Microsoft Viva Goals
Trial Configuration Checklist

This checklist is designed to help users configure the software to meet their specific needs and requirements. It includes items such as setting up user accounts, navigating the software, configuring integrations, and trying out individual features.

Outcome: You're well versed in using the core features of Viva Goals.

1. Set up your organization in Viva Goals

	Steps	Role	Description	Reference Link
1.1	**Log into your account**	M365 Global Admin	Log in to your Viva Goals account with your Azure Active Directory credentials.	Viva Goals Login
1.2	**Invite users in Viva Goals**	Viva Goals Admin	After the org is created, enter the names of the users you want to add.	Invite and remove users
1.3	**Create and edit teams**	Viva Goals Admin	Next, create teams for your organization.	Create and edit teams
1.4	**Configure Help and Support**	Viva Goals Admin	Discover how to add customized support links for your organization.	Configure Help and Support
1.5	**Navigate Viva Goals**	All users	Get a tour of the Viva Goals Software.	Viva Goals Navigation Quick Tour

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2. Create OKRs in Viva Goals

	Steps	Role	Description	Reference Link
2.1	**Write Objectives, Key Results & Initiatives**	All users	Make sure that you are writing effective OKRs that inspire your team to action and deliver on the results you are seeking.	Create Objectives, Key Results, and Initiatives with Viva Goals
2.2	**Align & cascade your goals**	All users	Aligning your objectives up and down at the team and organization level enables everyone to work toward a common goal.	Collaborate and Align with Viva Goals

3. Check in & Update OKRs in Viva Goals

	Steps	Role	Description	Reference Link
3.1	**Check in OKRs manually**	All users	Manually enter the latest value of the metric you are tracking through the Viva Goals app.	Check in with Viva Goals
3.2	**Check in OKRs automatically with a data integration**	All users	OKR progress is automatically updated via a data source such as Azure DevOps.	Viva Goals Integrations Overview

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4. Engage with Viva Goals

	Steps	Role	Description	Reference Link
4.1	Follow, like, comment, and share OKRs	All users	Engage with colleagues and foster collaboration.	Engage with Viva Goals
4.2	Share OKR updates via Teams (optional)	All users	Surface specific OKRs and Initiatives within your Teams chats to add more context to your conversations.	Share OKR updates in Microsoft Teams chats

5. Reporting in Viva Goals

	Steps	Role	Description	Reference Link
5.1	Create and manage review dashboards	All users	Visually organize collections of data and communicate at all levels of the organization.	Review dashboards in Viva Goals
5.2	Create OKR Reports (optional)	All users	Generate preset views, create custom views, and apply filters to view OKRs and Initiatives of interest using Explorer.	Using Explorer in Viva Goals
5.3	View OKR Analytics (optional)	All users	View analytics around adoption, engagement, and best practices for your OKR program.	OKR Program Analytics

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