

Microsoft Viva Goals x ADO Playbook

Microsoft Viva Goals is a goal alignment solution that connects teams to your organization's strategic priorities, unites them around your mission & purpose, and drives business results.

To do this, Viva Goals applies the power of the Objectives and Key Results (OKR) framework. Click here for details on OKRs: [Viva Goals Adoption](#)

Because Viva Goals is a part of Microsoft Viva, it integrates into the employee experience, empowering teams to be their best from anywhere.



Satya Nadella  
@satyanadella



Aligning the entire organization on the most important work is critical – and we're making this easier than ever with Viva Goals.

 **Microsoft 365**  @Microsoft365 · Jan 13

It's goal-setting season!

Dive into the latest trends along with ideas to make 2023 your most impactful year yet: msft.it/6012evpbO #MSFTViva

3:08 PM · Jan 13, 2023 · **124.1K** Views

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Introduction



Terms and Definitions

Organization

An Organization in Viva Goals resembles the topmost entity in an enterprise at which the organizational OKRs are set up and every team in that org aligns their OKRs with those organizational OKRs. Typically, an organization in Viva Goals represents the company or business unit or a large department within the company.

Objectives

Objectives are a proven goal-setting framework for creating alignment and focus and building a highly productive and engaged work culture to drive your business outcomes.

Key Results

Key Results (KRs) are the team or organization's measures to achieve an objective. They should be ambitious but achievable, and quantifiable enough to lead to objective scoring.

Initiatives

Initiatives are focused efforts that help you achieve your key results

Teams

Viva Goals supports multiple levels of hierarchy, from department level down to individual teams and functional units. To achieve this setup, you can use the teams and sub teams functionalities.

View

Viva Goals supports the ability to query across the organization to create a curated selection of OKRs. You can save this query as a view for yourself or to share across your organization.

Check-ins

Check-ins are updates you make to share progress on your OKRs. When you update progress on a key result, it automatically updates the status of the parent objectives as appropriate.

Viva Goals comparison to Azure DevOps (ADO)?

What problem does Viva Goals solve?

OKRs align your entire organization to strategy, shifting focus from output—the everyday work of your team—to outcomes, which are the results of that work. ADO being a tool focused on Outputs made the tracking and reporting of outcomes cumbersome. Viva Goals solves this problem by providing a single pane of glass, that is built for OKRs, to integrate the data required to report on the progress of those outcomes.

	ADO	Viva Goals
Report OKR Progress to LT		✓
Track Engineer Contributions	✓	
Track OKRs progress		✓
Visibility into Features & below	✓	✓ [1]
Visibility into other team's OKRs	✓ [2]	✓
Integration of other data sources		✓
Follow an entire team OKRs	✓ [3]	✓
Velocity Tracking	✓	
Capacity Planning	✓	

[1] Visibility into Features and below is capable when using Initiatives in Viva Goals but this will illustrate the state, assignment, and title of the work items in ADO. For better presentation of ADO work items utilize an ADO Dashboard.

[2] Visibility to other teams OKRs in ADO will require access to the area paths and development of a query to attain visibility.

[3] Following another teams OKRs in ADO will require access to the area paths and development of a query to attain visibility in addition to selecting the "follow" option on all interested work items.

Setup and Administration



How to Access Viva Goals

Via the Browser

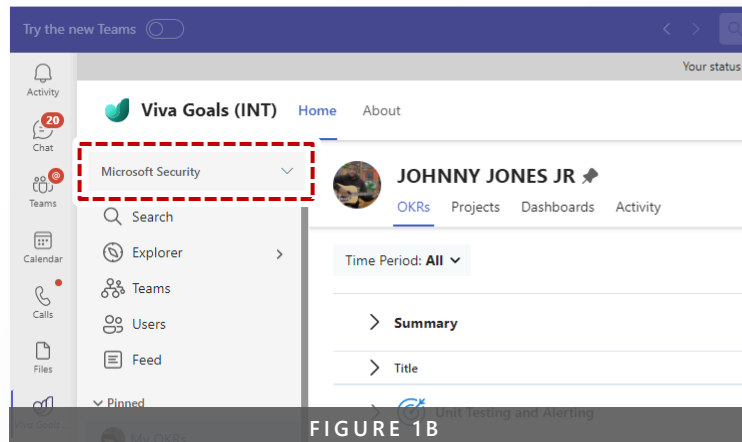
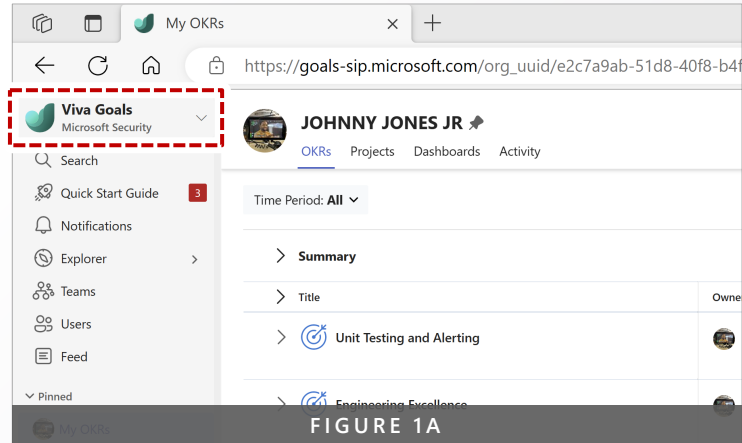
To open Viva Goals in the browser use this [URL](#) to gain access to our Production instance of Viva Goals. To switch organizations, use the drop down (highlighted in red) to view and select other organizations you have access to.

Via MS Teams

To open Viva Goals in MS Teams click on the **ellipsis (...)** and **type in "Viva Goals"** into the search and click on the **Viva Goals icon** to place the Viva Goals widget into your left panel. To switch organizations, use the drop down (highlighted in red) to view and select other organizations you have access to.

Via Azure DevOps

To access Viva Goals via ADO, locate the **Viva Goals tab** in the left panel within ADO. To switch organizations, use the drop down (highlighted in red) to view and select other organizations you have access to.



Adding Teams

Sub Teams and team hierarchy

A Team in Viva Goals is a group of users working towards a common set of team OKRs. The Team OKRs would directly or indirectly align to the organization OKRs. You can create as many sub teams as you want within each of your organization in Viva Goals. As you can see in the example (Figure 2A) the organization has 5 sub teams all correlating to the LT that currently reports to the organization. Although MSRC and SI&E both have sub teams they are consolidated under their main team to keep the structure neat. When creating a new team ensure that it is created with the appropriate team at the appropriate place in the hierarchy.

New Team Naming Standard

When creating a new team, it is important to ensure the entire name of your team is spelled out in addition to the acronym. The established standard is that when creating a team, you include the acronym in parenthesis followed by the full name of the team. Example: (EPS) Endpoint Protection Services. The acronym allows for simple search of the teams and the team being spelled out allows for those who are not familiar with your team to understand what you do.

