



Viva Goals Office Hours

How Viva Goals and AI can Help
You Kick Off Your New Year

January 24th at 8:00 am PST/ 11:00 am EST

Agenda

- **Welcome (5 min)**
- **Product Deep Dive (45 mins)**
 - Viva Goals Customization (10 min)
 - Viva Goals and Copilot (20 min)
 - Share an Update with Viva Goals (10 min)
- **Q&A (10 min)**

Viva Goals Customization

Viva Goals Custom Terminology

Default Terminology	New Terms	Description
OKR	Goal OKR	A term that collectively refers to all items in Viva Goals.
Objective	Outcome Big Rock Goal Objective Theme	A clearly defined goal that is significant, actionable, and ideally inspiring.
Key Result	Metric Outcome Result Key Result	Measurable outcomes used to track the progress contributing towards the larger outcome.
Initiative	Action Deliverable Initiative Milestone Project To Do	Work undertaken to drive progress toward key results and, ultimately, the objective.

Custom Terminology

You can customize the terminology that Viva Goals should use for Contoso Global.

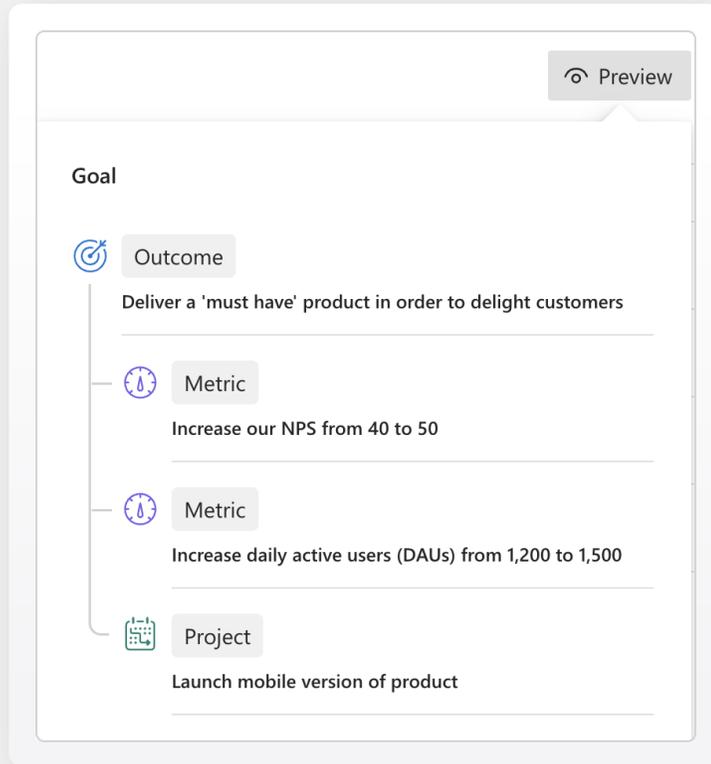
Default Term	Current Term	Description
OKR	↻ Goal	A term that collectively refers to all items in Viva Goals.
Objective	↻ Outcome	A clearly defined goal that is significant, actionable, and ideally inspiring.
Key Result	↻ Metric	Measurable outcomes used to track the progress contributing towards the larger outcome.
Initiative	↻ Project	Work undertaken to drive progress toward key results and, ultimately, the objective.

