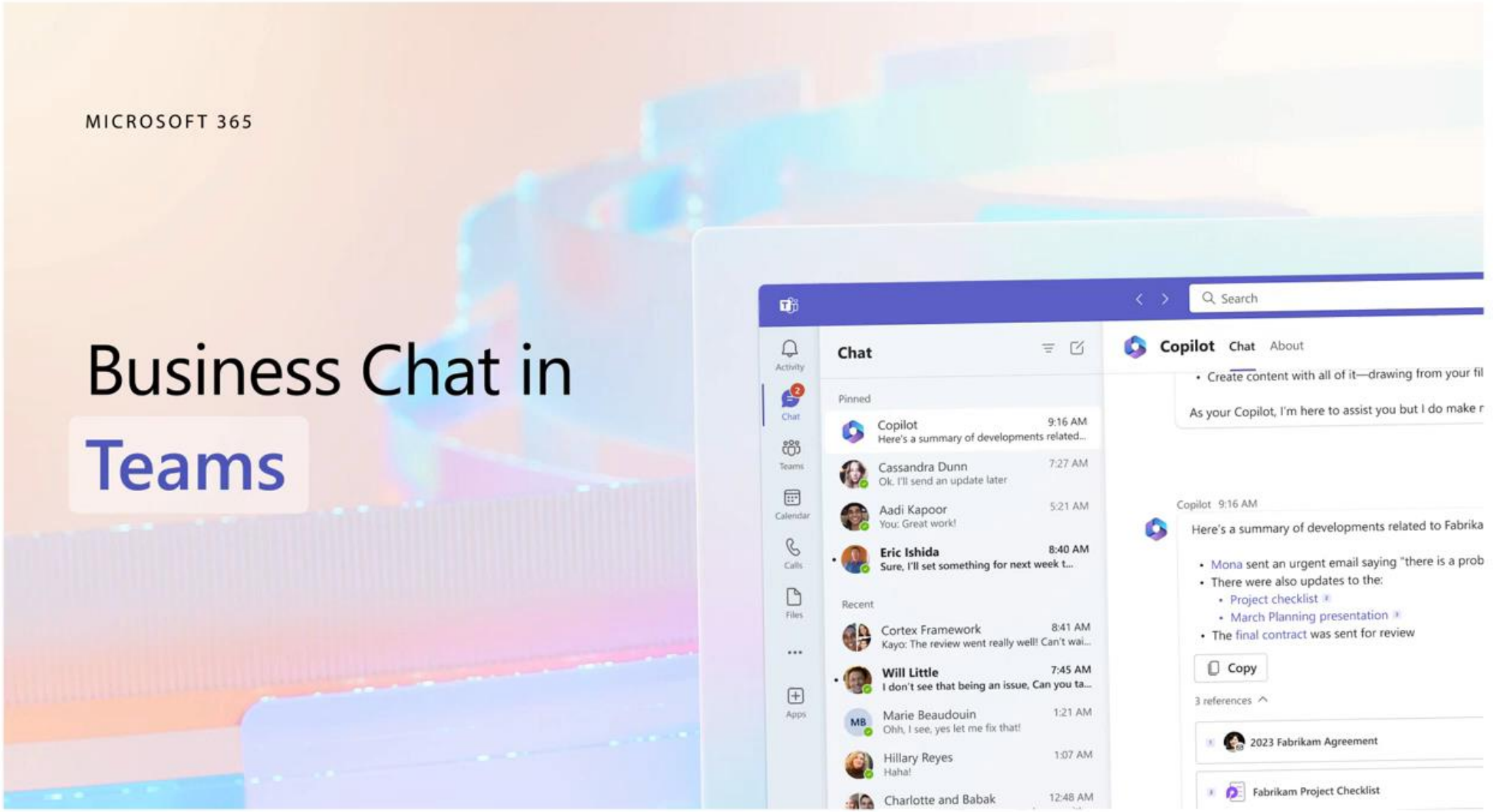
Module 1:
Building A More Focused & Aligned Culture With Viva Goals

Module 2:
Deep Dive Into OKR Best Practices & Viva Goals Advanced Configuration

2toLEAD

AI Can Help Us Manage Ourselves & Our Work Better

Sometimes it might be as simple as how you get started and caught up.



AI Can Accelerate Processes & Save Leadership Time

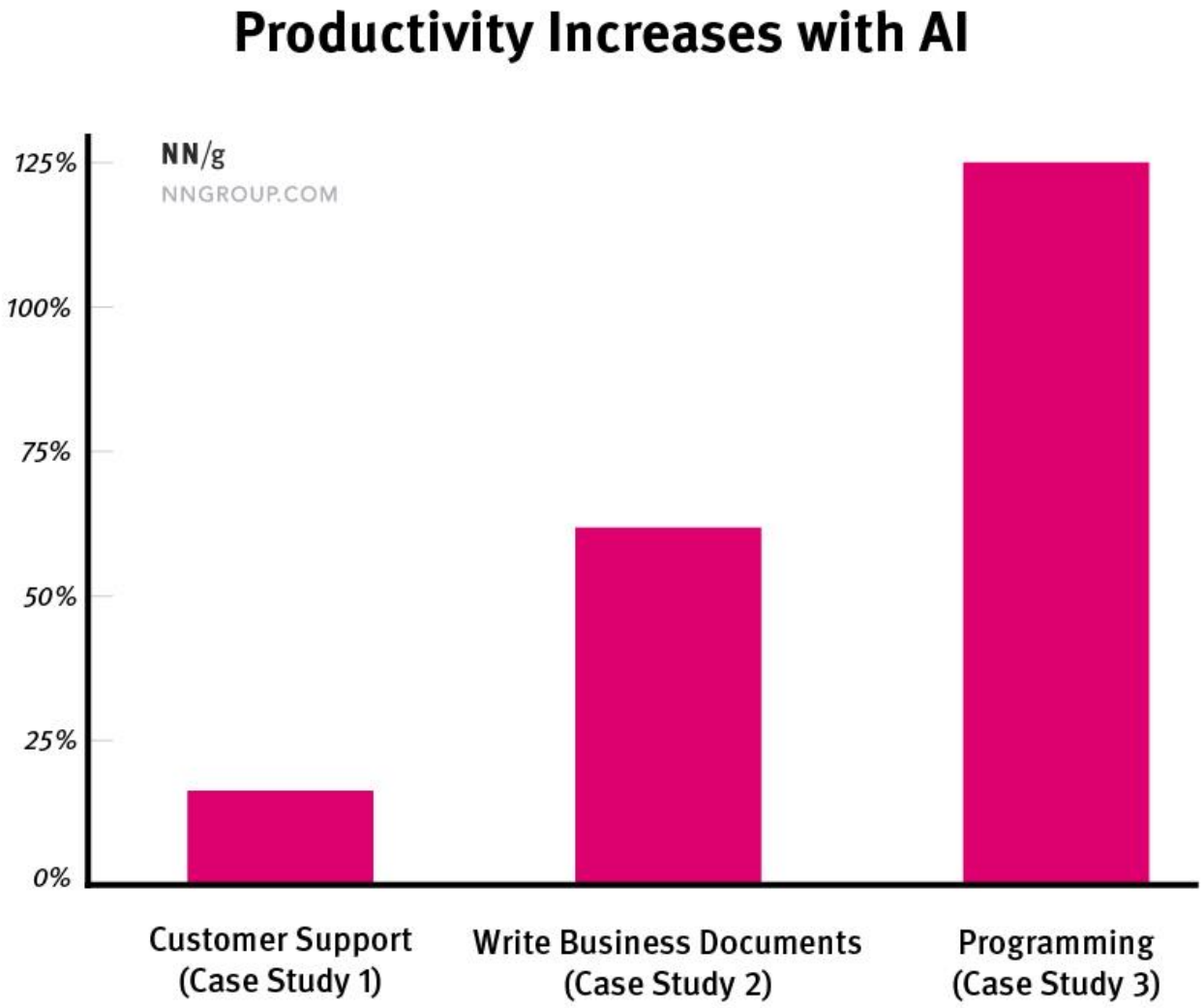
Whether that be key learning opportunities, opportunities to connect with your peers or reports or much more based on established interests, skills, direct or indirect signals and more.

Grounding AI In Organizational Data Makes A Difference

By leveraging your data we improve the quality of the prompt, and the quality of the response while doing responsible AI checks, security, compliance, privacy review and command generation.

The Results So Far…

The results are clear, but the pace is also accelerating. Programming is the most mature of these 3 sample workloads, but with Copilot we are seeing already significant improvement.



