Microsoft Viva

Viva Goals
Office Hours

"Where Are We Going?": How to Chart
Your Viva Goals Journey

July 26th
8am PST / 11am EST

Agenda

- Welcome (5 min)

- "Where Are We Going?": How to Chart Your Viva Goals Journey– featuring Liz Pierce and Tamara Taylor (15 min)

- AMA (10 min)

- Interactive brainstorm session with the Viva Goals team: How do you collaborate on goals in your organization today and what more can Viva Goals do to help? (20 min)

"Where Are We Going?": How to Chart Your Viva Goals Journey

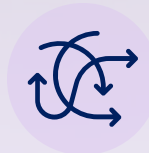# Organizations are facing unprecedented and critical challenges

Organizations are required to operate faster and more efficiently while dealing with uncertainty

Employees are seeking purpose and meaning at work

COVID accelerated the transition to remote and distributed work—and a greater need for organizational resiliency

Work is further siloed, making visibility and the "line of sight" into productivity challenging for leaders

Organizations are looking for a better way to drive purpose, alignment and results
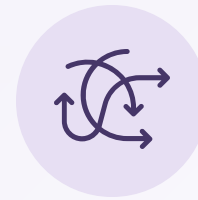
Becoming more judicious with their budget, resources and time

Adapting to a new normal at work, including the digital needs of a hybrid or remote workforce

Focusing on and communicating top priorities for the organization

Aligning and connecting work groups that are either siloed and disconnected, or doing redundant work

Driving Employee Engagement AND Business Results

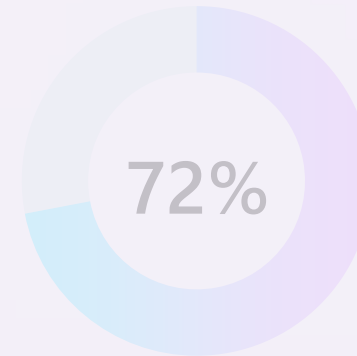**Employees want to know their work matters and makes an impact**

Leaders are struggling with strategic alignment and visibility in a new world

50%
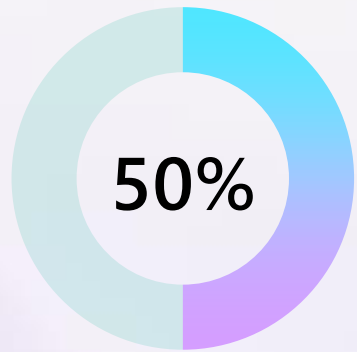
of employees say goal clarity gives them a greater sense of purpose[1]

81%
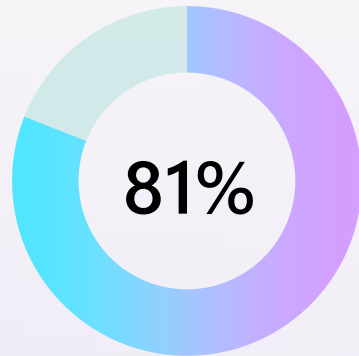
of employees say it's important for leadership to help them prioritize their workload[2]

72%

of executives and middle managers surveyed could not list three of their company's strategic priorities[3]

80%
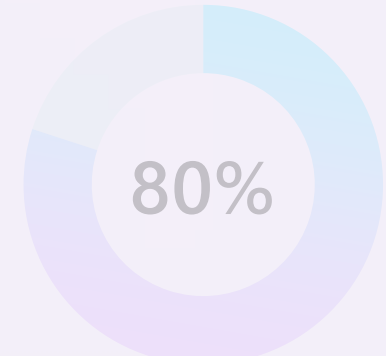
of people managers say they would benefit from more clarity from senior leadership on impactful priorities[2]

[1]*Forrester State of Goal-setting report, 2023*
[2]*Microsoft Work Trend Index, 2022*
[3]*MIT Sloan Management Review, 2018; "No one knows your strategy – not even your top leaders"*

Organizations are placing a priority on...

Clarity, Impact and Results

Investing more time crafting clear goals and clarifying strategy as one of three "must do's" to drive better visibility and alignment that leads to faster decisions across teams

Constructing small, agile, cross-silo teams focused on outcomes —empowered to do the work that drives the greatest impact

Adopting new collaboration technologies that support "micro-interactions" that resulted in clear outcomes

Organizations are accomplishing this by...

Focus, Purpose and Adaptability

Redesigning Work Processes

New work processes foster new ways of working-- redefining collaboration that drives clarity and focus

Creating Emotional Proximity

Impact of work is more tangible, meaningful and connected to higher sense of purpose and to what matters most

Cultivating Micro-Based Experiences

Teams are empowered to create micro-cultures that are more easily adaptable for "domain-level" work streams

What is *their* "Why" for using Viva Goals?