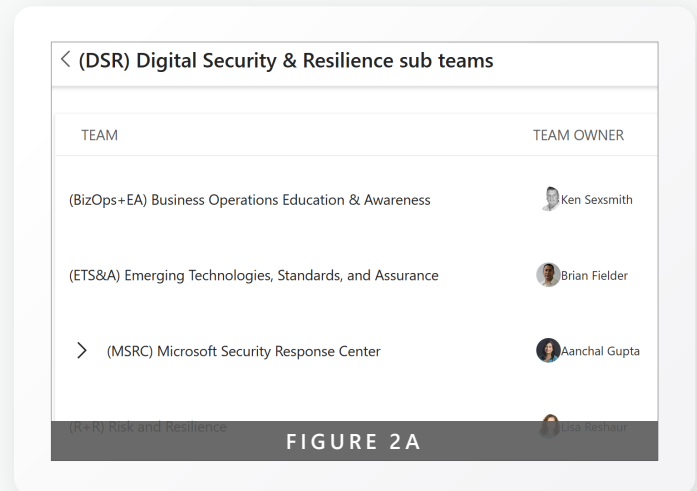


FIGURE 2A

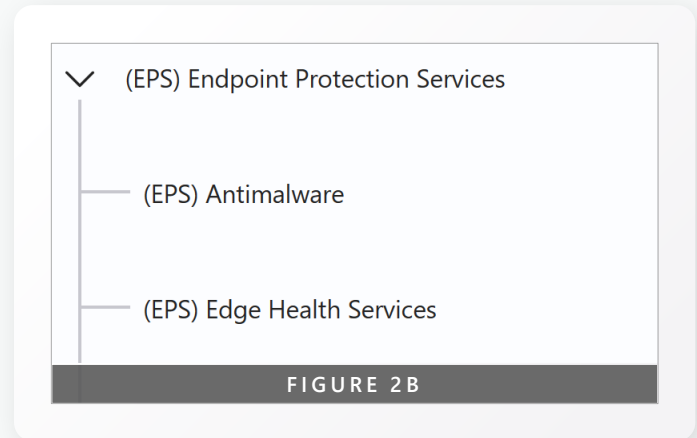


FIGURE 2B

New Sub-Team Naming Standard

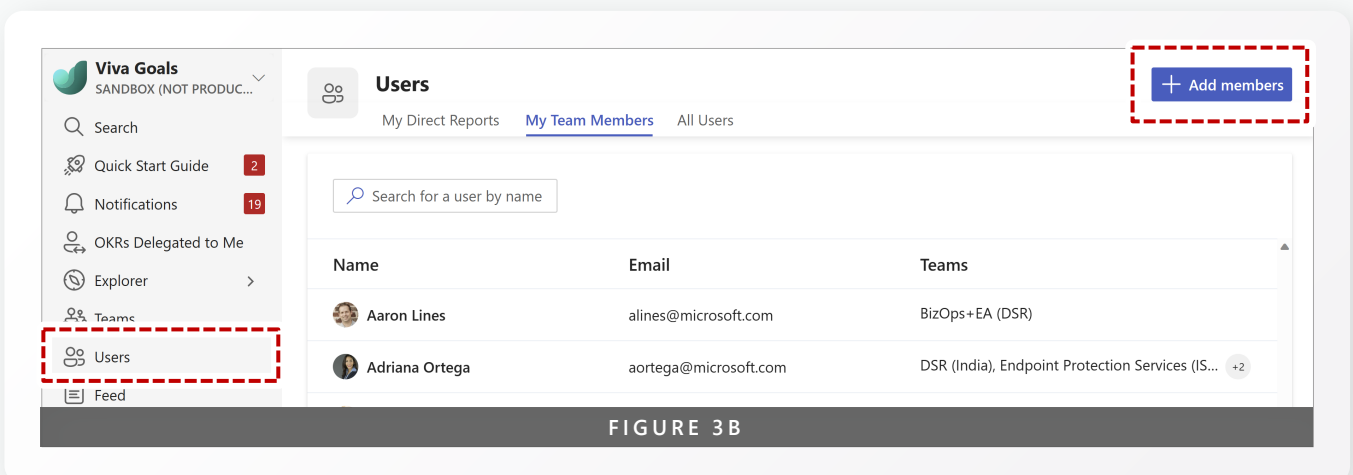
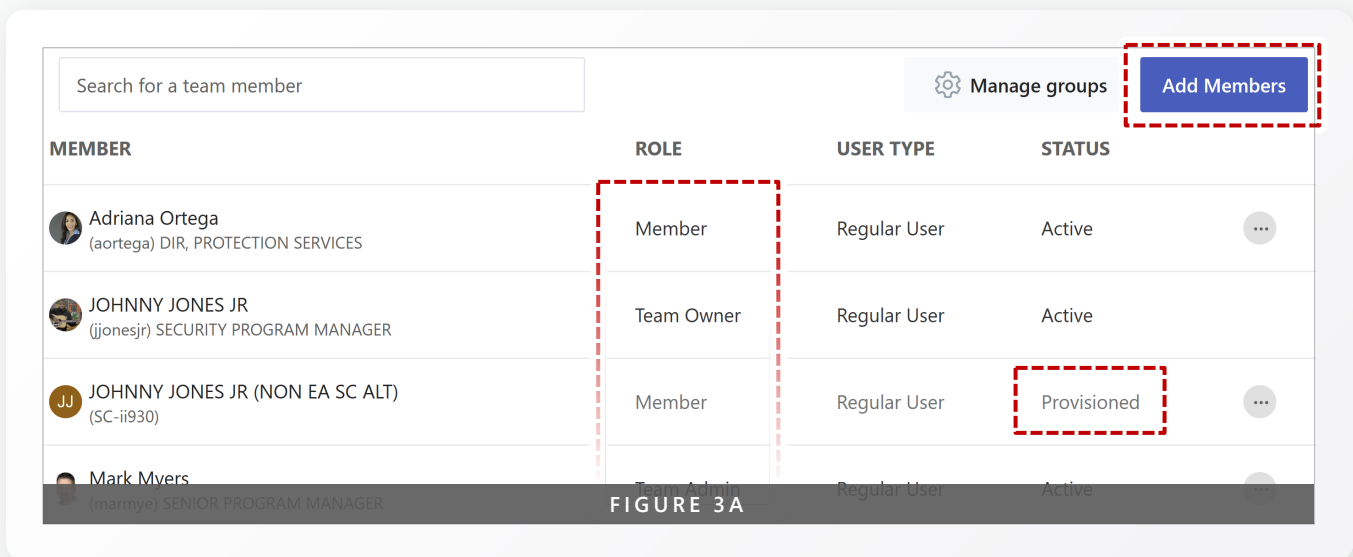
When creating a new sub team there are a few things to consider that will inform which acronym you will use.

- First, Is this a new service that needs to report to the next level of LT? Example Figure 2A if you are creating a new team that needs to report directly to the organization then the organization needs to be the parent team.
- If the team you are creating is a sub-service of an existing team such as in Figure 2B Then the acronym needs to be the same as the parent team.

Adding Users

To add new users, go to the Team OKR page select **ellipsis (...)** then the **Team Members** tab, select the **Add Members** button. Once the new screen appears, start typing the name or email of the user you wish to add. Auto-complete will suggest matching users. Select the name or email of the user, which is returned as a result.

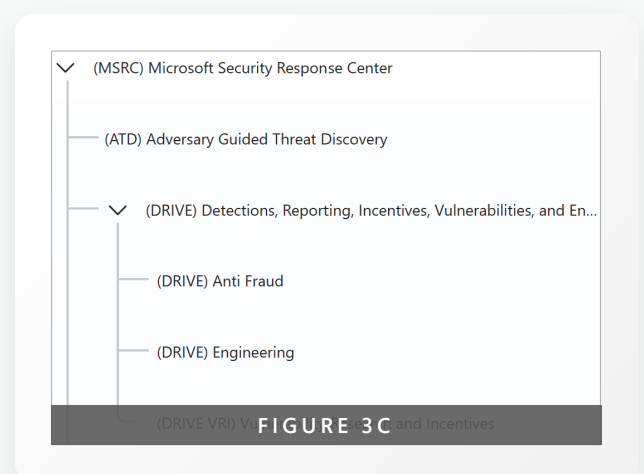
Another way to do this is to select **Users** from the menu and then select the **Add members** button. If using this second method, you must then add the user to your team using the first method. Users who have yet to log into Viva Goals will show as "Provisioned".





Team naming structure

The team naming structure for Viva Goals will follow a simple standard to allow for quick identification of each team via acronym and full team name as seen in Figure 3C. This allows for those who may not know what the acronym stands for avoid having to query the meaning. The sub-services under a team will maintain the parent team's acronym to identify which team they are supporting. For example, the DRIVE team has sub-services that contribute to the DRIVE overall service as shown below. They all share the DRIVE identifier. However, DRIVE being its own team will not have the MSRC identifier because it provides a specific set of services and thus must be identified with its own acronym.

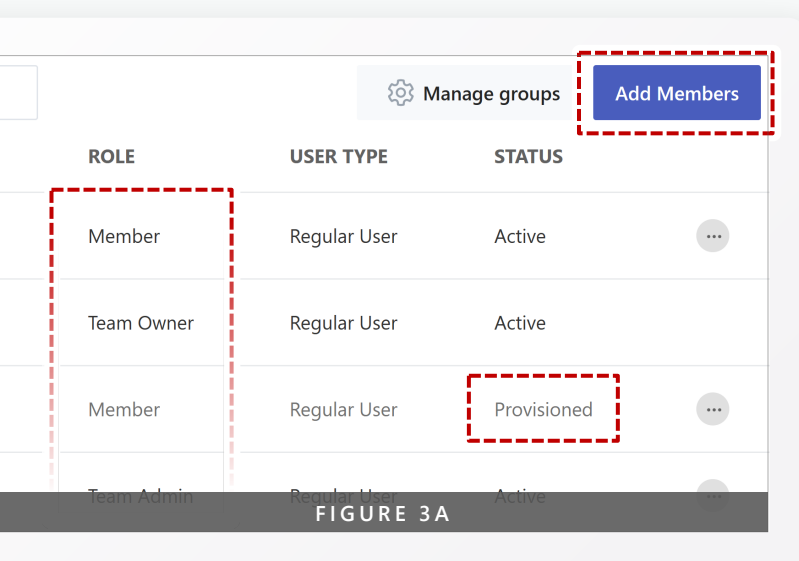


Team Owner vs Team Admin vs Team Member

There are several different roles for users to be assigned when added to a team. Please refer to **Figure 3A** when considering the below.

- **Team Owners:** Teams are functional units within a Viva Goals Organization. Team owners are typically managers of a team. Team owners can be managers of people or managers of cross-functional teams. A team can have only one team owner. Some tasks managed by Team owners are: Adding members to the team; Modifying the notification schedule settings of the team; Modifying the OKR and Initiative creation permission settings for the team; Editing or making check-ins for all OKRs of the team.

- **Team Admins:** Team admins are generally Planning Leads at a team level, who manage the set-up of a team that includes addition of members to the team, permission settings, notification settings, etc. A Team can have multiple team admins. Teams should limit the number of admins due to the scope of Admin permissions. Some tasks managed by Team Admins are: Adding members to the team; Modifying the notification schedule settings of the team; Modifying the OKR and Initiative creation permission for the team, creating and editing OKRS for the team; Editing OKRs of their team (This is a default activity).
- **Regular Members:** Regular members (the default role for everyone) are typically users within an organization who want to actively participate in the OKR process. Viva Goals recommends all users be added as regular users. Some of the tasks managed by Regular members are: Creating team-level OKRs and Initiatives in teams provided they have creation access to the team; Editing, aligning, and making check-ins on their OKRs.



Objectives, Key Results, Initiatives





Objectives, Key Results, Initiatives

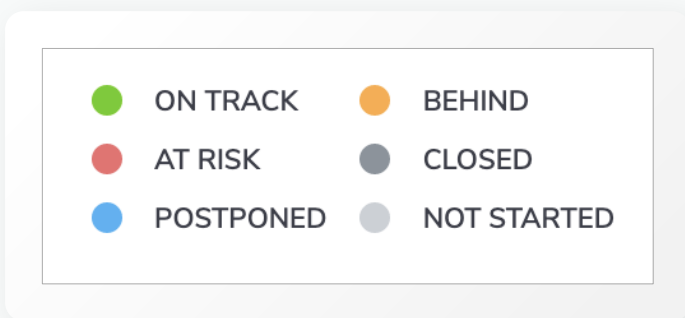
OKRs

One of the fundamental tenets of OKRs is distinguishing between outcomes versus outputs. Objectives, and Key Results, are focused on driving impact (i.e., outcomes), while Viva Goals initiatives are focused on outputs – the work that is planned to achieve the key results. Both are important metrics to track, but they measure different things.

Progress

Viva Goals calculates the expected progress % based on the 'Start date' and 'End date' specified by the owner of the OKR. The progress bar and graph below is found on the objectives' quick view. (Select the objective name to open up the objective's quick view). You can also select the 'full view' of the OKR to view the progress graph. On the first day of the time period, the expected progress would be 0%. On the final day of the time period, the expected progress would be 100%. While it is highly recommended to automate OKR progress updates either through an integrated data source, or via rollup from children's objectives, the OKR owner might have better context on progress.

In such cases, you can manually override the automated progress and status, and set them as you see fit example shown [here](#). Viva Goals lets you validate and indicate the progress of your OKRs with a status. OKR statuses are color-coded and below are the definitions of the different status colors:



For example:

The objective 'Successfully launch version 3 of our main product' has four key results that contribute to its progress. The objective's status will be derived on the progress %. In the example, the expected progress of the objective is at 82% and the actual progress is at 56%. Since (Expected Progress - Aggregate Progress > 0% & <=25%) the status is derived as 'Behind'.

