Viva Goals
Getting Started Guide
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Adoption guide overview

Purpose of this document

This easy-to-follow how-to guide will walk you through the key steps required to easily manage a successful enterprise-wide roll out of Viva Goals. We've helped hundreds of enterprise organizations along their OKR (Objectives and Key Results) journey with Viva Goals, and have captured the key best practices on how to get started from those engagements together in this document to support you on your own journey.

To learn more about Viva Goals, visit Microsoft Viva Goals | Microsoft Viva.

Adoption steps

**Plan:**
Develop a strategy for how you will roll out Viva Goals and align stakeholders.

**Set Up & Launch:**
Set up and configure Viva Goals and get your initial Viva Goals Organization ready for launch.

**Adopt:**
Roll out Viva Goals and monitor to drive engagement and value.
How Viva Goals helps, from strategy to execution

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

- Connect employees to your organization’s goals and drive the right business outcomes.
- Build and manage your goals in one place with deployment and best practices guidance.
- Bring goal management in the flow of everyday work with integrations into your existing toolset.
Audiences for this document

IT leads/admins in charge of deployment and adoption, and who need to frame adoption requirements, resourcing, and effort to business stakeholders.

Business users looking to revitalize their organization’s Employee Experience, including, but not limited to, Champions, change management/adoption specialists, HR, and internal communications teams. Also, the person (or persons) made accountable by the business stakeholders to achieve maximum satisfaction of the Employee Experience.
Plan

✓ Define your ‘why’ and launch scope
✓ Define launch goals & identify launch milestone
✓ Assemble your team
✓ Define program expectations
✓ Socialize and gain buy-in
**Define your ‘why’ and launch scope**

<table>
<thead>
<tr>
<th>How do we get started?</th>
<th>Establish your launch scope</th>
</tr>
</thead>
</table>
| One of the seemingly hardest questions to answer is one of the most fundamental – why are you moving to adopt Viva Goals in the first place? | ○ **How does your organization approach planning today?** What is your existing senior-most ‘center of gravity’ for planning today?
  - For organizations with centralized planning, where the CEO and leadership team set the vision for the overall company, we strongly recommend starting with this group.
  - For organizations with de-centralized planning, where the leaders of individual departments or business units run their own processes, starting at the business unit level can make sense.
| **Start with your why** | ○ **Who has appetite and enthusiasm for change?** Of those planning centers of gravity identified, who is eager for a new solution, or has expressed interest in OKRs? |
| Get clear on why you want to roll out Viva Goals, and the impact you are hoping it will have on your business. Being able to articulate your ‘Why’ and ‘Why now’ will help build buy-in for this change in your organization. | **Bottom line:** your initial launch scope should be at the most senior level that you have buy-in for making a change. 

To learn more about how Microsoft has rolled out OKRs internally and benefits from the process, read our latest case study [here](#). |

If your CEO is on board – start with the Senior Leadership Team. If your CEO is skeptical, but your COO is enthusiastic, start with the Operations Leadership Team. In our experience, starting at the leadership level gives the strongest foundation and the best surface area for impact, and provides the spark for faster change in the broader organization – decreasing the ‘time to value’ for your program towards achieving your organizational goals.
Define launch goals

What are you trying to accomplish with Viva Goals? What do you hope to increase or decrease, and, if it’s possible to quantify it, by how much? Eg:
- Improve transparency and understanding of leadership goals
- Give our leaders a better understanding of how the work their teams do contributes to the progress towards company objectives
- Increase the share of employees who can name our top 3 business priorities from 15% to 90%

How will you monitor and assess your progress towards accomplishing those goals? We recommend setting KRs for your OKR launch, with your objective reflecting your goal as articulated above.