Our Customers Say...

Getting from "why" to "how" with Viva Goals

Visibility

Leveraging an organic grassroots approach, the **Experiences + Devices** org is revitalizing and '*redesigning work processes*' inside Microsoft
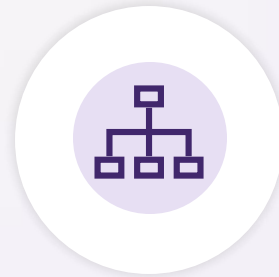
Alignment

With a structured top-down deployment, **WeLocalize** cascaded to a team level to mobilize & increase *proximity* to common goals

Growth

Using a roll-out centered around OKR upskilling and change management, **O.C. Tanner** elevated their *culture of ambition & accountability*

Driving *visibility* with Viva Goals | Microsoft E+D Org

Challenge – "Why?"

- Different rhythms of business, systems of record, and goal targets across teams
- Slower decision making, partly due to lack of clarity around goals and dependencies
- Inefficiency in meeting prep / re-work to create content for siloed meetings

Solution – "How?"

- Use Microsoft Viva Goals and to increase cross-team visibility and help employees work more efficiently and effectively together across the organization
- Modelled depth, hands on adoption motion in the Leadership Team program
- Scaled rapidly via grassroots adoption enabled by broad licensing assignment, availability of self-serve resources, and best-practice sharing community engagement

Benefits – "Where are we going?"

- **More transparency.** Single source of truth for goals – 650+ teams have 'opted in'
- **Increased partnership.** Cross-functional visibility highlight collaboration & partnership opps
- **Greater focus.** Leaders have a heightened sense of clarity and accountability
- **Increased agility.** Healthy business rhythms emerge around goals
- **Elevated achievement.** Building a portfolio of accomplishments and culture of celebration

Microsoft

Industry
Professional Services

Organization size
45k+ employees, 1000+ teams, across 30+ countries

Country
United States

Microsoft Viva app
Viva Goals

Experience area
Purpose

"Viva Goals allow anyone in the organization to see what other people are working on. Individuals can see the importance of their contributions to their team. Leaders can see how their objectives are being implemented by teams throughout their organization and initiate discussions to keep the work on track."

Jennifer Perret
Principal Group Program Manager
Microsoft

Cascading *alignment* with Viva Goals | WeLocalize

Challenge – "Why?"

- In a given month, they might have tens of thousands of individual projects
- They were looking to adopt systems and processes to drive execution and monitor delivery
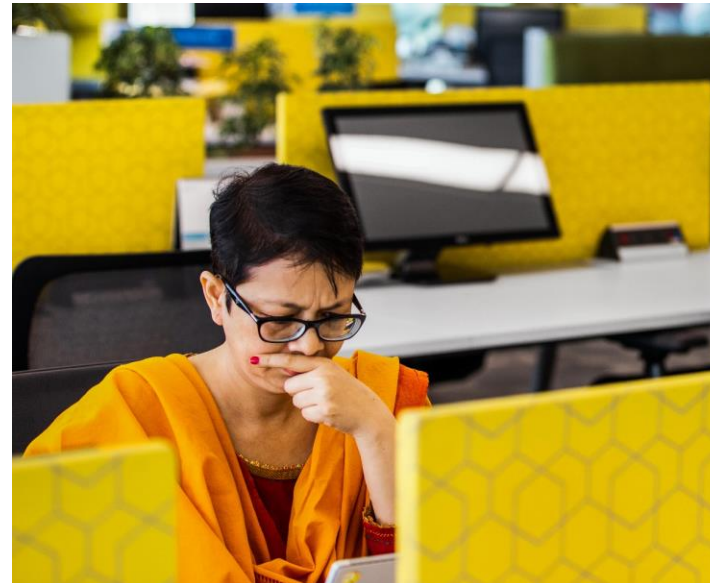- Their goal was to support increase efficiency, alignment, and agility in business processes

Solution – "How?"

- Shift to embrace an agile approach and a structured goal-setting solution
- Restructured their project management and customer delivery teams into 60 cross-functional "Squads" of 10 or fewer people
- Drove a top-down transition with centralized executive sponsorship

Benefits – "Where are we going?"