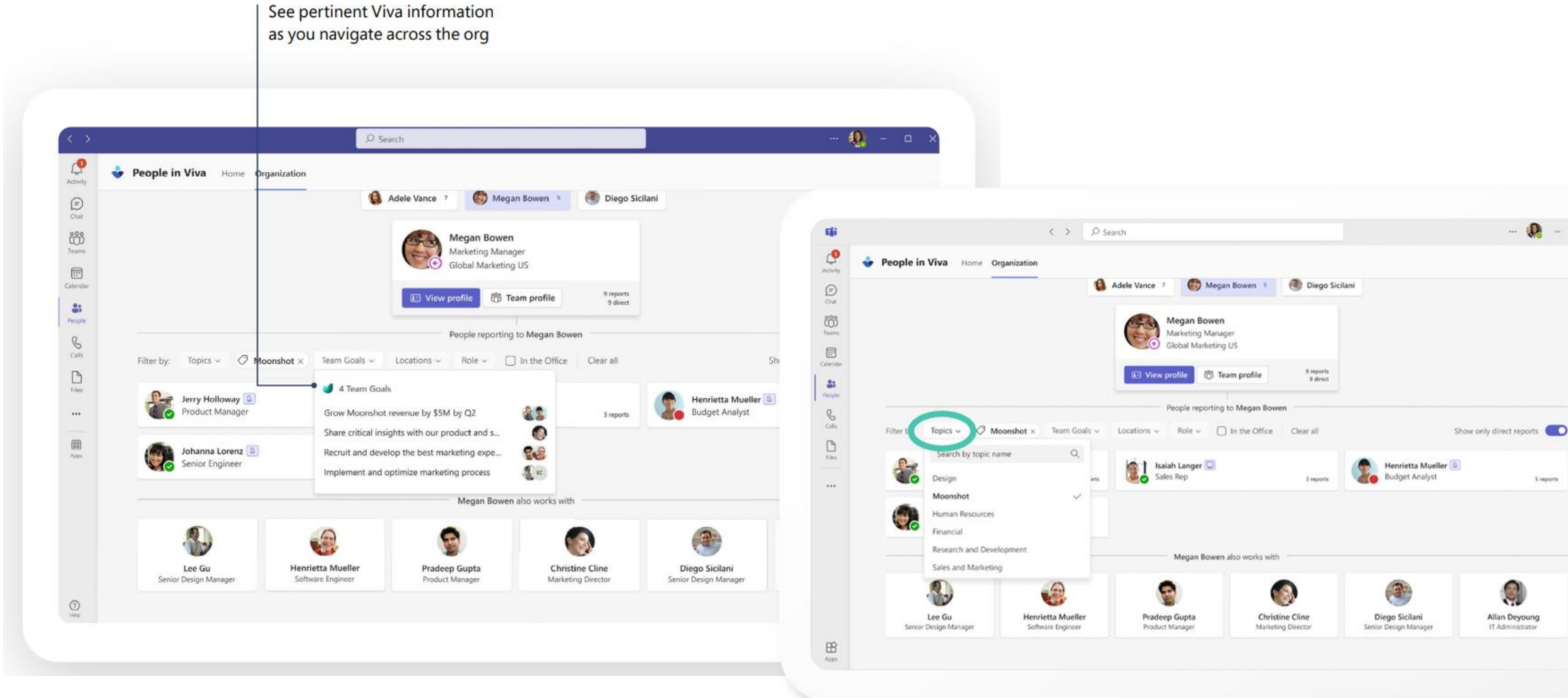
Study 1: Erik Brynjolfsson, Danielle Li, and Lindsey R. Raymond. Generative AI at Work.

Study 2: Shakked Noy and Whitney Zhang (2023): Experimental Evidence on the Productivity Effects of Generative Artificial Intelligence.

Study 3: Sida Peng, Eirini Kalliamvakou, Peter Cihon, and Mert Demirer (2023): The Impact of AI on Developer Productivity: Evidence from GitHub Copilot.

Improve **Employee Alignment**

People In Viva & Viva Goals as well as countless other experiences further enrich the ways we communicate, align and connect. All elements of a good digital workplace and employee experience strategy.



Microsoft Viva

Technical Onboarding

Admin definitions

Overview guidance: Roles and permissions in Viva Goals

Org Owner

Organizational owners manage members, teams, setup, and billing for the account. By default, they own organization-level OKRs, but organizational objectives can be owned by other members also.

Org Admin

Organizational administrators are members who manage the setup of the organization and can manage users and teams. An organization can have more than one organization administrator.

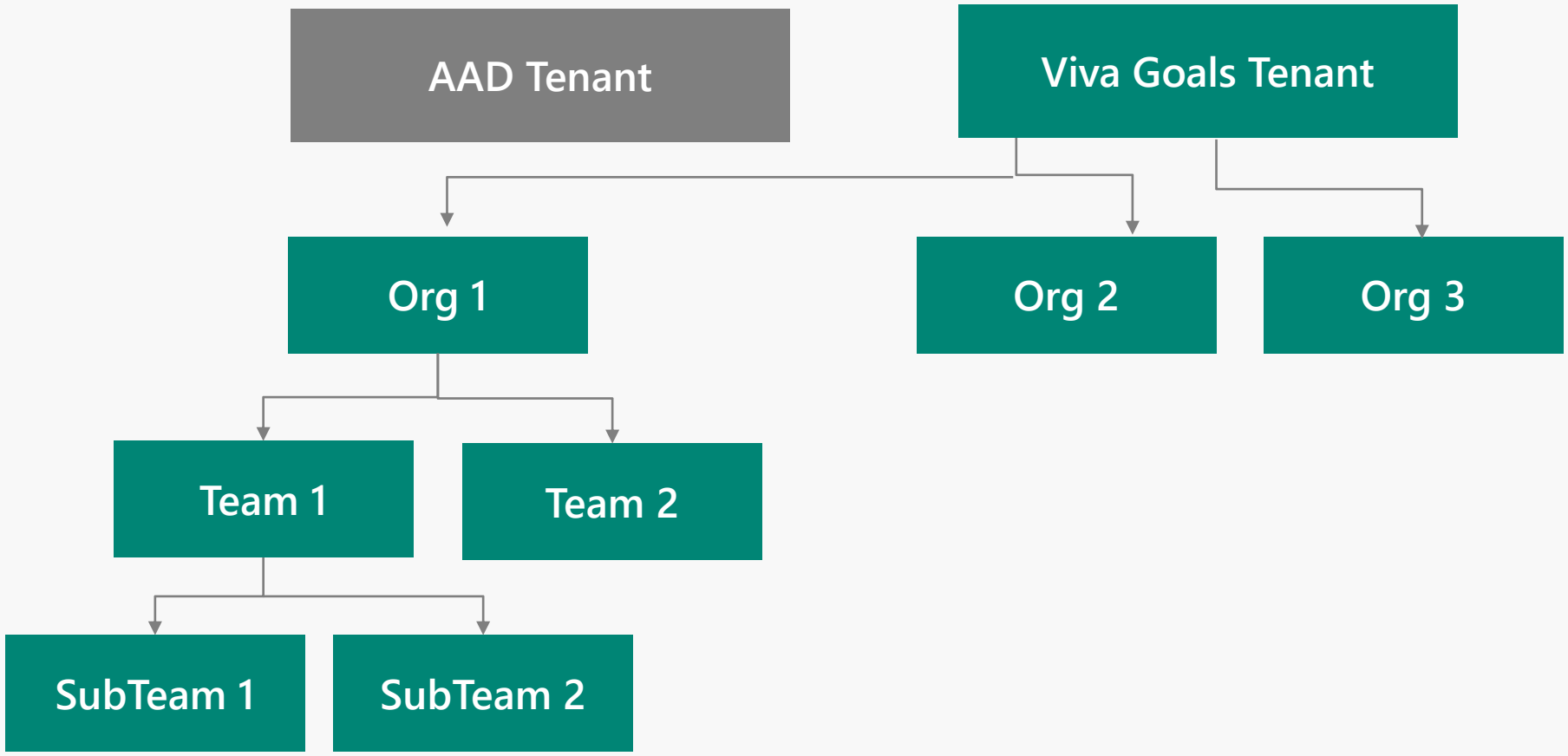
Teams Owner

Team owners are members who own their team members' OKRs.

Teams Admin

Team administrators are members who can manage team members.

Viva Goals Org / Team Hierarchy



Viva Goals Set Up Steps

Step	Task	Priority	Description	Guidance/Links
1	Assign licenses to users and groups	Required	Assign licenses for the users you want to have access to Viva Goals features.	NA
2	Configure org creators[1]	Recommended	This is not a wizard step, but wondering if we should provide guidance so that it can be addressed if it comes up	Restrict organization creation permissions
3	Assign the Organization Administrator role[1]	Recommended	Assign roles and user permissions (those who can access all functionality vs. those who can view only).	Roles and permissions in Viva Goals
4	Configure time periods	Optional	Manage OKR time periods and customize them for your organization's requirements.	Manage OKR time periods
5	Configure notifications	Optional	Customize notifications settings through the admin portal.	How to set reminders for check-ins
6	Configure integrations	Optional	Integrate Viva Goals with industry-leading tools and platforms you use every day,	Viva Goals integrations overview
7	Configure OKRs rules	Optional	Configure how you want to view objectives and key results.	Configure your OKR model in Viva Goals
8	Configure projects	Optional	Keep track of all the work your org is executing with Projects.	Projects in Viva Goals
9	Pin the app in Teams	Recommended	Pin the Viva goals app in Teams to guide users to the app.	Manage app setup policies in Microsoft Teams
10	Plan and drive adoption of Viva Goals in your organization	Recommended	Review, plan and apply adoption best practices to help make your deployment a success with our variety of resources.	• Adoption guide • OKR success toolkit • OKR examples • Maturity model
11	Promote Viva Goals to employees and measure engagement	Recommended	Measure level of organizational engagement for services deployed using resources in the MAC.	Viva Connections Teams App Usage Report
12	Get connected to support channels	Recommended	Use available resources to get technical support, ideas from other organizations, and become aware of new features.	See slide

[1]Step not included in Set Up Guide (aka Wizard)

Task | Assign licenses and user groups

You must assign licenses for the users you want to have access to Viva Goals features. This can mean all the employees in your organization or a specific subset. Note: It may take up to an hour to get access after licenses are assigned.