In our experience, the most successful programs focus on Adoption, Engagement, and Value. Our recommended launch OKRs would include:
- **Adoption**: 100% of top-level team leaders have established OKRs in Viva Goals within the first quarter
- **Engagement**: At least 75% of OKRs have had a check-in in the last 30 days
- **Value**: At least 50% of the organization has viewed and interacted with organizational OKRs in Viva Goals within the first quarter
Now that you have articulated what you are hoping to accomplish, it’s important to anchor your planning workback in the realities of your organization. To set dates for launch, consider:

- What is a natural moment in your existing business rhythms to introduce OKRs and Viva Goals (eg upcoming All Hands or a Fiscal Year boundary)?
- To ensure maximum value for your team in what they will experience in Viva Goals at that moment, how can you get started now to be ready?

### Potential launch milestone

<table>
<thead>
<tr>
<th>Potential launch milestone</th>
<th>Value to the organization</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fiscal year kick off</strong></td>
<td>Enter your fiscal year aligned with clarity on what you want to accomplish together</td>
</tr>
<tr>
<td><strong>Semester planning kick off</strong></td>
<td>Engage your teams in semesterly or quarterly planning (eg for engineering, marketing, etc) with focus on your most important goals</td>
</tr>
<tr>
<td><strong>Town Hall</strong></td>
<td>Introduce a new tool mid-year he enable teams to gain comfort with it prior to leveraging it at your next planning inflection moment</td>
</tr>
</tbody>
</table>
## Sample Viva Goals launch workback

In general, we find that a successful scale launch of Viva Goals takes anywhere from 4-8 weeks, with the key dependency on timing being the number of ‘layers’ of teams you want to include in your pre-launch scope to get set up ahead of time.

Here’s an example workback of a company CEO + their directs OKRs getting recorded in the system prior to a broad launch to their teams:

<table>
<thead>
<tr>
<th>Phase</th>
<th>Timing</th>
<th>Activity</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan</td>
<td>T-45 days</td>
<td>Kick off planning</td>
<td>Engage your team and read this guide to get started!</td>
</tr>
<tr>
<td></td>
<td>T-35 days</td>
<td>Executive sign off</td>
<td>Share your launch plan with key stakeholders for approval</td>
</tr>
<tr>
<td>Set Up</td>
<td>T-35 days</td>
<td>Set up org</td>
<td>Get the Viva Goals org set up reflecting program expectations</td>
</tr>
<tr>
<td></td>
<td>T-20-35 days</td>
<td>Draft and enter org-level goals</td>
<td>Finalize and enter your organizational level goals into Viva Goals</td>
</tr>
<tr>
<td></td>
<td>T-30 days</td>
<td>Invite OKR Champs</td>
<td>Invite OKR champs into the tool and ask them to enter goals</td>
</tr>
<tr>
<td></td>
<td>T-5-30 days</td>
<td>Draft and enter team goals</td>
<td>Partner with OKR Champs to draft and enter team goals</td>
</tr>
<tr>
<td></td>
<td>T-5 days</td>
<td>All team goals entered</td>
<td>Make sure all organizational and team goals are loaded</td>
</tr>
<tr>
<td>Adopt</td>
<td>Town Hall</td>
<td>Invite all users</td>
<td>Share link to your Viva Goals organization with your team!</td>
</tr>
<tr>
<td></td>
<td>Ongoing</td>
<td>Embed in ROB &amp; build community</td>
<td></td>
</tr>
</tbody>
</table>
Example timeline: Experiences + Devices org at Microsoft

Weeks 1-2 – Plan
Define launch goals & plan strategy

Week 2 – Plan
Gain executive buy-in and sign off on launch plan

Week 3 – Set up
Enter Leadership Team OKRs & onboard OKR Champs

Week 3 – Set up
Configure Viva Goals Organization

Week 6 – Set up
Leadership team + directs OKRs due in Viva Goals

Week 8 – Adopt
Launch to full organization during FY23 Kick off

Week 10 – Adopt
First Leadership Team meeting run from Viva Goals

Planning & Set Up: 8 weeks
Adopting any new solution requires buy-in and support from across the business. Below are key roles who will partner to help bridge the technology and business outcomes that matter to your organization.