Custom Terminology

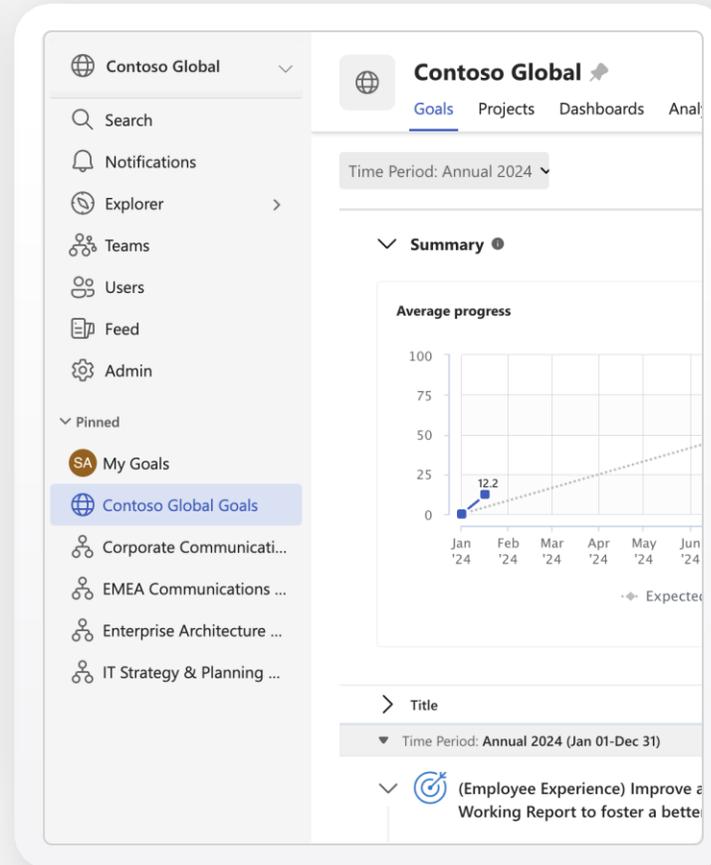
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Key Result	↻ <ul style="list-style-type: none"> Big Rock Goal 	Measurable outcomes used to track the progress contributing towards the larger outcome.
Initiative	↻ <ul style="list-style-type: none"> Objective Outcome Theme 	Work undertaken to drive progress toward key results and, ultimately, the objective.

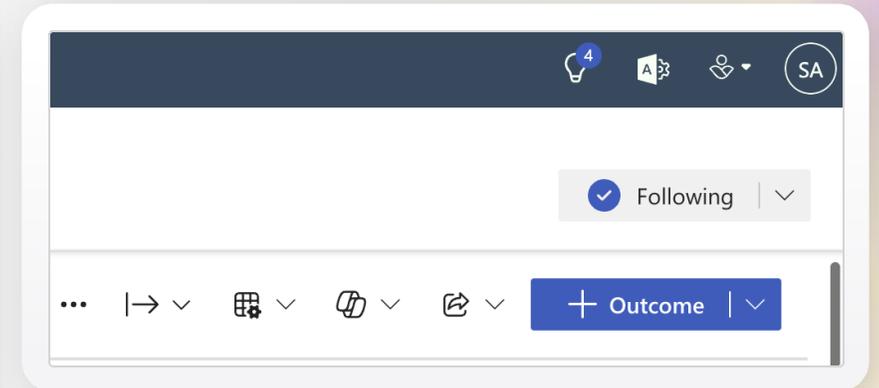
Viva Goals Custom Terminology



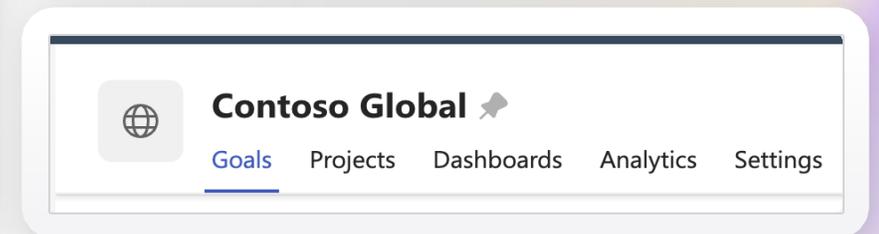
Get a preview in the settings area before you implement



Note how the system reads "Goals" and no longer "OKRs"