Status will be calculated based on the progress updates of that objective or key result. In cases where all the key results of an objective have 'Postponed' or 'Closed' as the status, then the parent objective's status will automatically be marked as 'Postponed' or 'Closed' respectively irrespective of the Progress %. Items that are postponed will no longer contribute to the parent's progress. Here's how status is calculated based on the progress updates for an OKR:

● **"On Track"**

If (Expected Progress – Aggregate Progress <= 0%)

● **"At Risk"**

If (Expected Progress – Aggregate Progress > 25%)

● **"Postponed"**

If the Key Result will not be worked on for any reason (make sure to include the rationale in the comments of the KR)

● **"Behind"**

If (Expected Progress – Aggregate Progress > 0% & <=25%)

● **"Closed"**

At the end of the planning period only, mark all completed KR's "Closed".

● **"Not Started"**

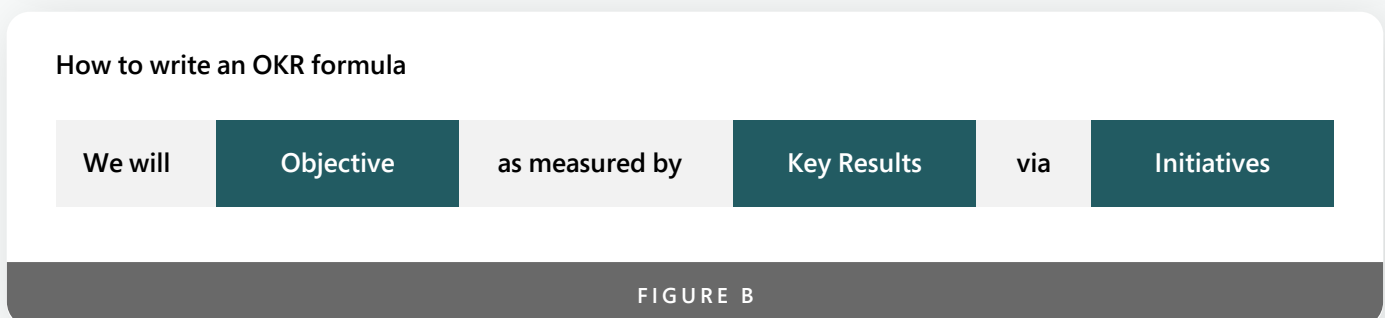
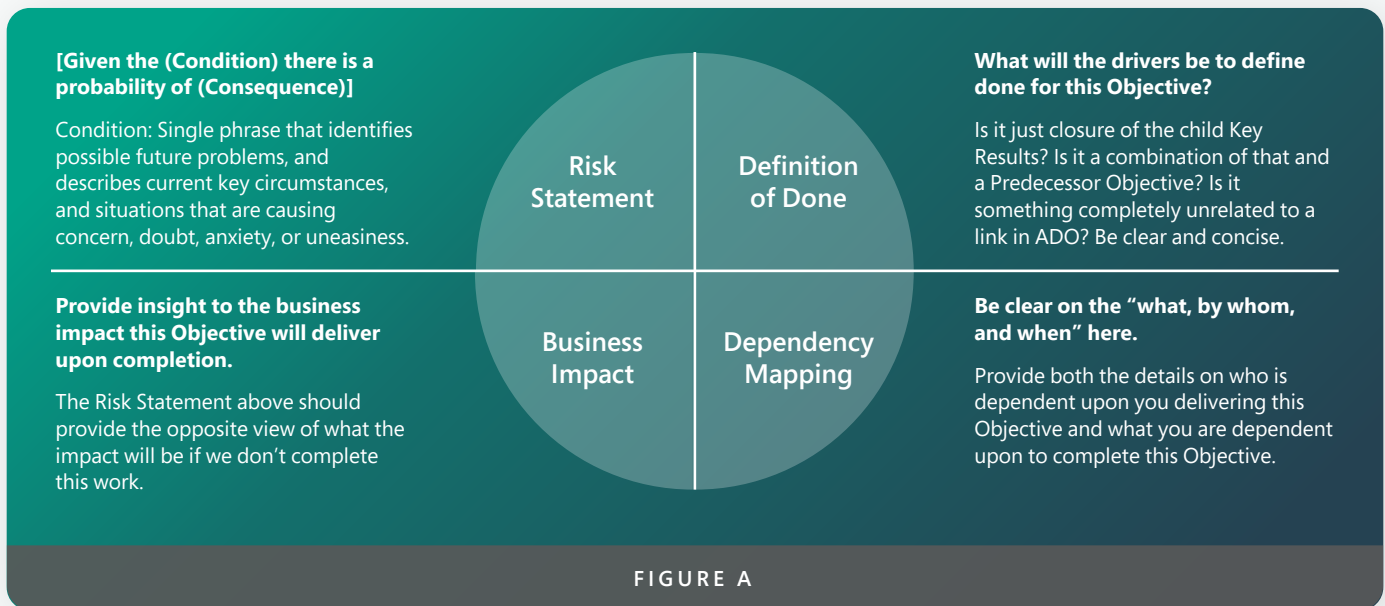
All KR's stay in this state until work has begun on them.

Writing an effective Objective and Key Result

Writing an effective Objective & Key Result(s) helps to establish a solution to a Risk Statement, identifying the measurable and actionable steps that ladder up to the solution to drive the Objective, and delivering on the Business Impact as seen in Figure A.

How to write an OKR formula can be found in Figure B.

More detailed information on the basics of Objectives and Key Results, find that information here: [Viva Goals Adoption](#)



Risk Statement:

[Given the (Condition) there is a probability of (Consequence)]

Condition: Single phrase that identifies possible future problems, and describes current key circumstances, and situations that are causing concern, doubt, anxiety, or uneasiness.

Key points in identifying a condition are:

1. Must be a FACT or perceived to be FACT
2. Must be REALITY BASED
3. Must be ACTIONABLE

Consequence: single phrase or sentence that describes the key adverse event or negative outcome(s) of the current condition.

FIGURE C

What is a Risk Statement

A Risk Statement helps to clearly articulate the exposure and impact of a given condition, including the probability of the consequence associated with performing and not performing the associated work to mitigate the risk. A risk statement must be actionable, show reasonable risk, and help in prioritizing conversations (trade-offs). See the example in Figure C.

Summary on effective Objectives and Key Results

In Summary, the critical framework for Objectives + Key Results are below:

Risk Statement:

[Given the (Condition) there is a probability of (Consequence)]

Condition: Single phrase that identifies possible future problems, and describes current key circumstances, and situations that are causing concern, doubt, anxiety, or uneasiness.

Key points in identifying a condition are:

1. Must be a FACT or perceived to be FACT
2. Must be REALITY BASED
3. Must be ACTIONABLE

Consequence: single phrase or sentence that describes the key adverse event or negative outcome(s) of the current condition.

Business Impact:

Provide insight to what impact this Objective will deliver upon completion. The Risk Statement above should provide the opposite view of what the impact will be if we don't complete this work.

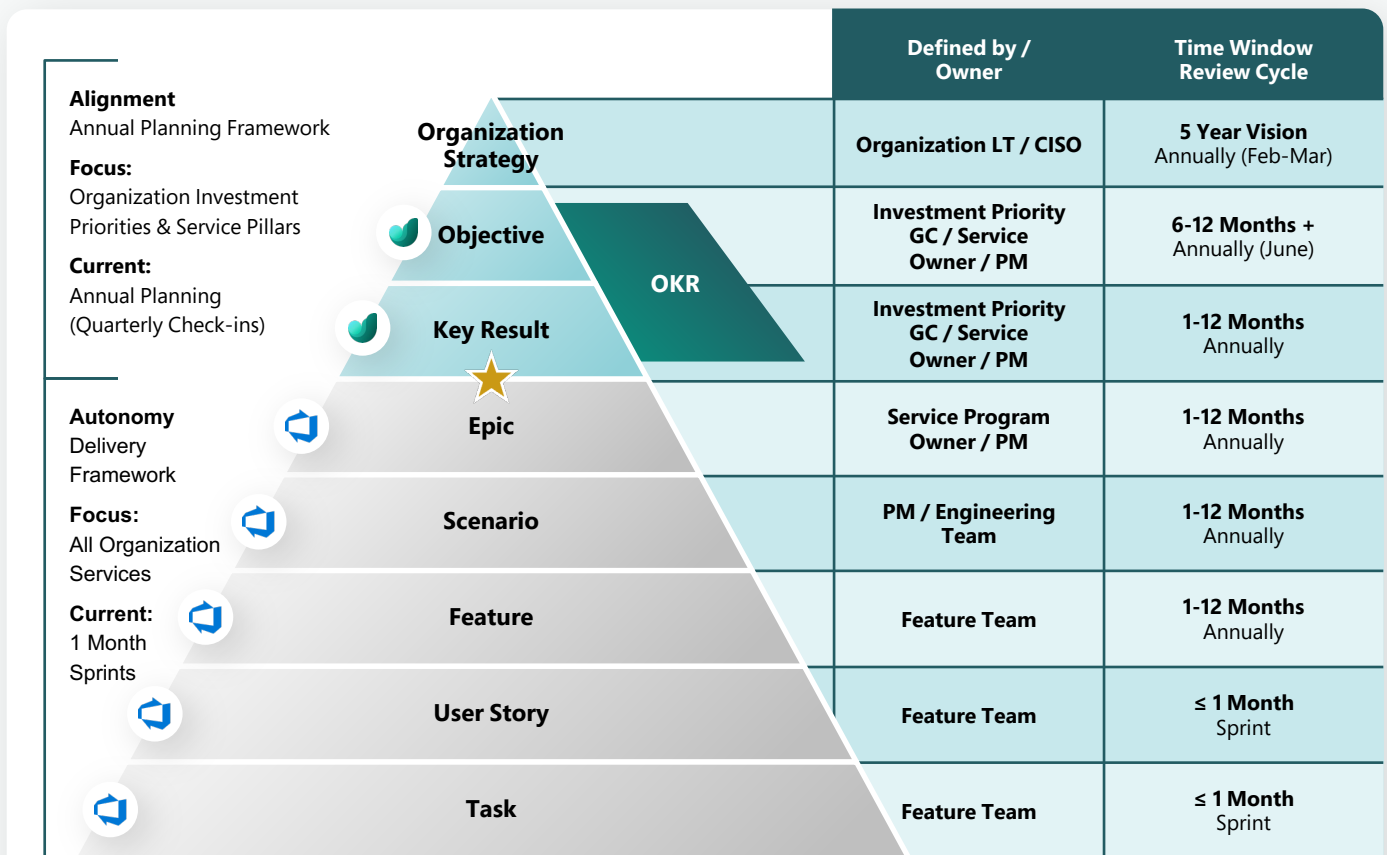
Definition of Done:

What will the drivers be to define done for this Objective? Is it just closure of the child Key Results? Is it a combination of that and a Predecessor Objective? Is it something completely unrelated to a link in ADO or Viva Goals? Be clear and concise.