Overall guidance:

Use the following list of users and groups to manage licenses.

Step 1: Select ‘Assign licenses’ (to assign Viva Goals licenses), or

Step 2: Select ‘Unassign licenses’ to remove or manage licenses

FAQ

Q. How will license assignment work with Viva Suite?

A. Once you login to goals.microsoft.com and a license is assigned automatically.

Task | Configure org creators

Microsoft 365 Global Admins are responsible for managing the deployment of Viva Goals and permitting specific individuals to create Viva Goals Organizations.

Overall guidance: Restrict organization creation permissions

Step 1: Log in to your Viva Goals account.

Step 2: If you've directly landed in the **Create or join organizations** page, jump to step 3. If you land in an organization's landing page (My OKR page), select the organization selection dropdown from the navigation panel on the left.

Step 3: Select **Create or join organization**.

Step 4: In **Create or join organizations** page, select **Settings** in the top right corner.

Step 5: A menu with the three org creation permissions will appear.

Step 6: Choose the appropriate option and select **Save**. If you have selected **Specific users or groups**, enter the names of those users or a group (you can select only one group) and select **Save**.

FAQ

Q. Can anyone create an org?
A. Yes, by default, anyone can create an org.

Q. Can we lock down who can create an org?
A. Yes, however, *only* Global Admins can edit permissions. If you are the Global Admin in the Microsoft tenant, you will have a settings button that allows you to customize who can and cannot create an org.

Task | Assign the Organization Administrator role

Microsoft 365 Global Admins are responsible for managing the deployment of Viva Goals and assigning (or designating) specific individuals to perform roles in their organization to support them.

Overall guidance: Roles and permissions in Viva Goals

Viva Goals supports two kinds of accounts:

- **Regular user:** Regular team members/users can access all Viva Goals functionality, including creating, updating, and owning OKRs. They can also have additional responsibilities like administrator or manager.
- **Observers:** Observers can't create, edit, or own OKRs. However, they can view all OKRs.

FAQ

Q. What is the role of the Organizational Owner?
A. Organizational owners manage members, teams, set up, and billing for the account. By default, they own organization-level OKRs, but organizational objectives can be owned by other members also.

Q. What is the role of the Organization Admins?
A. An assignable AAD role, Organization Admins have direct access to the Microsoft Viva Goals admin dashboard, and customized settings that can be applied specifically for your organization, They manage the setup of the organization, manage users and teams, and have access to all OKR permissions, including creating, editing, and deleting any objectives or check-ins. There can be more than one Organizational Admin.

Task | Configure time periods

As a Viva Goals administrator for your organization, you can manage the OKR time periods and customize them for your organization's requirements. Instead of the default quarterly periods, you can make time periods monthly or define a custom time period and remove the default quarterly periods.

Overall guidance: Manage OKR time periods

1. Navigate to the **Time Periods** section in your admin dashboard. Select and save the month when your planning year starts.
2. Use the **Add Time Periods** option to add custom time periods.
3. Select **Actions** menu and Set **Custom** time period as Current Time Period.

Task | Configure notifications

Check-ins are updates that OKR owners make to the objectives and key results they are responsible for. By default, Viva Goals sends notifications to the owners to make updates either through MS Teams or email. Global admins can customize notifications settings through the admin portal in Viva Goals.

Overall guidance: How to set reminders for check-ins

1. Navigate to Admin > Notifications
2. View available notification settings
3. Select desired option for each setting you wish to change.

Task | Configure integrations

You can integrate industry-leading tools and platforms you use every day with Viva Goals.

Overall guidance: Viva Goals integrations overview

1. Navigate to Admin > Integrations
2. View available integrations
3. Select Enable to activate and setup a connection for a specific integration that you want. Follow the on-screen setup steps

FAQ

Q. Will more Microsoft application integrations be available?
A. Power BI, Project, Planner, and Dynamics integrations are scheduled for Q1.

Q. Can a customer utilize 3rd Party identity services?
A. 3rd Party identity services (Okta, for example) are on the roadmap.

Task | Configure OKR rules

You have some flexibility on what how to view objectives and key results in Viva Goals.

Overall guidance: Configure your OKR model in Viva Goals

1. Navigate to **Admin** > **Admin Dashboard**
2. Select the **OKR Model Configuration** tab

FAQ

Q. Once you define objectives and key results, how can you edit your view?
A. You can do three things: 1) Nest objectives under key results, 2) Block objectives from ever contributing to the progress of their parent, and 3) Allow key results to be nested under key results.

Task | Configure projects

Projects help keep track of all the work your organization is executing to achieve your Objectives and Key Results (OKRs). Like key results, projects can also be created under objectives and other key results in Viva Goals, depending on which outcome they help to achieve. A Global Admin can manage settings that enable/disable the ability for multiple teams & owners to collaborate on their key objectives & projects.

Overall guidance: Projects in Viva Goals

1. Navigate to Admin > OKR & Projects
2. View available settings under Shared OKRs & Projects
3. Select desired option for each setting.

FAQ

Q. Where do projects fit in the OKR model?
A. Projects are the actions that taken to achieve Key Results. Projects feed Key Results. Key Results Feed Objectives

Q. Are projects required in the OKR model?
A. No.

Task | Pin the Viva Goals app in Teams

The Viva Goals app is installed in your Microsoft 365 or Office 365 tenant by default. It is recommended that you pin the app in Teams for the users you've selected to guide them to the app. You may modify the app permission policy.

Overall guidance: Manage app setup policies in Microsoft Teams

1. Create a custom app permission policy.
2. Edit an app permission policy.
3. Assign a custom app permission policy to users.
4. Manage org-wide app settings for Microsoft 365 Government.

FAQ

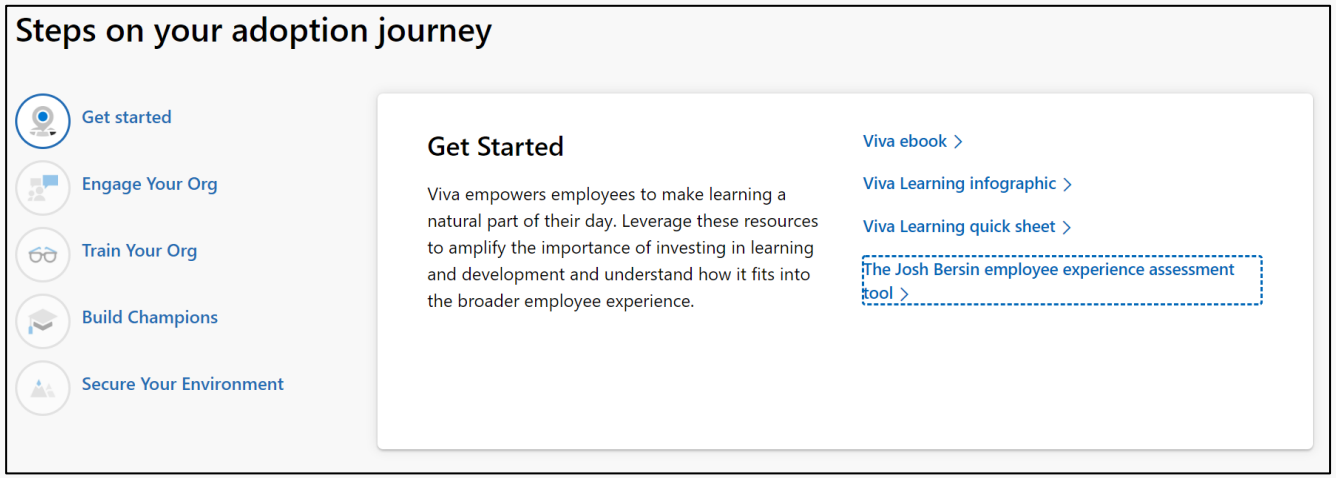
Q. How will the Teams app differ from the Viva Goals web app?
A. The Teams app is a full featured version of Goals app.

Q. Will users need to have Viva Goals licenses to access the Teams app?
A. Yes

Task | Plan and drive adoption in your organization

Now that you have prepared and configured your environment for Viva Goals, we recommend you review, plan and apply adoption best practices to help make your deployment a success. There are many resources available to help you plan and drive adoption.

- Introduce Viva Goals to employees via an email template that you can email directly from the Set Up guide (**note**: You'll need to set your org's preferences in Microsoft communication to users and specify the recipients.
- General adoption guidance (get started, engage your org, train your org, build champions, and secure your environment)
- **Viva Goals Adoption Guidance**
  - Adoption guide
  - OKR success toolkit
  - OKR examples
  - Maturity model



Task | Get connected to support channels

Below are multiple Microsoft resources to support you in the care and feeding of Viva, including Viva Goals and OKRs. You can use these to get answers to your questions, get technical support, get ideas from what other organizations, and become aware of new features coming your way.

