

# OKR Community Toolkit

**Purpose of this toolkit:** This toolkit offers an overview and step-by-step process for creating a vibrant internal community around OKRs within your company.

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# Why have an OKR Community?

Creating a community of support is necessary for any change in your business and whether you are just embarking on the OKR journey or already have a mature OKR program, creating a community is a great way to scale learning and support across your organization.

Communities can act as the 'front page' of a specific topic within your business and empower employees to build off each other, seek help, and resource one another.

A community creates the energy and momentum you will need to enhance culture and connection through OKRs, and embed them into the DNA of your organization.


# Technical Community Setup

In this section we will cover where and how you should set up the technical components of your community.

1. Understand where communities across your company exist today. Common locations from a software perspective include:
  - a. A Team within Microsoft Teams
  - b. A Group within Workplace
  - c. A set of channels within Slack
2. We recommend leveraging existing software infrastructure that supports those other groups in order to minimize change and meet employees where they are already engaging.



**Pro Tip:** Include an introduction from your Executive Sponsor(s) on why your company uses OKRs, expectations for teams and individuals, and a channel/link to submit feedback directly to Executive Sponsor(s). This will showcase Executive buy-in and help you build cultural buy-in.

3. The recommended structure of the location is as follows, with more detail in the community structure section:
    - a. General Announcements (moderated)
    - b. Open Discussion & Q/A
    - c. Learning Resources
    - d. OKR Champions (private)
-  **Pro Tip:** Pin your [OKR Playbook](#) to each active community channel. Your Community manager can update the OKR Playbook as the maturity of your OKR program increases.
4. Finally, we recommend setting up recurring events (see the events section below) that are posted in the location to provide a single source of truth for event invitations.

# OKR Community Structure

**Purpose of this section:** Use this section as guide to setting up the structure of your OKR community.

Channels	Descriptions
General Announcements	A moderated channel for admins only to post announcements about your OKR program
Open Discussion and Q/A	Your team can ask questions about OKRs, software, best practices, and more. We recommend pinning a post with the top FAQs to this channel.
Learning Resources	A consolidated list of learning resources for community members to access and leverage in a self-guided capacity.
OKR Champions	A private channel for your OKR Champions (employees who have gone through more in-depth OKR training) to share best practices, learnings, and other information amongst each other.
Training and Events Calendar	A shared calendar available to all members of the community, outlining past and future events focused on OKRs.

# OKR Community Roles & Responsibilities

## Resources you need:

### Community Manager

- Consolidates training resources into a single location for easy access
- Coordinates regular trainings and office hours
- Owns the OKR Award program and selects recipients
- Identifies success stories across the business
- Regularly communicates product or training updates to the community

### OKR Champions

- Answer open questions across the discussion forum
- Host and train the beginner OKR learning sessions
- Assist their colleagues in the creation of OKRs as needed



**Pro Tip:** Kick off OKR Champion roundtables. If you have OKR Champions in UK, USA, APAC, and EMEA, make sure you are delegating a leader to facilitate monthly or quarterly roundtables and share challenges and learnings. Notes can be shared in the broader OKR community. We have seen customers do this and generate strong ROI from these conversations. General Announcements (moderated).

### Learning Resources

Consolidating a variety of resources (outlined below) into a single location for access amongst the broader community.

- Providing a consolidated list of [online trainings](#) about OKRs and Viva Goals.
- Providing links to Case Studies of other businesses who have succeeded with OKRs.
- Aggregating success stories across your own business of teams that have been successful in leveraging OKRs.
- Providing a shared calendar of upcoming Live Trainings for easy sign-up.
- Providing information and access to certification opportunities for individuals who want to continue to develop their OKR skillset.

# OKR Events

## OKR Trainings & Office Hours

We recommend that your team host regular learning opportunities on beginning OKR training for new hires and employees who are still in the process of adopting OKRs. Additionally, we recommend hosting regular office hours (biweekly or monthly) in order to answer questions in a live format.

## OKR Awards

To gain more excitement and traction around using OKRs across the business, we recommend highlighting a few teams and individuals in their OKR achievement alongside some form of reward for their work.