Work Item Taxonomy (Viva Goals + ADO)

Organizations should use the following Viva Goals + ADO Taxonomy to plan and execute engineering and development work, driven by the overall Organizational Strategy which establishes key Investment Priorities (IP). Refer to the Alignment section below. The ADO taxonomy for Organizational Services are defined in the Autonomy section below as well as Ownership, Time Window, and Review Cycles. The Organizational Strategy updates and teams plan annually with a quarterly check-in. The organization manages the Objectives + Key Result(s) in Viva Goals (Program Management) and the balance of the Work Item Types in ADO (Engineering + Development work) with the ADO container being an Epic in ADO, which ties to the OKRs in Viva Goals. Refer to Figure D (page 19).

Work Item Taxonomy (Viva Goals + ADO)



★ Teams are welcome to use any ADO WI type (Epic, Blueprint, Scenario, etc.) if it is a 1:1 relationship between the Key Result in Viva Goals and the WI type in ADO. A 1:Many relationship is far more difficult to manage when making updates (changes + new). Avoiding Shared Queries.

FIGURE D

Adding Objectives

Manually Creating Objectives

As seen in Figure 4A, when creating objectives manually in Viva Goals you want to ensure that you are creating it under the correct team, and it is in the correct time period (can be found under the “When” setting).

Importing OKRs via Excel

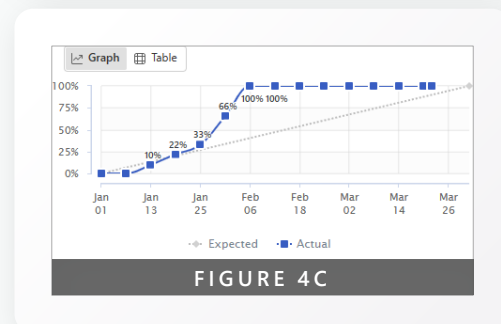
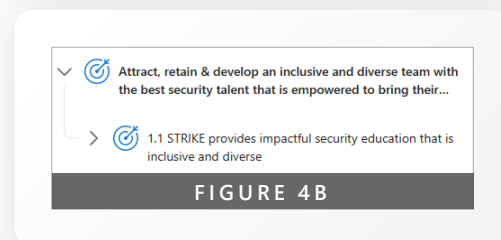
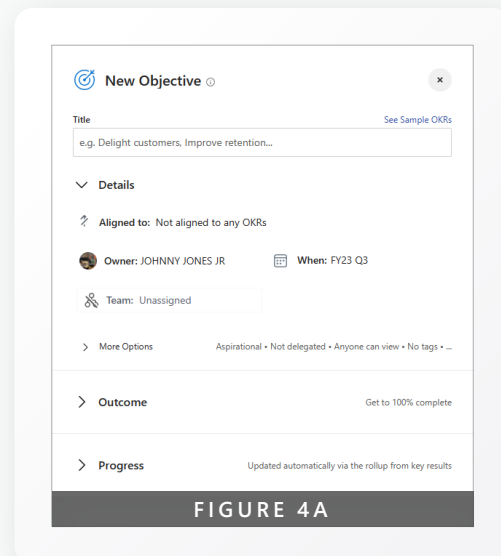
Viva Goals allows bulk importing of Objectives, Key Results and Initiatives using a standard Excel template. Bulk import allows you to take pre-existing lists of OKRs and Initiatives and quickly add them to Viva Goals. The import process has the following limitations:

- The number of rows in Excel should not be greater than 1000.
- The file size limit is 5 MB.
- The file should not be protected.
- Avoid changing the name of the sheet (for quick detection), renaming column headers, and removing columns.

Objective Progress

Objective progress will be measured by the child Key Results as the default setting. You may choose to track it via a manual update. You may also have a child objective provide contribution to a parent

objective as seen in Figure 4B. The progress trend graph can be seen when clicking on an objective and will show the progress in one week intervals. Objectives status will be determined by your progress in relation to your objective’s start and end date as seen in Figure 4C. As your expected progress moves further from the actual progress your status will move from “On Track” to “Behind” then “At Risk”.



Adding Key Results

Manually Creating Key results

When creating Key Results manually in Viva Goals, as seen in Figure 5A you want to ensure that you are creating it under the correct team, and it is in the correct time period (can be found under the “When” setting).

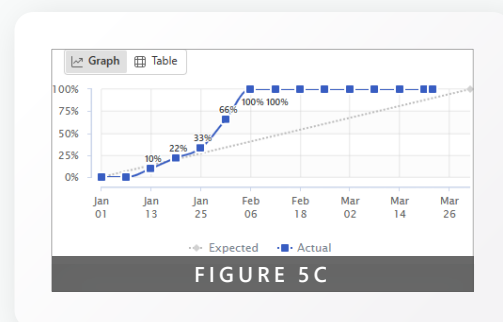
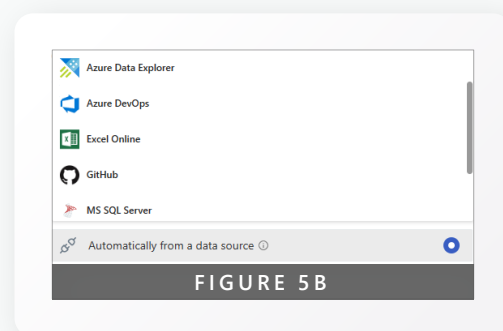
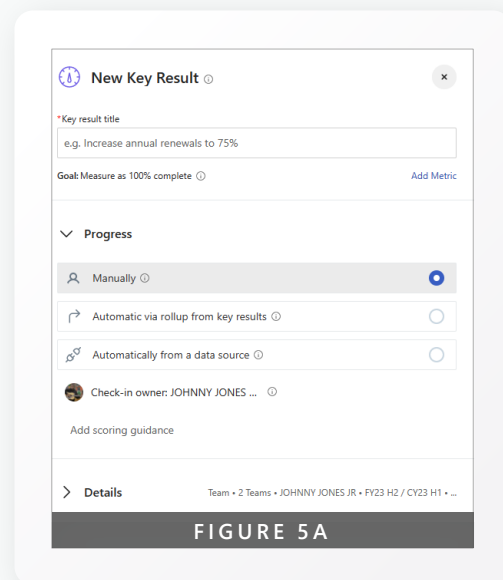
Key Result Integrations

Under the “Progress” tab you will see that there are three options to provide the data to update the progress of your Key Result. The first two will look familiar as they are the same options that we have when creating an Objective. The third option is the one that will be of significant use to those who want to automatically update their progress using an outside data source. In Figure 5B you will see a short list of the options offered to provide this data integration. For a detailed list (as of April 2023) please see the Integrations section of this playbook.

Key Result Progress

Key Result progress can be measured manually, via integrations or as a rollup from other Key Results or Initiatives. Initiatives offer you the ability to have more than one integration provide the

progress update for an individual Key Result, see Figure 6B for an example. The progress trend graph in Figure 5C can be seen when clicking on a Key Result and will operate the same as the Objective trend graph.



Adding Initiatives

Using Initiatives

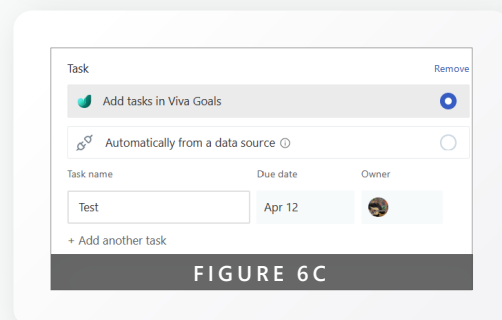
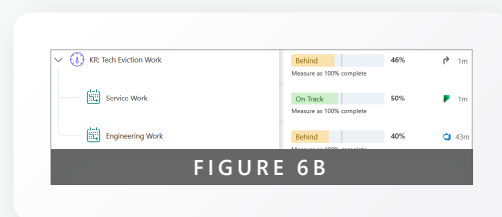
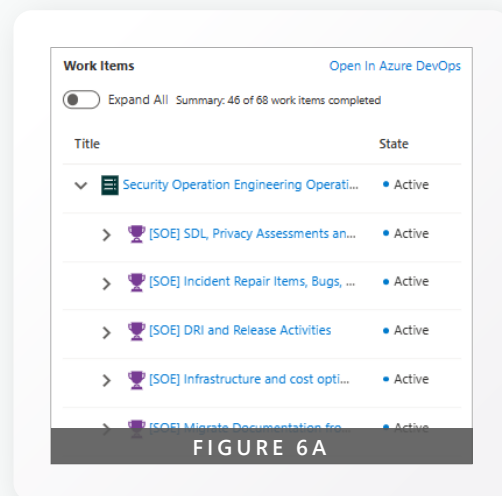
Initiatives are currently the lowest object type in Viva Goals. Its best utilized to represent an initiative in a Key Result. Refer to Figure 6B for an example of two initiatives contributing to the parent Key Result. The initiatives are each representing specific work that is contributing to their, and in turn their parent's, progress. Also notice that each initiative is connected to a different integration to pull this progress automatically (this is depicted by the Azure DevOps and MS Planner icons on the right of the Figure).

Creating Initiatives

When creating an initiative there are a few differences that cause this item type to differ from an Objective and Key Result. First, in order to connect to an integration source, you must click on Outcome>Add Tasks. This differs from the Key Result where the integration was under "Progress". Initiatives also provides the ability to create and assign tasks that can be closed to contribute to the progress of the initiative (Refer to Figure 6C).

Initiatives Progress

Initiative progress can be measured manually, via integrations or individually created tasks. Initiatives offer you the ability to have more than one integration provide the progress update for an individual Key Result, see Figure 6B for an example. When connecting to ADO you will be able to see the individual work items linked to that initiative as seen in Figure 6A.