1. Sign up at Microsoft Tech Community
2. Subscribe to the following community hubs for discussions & blogs:
   - Microsoft Viva Discussion
   - Microsoft Viva Blog
   - Microsoft Viva AMA
   - Microsoft FastTrack Discussions
   - Microsoft FastTrack Blog

Microsoft Support

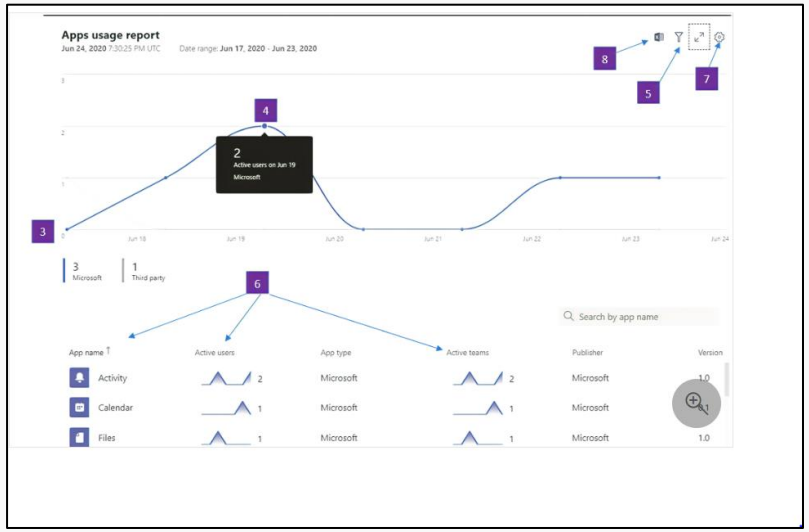
- Get support - Microsoft 365 admin

Task | Promote and measure employee engagement

There are various tools and reports available to help you measure the level of organizational engagement for services you've deployed. We recommend starting with those listed below which are available through the Microsoft Admin Center.

Overall guidance: Viva Connections Teams App Usage Report[1]

There are other third-party tools available like Microsoft Clarify or Azure Monitor should you require more or different analytics. Use of these tools requires deeper setup, customization, and data usage considerations that are currently outside the scope of this guide.



[1] While the tool is called Viva Connections, it is available to all Viva modules, including Viva Goals
Whatever apps are in your tenant should show up in this report when products are GA. Will be available for Viva Goals on 8/1.

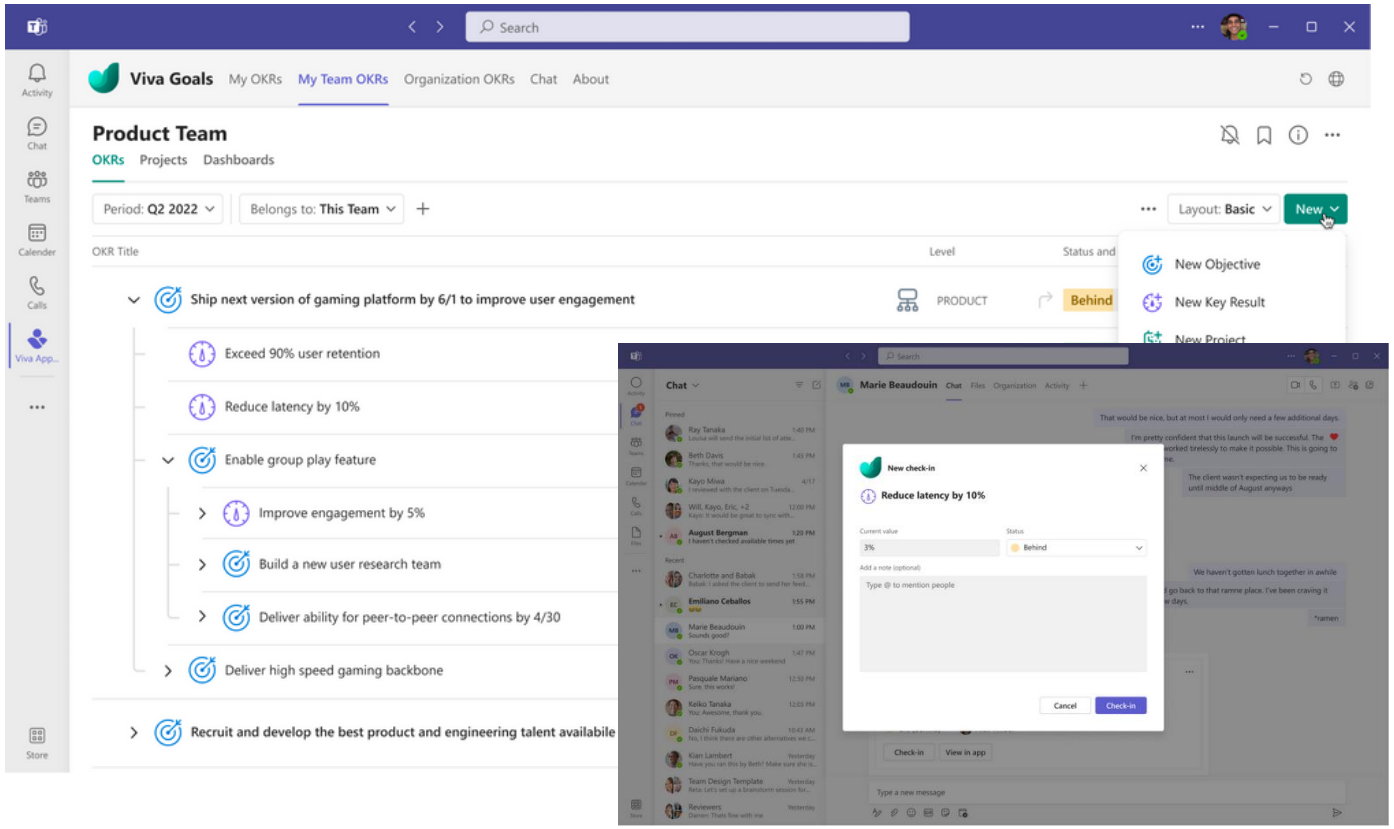
EXAMPLE PILOT

Improve Team Performance & Alignment With Viva Goals

Empower objective alignment at the organizational, team and individual level. Connect work to outcomes with projects and tasks aligned to OKRs while sharing progress and insights across your organization with shareable links and pinned apps.

Estimated Duration: 4 Weeks

YOUR EXPERIENCE MAY VARY...



Educate On Importance Of Connecting Goals To Outcomes

Expert Led Discussions On Viva Goals & Designing Your Pilot Program

Implementation Of Viva Goals Pilot & Pro-Active Support

Sample Viva Goals Pilot Timeline

Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
Kickoff **Communications Planning** **Viva Goals Technical Deployment**	**OKR Leadership Program**	**OKR Coaching Program** **OKR Design Workshop(s)** **Viva Goals Software Training**	**Viva Goals Software Training**	**Dashboard & Integration Support**	**Close-out Meeting**

What are OKR Champions?

The OKR Champion facilitates the OKR process and drives adoption, either across the entire organization or within their department as part of a broader cross-functional OKR Champion group.

Roles and Responsibilities

OKR Champions 4 Responsibilities

1. Be the communications center for all things OKR-related

2. Set organizational expectations for OKRs

3. Set up training opportunities and hold teams accountable

4. Celebrate OKR wins

The OKR Champion

OKR Champions play a key role in the rollout, adoption and continuity of leveraging OKRs within an organization in a sustainable fashion. They are the connection points between different teams that help keep OKR programs on track.

What they do:

- Help other leaders communicate the vision behind change
- Coaching fellow colleagues on OKR methodology and software
- Facilitating OKR sessions, mainly creation and reflection
- Ensure OKRs are clear and aligned
- Directing people to helpful resources
- Improving how your teams practice OKRs

