Microsoft Viva

Viva Goals
Office Hours

What to do in your first 30 days with
Viva Goals

August 23rd
8am PST / 11am EST

Welcome to Viva Goals Office Hours!

You'll get the recording and deck in the Thank You email next week

Please ask questions in the chat box, we have experts ready to answer

Interact with us during the polls throughout the presentation

Microsoft Teams

Agenda

- Welcome (5 min)

- What to do in your first 30 days with Viva Goals – featuring Jake Singer (25 min)

- Viva Goals Product Deep Dive: Demo of our new Goals Broadcast feature (15 min)

- AMA (15 min)

What to do in your first 30 days with Viva Goals

Viva Goals Personas & Training Paths

Business Leader

Leader who drives company, group, or team strategy, creates and approves team/organizational goals, and reviews progress.

Recommended Training:
Viva Goals Quick Start

Typical titles: C-suite, Vice President, General Manager

Champion

Central expert and axis that keeps programs on track and connected. Drive overall program and rhythm of business across the entire organization (or multiple teams).

Recommended Training:
OKR Leadership Program

Typical titles: Chief of Staff, Planning Lead, Strategy & Operations

Planning Manager

Individuals and team managers who drive planning and tracking process on a given team. They ensure check-ins, reporting, and meetings follow prescribed rhythm of business.

Recommended Training:
OKR Leadership Program

Typical titles: Team Manager, Business Manager, Chief of Staff, Data Analytics Manager

Goal Owner

Users who own goals and are accountable to drive and report progress on goals.

Recommended Training:
Viva Goals Quick Start

Typical titles: Anything from Individual Contributor to Vice President or beyond

Stakeholder

Users who engage with updates on progress of goals.

Recommended Training:
Viva Goals Quick Start

Typical titles: Anything from Individual Contributor to Vice President or beyond

Tech Admin

User who does the technical setup and responsible for managing the software and ensures licenses are assigned and security/compliance needs are met.

Recommended Training:
Intro to Viva Goals (Admin)

Typical titles: IT Admin, Technical Operations

First 30-days as an Admin, Champion/Planner in Viva Goals

Week 1 with Viva Goals – Admins & Champions/Planners

For Admins

Before you create Viva Goals Organization

1. Identify your operating team
2. Navigate and understand the tenant level admin
3. Set tenant privacy settings, enable Integrations

Once in Viva Goals

1. Navigate and understand the organization admin panel
2. Set privacy settings within the organization (who can join, invite, export)
3. Understand import options (AAD)
4. Import champions/planning managers and assign admin rights to the necessary peoples