<table>
<thead>
<tr>
<th>Key roles</th>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Executive Sponsor</td>
<td>Senior leadership member who supports the case for change and communicates regularly with leadership to embed OKRs into company culture. They drive the company’s ability to truly center on OKRs, starting with modeling the use of OKRs in key meetings (eg Town Halls, leadership meetings, monthly departmental reviews, etc) and encouraging every member of an organization, even those who don’t directly own OKRs, to be familiar with them &amp; be enrolled in the team effort to achieve them.</td>
</tr>
<tr>
<td></td>
<td>OKR Program Lead</td>
<td>Serve as the program and project leader to ensure that a clear plan and expectations are in place, and the business successfully realizes value from the launch. Facilitates the OKR process, drives ownership and tool adoption across the entire organization. The ideal OKR Program Lead has a hand in organizational planning today already (eg Chief of Staff), and can dedicate ~50% of their time during launch period and 10-20% of their time ongoing to the OKR program.</td>
</tr>
<tr>
<td></td>
<td>OKR Champions</td>
<td>A team of OKR champions is required to help with strategy execution and drive change across the organization. Champions spearhead their local programs and make sure all checks and balances are in place for a successful rollout. The ideal OKR champion is involved in or leads planning processes for the team they are partnering with and can dedicate 10-20% of their time ongoing to the work. We recommend identifying at least one OKR champion per team adopting Viva Goals for planning (eg those who are going to enter goals into Viva Goals).</td>
</tr>
<tr>
<td></td>
<td>Global IT Admin / Viva Goals Admin</td>
<td>Oversee technical aspects of the Microsoft Viva Goals deployment and rollout.</td>
</tr>
</tbody>
</table>

Assemble your team
Define program expectations

Having established your launch goals and scope, and assembled your core team, the next key area to drive clarity is expectations—being specific about what you will be looking for from those participating in your OKR program and using Viva Goals. This clarity helps ensure you are aligned on the scope of your program: what teams are expected to have goals in the tool, who is responsible for driving those programs, and when they expected to update their goals.

These can feel like big decisions, but we recommend basing them on the reality of how your team approaches planning already. For the launch group you’ve identified:

1. **How do different departments in your organization approach planning today?** Are there robust planning processes at the department and sub-team level, or are those teams primarily reliant on the CEO/leadership team’s plans? For departments and sub-teams that don’t have robust planning processes today, we recommend not requiring immediate adoption of Viva Goals, but leaving it as opt in.

2. **For every team with a robust existing planning process, who runs it today?** Who has the pen on drafting team priorities or KPIs? Who is in charge of monitoring and reporting on them?

3. **What cadences / rhythms do you use for planning today?** Are you aligned to an annual Fiscal Year process, or do you manage towards Semesterly or Quarterly targets? Does this vary by team?
### Program template

**[Launch Organization] OKR Program Expectations**

<table>
<thead>
<tr>
<th></th>
<th>Leadership Team (“L1s”)</th>
<th>L2s</th>
<th>...</th>
<th>Individuals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tool</td>
<td>Viva Goals</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adoption Expectation</td>
<td>Required</td>
<td>Required</td>
<td>Recommended</td>
<td></td>
</tr>
<tr>
<td>OKR Champion / Program Lead</td>
<td>________</td>
<td>________</td>
<td>_________</td>
<td></td>
</tr>
</tbody>
</table>
| Rhythm of Program | • OKRs/goals set ________, revisited ________, and reviewed ________  
• OKRs/goals checked in biweekly |     |     |     | Not recommended. Individuals should rely on performance management conversations to manage and track individual priorities. |
| Goal expectations | • Be aspirational – achieving 70% of your target is still a success  
• Ensure alignment – up / down / across the organization  
• Be focused – no more than 3-5 Objectives, 3-5 Key Results per objective |     |     |     |

While these are some of the most important decisions to finalize, if you have time there is also value in building out a more robust and personalized OKR program guide for your organization; see [here for a template](#).
Now that we’ve established our plan, it’s important to take the time to socialize with key stakeholders to ensure their buy-in and support.

Your Executive Sponsor and OKR Program Lead should share your goals, milestones, and program expectations with the leaders and identified planning leads/OKR Champs in your initial launch scope to ensure understanding and buy-in.