Integrations



Integrations

Viva Goals supports integration with Microsoft and third-party apps and platforms so that the OKR implementation process is as simple, effective, and seamless as possible. In this playbook we will dive into ADO but for PowerBI, Planner, Kusto, SQL, and Excel.

Azure DevOps

Viva Goals integrates with Microsoft Azure DevOps to automatically update key results and initiatives in Viva Goals. Key Result and Initiative progress is updated automatically based on the connected Azure DevOps work items. You can leverage the Azure DevOps integration to automatically track progress for a key result and to automatically track progress for an Initiative KPI.

PowerBI

Key Results and initiatives that use metrics to track completion in Viva Goals can directly connect to data from reports in Power BI using our simple point and click interface. Viva Goals will sync the data at regular intervals, ensuring your Key Results and initiatives always stay up to date with the latest progress.

Planner

Viva Goals integrates with Microsoft Planner to automatically update key results and initiatives in Viva Goals. OKR and initiatives progress is automatically calculated based on the completion of tasks in Planner. You can connect to Planner as a data source to automatically update three different capabilities in Viva Goals: track progress for a key result, initiative, and initiative KPI.

Excel

Viva Goals Excel Online integration lets you update your objective and key results (OKR) progress automatically based on the values of specific cells in Microsoft Excel worksheets. For example: You use Excel Online to track the revenue generated by the sales team. You have an objective in Viva Goals to achieve \$3M ARR for a quarter. When you link this objective to the corresponding sheet in Excel Online, the status of your OKR will be updated automatically as the value in the cell changes. You won't have to switch back and forth between your sheets and Viva Goals to update progress.

More Integration Capabilities

Azure Data Explorer (Kusto)

The Viva Goals integration with Azure Data Explorer (aka Kusto) allows you to link your OKRs in Viva Goals to a cluster and database in Azure Data Explorer and provides automatic, periodic updates on your OKRs. For example, if you have a Key Result to increase visits and the time spent in your app by 60%, then you can directly link this Key Result with the relevant data in Azure Data Explorer. This data will be automatically synced with Viva Goals every hour. Whenever there's a change in the underlying dataset, the OKR status will be updated.

MSSQL

Viva Goals integration with Microsoft SQL Server lets you link your OKRs in Viva Goals to a server database in Microsoft SQL Server to provide automatic, real-time updates on your objectives. For example, if you have an objective to increase visits and the time spent in your app by 60 percent, link this objective with the relevant data in SQL Server. Whenever there's a change in the dataset and the database is updated, this data is automatically synced with Viva Goals every hour, and the OKR status updated.

GitHub

Viva Goals GitLab integration enables you to update your objective and key result (OKR) progress automatically based on the progress of issues in your GitLab initiatives. Let's use this example: You use GitLab to track your initiatives. You have an objective in Viva Goals to resolve 30 issues every quarter. When you link this objective to the corresponding initiative in GitLab, the status of your OKR will be updated as the issues under the associated initiative get resolved. You can also track the progress of issues that are being handled by a specific user for objectives that are user centric. Viva Goals will automatically sync the values for you and chart your progress toward the goal, saving time while keeping your OKRs current.

Azure DevOps

Preparing to Integrate

When preparing to integrate ADO there are several preparatory steps to facilitate the integration. First you will want to set up your ADO objects in preparation to link to Viva Goals. See Figure 7C for the process flow from ADO to Viva Goals.

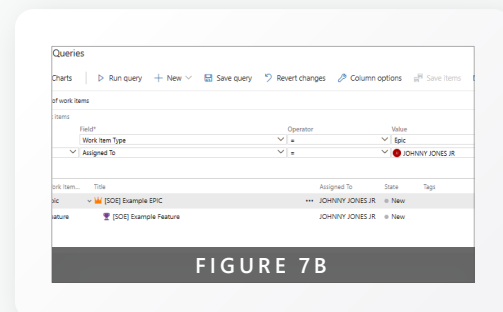
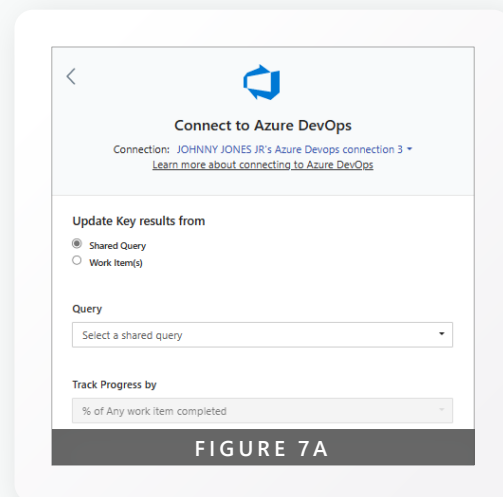
Integration via Query

Select the shared query method shown in Figure 7A. Search for and select the shared query that contains the Azure DevOps work items (Example in Figure 7B). Select the work item type to track progress. You can choose from any work item type in the query or all work items in the shared query. Viva Goals progress is calculated as the % complete of the chosen work item type (This means items whose state is "closed"). Once saved, you should now see the Azure DevOps icon next to your initiative. Viva Goals will now automatically sync the work item details and update the progress once per hour based on the completion percentage of the ADO work item types selected within your shared query.

Direct Integration (Connect the Key Result in Viva Goals to the Epic in ADO)

Refer to Figure 7A. Select work items method. Next select the work item type

to connect to – we recommend utilizing the (EPIC) work item type in your Azure DevOps hierarchy as the parent to the work being accomplished (refer to Figure 7C). An Epic is a 1:1 relationship from ADO to Viva goals. The integration will automatically include the child work items. For example, connect to an EPIC that is the parent to the Features versus connecting to each individual Feature. Search for and select the specific work item(s) of the chosen type. You can choose to measure progress by a specific work item type (i.e., the type you directly connect to or any of its children types) or all work items (i.e., connected and children).



Azure DevOps / Viva Goals flow

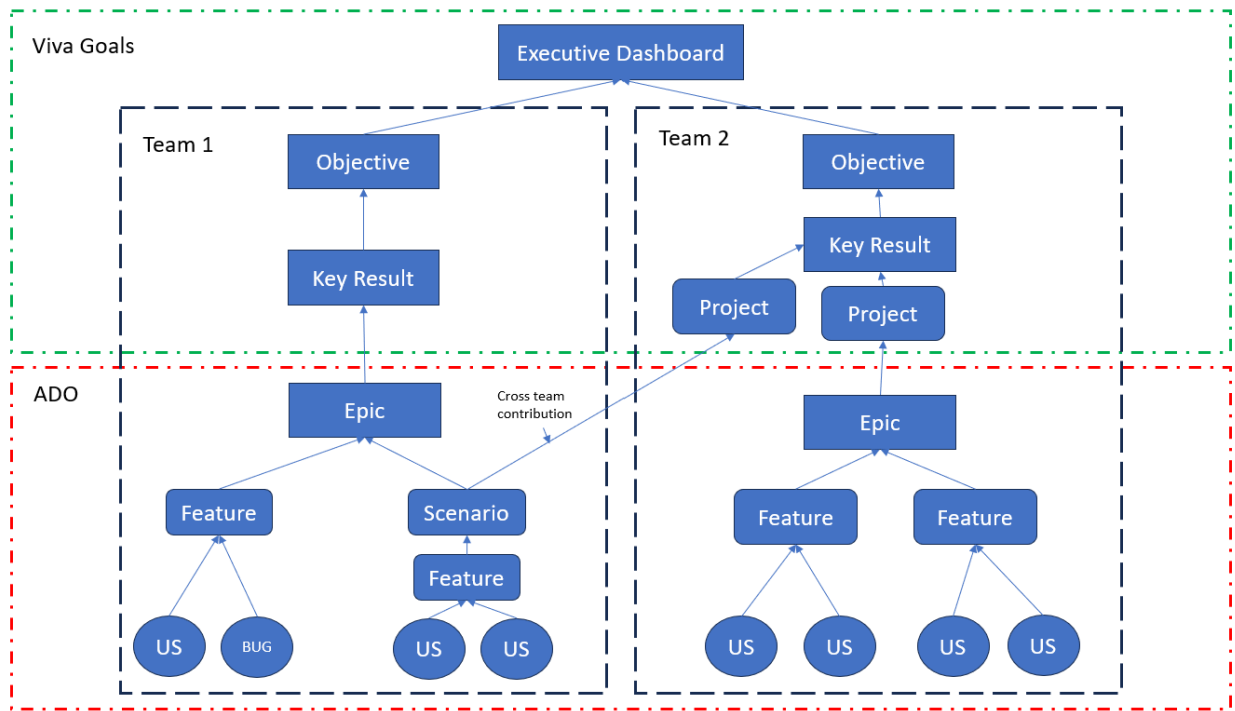


FIGURE 7C

Dependency Mapping



Permissions

Each item type in Viva Goals has their own permission settings shown in Figure 8A. There are several options on this screen, each allowing you to grant or remove visibility or access to these items. Under the Privacy section there are options to restrict visibility and alignment permissions to everyone or those who you select. Sharing edit access provides the permissions to **Delete, modify weights, close, reopen** the item. Direct access or default access has full permissions over the item. Descriptions of Team admins can be found [here](#). Direct access is provided for those who are one of the following roles:

1. OKR owner(s)
2. Creator of the OKR
3. Team Admin/Team Owner
4. Manager of the OKR owner
5. Owner of the parent OKR (the OKR with which this OKR is aligned to)

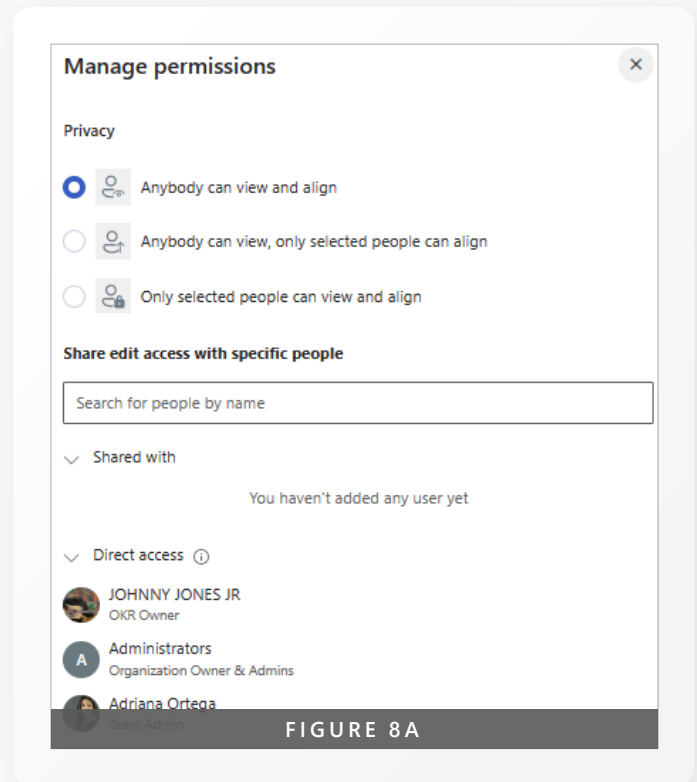


FIGURE 8A

OKR Ownership

There are several different roles for users to be assigned when added to a team. Please refer to Figure 8A when considering the below.