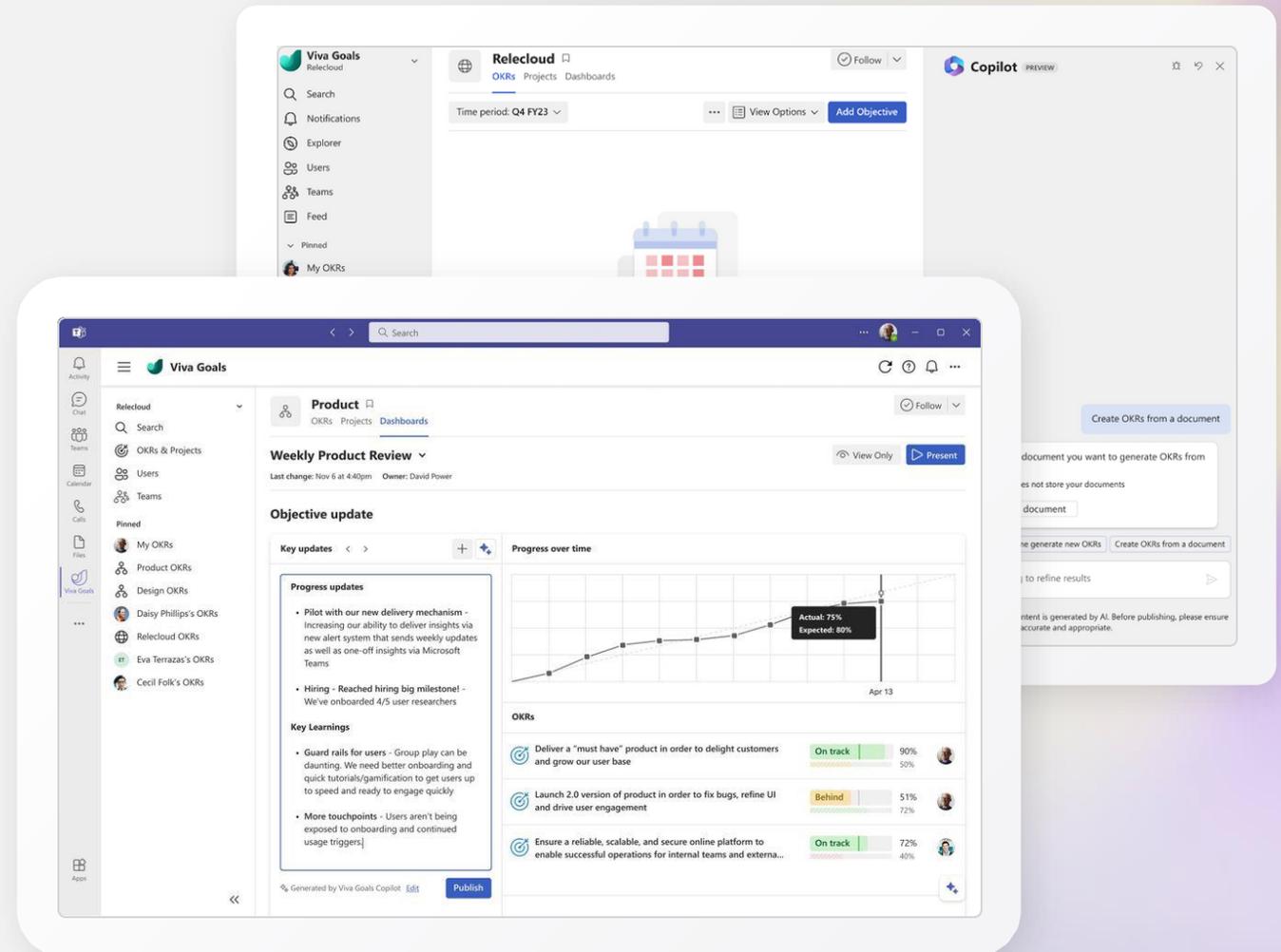
Updated terminology shows up on the prompts as well as the view tabs