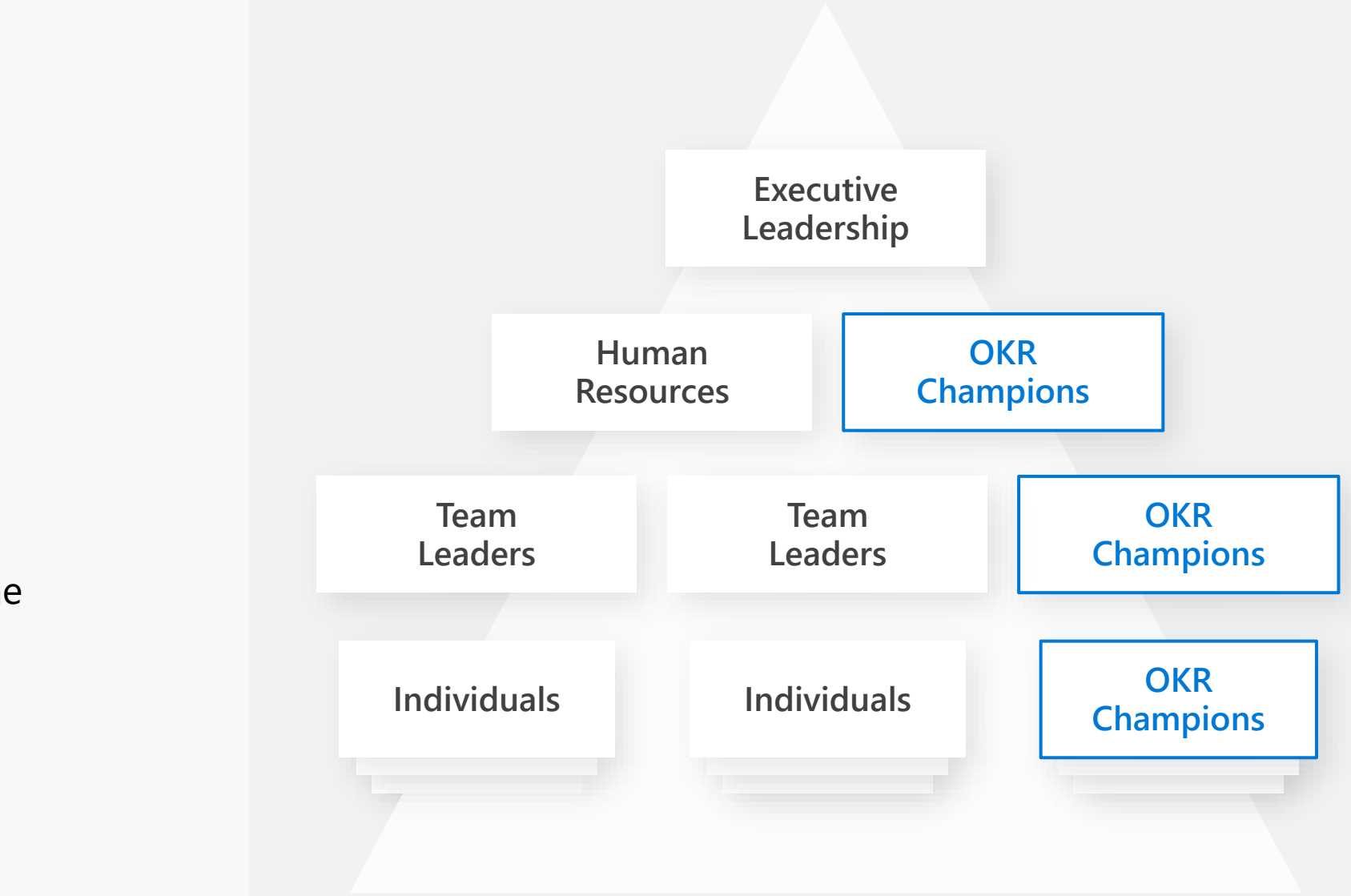
What it takes:

- About 2-3 hours per week on average
- High-potential employees who are curious, effective listeners, prone to solving problems and building quality relationships
- Senior leadership support of Champions
- Complete software training

Recommendation: 1 Champion for every 15 to 50 employees.

You can lead from everywhere.

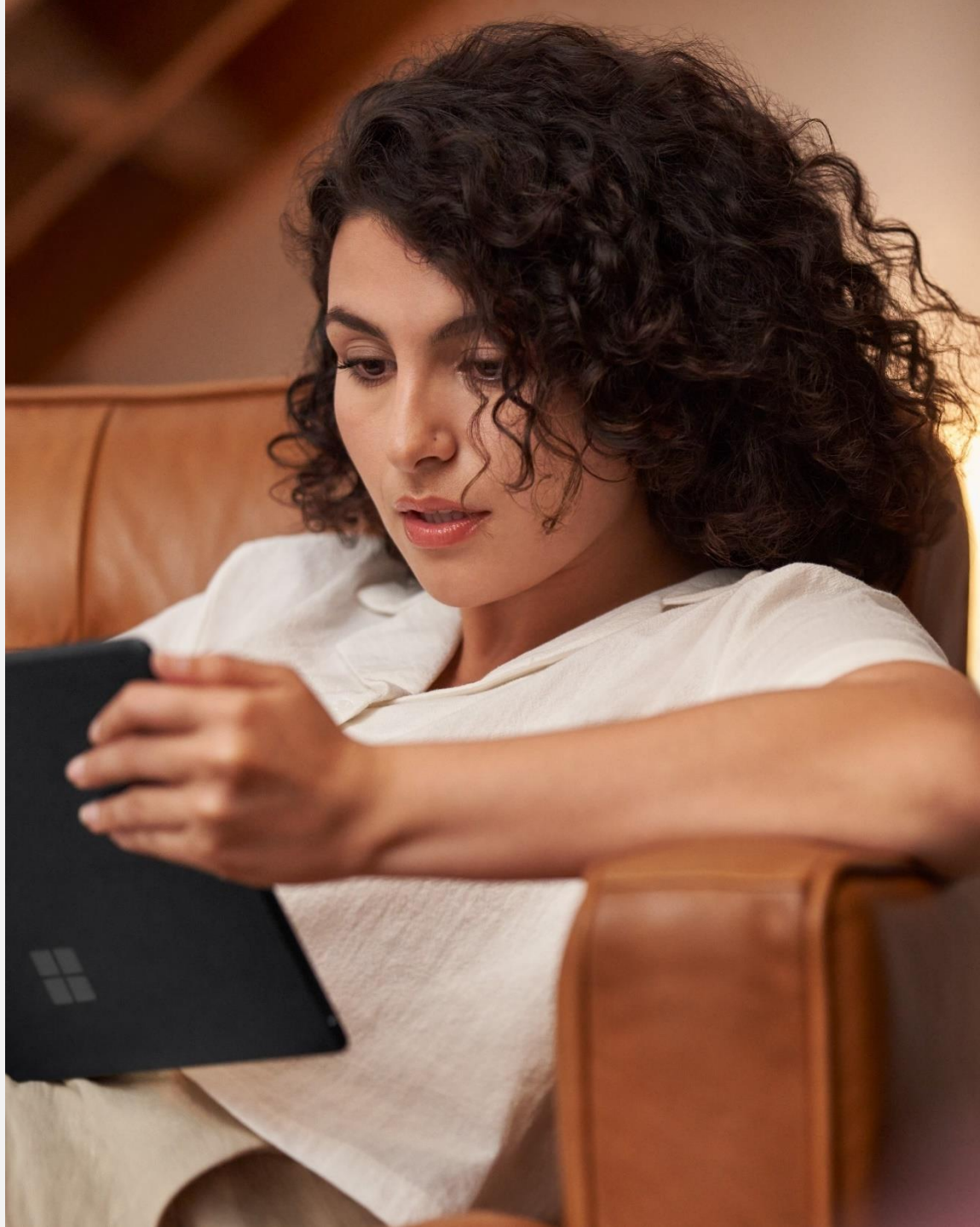
Anyone can galvanize others to leverage OKRs and identify + implement solutions to fine-tune OKR programs.



Common pitfalls when writing OKRs

Great OKRs take practice:

- ✓ Objectives are not challenging or do not stretch
- ✓ Key results aren’t quantifiable
- ✓ Creating too many objectives or key results
- ✓ Creating a list of tasks
- ✓ Writing OKRs that don’t have an impact



Common Obstacles

1. **Lack of mission, vision and values**
   Vital components which determine the overarching objectives you'll base your OKR framework on.

2. **Lack of focus**
   Best practice is to decide on a smaller set of objectives, each with set of key results, at one time.

3. **Lack of patience and/or commitment**
   Be committed and willing to wait up to 3+ months for results to become obvious.

4. **Lack of regular check-ins**
   Without frequent check-ins, it's difficult to keep OKRs on track, aligned and adjusted with the big picture.

OKR fundamentals

Types of Objectives

Committed: A goal that will be achieved. Resources and schedules should be adjusted to make sure it gets done.

Aspirational: An ambitious goal with no clear path to get there. It might roll over year over year and sometimes change ownership.

We will

Objective

as measured by

Key Results

via

Key Initiatives and Projects

Writing and editing

If you could look back at the end of the year and only accomplish 3-5 things…

What would make the most dramatic impact on your business?

Writing and editing

Ground Rules:

They should be actionable

They should be aspirational

They should be meaningful

They should be “sticky” and easy to remember

Writing OKR steps

Writing great OKRs is like writing a great book:

Step 1: Write

- Follow a formula

Step 2: Edit

- Ask the right questions

A quick overview of OKRs

Objectives and Key Results (OKRs) is a simple, yet powerful goal management methodology that is utilized by high-output organizations to create alignment and engagement around measurable goals.

Objectives: What the team wants to accomplish

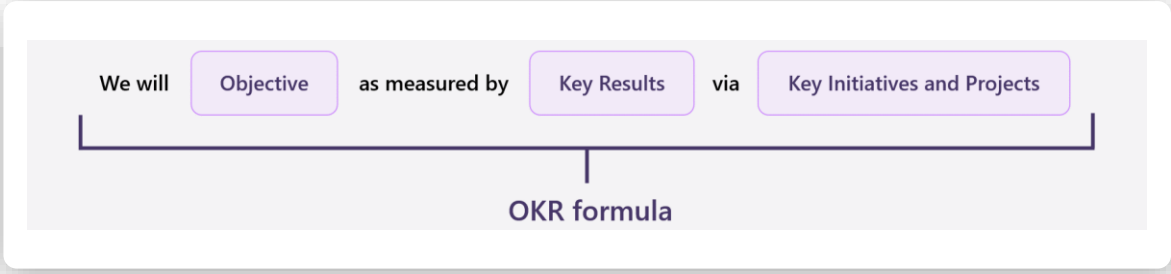
- Objectives are clear, inspiring, public stretch goals shared across teams and organizations. To sharpen focus, limit to 5 objectives.