- **Owners:** Teams are functional units within a Viva Goals Organization. Team owners are typically managers of a team. Team owners can be managers of people or managers of cross-functional teams. A team can have only one team owner. Some tasks managed by Team owners are: Adding members to the team; Modifying the notification schedule settings of the team; Modifying the OKR and Initiative creation permission settings for the team; Editing or making check-ins for all OKRs of the team.
- **Delegate:** Team admins are generally OKR champions at a team level, who manage the set-up of a team that includes addition of members to the team, permission settings, notification settings, etc. A Team can have multiple team admins. Teams should limit the number of admins due to the scope of Admin permissions. Some tasks managed by Team Admins are: Adding members to the team; Modifying the notification schedule settings of the team; Modifying the OKR and Initiative

creation permission for their team; Creating OKRs for their team; Editing OKRs of their team (This is a default activity).

- **Check-In Owner:** Regular members (the default role for everyone) are typically users within an organization who want to actively participate in the OKR process. Viva Goals recommends all users be added as regular users. Some of the tasks managed by Regular members are: Creating team-level OKRs and Initiatives in teams provided they have creation access to the team; Editing, aligning, and making check-ins on their OKRs or the OKRs that they've created.

Other Roles that are automatically assigned:

- **Creator of the OKR:** When an OKR is created the creator will have direct access to edit the OKR even if they are not listed as the Owner.
- **Manager of the OKR owner:** The manager of the OKR owner will also be granted direct access to that OKR.
- **Owner of the parent OKR (the OKR with which this OKR is aligned to):** If an OKR is aligned to another OKR, the owner of that OKR will have direct access.

Dependency/ Ownership Mapping

Alignment

Alignment in Viva Goals is a powerful way to show how your OKR is contributing to your overall OKRs, partner team's OKRs, and your LT's OKRs. Figure 9A shows a depiction of an Objective aligned to another Objective. You can align one Objective or Key Result to multiple OKRs as shown in Figure 9B. This is a great way to reflect a dependency between teams. You can also set permissions for alignments. With Align permissions, OKR owners can control who aligns with their OKRs. For example, as a Manager who wants their direct reports to align to their own OKRs, you can enable this using the Align permissions feature shown in the permissions section. By setting alignment permissions for an OKR, OKR owners can avoid misalignment of OKRs by other users to their OKRs which would otherwise affect their OKR's progress.

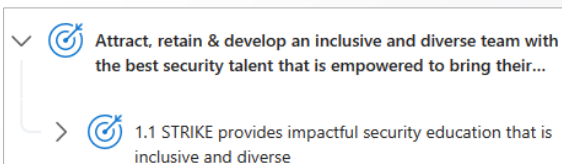


FIGURE 9A

Co-Ownership

In contrast to the alignment the co-ownership provides a way to show that two teams are both contributing to the OKR. This can also be used to push an OKR to a parent team in Viva Goals to create a consolidated view for that team. Figure 9C shows that this Objective is owned by Team 2 and Team 3. The limit on co-ownership is 5 teams per OKR. Note: each of the administrators on the co-owning teams will have default access to the OKRs.

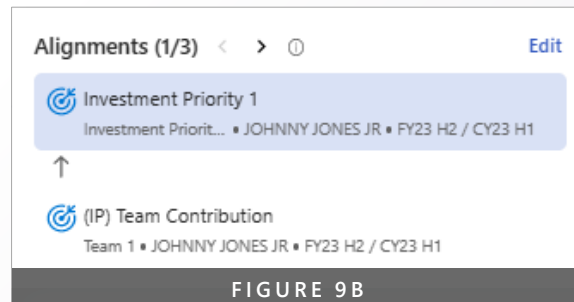


FIGURE 9B

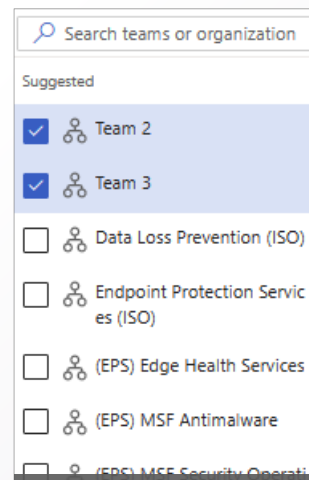


FIGURE 9C

Check-ins and Updates



Team Cadence

Team Owners and **Team Admins** can create a custom cadence for reminders for their departments and teams in **Admin** > **Team Settings** as seen in Figure 10A and 10B. For OKRs having single or multiple owners, you can decide which user in the organization is responsible for making check-ins use the 'check-in responsibility'

feature. The **check-in owner** will be able to check in the OKR (manual check-ins) and set up a data link on the OKR (for auto check-ins). This user will be receiving the check-in reminders. In the case of multiple owners, this will prevent all the owners from receiving reminders. Only the user set as 'check-in owner' will receive the reminders.

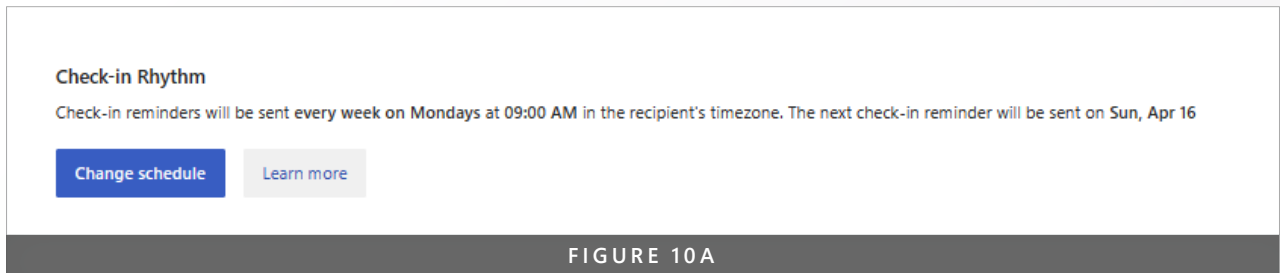


FIGURE 10A

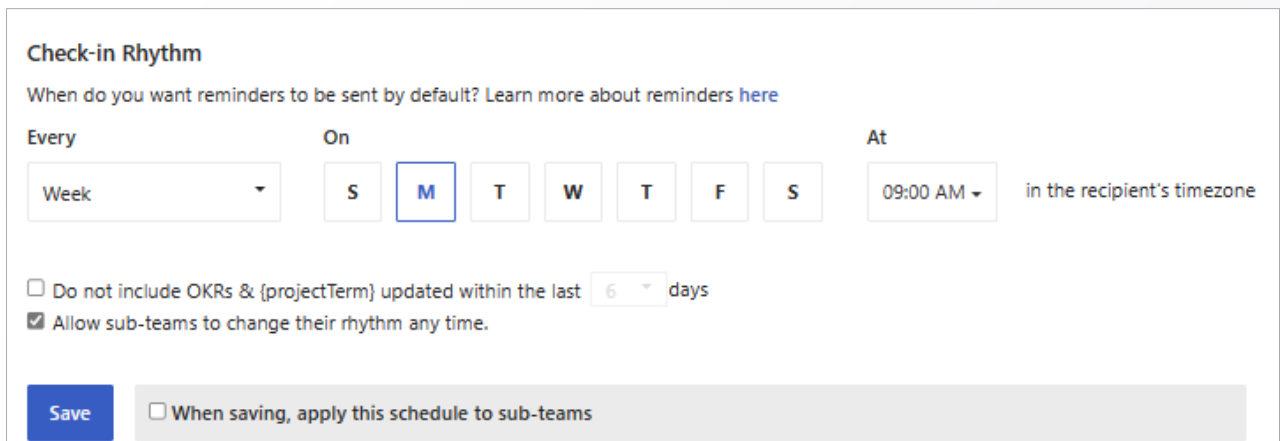
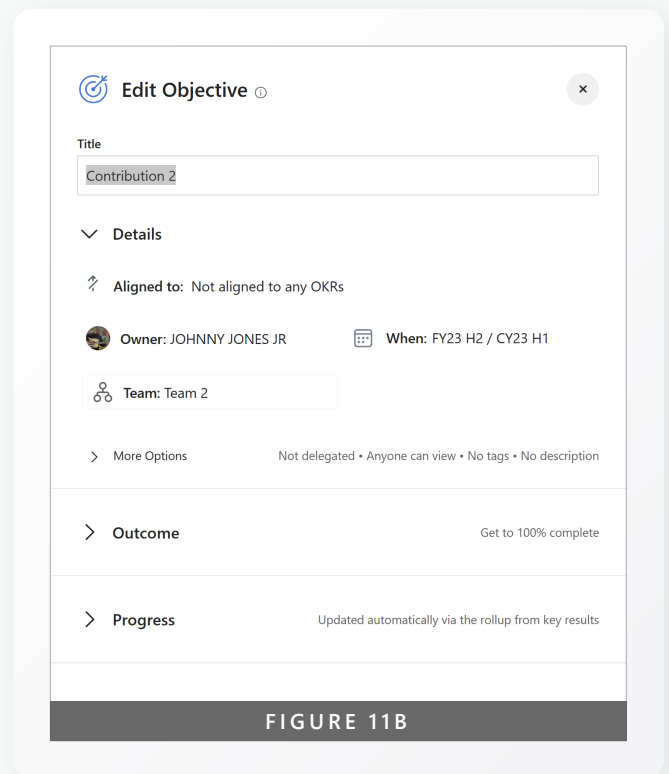
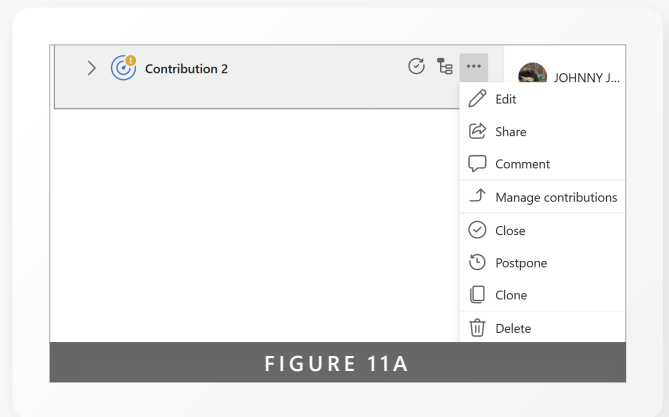