Continue to find your Champions – advocates for change within the business. This socialization moment is a great opportunity to re-engage your sponsors and ask them to confirm or identify who their OKR Champions will be in the coming roll out process.
Set Up & Launch

✓ Engage your team and understand key workstreams
✓ Set up org and establish team structure
✓ Invite OKR Champions and enter goals
✓ Launch to your organization
Engage your team and understand key workstreams

With sign off from your Executive Sponsor and business leaders on your plan, now is the time to engage the working team that will help to drive your launch. Bring the group together in a kick-off call and agree on an ongoing cadence – we typically recommend at least a weekly touch point for key stakeholders to ensure everyone is aligned on key dates & next steps.

Roles and Responsibilities

This cheat sheet should help everyone involved in Viva Goals rollout understand what they are responsible for and the order in which this work needs to be done. Learn more about roles and responsibilities for a Viva Goals OKR program rollout here.
Set up initial team structure

Create Viva Goals Organization
Your OKR Program Lead can work in tandem with your Global IT Admin / Viva Goals Admin to assign Viva Goals licenses, confirm tenant-level Viva Goals settings, and set up your new Viva Goals organization.

Review & confirm organizational settings
New Viva Goals organizations are by default set up with our recommended program approach, but leveraging the OKR program expectations you have already established, you can adjust organizational settings if needed.

Set up initial team structure
Your OKR Program Lead should establish the initial team structure in Viva Goals, and can then rely on the OKR Champs for your top level teams to do the same for their sub-teams (enabling iterative adoption in a team-centered way). Our recommendation is that Teams in Viva Goals should reflect ‘planning units’ – and as a result may not be a strict copy/paste of your organizational hierarchy (eg if you have a marketing, engineering, and sales team for a single product that plan together but report separately, we’d recommend making a single Team to house their joint goals in Viva Goals).
Invite OKR champions & enter goals

**Invite OKR Champions**
Invite your planning leads / OKR Champs into the tool to start getting familiar with Viva Goals and support you in getting everything ready for your wider launch.

**Align on timeline to enter OKRs into Viva Goals**
Your OKR Program lead can then work with your OKR Champs to set expectations about when goals should be finalized in the tool.

**Work with OKR Champion community to document & enter goals**
If your teams already have your goals documented offline – great! – then the work here is primarily getting them into Viva Goals (made easier with OKR import functionality). If your organization and teams have work to do to formally document your OKRs, leverage our learning paths and sample OKRs to support you and your team in drafting your goals.

OKRs can be intimidating if you are new to the methodology – but our top advice is to get started with something rather than hold out for perfection. OKRs are about the journey, and you’ll learn a lot by jumping in leveraging your existing documented goals and refining vs. holding out for perfectly polished OKRs.
Launch to your organization

Now that you have the initial set of goals entered and ready to go – we’ve reached your launch milestone and are ready to invite in the balance of your organization!

When considering the scope of users to invite, our recommendation is to add all employees that have a vested interest in visibility and access to the goals of the teams you are launching with.

This would include all employees who report under your Executive Sponsor in your org hierarchy, and may also include cross-functional interests (eg a Marketing team may want to include their Sales counterparts, etc).

To leverage the value of transparency in driving employee engagement and focus, we recommend casting a wide net.
Adopt

✓ Plan communication moments
✓ Establish standard goal setting cadences and drive rhythm of business (ROB)
✓ Establish community
✓ Engage your team with your goals
✓ Reflect on launch goals and iterate
Plan communications moments

At the start, you identified a Viva Goals launch moment that fit into your existing organizational rhythms. Consider the best approach in this moment for your team:

**Live at a Town Hall**
- A live announcement from your Executive Sponsor in a Town Hall
- Include a call to action to review organizational goals in Viva Goals
- Follow up with a survey to drive engagement (e.g., “Do you understand the priorities?”, “What are your suggestions to improve our organizational goals?”)