Key Results: How the team will measure success

- Key results are the team or org's measurable objectives. They should be ambitious but achievable, and quantifiable enough to lead to objective scoring. Set 3-5 key results.
- For example, 70% achievement is typically considered successful. Scoring higher may mean the aspirational goals are not being set high enough.

Key Initiatives and Projects: Activities which help the team achieve measurable outcomes

- Key initiatives and projects are the path to impact for each key result. They are the activities whose execution will impact performance on the defined objectives.



When done correctly, OKRs can enable significant acceleration of business results

I will increase brand recognition as measured by *increased revenue, reduced churn, and improved customer retention.*

Objective: Increase brand recognition to make ACME Skye Rockets the market leader

- **Key Result:** Increase revenue to $750M in 2020
- **Key Result:** Reduce net revenue churn by 2.75% in 2020
- **Key Result:** Improve customer retention to 98.6%
  - **Project:** Create Customer survey to identify areas for improvement by compiling questions and communicating with key customers

How to start writing OKRs

Start with your team's purpose

This should come from and align to the corporate goals (business priorities) for the designated time period.

The company objective is to:

_____

_____

_____

_____

_____

My objective, or my team's objective is to focus on:

_____

_____

_____

_____

_____

Let’s choose an objective

Choose what type of objective you want to create

There are two types of goals: committed and aspirational

Committed: is a goal that will be achieved. Resources and schedules should be adjusted to make sure they get done.

When graded the score for a committed OKR is 1.0

Aspirational: ambitious goals with no clear path to get there. They may roll over from quarter to quarter, or year to year, and sometimes even be reassigned to different teams.

When graded, the average score of an aspirational OKR is 0.7, but with lots of room for variance

Let’s write an objective

Once you select the type of objective you want, it’s time to start writing.

Begin with the basic formula below:

Verb + What you want to do + In order to/for/so that (what you hope to achieve).

For example: “Drive better attendance at our conference to improve the customers’ networking experience”

Good OKR Examples:

Objective: Increase brand recognition (to make ACME Skye Rockets the market leader)

- **Key Result:** Improve + internal employee engagement (to increase job satisfaction)
- **Key Result:** Develop + a sustainable candidate lead strategy (in order to fill 90% of roles)

Creating key results

After creating an objective, you need to define 3-5 key results that you will use to measure whether you accomplished the objective or not.

Key results should be:

- Quantitative
- Aspirational
- Specific
- Progress-based
- Drive the right behaviors

When possible, use this formula: Verb + what you're going to measure + from "x to y"

For example: "Increase attendance from 350 to 500 people".

Two types of key results:

- **Metric:** (most common) track quantitative outcomes designed to gauge success on an objective
- **Milestone:** used to convert a binary outcome into a key result

Creating key initiatives and projects

Finally, let's write some Key Initiatives/Projects. Key Initiatives/Projects are outputs and result in a list of tasks that need to be completed.

When possible, use this formula: Verb + Output + as measured by the completion of X, Y, Z

The verb + output is name of your **Key Initiative/Project**, and the X, Y, Z is your list of tasks **A, B, and C**.

For example: “Create dynamic video content as measured by the completion of writing the script, recording the audio and rendering the video”.

Review

I will increase brand recognition as measured by *increased revenue, reduced churn, and improved customer retention.*

Good OKR Example:

Objective: Increase brand recognition to make ACME Skye Rockets the market leader

- **Key Result:** Increase revenue to $750M in 2020
- **Key Result:** Reduce net revenue churn by 2.75% in 2020
- **Key Result:** Improve customer retention to 98.6%
    - **Project:** Create Customer survey to identify areas for improvement by compiling questions and communicating with key customers

OKR Framework/Examples

What are the Key Initiatives and Projects?

1. Hire more people

Create a list of suitable candidates by speaking with hiring managers, creating job specifications and contacting recruiters.

Questions to ask:

Verb + Output + as measured by the completion of X, Y, Z

What tasks can we do to help achieve the Key Results?

Best practices for OKR Greatness

When done well, OKRs can lead to a host of benefits

- Bidirectional goal-development
- Develop agility
- Achieve strategic and tactical alignment
- Enable transparency
- Feed collaboration
- Drive tactical focus
- Create accountability

Best Practices for Achieving Greatness with OKRs

People

How people are managed, and how they collaborate

Process

The steps and milestones you continuously drive towards

Technology

The digital systems you need to get things done

Data

The information you leverage to effectively pursue goals

External Content

The events taking place outside of your immediate context

Best Practices for Achieving Greatness with OKRs

People

1. Be intentional about communicating with your people (key dates, milestones, opportunities to learn about OKRs)
2. Be clear about the delineation between OKRs and Performance reviews, so that you can…
3. Prioritize intellectual safety → Encourage people to set bold goals
4. Encourage a culture of continuous learning to reverse shortcomings and press on advantages

Best Practices for Achieving Greatness with OKRs

Process

1. Carefully design your cadences and timelines (we provide archetypes but encourage customization)
2. Getting top-level leadership guidance on goals earlier is better
3. When brainstorming OKRs, consider inviting stakeholders from core and adjacent groups to provide feedback
4. Ensure close collaboration with OKR Champions (working with them will help you + the entire organization)

Best Practices for Achieving Greatness with OKRs

Technology

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3. When brainstorming OKRs, consider inviting stakeholders from core and adjacent groups to provide feedback

4. Ensure close collaboration with OKR Champions (working with them will help you + the entire organization)

   - Includes feedback on how the process is working (or not) for you and your team

Best Practices for Achieving Greatness with OKRs

Data

1. When crafting OKRs, think about how you will measure success and if you have the information to be able to quickly and efficiently leverage it for updates

2. Proactively work with data management teams to ensure that you can gain access to information needed

3. Take data management seriously!
   - (many of our clients treat data management as an afterthought; we find that organizations who focus on this tend to see greater operational efficiency)

4. Capture data about what people need to make OKRs more empowering for them
   - (i.e., surveys, focus groups, occasional check-ins by OKR Champions)

Best Practices for Achieving Greatness with OKRs

External Content

1. Broader Industry: knowing the mega trends that are impacting the broader economy
2. Immediate Industry: understanding the forces that are shaping how your own industry is evolving
3. Company-Level: internalizing the strategy of your entire company
4. Other Teams Within Your Immediate Department/ Organization: intimately understanding what your immediate organization is focused on achieving
5. Other Departments: knowing key priorities of other areas of the organization

Note: While this may largely fall to strategy-oriented teams, there are benefits to having more people aware of external dynamics (and how to factor them into their own work)

When done right, the whole organization benefits

Executives

- Better understanding of progress of largest business initiatives throughout time periods
- Stronger cross collaboration between departments and teams
- Creating initiatives based on the Mission and Vision of the company
- High-performing, empowered employees

Team Managers

- More focused priorities and team meetings
- Transparency and collaboration between teams and departments
- Clear alignment to Business initiatives
- Clear accountability and ownership on OKRs
- Better understand where to provide resources

Individual Contributors

- Understand how your day to work aligns with great initiatives to the company
- Provides more purpose to your work
- Transparency on biggest priorities for the company and teams
- Ability to better prioritize growing number of tasks

Best Practices: How to get to OKR Mastery

Executive Leadership

- Vocal sponsorship of OKRs and key benefits
- Advanced guidance given on strategic plan
- Intellectual safety
- A focus on outcomes, not just output / time investment

OKR Champions

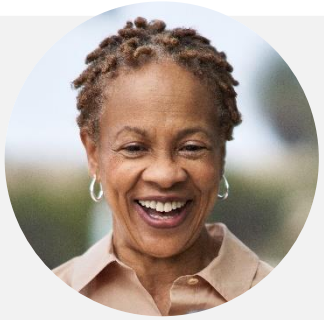
- OKR Champions regularly engage key stakeholders in the organization
- Clear timeline visibility is given for the entirety of each quarter
- An OKR “playbook” is developed to codify processes
- Leadership is vocally supportive of OKR champions
- Presence of an active feedback mechanism

OKR Development and Refinement

- OKRs are developed in a collaborative manner
- Time to develop OKRs is protected
- OKRs are revisited daily/weekly/bi-weekly
- Goals are bold
- Reflection and learning are promoted and referenced across cycles

Key feature pull through

- Viva Goals is used to run team meetings and key department / company meetings
- Team members use check-ins and Dashboard Review to provide meaningful commentary on progress, roadblocks, and learnings



Creating Psychological Safety

Safety amidst change

1. Normalize "intelligent failure"

- Some OKRs will succeed, others fail
- Ambitious stretch goals
- Built into the scoring system

Safety amidst change

1. Normalize "intelligent failure"

- Some OKRs will succeed, others fail
- Ambitious stretch goals
- Built into the scoring system

