Microsoft Viva

Viva Goals
Office Hours

**Reflection and Goal Planning
with Viva Goals**

December 13th
8am PST / 11am EST

Agenda

- Welcome (5 min)

- Reflection and Goal Planning with Viva Goals (25 min)

- Viva Goals Product Deep Dive: Goal Customization (15 min)

- AMA (10 min)

2023 Retros and 2024 Goal Planning with Viva Goals

Goal Rhythm Of Business

Goal setting follow a rhythm of business over a certain time period, generally recommended to be quarterly, with the following 4 steps:

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

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

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

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

Collaborate

Create

Close

Check-in

Importance of Reflection

- Empirical studies support that reflecting on work improves job performance:
  - In controlled setting, **performance improved by 18%** when participants were given the opportunity to reflect and share their learnings
  - In field experiment (Wipro), **22.8% increase in performance** for participants who reflected on their training.

- Locke and Latham also supported how feedback was a factor for higher goal achievement.

"When we fall behind even though we're working hard, our response is often just to work harder. But in terms of working smarter, our research suggests that we should take time for reflection."

—*Gino and Piscano*

Reflection and Collective Intelligence

Collective intelligence is the improved ability and skill that arises when individuals work together.

Leveraging the power of many minds working together. *Becoming smarter together.*

Steps Involved for a Goal Reflection Session

Step 1: Collaboration

- 2 weeks before end of time period, all goals owners are notified to update their goals' progress with highlights, lowlights, and learnings.

Step 2: Pre-Read

- A pre-read is sent to provide time for the audience to read through the updates and prepare any questions.

Step 3: Presentation of Reflection

- Leaders showcase their wins, learnings and next steps. Q&A is included to bring clarity especially for cross-functional goals.
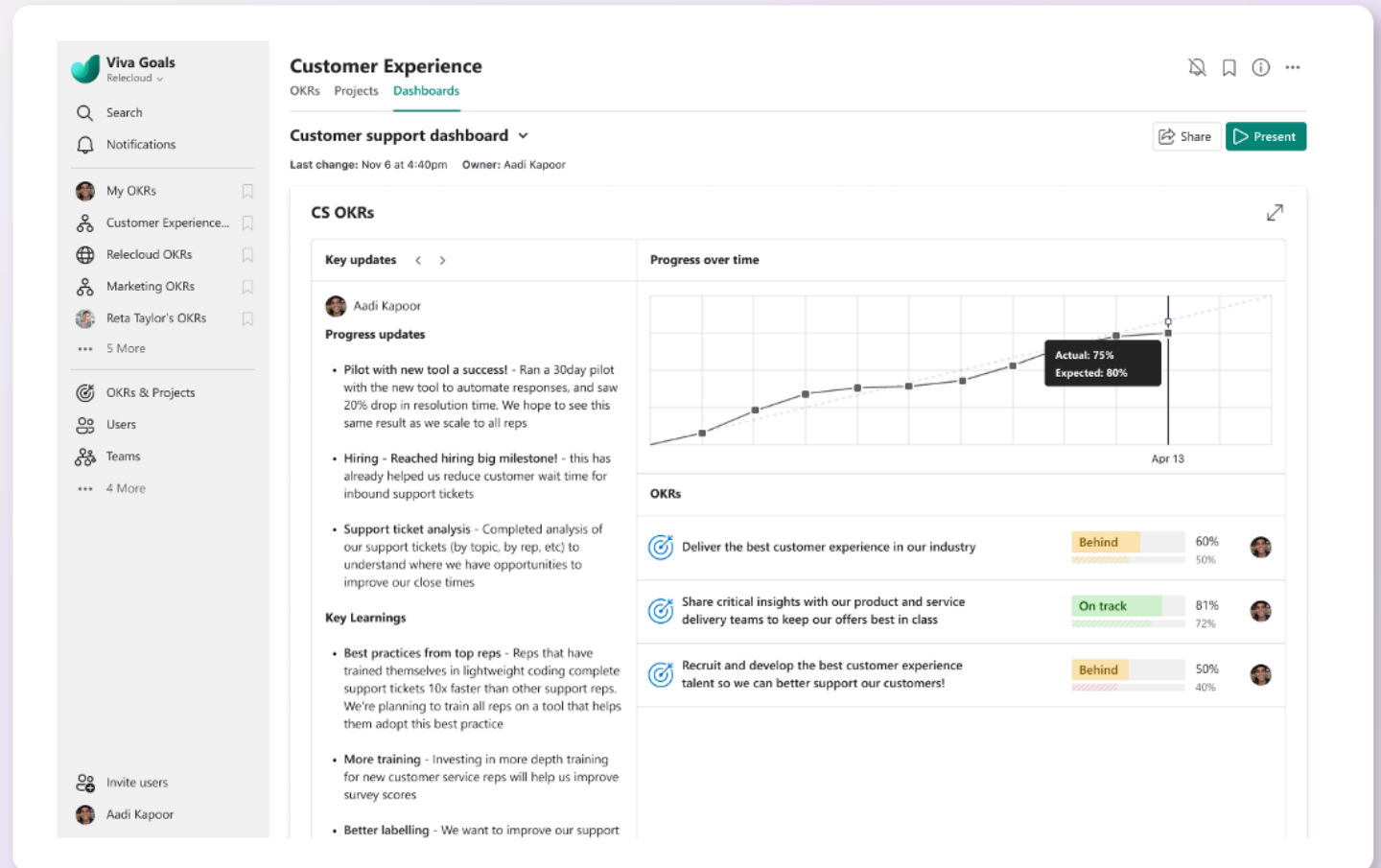
Step 4: Communication to wider audience