- **Alignment.** Squads are now more efficient, focused, and able to operate more independently
- **Employee happiness.** Project manager attrition has declined by more than 10 percent
- **Customer satisfaction.** As Squads became more familiar with agile methods, OKRs, and the app, Likert satisfaction scores among customers rose from 4-5 to 7-8.

welocalize

Industry
Professional Services

Organization size
Large (1,000-9,999 employees)

Country
United States

Microsoft Viva app
Viva Goals

Experience area
Purpose

"We might perform 50,000 projects a month for customers, involving 125 different languages. Viva Goals helps us share a common language and understanding of company goals, ultimately making us quicker and more efficient, focused, and competitive."

Chris Grebisz
Chief Technology Officer
Welocalize

Aspiring towards *growth* with Viva Goals | O.C. Tanner

Challenge – "Why?"

- Company was shifting from its roots in manufacturing to be more technology focused
- Needed to transform the way it develops and improves products to keep pace & innovate
- Tenured organization who were used to one way of doing things but needed to evolve

Solution – "How?"

- Change management initiative centered on embracing the OKR methodology
- Shifted the thinking internally on the benefits of focusing on *outcomes* not *outputs*
- Embraced top-down sponsored deployment of Viva Goals as the tool to operationalize and drive accountability and alignment on the improved goals teams were now setting
- Started with a pilot at the Leadership level before broad department-wide roll out

Benefits – "Where are we going?"

- **Alignment.** Uncovering dependencies and driving 'unity in focus'
- **Visibility.** Everyone sees the full picture and understands their part in it
- **Achievement.** The team feels empowered and supported to set ambitious, stretch objectives

O.C. TANNER

Industry
Manufacturing

Organization size
Large (1,000-9,999 employees)

Country
United States

Microsoft Viva app
Viva Goals

Experience area
Purpose

"We saw the need to elevate our game in terms of aligning the objectives we needed to accomplish and how to accomplish them. That's why we chose to roll out Microsoft Viva Goals to all of our software and IT employees."

Jason Anderson
Vice President of Product
O.C. Tanner

What is *your* "Why"...

and what should you do next?

What is *your* "Why"?
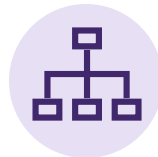
What's your biggest challenge?

Visibility
Eg: Different systems of record and ROBs lead to challenges navigating dependencies

Focus
Eg: Everything is important and urgent – so nothing seems to be getting done

Alignment
Eg: You want to make a shift in strategy – but lacking common understanding on how

Adaptability
Eg: Overlapping processes, leading to a lot of 'work about work' + slower decisions

Growth
Eg: Team culture lacks psychological safety to 'fail' leading to lack of ambition in goal setting

How can you approach Goals adoption?

- Standardize use of Goals for goal tracking
- Leverage self-serve resources + community
- Rely on grassroots virality to drive adoption

- Model & broadcast 'focus' at leadership level
- Use Goals to drive accountability & ownership

- Managed cascade, starting top-down
- Clarify expectations & require alignment

- Standardize use of Goals for goal tracking
- Prescribe standard Dashboard templates for specific meeting types (eg QBR vs. stand up)

- Invest in depth OKR change management
- Model growth mindset at leadership level

What to do next?

- Reflect on your 'why'
  - The Viva Goals Journey: Reflect on Your WHY
    - *Note: This resource is available on the [Office Hours Resources Site](#).*

- Define your 'how'
  - How structured will your roll-out be (eg top down vs. grassroots)?
  - How intensively will you focus on evolving how people set goals?
  - What support will you put in place (self-serve resources, community of practice, 'on call' experts/champions)?

- Leverage Viva Goals adoption resources
  - *Adoption guide*: [Viva Goals Getting Started Guide](#)
  - *Maturity model*: [Viva Goals Enterprise Maturity Model](#)

Brainstorm Session

Group Brainstorming Exercise

<u>Activity</u>

How do you work together to come up with and achieve goals?

<u>Instructions</u>

- We'll walk you through our assumptions on how you work to achieve goals collaboratively.

- Raise your hand or utilize the chat feature: Tell us what we're getting right, what we're getting wrong, and things we may have missed

<u>Goal</u>

- To get feedback on what resonates and what doesn't in the goal creation & execution process.

- Create awareness and empathy on how different individuals and team cultures collaborate on goals.

Microsoft Viva Goals Community Events

Viva Goals August Office Hours

What to do in your first 30 days with Viva Goals

- Featuring Jake Singer, Senior Program Manager, Viva Goals Customer Success and Incubation
- August 23rd at 8am PST / 11am EST
- Register here

Stay in the loop with Microsoft Viva Goals

- Where to find upcoming live events:
- Microsoft Viva Goals Community
- Join our newsletter:
- Subscribe here, to stay informed on everything going on within Microsoft Viva Goals, including upcoming events like office hours, events happening in the Viva Community and more!

![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