**Email announcing Org goals**
- An email announcing your fiscal year goals overall
- Includes a link out to your OKRs in Viva Goals
- End with a call to action to your team to monitor progress and keep the leadership team honest about trade-offs needed to achieve your goals

**Federated at sub-team level**
- A decentralized launch, where each of your OKR Champs works with their local teams to launch at meaningful moments in their local planning rhythms
- Within those teams, this could include Town Halls, newsletters, or planning moments relevant to their teams

Any one, or a combination of, the above may meet your organizations needs best. For additional inspiration on OKR communications plans, check out our communications templates here. Post-launch, make sure to establish a regular rhythm of communications to your organization about progress – quarterly Town Halls, monthly newsletters, etc. Consider setting up Organizational Summary mails from Viva Goals itself to automatically keep your team updated on your overall progress as check-ins occur.
Establish standard goal setting cadences

Once you’ve launched, to maximize the value from your investment you’ll want to focus on driving check ins and later closing out at the appropriate moment in your planning cycle. Learn more about how to run a healthy OKR program with Viva Goals here.

1. Team members collaborate with each other to align on strategy, develop shared OKRs, and understand how overall objectives from senior leadership cascade to the team level.

2. OKRs are planned, written, and added into the system. Collaboration continues among team members to finalize OKRs.

3. Throughout the quarter, users make check-ins to track their progress. This can be done manually or automatically through data integrations.

4. At the end of the period, users reflect on progress, close and score their OKRs, share key learnings, and prepare for the upcoming time period.

Collaborate
Create
Close
Check-in
# Drive rhythm of business (ROB)

You will really start to see the transformational power of OKRs once they are embedded into your existing business rhythms and rituals. Doing this will help to ensure that your teams are focused and aligned, and will support a culture of transparency, agility, and growth in your broader organization.

<table>
<thead>
<tr>
<th>OKR Value Driver</th>
<th>OKR Superpowers</th>
<th>Business Rituals</th>
</tr>
</thead>
</table>
| Strategic and Priority        | • Engages key stakeholders early; establishes ownership  
• Identifies macro dependencies (vertical and horizontal)  
• Surfaces early constraints (budget, bandwidth, priorities)  
• Reports up to sr. leadership on overall progression at the org level  
Key milestone: Provides transparency and reports up to leadership on opportunity and risk. | Annual Strategic Planning  
Program Incremental Planning  
Quarterly reviews with Sr. Leadership |
| Alignment                     |                                                                                                                                                                                                               |                                                                                  |
| Organizational Visibility     | • Using OKRs to ‘report out’ to your broader organization about successes, learnings, and next steps  
Key milestone : What did we accomplish as an organization, what can we celebrate together, what were the key lessons learned, what are we doing next? | Monthly All Hands  
Monthly newsletter                                                                 |
| Team Ownership and Accountability | • Drives ownership and accountability in the flow of work  
• Surfaces key areas of collaboration across departments and/or teams  
• Surfaces key opportunities for course correction at the project/program level  
• Leverages OKRs to ‘report up/across’ to key contributors on overall progress at the team level  
Key milestone: What did we accomplish as team, what challenges exist that might keep us from achieving our short-term and long-term goals (ie KRs provide rigor, focus and help teams zoom in) | Weekly Team Meetings  
Cross-functional Project Meetings  
Scrum Meetings                                                                     |
| Division/Department Execution | • Drives progress against commits during planning process  
• Maintains clarity against shared objectives / dependencies / priorities  
• Provides continuous and real-time adjustments on progress  
Key milestone: Where are the areas for improvement, collaboration and mitigating risk. | Quarterly Business Reviews (QBRs)  
Quarterly Planning  
Monthly Department Meetings                                                      |
Establish community

Your OKR Champs were key to helping you get to your launch date, and nurturing this community will be important to the continued success and growth of your program.

We recommend setting up a community in Teams or on Yammer to encourage ongoing conversation and best practice sharing with this group. Consider establishing regular rhythms for Office Hours or Community calls in addition to promoting asynchronous collaboration.

You can learn more about best practices on how to establish a vibrant OKR community [here](#).
## Engage your team with your goals

### Streamline check ins & prep

Increase the efficiency of your team in preparing for goal review conversations by leveraging available data integrations and dashboards in Viva Goals.