FIGURE 10B

Updating OKRs

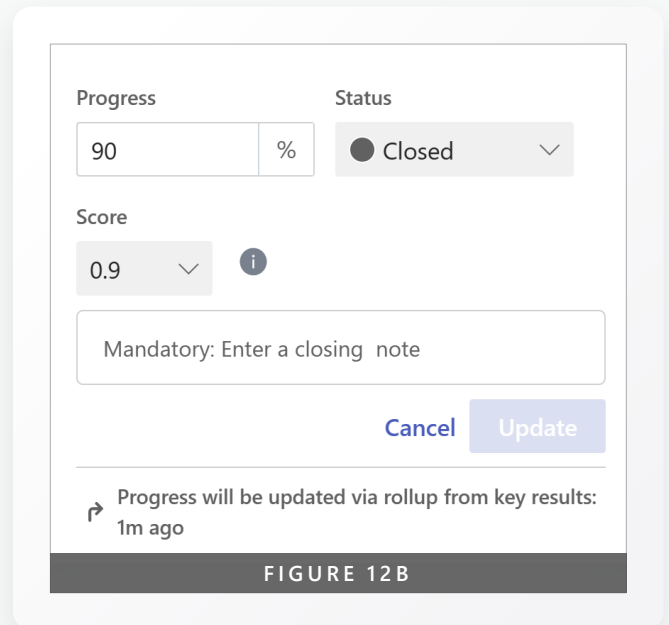
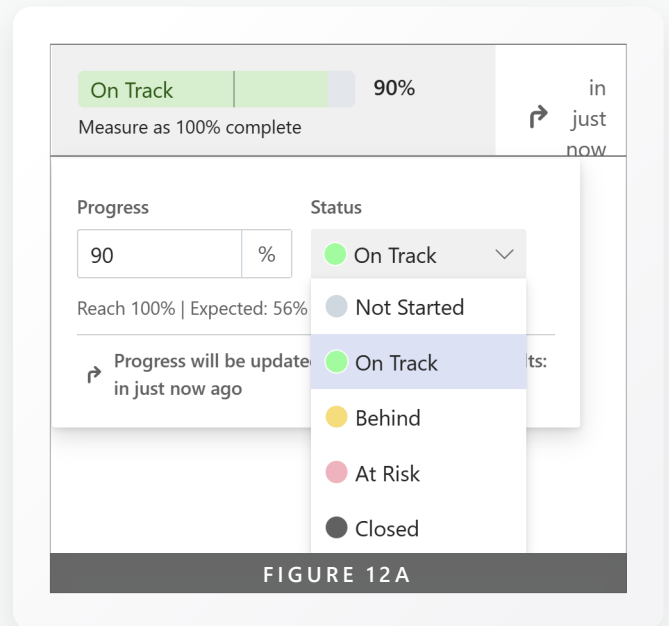
Once you create an Objective, Key Result, or Initiative, you do have the ability to modify the item. You can accomplish this by hovering over the item and selecting edit as seen in Figure 11A. Once you are in the edit screen, Figure 11B, you will be able to modify any of the setting that you set when creating the item.



Check-ins and Updates

Closing an OKR

At the end of your OKR time period, use the following process to close, score, and comment on your progress. Click on the progress bar for the OKR that you want to close as seen in Figure 12A. Next, choose the close option and another panel will open with a few options as seen in Figure 12B. You will see there is a section for a score and a closing note. We will cover scores later in this section. If after you close the OKR you need to reopen it, you can do this by following the next series of steps.



Hover over the OKR you want to reopen and select Reopen and a new panel will open as seen in Figures 12C – D. You will need to enter in the progress and enter in a reopen note explaining why your item is reopening.

A note about scoring

At the end of the relevant OKR time period, you will close your key results and score them based on the progress made. The scoring range is 0 – 1, with 0.7 - 0.9 being considered successful. Not all OKRs are aspirational, and those that are "stretch" or "aspirational" should be marked as such. The idea is that you hit 0.7 as a standard each cycle. Once you've scored, add comments on what went well, what you learned, and what can be done better next time. Thoughts to consider as you determine a score include, "What did we learn from this?", "How can we improve next time?" and "How do we build on this work?". Refer to Figure 12E.

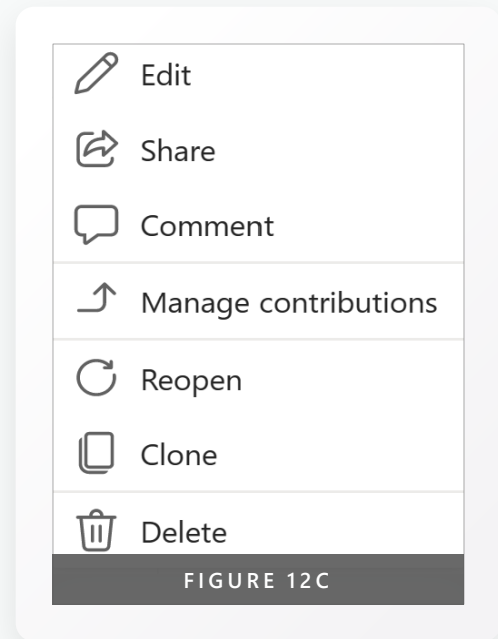


FIGURE 12C

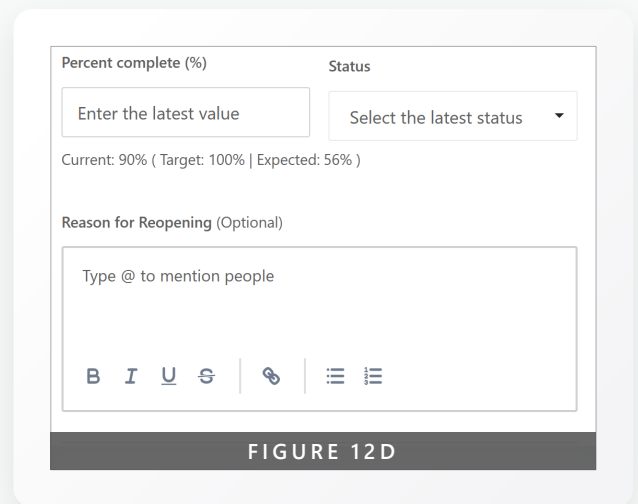


FIGURE 12D

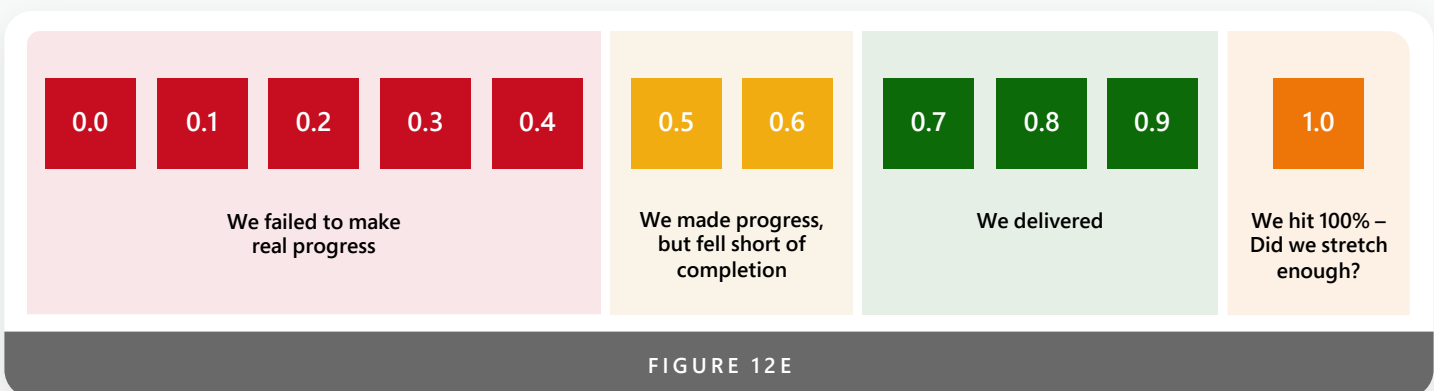


FIGURE 12E

Following/ Followers



Following/ Followers

Following others OKRs

To follow organizations, teams, and users that are important to you, select the **Follow** icon on the team you wish to follow as shown in Figure 13A. This option is located on the top right of the team's landing page.

Following allows you to receive notifications in Viva Goals regarding the OKRs of teams you follow. By default, you will be following these teams:

1. The organization
2. Teams you're part of
3. Teams you own
4. Parent teams of your teams
5. Teams owned by your reports

Manage your followers

If you want to track who you are following or manage your followers you can do that by traversing to your preferences. To find preferences locate your name on the bottom left of your screen and click on it. You will see the options in Figure 13B, select Preferences. Under Manage Notifications you will see the options presented in Figure 13C. You will be able to see who follows you and who you are following.