Copilot in Viva Goals

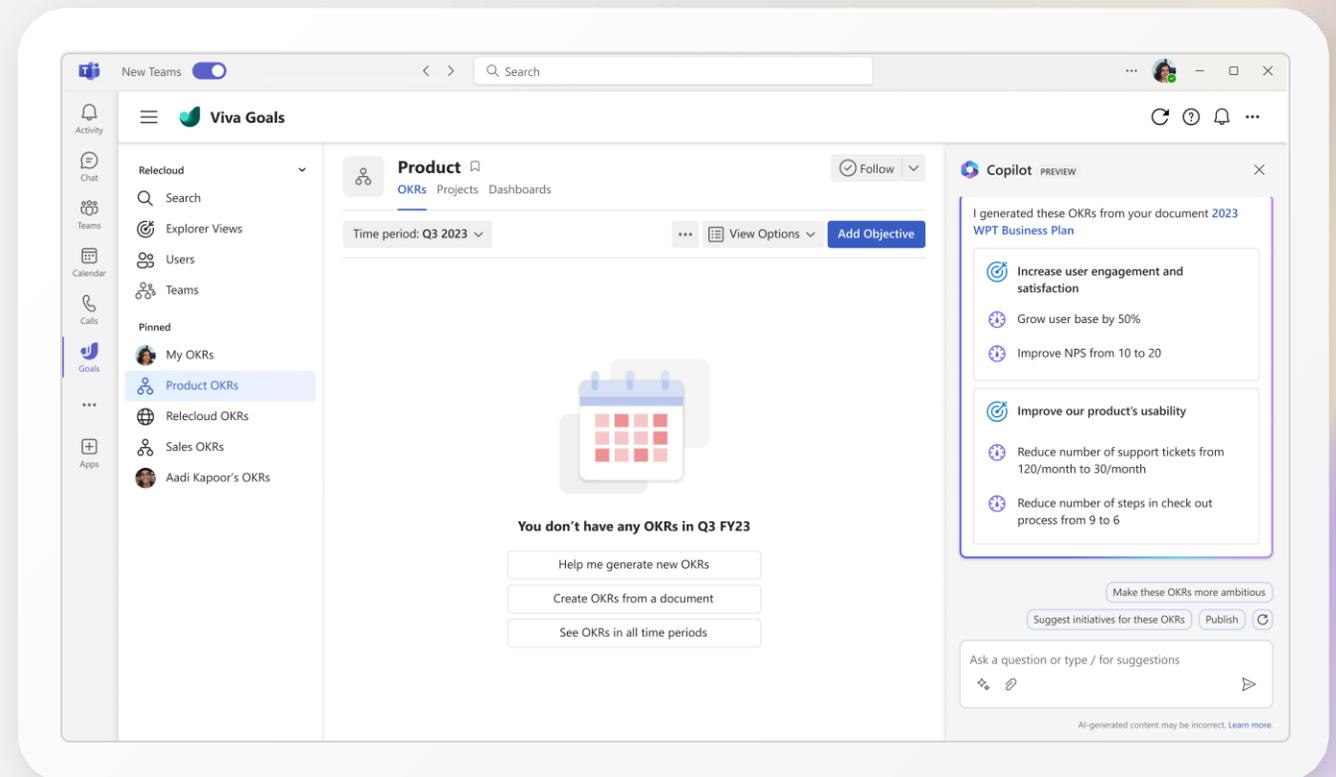
The future of goal management: Copilot in Viva Goals

- Bring content and relevancy by generating outcome-focused goal recommendations from **existing documents**
- Get personalized guidance and recommendations with **conversational AI** to generate and refine OKRs
- Develop more comprehensive check-ins with an **automated progress summary** for each goal using data and context
- **Generate an overview** that can be shared in different views with a progress summary for team OKRs



Copilot in Viva Goals for... 2024 Goal Planning

- Generate actionable, measurable goals **from strategic docs your leadership has shared** and **meeting notes**
- Break strategy docs down to create **relevant goals for specific departments and teams** (i.e. Product, Customer Success, Marketing, etc.) to ensure organization-level priorities are put first on a department-by-department and team-by-team basis
- Empower team members to **use conversational AI with Copilot in Viva Goals** to author, refine, and propose goals
- **Shorten the goal planning cycle and improve the quality of your goals** to get to productivity that moves the needle for your business, faster



Copilot in Viva Goals for...