2. Celebrate small wins

Establish Business Rhythms

3 C’s Cycle

Create – Before each quarter

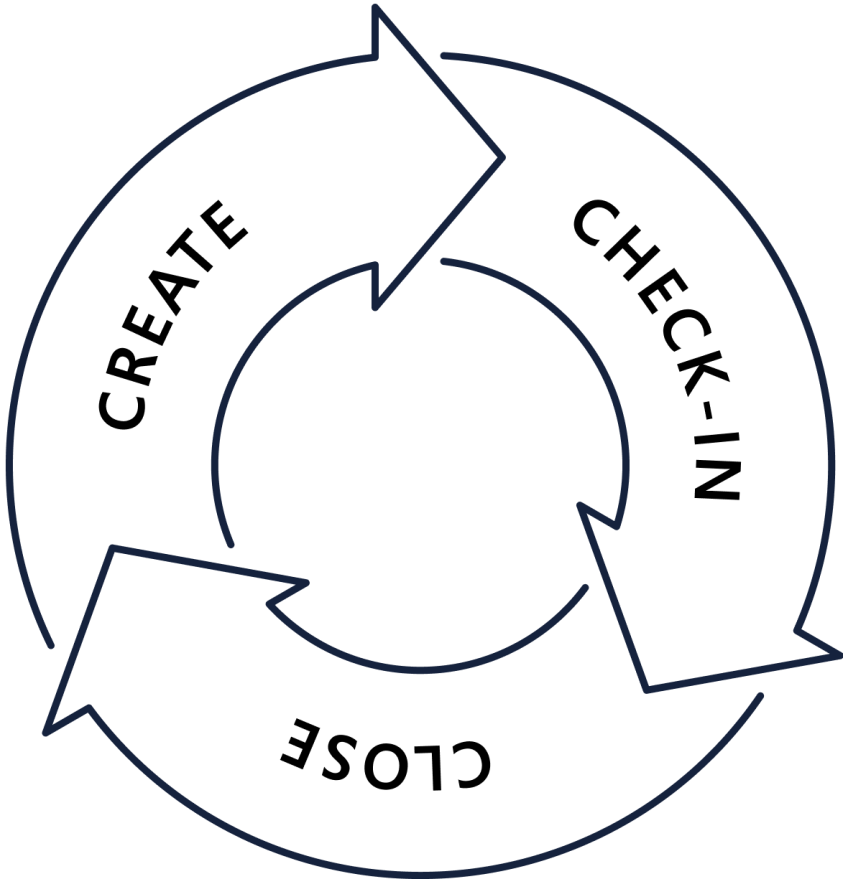
- Department OKRs are defined based on the company OKRs
- Team and individual OKRs created and aligned

Check-in – Throughout the quarter

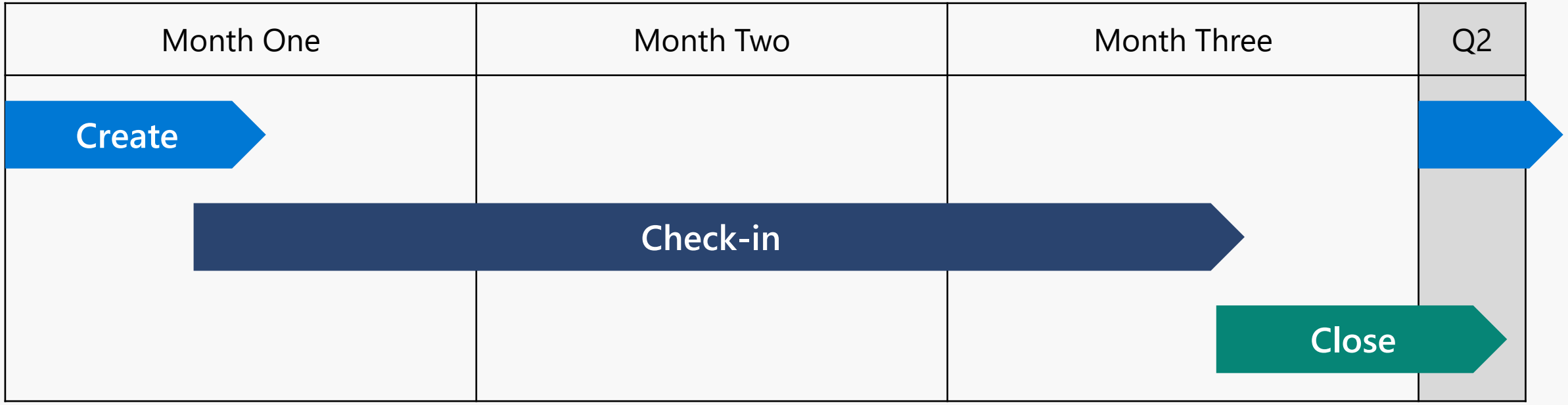
- Evaluate your OKR progress and discuss evaluation with senior management
- Address at-risk or off-track OKRs and course-correct where possible

Close – End of quarter

- Review performance with senior management, discuss achievements and lessons learned
- Define new quarterly OKRs



OKR Timeline/Quarterly Cadence Example



Draft + Share Company OKRs

- Share Team OKRs
- Share Individual OKRs

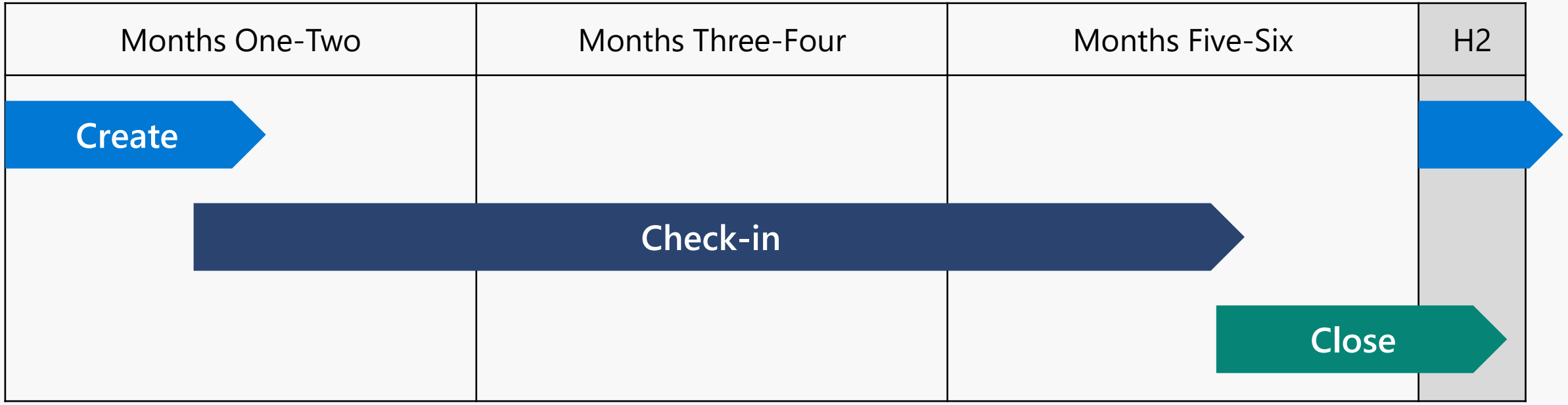
Check-in Weekly through:

- Manual Entry
- Messenger Apps
- Integrations

Close and Score:

- Assess: Stop, Change, Start
- Begin Again!

OKR Timeline/Semester Cadence Example



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- Share Team OKRs
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Check-in Weekly through:

- Manual Entry
- Messenger Apps
- Integrations

Close and Score:

- Assess: Stop, Change, Start
- Begin Again!

Business Rhythm Tips

1. **Do:** Set strategy meetings in advance
   - Creation and Planning
   - Closing and Reflection
2. **Don't:** Add new meetings for check-ins

Make it Visible

25
25
25

Make it Visible

1. Walk the talk
   - Town Hall: How is the company doing > OKR Progress
   - Team Meetings: OKR Dashboards
   - 1:1 or Connect: OKR Progress