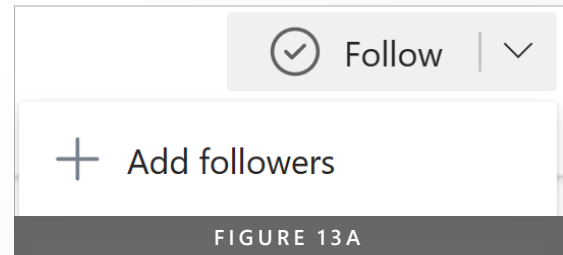


FIGURE 13A

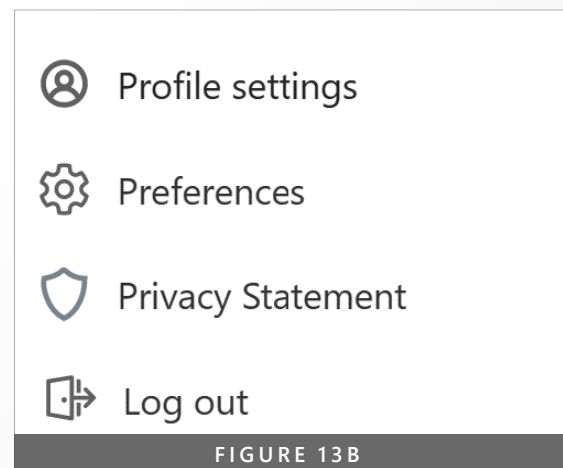


FIGURE 13B

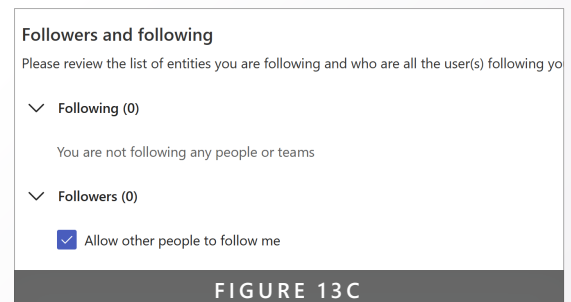


FIGURE 13C

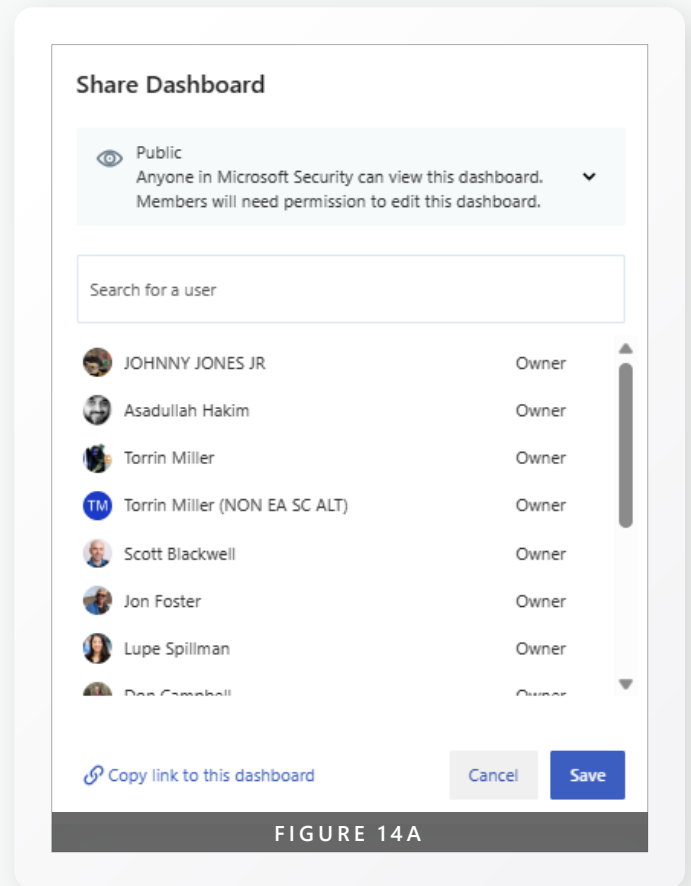
Organizational Standardization



Dashboards

Dashboards in Viva Goals presents a way to display your OKRs in a structured and organized way. You can add ownership/Edit access by clicking on the lock icon and selecting the appropriate users as seen in Figure 14A. The organization should create a structure on how these Dashboards will be created and presented. An example organizational structure is as follows:

1. Each panel in the Dashboard will represent a different team to allow for ease of editing and traversing through the Present mode.
2. OKR List will be used as opposed to OKR Detail to allow for use of the Key Update section
3. Metrics will be shown via the Custom Embed section



Moving an OKR to a new Planning Period

When considering moving an OKRs to another Planning Period there are two options.

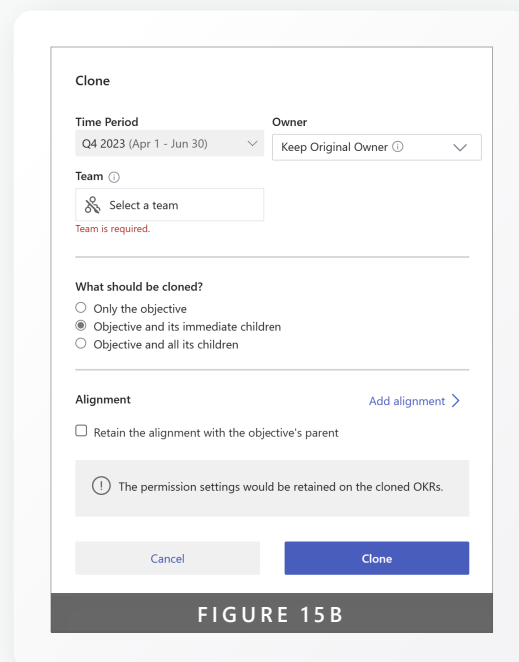
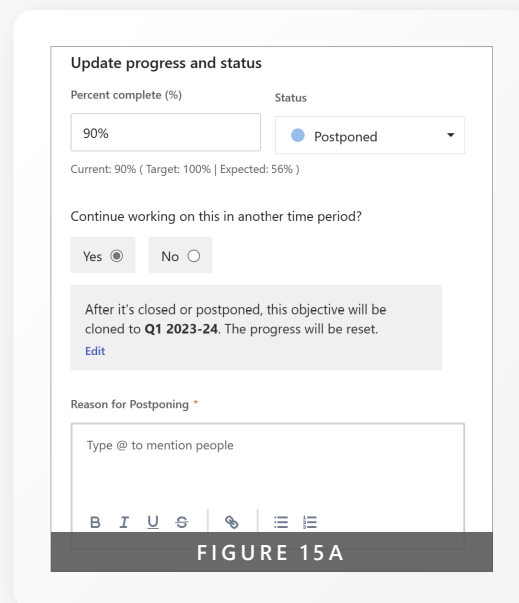
Postpone

If you have an OKR that needs to halt work in this Time Period and be moved to another Time Period, we will make use of the Postpone option. To get to the screen shown in Figure 15A, hover over the OKR you want to postpone, click the ellipsis (...) and select postpone. Select if you want to work on this in another Time Period and then you will be given the option to choose the Time Period to move it to. If you are moving a Key Result the parent will not move with it and you must either assign it to a new parent or choose to move the Objective as well.

Clone and Close

If you need to move an incomplete OKR to another Time Period, we will use the clone and Close option. What will need to be done is to first clone the OKR by clicking the ellipsis on the OKR you wish to move. You will need to choose if you want

to move the Objective and its children, align to a new parent (Important if this is a Key Result), choose the team that will own this new item. Once you have cloned the selected items conduct the closure process defined previously in this playbook. Refer to Figure 15B.



Book of Work (BoW)

The organizational Book of Work is comprised of a variety of categories depending on scope and impact. All work is important, some has higher risk implications or span of impact across the Microsoft ecosystem. These following categories establish the differences between these categories. Refer to Figure E.

IP – Investment Priorities

Investment Priorities (IPs) are programs that are usually significant and span the Microsoft ecosystem, including multiple organizations. These are areas that the organization is deeply invested, not only in resources but alignment to our overall organizational Security position. These programs require a single organizational

point of contact, called the General Contractor (GC). The GC has full responsibility to own and drive all aspects of their Investment Priority program, which includes the planning and OKRs.

FP – Focus Programs

Focus Programs (FPs) are usually IP programs that are transitioning to a run/operations state once they have delivered the largest phase of their program. FPs also have GCs and are considered an extension of the IP program management process.

LP – Leadership Priorities

Leadership Priorities (LPs) are organizational focus areas that the leader of each Organization identifies as a priority beyond the IPs and FPs, for the upcoming planning cycle. These are identified as part of the strategy development process at the start of the year. An LP is also run by a General Contractor, just isn't identified as an Investment Priority.



FIGURE E

Using ADO and Viva Goals

OKRs in Viva Goals

As stated throughout this playbook, the organization OKRs will now reside in Viva Goals. This means that the work item types of Objective and Key Result will not be utilized in ADO going forward.

EPIC and below in ADO

With the removal of OKRs from ADO a few questions arise:

Q: How will we track parent child relationships in ADO?

A: Organizational will be utilizing the work Item Type of "EPIC" to act as the parent or bucket for the features that will fall under a specific KR. The admin will then connect that EPIC to the KR in Viva goals. New features and stories added as a child to that EPIC will report to Viva Goals automatically.

Q: How will I (ADO user) know what KR my work contributes to?

A: The PG is releasing (April 2023) a feature that will show the lineage between ADO and Viva Goals to show the relationship from User Story to Objective.

Q: How will I brief on my work if the OKRs are in Viva Goals

A: Each tool has its place when briefing. Viva goals will be a high-level Outcome focused presentation tool and ADO will be an Output focused presentation tool.

ADO Dashboard vs Viva Goals Dashboard

As stated above the Viva goals dashboard will be used for a high level overview of the OKR progress. So when to use the ADO Dashboard? ADO dashboards are to be used when the briefing is required to dive into the details about how the OKRs are being accomplished but not necessarily about the OKRs themselves. For example: I need to brief my Director on a series of bugs and User stories my team has completed in order to fix a long tracked issue in our system. I would build and present a Dashboard in ADO to display that data. If I was, however, to show brief to my CVP on the overall progress of the Key Result that those Bugs and User Stories are contributing to I would brief that in Viva Goals as we are not going to address the individual work items but the progress overall.

Appendix

Links to Viva Goals Training

Viva Goals Training

- [Browse all learning paths and modules - Training | Microsoft Learn](#)

Viva Goals Learning Page

- [Introduction to Microsoft Viva Goals | Microsoft Learn](#)

References

Copilot in Viva Goals

- [Copilot in Viva](#)



Microsoft Viva Ecosystem: Customize, extend, and integrate

With Microsoft Viva, implementing an employee experience platform doesn't require a technology transformation. Viva provides an open and extensible platform, with an ecosystem of partners so it works with many of your existing systems and tools. With Viva, you can extend your existing investments by better connecting them together and making them available in a more modern experience for your employees. Learn more about the Microsoft Viva ecosystem by visiting [our website](https://microsoft.com/viva).

<https://microsoft.com/viva>

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