- Newsletter/Email/Viva Engage is sent to wider audience to provide summary and next steps.

How V+PG Do Reflection

Layout

- Panels are broken down into:
  - V+PG level Goals and Metrics
  - 3 teams incl. Viva Goals

- Format for each update is:
  - Highlights
  - Learnings
  - Help Needed
  - Next Steps

- Audiences targeted are:
  - V+PG in Newsletter
  - G+E Reporting up dashboard

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Common Blockers to Creating Goals

Often, we hear the following feedback on why creating goals is difficult:

- Identifying the relevant goals and metrics for different roles and teams

- Prioritizing the most important goals to focus on

- Refining the goals and metrics can be time consuming

OKR/Goals Coaching
Question Cheat Sheet

We will... **Objectives**

As measured by... **Key Results**

Via... **Initiatives**

Objectives/Goals	Key Results/ Metrics	Key Initiatives	Refinement	Finalization
• What is the most important area of our business that we need to focus on? • Why does that matter for us now? • How would we write it into a statement that inspires our team?	• How will we know we were successful? • What is the impact of our work? • What metric would let us know that we were successful? • Do we currently measure that metric? • What is our target?	• What do we need to do to achieve our key results? • Who needs to be involved? • What can we get done in the next X months?	• Does the Objective still hold true to the Key Results? • Are each of the Key Results well-defined with targets? • Will we see progress on each of our Key Results during the timeframe?	• If we fulfill all our Key Results, does that mean we were successful in our Objective? • Are all our Key Results necessary to fulfill our Objective? • Who owns which components of our goals?