Providing Updates to Leaders

- **Generate goal progress updates with the click of a button** using conversational AI in Viva Goals
- Refine what Copilot in Viva Goals delivers to sound **more professional or shorter**
- Simply **copy/paste the update into the surface that makes most sense for you**, from email to PowerPoint to Teams to Viva Goals review dashboards
- Provide leaders with **data and impact-driven updates** whenever necessary in a fraction of the time

The screenshot displays the Viva Goals interface for Steve Smith. The main area shows a list of OKRs for Q3 2023:

Title	Status and progress
> Deliver a "must have" product in order to delight customers and grow our user base	Not started
> Launch 2.0 version of product in order to fix bugs, refine UI and drive user engagement	Behind
> Reduce number of support tickets from 120/month to 30/month	On track
Reduce number of steps in check out process from 9 to 6	Behind
Increase user time spent on site from 2:37 per session to 3:45 per session	At risk
Perform a click study	On track
Compile bug report	At risk
> Ensure a reliable, scalable, and secure online platform to enable successful operations for internal...	On track

On the right, the Copilot interface shows a generated summary of Q3 FY23 progress:

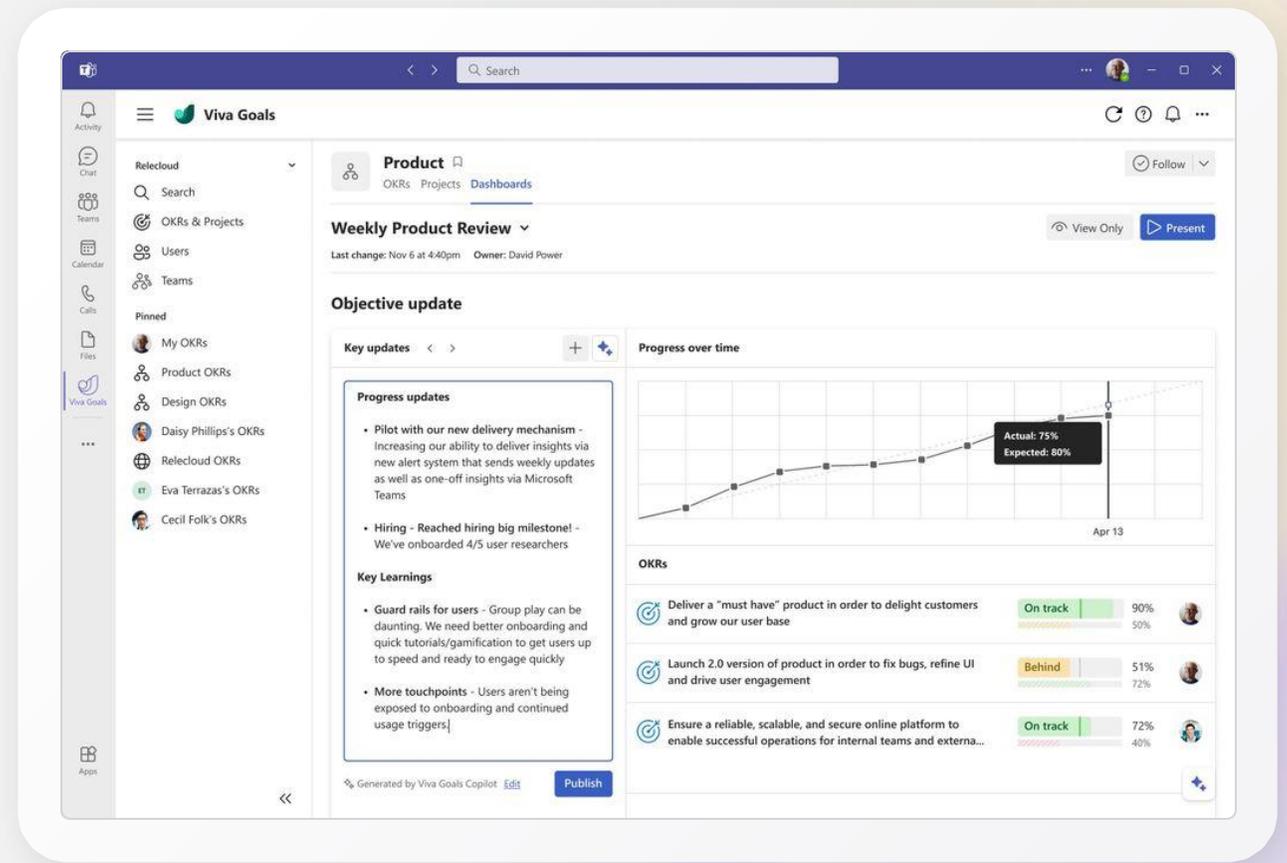
Sure, here is the summary of Q3 FY23 for last month:

- The team has made significant progress towards delivering a "must-have" product, with 50% completion.
- However, this objective is currently at risk due to unforeseen challenges in the development process.
- The company is working diligently to address these challenges and get back on track.
- Meanwhile, the company is on track with their goal to launch the 2.0 version of the product, with 20% progress achieved.
- The development team has been successful in fixing some critical bugs and has made strides in refining the UI. The company is confident that this objective will be achieved on time.
- On the other hand, the objective to

Buttons for 'Copy', 'Make it shorter', and 'Generating summary, please wait...' are visible.

Copilot in Viva Goals for... Reporting on Outcomes

- Reduce friction and time in **gathering updates and putting together reports for business reviews**
- Frame **the impact of your team** clearly and concisely as recommended by conversational AI
- **BONUS:** Use Share an Update to share outcomes generated from Copilot in Viva Goals with all relevant stakeholders via email
- **EXTRA BONUS:** Export your findings to PowerPoint and fine tune with Copilot



Share an Update

Share important context about goals with ease

- **Communicate about goals at scale** so your team can stay focused on the most important priorities
- **Share progress updates** with stakeholders
- **Share dashboards** so the team has visibility to business rhythms.

The screenshot displays the Viva Goals interface for a user named Mona Kane. The main dashboard shows a list of goals for Contoso, including 'Deliver new customer scenarios', 'Our products are loved and trusted', 'Deliver Windows Innovation', 'Developers love M365', 'Drive strong business performance', 'Elevate brand presence and reputation', and 'Build a world class company culture'. A 'Share an update' dialog box is open on the right, allowing the user to share a message with their team. The dialog box contains a text area with the following content:

Hello everyone,

As we approach the end of the quarter, I wanted to provide an update on our progress towards achieving our goals. I am happy to report that we are making good progress across all the objectives.

Highlights:

We have successfully delivered several new customer scenarios, including a new onboarding experience for new users and an updated checkout process that has led to an increase in completed transactions. Our product and design teams have been working hard to improve the customer experience, and our efforts are paying off.