For Champions

Before you get in Viva Goals

1. Identify your "North star" of Goals
2. Identify your rollout team, R&Rs
3. Document your planned business rhythms

Once in Viva Goals

1. Navigate and understand the organization admin panel
2. Set methodology model configurations within admin
3. Understand import options (AAD)
4. Create Teams and team owners
5. Which integrations will your end users need? Ensure these are enabled within the admin
6. Absorb self-led content to familiarize yourself with tool and methodology
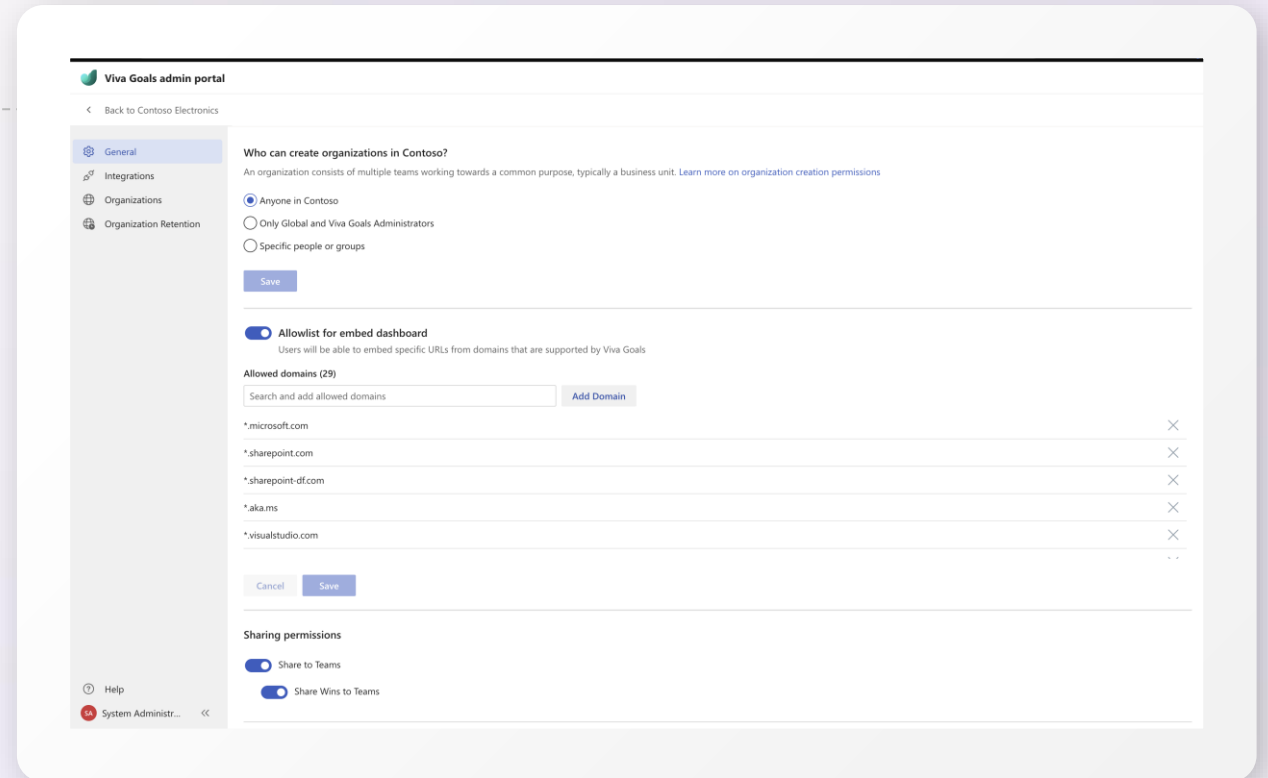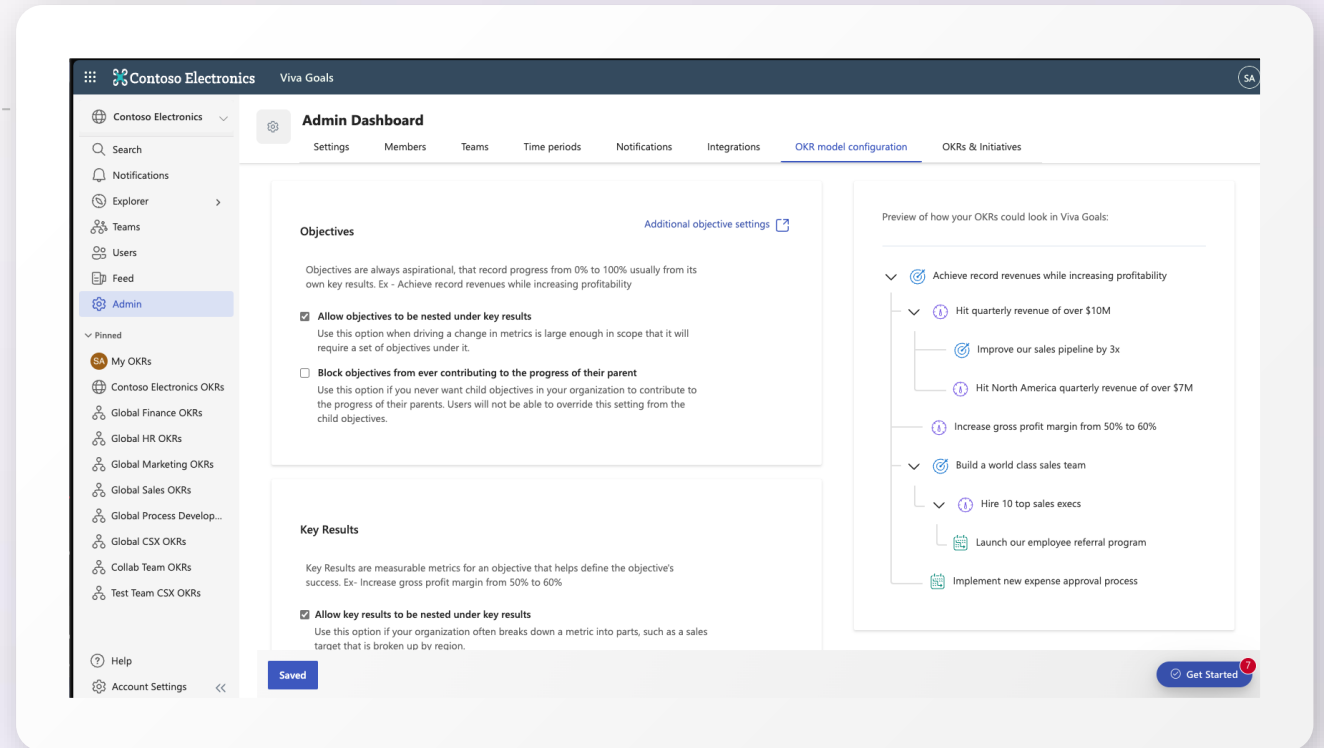
Initial Setup - Admins

For Admins

Before you create Viva Goals Organization

1. Identify your operating team
2. Navigate and understand the [tenant-level admin](#)
3. Set tenant privacy settings, enable Integrations

Once in Viva Goals

1. Navigate and understand the organization admin panel
2. Set privacy settings within the organization (who can join, invite, export)
3. Understand import options (AAD)
4. Import champions/planning managers and assign admin rights to the necessary peoples