Make it Visible

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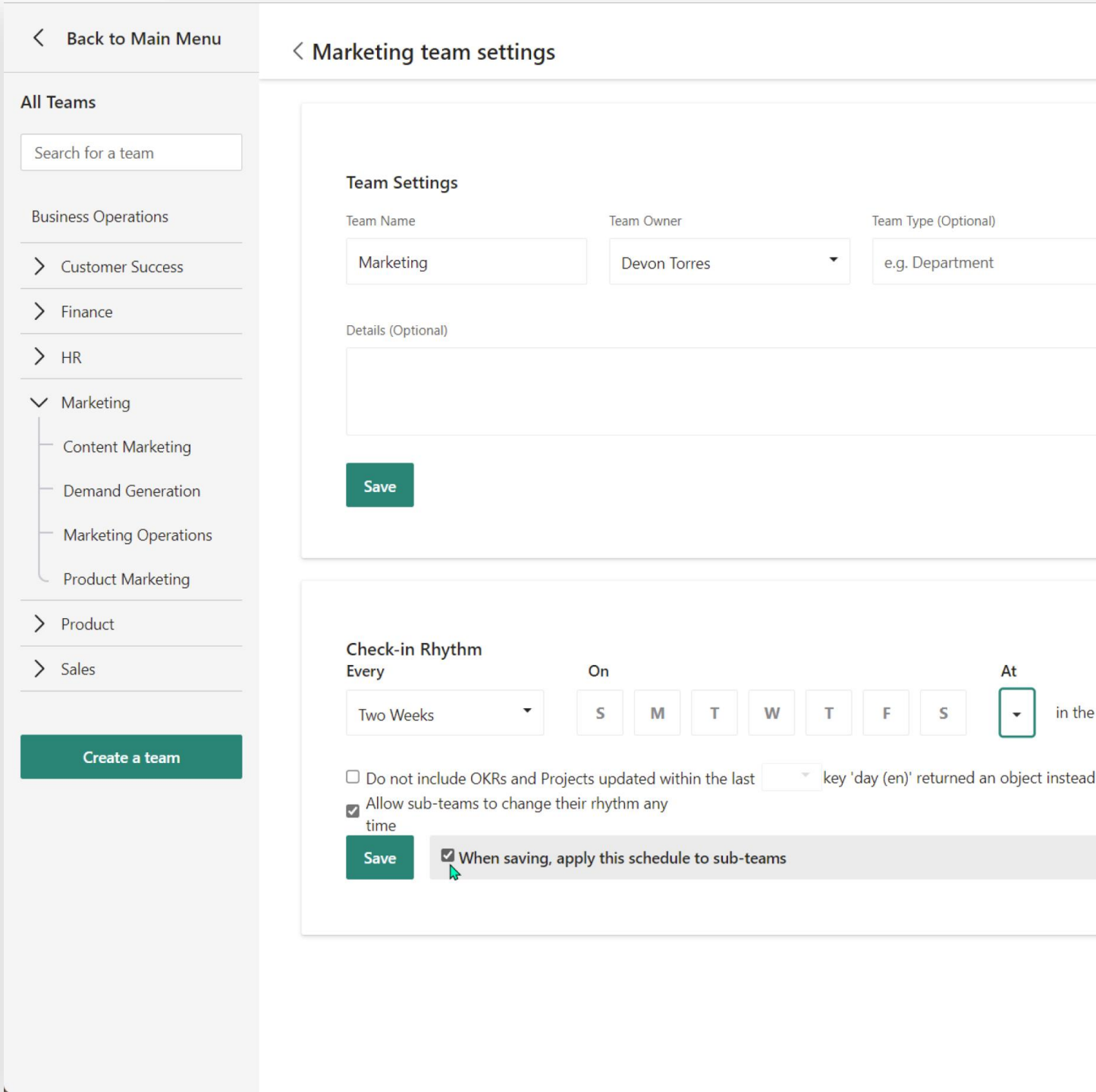

Make it Visible

1. Walk the talk
   - Town Hall: How is the company doing > OKR Progress
   - Team Meetings: OKR Dashboards
   - 1:1 or Connect: OKR Progress
2. Use reminders to build muscle memory and drive repetitive behavior
3. Pro Tip: Habit Stacking

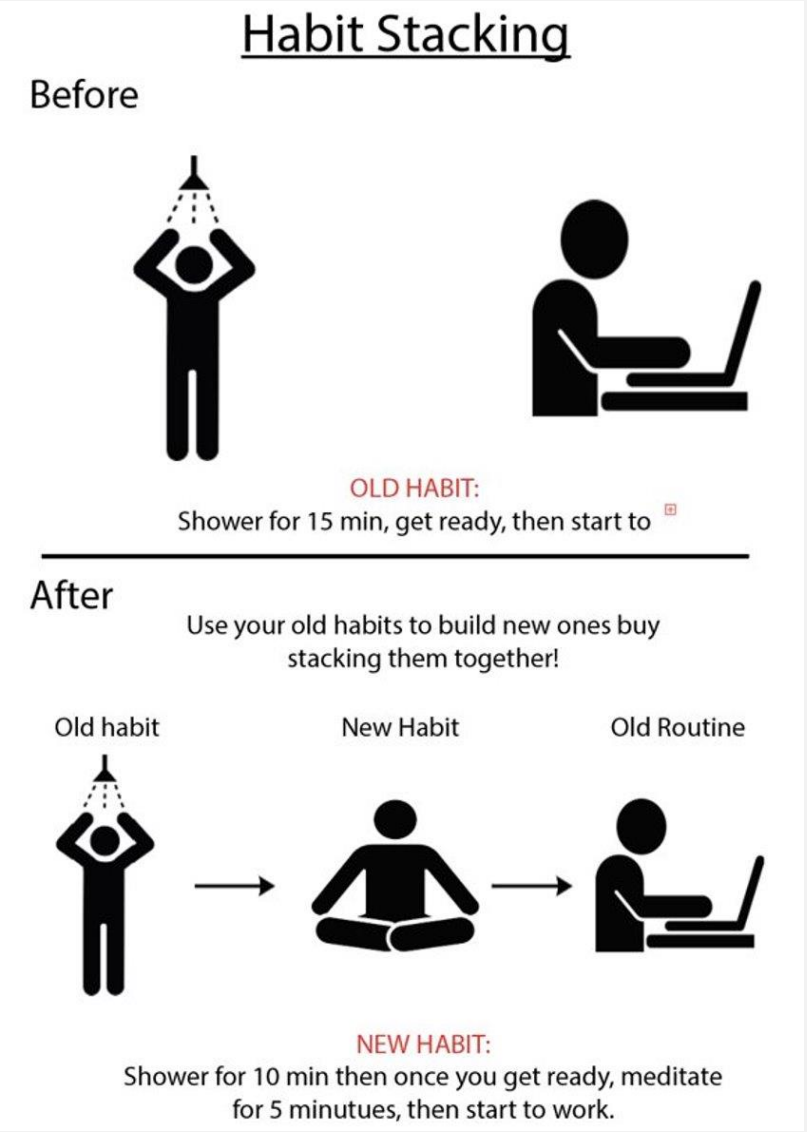

Image: Juan Perez

Agenda

Module 1:
Building A More Focused & Aligned Culture With Viva Goals

Module 2:
Deep Dive Into OKR Best Practices & Viva Goals Advanced Configuration

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Thank You

Message me on LinkedIn or email Richard@2toLead.com

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Richard Harbridge

2toLead Chief Technology Officer & Microsoft MVP
Super Friendly

Let's connect and find ways to do more and work together.

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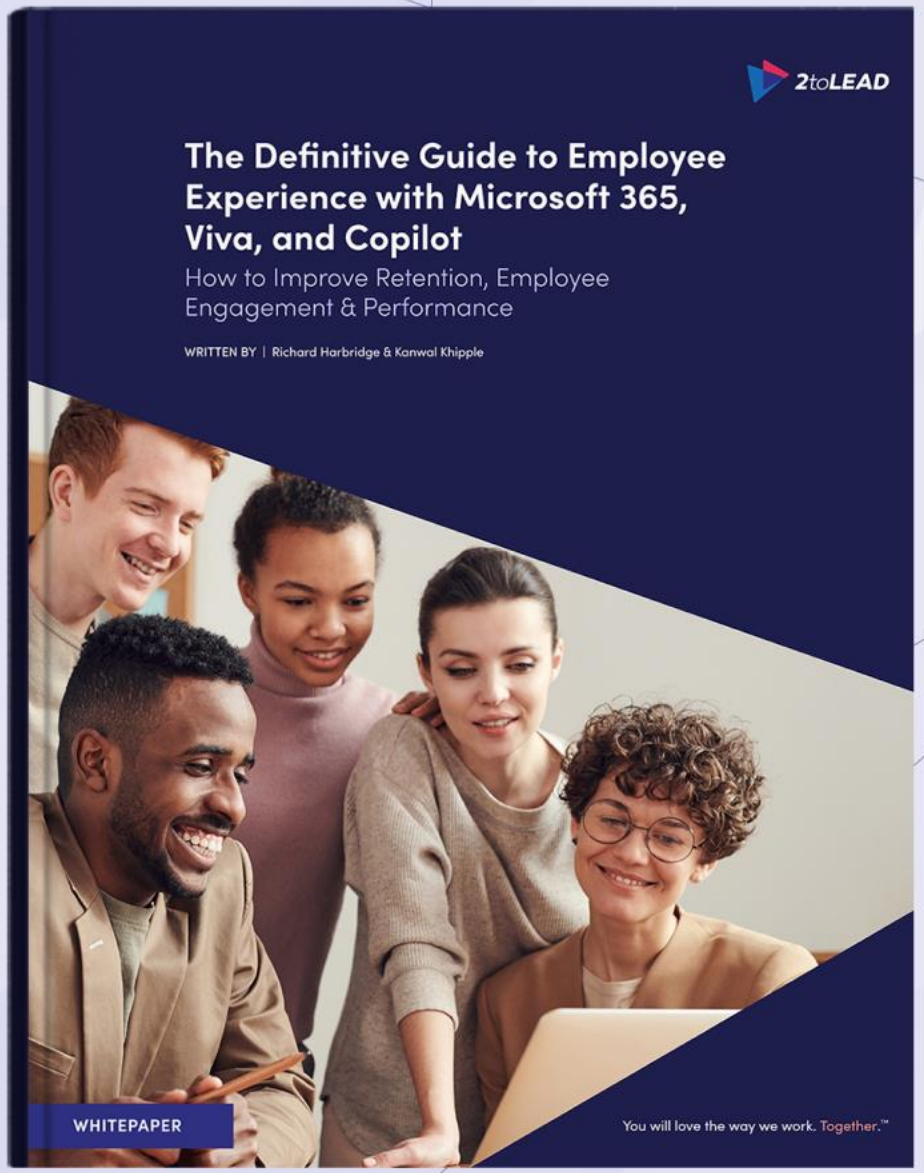
You will love the way we work. Together.™