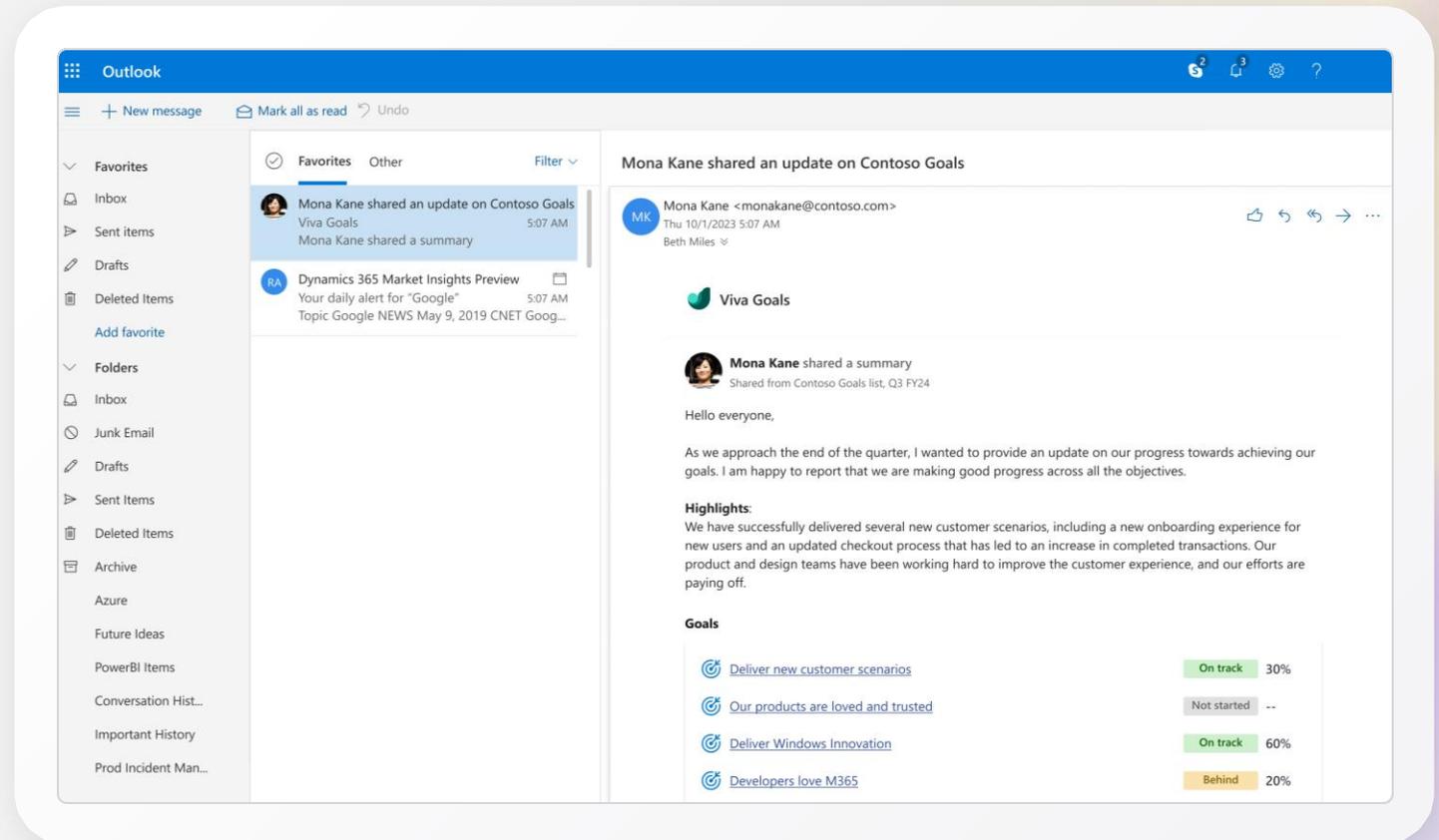
Below the text area, there is a table showing the progress of various goals:

Goal	Status	Progress
Deliver new customer scenarios	On track	30%
Our products are loved and trusted	Not started	--
Deliver Windows Innovation	On track	60%
Developers love M365	Behind	20%
Drive strong business performance	At Risk	10%

The dialog box also includes a 'Post' button and a notification that 'Members of Service...' will be notified in email when the update is posted.

Meet your team where they are already working in Outlook

- **Updates standout** in email with rich visual content.
- **React and comment** on updates from Outlook or the Goals App
- **Understand the impact of your shares** in views, comments, and reactions.



AMA

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