Viva Goals integrates with the systems of record and work your team already uses every day and can pull in Key Result and Initiative updates straight from the source.

Dashboards automatically gather OKR progress and contextual data so you can always be prepared to present a real-time status update on your goals. You can learn more about how to set up dashboards [here](#).

### Stay in the flow of work

Viva Goals can meet your users where they are today, integrating seamlessly with the tools your team is already using every day, right in the flow of work.

Leverage the Viva Goals app in [Teams](#), our [Slack](#) integration, or our [native ADO integration](#) to keep your teams goals top of mind even as your team focuses on their day to day tasks.

### Involve the whole organization

Even as Viva Goals adoption continues to grow, it’s likely not every member of your organization is going to be an OKR owner – but every member of your team can benefit from the adoption of Viva Goals! Your broader team can use Viva Goals to:

- See how their individual and team projects support organizational and team goals
- Gain a deeper understanding of the business and key drivers with transparency of KR performance and check in notes
- Engage with organizational goals by commenting and liking OKR updates & status updates
- Explore how adjacent teams may be working on like OKRs and projects and join forces to scale impact

Once your initial launch is complete, you are likely to find continued interest from teams who have access to Viva Goals but weren’t included in your initial launch workback who want to onboard their own OKRs to Viva Goals. You can make it easy for those teams to get started and enable grassroots adoption by publishing the OKR program expectations you aligned on broadly and by allowing users to create their own teams and enter and share their own goals.
You’ve now successfully launched Viva Goals and are starting to see adoption across your organization. This is a great time to reflect back on the launch goals you established earlier.

1. How many senior leaders did end up entering their goals?

2. How consistent have your OKR owners been about checking in against progress made towards their goals?

3. How much of your team has explored your organizational OKRs?

Reflect on your wins, celebrate your learnings, and align on your opportunities to drive more engagement. Share these findings out with your team, taking the opportunity to highlight those who have seen success or developed best practices, and work together to set goals for how you’ll go even further in the next time period!

How to evaluate performance?

You can leverage our OKR program analytics feature to check in on your launch OKRs and monitor adoption, allowing you to understand trends + determine the most impactful actions to increase engagement and organizational value.

<table>
<thead>
<tr>
<th>Adoption</th>
<th>How well has your organization adopted the OKR Program Learn more</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users</td>
<td>Orks</td>
</tr>
<tr>
<td>Total Users</td>
<td>500 (100%)</td>
</tr>
<tr>
<td>Users with Orks</td>
<td>218 (43%)</td>
</tr>
<tr>
<td>Users with checks</td>
<td>142 (28%)</td>
</tr>
<tr>
<td>Total teams</td>
<td>500 (100%)</td>
</tr>
<tr>
<td>Teams with checks</td>
<td>250 (50%)</td>
</tr>
</tbody>
</table>

Reflect on launch goals
Additional resources

**Microsoft adoption resources**

- Review and download Viva Goals resources on adoption.microsoft.com, including how to get buy-in for OKRs, sample OKRs, an OKR success kit, and more.
- **Viva Goals Office Hours Resources – Microsoft Adoption**: Recordings and resources from our ongoing Viva Goals Office Hours series, available to all customers and prospective customers.
- **Microsoft FastTrack for Viva**: Deployment assistance including support from Microsoft engineers with technical expertise on Microsoft Viva and other Microsoft tools.

**Learn more about Viva Goals**

- **Getting Started with Viva Goals Learning Path**: Our digital learning path for Microsoft Viva Goals end users contains a wealth of on-demand information on how to make the most of the platform.
- **OKR Leadership Program Learning Path**: Our digital learning path for OKR champions and leaders defines what an OKR champion is and gives you all the information you need to drive successful OKR adoption in your organization.
- **Introduction to Microsoft Viva Goals – Admin Help Content**
- **Introduction to Microsoft Viva Goals – End User Help Content**

Here you’ll find a Quick Start guide, bite-sized training videos, and step-by-step tutorials to help end users get up to speed quickly with Viva Goals software to make your OKR program run smoothly.