Week 1 with Viva Goals – Admins & Champions/Planners

For Champions

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3. Understand import options (AAD)
4. Create Teams and team owners
5. Which integrations will your end users need? Ensure these are enabled within the admin
6. Absorb self-led content to familiarize yourself with tool and methodology

Weeks 2-3 with Viva Goals – Champions & Planners

For Champions – Once in Viva Goals

1. Which integrations will your end users need? Ensure these are enabled within the admin

2. Consider any micro/meta data that you would want to report on (tags/keywords)

3. Begin to test and ideate on how to use the various goal types

4. Create your top-level goal(s)

   a) Do you have insight into how these cascade? If so, create the next level of children.

   b) If you do not have insight, this is where the champions should meet to determine how you want to align goals to build transparency and link work items

Week 4 with Viva Goals – Champions & Planners

For Champions – Once in Viva Goals

1. Create a dashboard to showcase and highlight the top-level goals in the system. This dashboard will be used to familiarize users with the tool, and serve as the story to tell users on the "why".

2. Document the expectations for your various R&Rs, what actions are they expected to complete within the first 30, 60, 90 days?

3. Complete communication templates – ensure we are clearly communicating to the org & various R&Rs the why and how behind utilizing Viva Goals

4. Import end users to the system (notify?)

5. Set your first internal goal review for 2-3 weeks out from launch date

L200+ Functionality to explore

- Dashboards

- Explorer

- Phased Targets

- Managing Contributions

- Committed vs Aspirational Goals

- Tags

- KPI Panel

- Managing Columns

- View Options

Resource Slide

Resources for Admins

- Viva Goals Admin Portal
- Login, Join, & Create Organizations
- Navigate the Admin Dashboard
- Organizations & Teams
- Roles & Permissions
- Integrations Overview
    - Managing Integrations

Resources for Champions

- Viva Goals Quick Start Guide
- Learning Paths
- Viva Goals - Driving Adoption
    - Viva Goals - Office Hours Resources
    - Viva Goals Community
- Integrations + Viva Goals
- Best Practices for running your OKR Program + Viva Goals
- Collaborate with Viva Goals in MS Teams
- Trial Configuration Checklist

Customer Stories

- Welocalize boosts agile transformation and OKR adoption at global scale with Viva Goals.
- Global consulting firm CAI boosts business agility and operational alignment with Viva Goals.
- OC Tanner uses Viva Goals to align on objectives and key results to create "unity in focus"
- Engage Squared fosters sustainable growth and purpose-driven digital engagement with Viva Goals.

Viva Goals + Copilot

- The Future of Goal setting with Viva Goals Copilot
- Video - How to drive clarity & alignment with Copilot in Viva Goals

Viva Goals Product Deep Dive

Goals Broadcast

Why?

Providing team and organization-wide updates can feel like a heavy lift for leadership teams, when sending out newsletters and email updates on goals can take hours, days, or even weeks to gather data for and share efficiently and effectively.

What?

With **Goals Broadcast**, leaders can share updates on goals to all members of their team directly from Viva Goals during key moments ad-hoc, as well as in key moments of the goal cycle.

When?

- At conclusion of planning, when the OKRs are finalized.

- Before / After cadenced business reviews.

- Post OKR closure.

Goals Broadcast

How?

- Available to all **admins** and **owners of teams** in Viva Goals.

- Admins and owners can use the "share an update" button from the share menu of the list/dashboard tab.

- Complete the "Share an update" modal with highlights, learnings, and next steps.

- Hit 'Post' to send the update.

- The update shared will also be available in the 'Updates' tab of the team/organization page.

- Members will be notified via email.

Microsoft Viva Goals Community Events

Tech Community YouTube Live: Driving a Healthy OKR Program with Viva Goals

Leadership Buy-In and Markers of Success
- Featuring Mike Berg, Principal Analytics Manager, IDEAs
- September 14th at 9:00am PST / 12:00pm EST
- RSVP here

Viva Goals September Office Hours

How to Build a High Performing Team with Viva Goals
- Featuring Lucy Hitz, Senior Product Marketing Manager, Viva Goals and Aarushi Arora, Senior Program Manager, Viva Goals
- September 20th at 8:00 am PST / 11:00 am EST
- Register here

Tech Community YouTube Live

How to Improve Collaboration and Results with Viva Goals and ADO
- Featuring Mark Meyers, Senior Program Manager, Digital Security & Resilience and Johnny Jones Jr., Senior Security Technical Program Manager, Digital, Security & Resilience
- September 26th at 9:00 am PST / 12:00 pm EST
- RSVP here

Stay in the loop with Microsoft Viva Goals

Where to find upcoming live events:
- Microsoft Viva Goals Community

AMA

Microsoft Viva

Thank you!

Please make sure to take our exit poll so we can better serve you next time!

Have questions? Reach out to GoalsOfficeHours@Microsoft.com