Generate OKRs from a document

Generate OKRs

Refine OKRs

Human Centered Approach to Goal Setting: Leadership Teams

- Managing conflicts

- Diversity of thought

- Team skilling and enablement

- Change Management

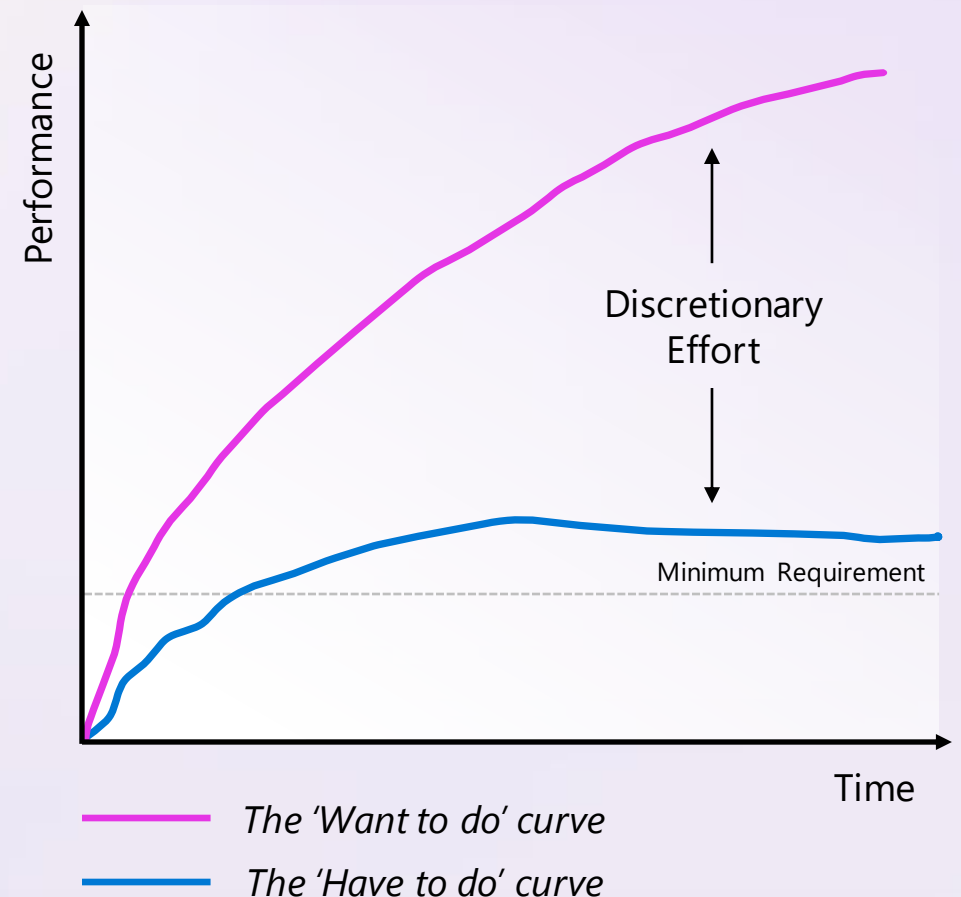➤ [How to Build and Coach a Healthy Team with Viva Goals](#)

Human Centered Approach to Goal Setting: Individual Contributors

Organizational Commitment

- Affective
- Continuance
- Normative

Discretionary Effort Chart

Performance

Discretionary Effort

Minimum Requirement

Time

— The 'Want to do' curve

— The 'Have to do' curve

Affective Organizational Commitment + **High** Discretionary Effort ➡ Catalyst for Goal Execution

Summary

Reflections

- Schedule reflection time at the beginning of quarter/semester
- Use Viva Goals Dashboard to create a reflection template for your team and department.
- Set reminders for goal owners to update their reflections ahead of the meeting

Goal Creation

- Create goals with your team and communicate the 'why'.
- Progress over perfection – We learn by doing.
- Leverage Copilot to streamline your goal setting process

Human Centered Approach to Goal Setting

- Use an external facilitator for goal setting meetings – Viva Goals Partners
- Assess organizational commitment and discretionary effort using employee surveys – Viva Glint
- Create goals to address the gaps in employee engagement levels using Viva Goals

Viva Goals Product Deep Dive

Goal Customization

Why?

We added the goal customization flexibility to allow teams to set and manage Goals without having to learn or adopt the OKR framework.

What?

What are the changes?

- Admins of organizations can now control the nomenclature of Goals used in the app for the following terms
  - OKRs
  - Objectives
  - Key Results
  - Initiatives

- Tenant Admins can set the tenant default terminology and grant organization admins permissions to modify terminology.

When?

Custom terminology will be available to all Viva Goals customers by 12/12.

Goal Customization Demo

Special resources for you!

- [Learn more](#) about Copilot in Viva Goals and Goal Customization

- [Sign up](#) for Copilot in Viva Goals Private Preview

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