### Award Ideas include:

- **People's Choice (Voter's Choice):**  
Award your favorite OKR expert by vote
- **Gone Green (Achievement):** Who is seeing green when it comes to their OKRs at the end of a business cycle?

- **Growth Mindset (Learning):** Who has done the best job of learning from their OKRs and implementing what they learned?
- **OKR Expert (Engagement):** Person who has helped the most by answering questions in the community, sharing content and recommendations. This will incentivize employees to join the community and be more engaged there.

### Reward Ideas include:

- Financial compensation
- Company-wide recognition
- Additional PTO
- Choosing from a reward catalog (if available)

## Team Highlights

In addition to trainings and awards, we also encourage you to spotlight teams' journeys in using OKRs, the decision to use OKRs, path to enablement, successes, and failures along the way. Typically, companies will run these either once per month or once per quarter in their community. This is a great opportunity for employees to showcase their contributions to the broader company.

# Community Communications Templates

## Join the OKR Community!

**Send To:** Executives

**Subject Line:** Request to promote internal OKR community

**Body:**

Hi <Insert Executive's Name>,

I'm reaching out to ask you to consider promoting our internal OKR community channel to our team to encourage team members to join the community.

**Why this is important:**

- The community scales OKR learning and support across our organization
- The community allows employees to build off each other and seek help without always requiring a specific dedicated resource
- Ultimately, the more active team members we have in the community, the more successful OKR program we will have

**Here is a quick message you can copy and paste to the team. Thanks for your help!**

Hi team,

I wanted to ask all of you to take a moment to join our internal OKR community. Ensuring that the majority of our team joins the community is critical for overall adoption of OKRs. In the community, you will have access to learning resources, Q&A, training events, and more.

Please join the community here. Thank you! <Insert Community Link>



**Send To:** End Users

**Subject Line:** Request to promote internal OKR community

**Body:**

Hi team,

I'm reaching out to ask you to join our internal OKR community.

**The benefits of joining include:**

- Easy access to OKR learning resources
- A dedicated channel for OKR Q&A and FAQs
- Access to our OKR training events
- The ability to network with other team members who are leveraging OKRs in their department

**Please join our internal OKR community here!** <Insert Community Link>

## New To the Community Pinned Post

We recommend creating a "New to the community" pinned post and the top of your "Announcements" channel in the community to help guide users as to how best to leverage the community.

### **New to the community? Start here.**

- What is the OKR community?
- What is each channel used for?
- Training Resources
- Training & Events Calendar

# How to Create an OKR Community Intranet

## What is an OKR Community intranet?

An OKR Community intranet is a page where you can house all your information regarding OKRs like writing best practices, links to learnings, and FAQs. You can host a community intranet on web-based platforms like SharePoint.

## How to set up an OKR Community intranet

Page	Description
Home Page	Brief description of OKRs and embedded learning content like <i>About OKRs</i> , <i>Community</i> , and <i>FAQs</i> .
About OKRs	Deeper dive explaining what OKRs are and why they should be used. It is also helpful to link to your OKR community here for team members to join.
OKR Community	Explains what the OKR Community is, the benefits of joining, and a link to join the community.
Training	Links to training resources on the OKR methodology as well as software training. It is helpful to embed your training events calendar if applicable.
OKR Office Hours	Explains when office hours are, including FAQs.
Contact US	Add contact information like an email address for team members to ask questions and learn more.
FAQs	Add frequently asked questions and answers like "How can I get access to the software?" or "Where can I get additional training?"

The more community and conversation you generate around OKRs and Viva Goals, the more successful your OKR program and product adoption is likely to be.

For more information on how to build a successful OKR program using Viva Goals, read our [Viva Goals Adoption Guide](#).

## Discover Microsoft Viva

Microsoft Viva is an employee experience platform that brings together communications, knowledge, learning, resources, and insights in the flow of work. Powered by Microsoft 365 and experienced through Microsoft Teams, Viva fosters a culture that empowers people and teams to be their best from anywhere.

[Learn more about Microsoft Viva](#)

<https://microsoft.com/viva>