



Viva Goals Office Hours

**3 Ways to Improve Your Goal Management
Process with Copilot in Viva Goals**

Thursday, November 9th
8am PST / 11am EST

Agenda

- Welcome (5 min)
- 3 Ways to Improve Your Goal Management Process with Copilot in Viva Goals – featuring Lucy Hitz (15 min)
- Viva Goals Product Deep Dive: Copilot Demo – featuring Jatone Wilson (20 min)
- AMA (15 min)

3 Ways to Improve Your Goal Management Process with Copilot in Viva Goals

What is Viva Goals?

A goal and Objectives and Key Results (OKR) management solution designed to help leaders and teams **create, manage and track organizational goals.**

Outcome-driven goals help teams **align to strategic priorities** and **deliver measurable results.**

Viva Goals provides a **single, secure repository** for goals across the organization, connecting team goals to employees' daily work with easy-to-use updates, reporting and integrations.

The screenshot displays the Viva Goals interface for a 'Customer Experience' OKR. The main content area shows a list of OKRs with their status and progress. The left sidebar contains navigation options.

OKR Title	Status and progress	Owner	Due date
Deliver the best customer experience in our industry	Behind 50%	[User]	Jun 30
Provide delightful customer support	On track 60%	[User]	Jun 30
Decrease support ticket resolution time to 43hrs (from 55hrs)	Behind 60%	[User]	Jun 30
Increase 'positive experience' survey score to 95 (from 90)	At risk 40%	[User]	Jun 30
Decrease response time to 5hrs (from 6hrs)	On track 80%	[User]	Jun 30
Every customer quickly and easily sees ROI from using our products and services	Behind 50%	[User]	Jun 30
Our customer success teams are empowered with best-in-class tools to ensure customers are successful	On track 72%	[User]	Jun 30
Share critical insights with our product and service delivery teams to keep our offers best in class	At risk 34%	[User]	Jun 30
Recruit and develop the best customer experience talent so we can better support our customers!	On track 60%	[User]	Jun 30

Setting your annual and quarterly goals

Without Viva Goals

- Leadership sets goals as part of planning cycle
- Goals are presented in an annual kick-off or corporate planning meeting
- Goals are stored in a folder, SharePoint site, Teams site, other repository
- Goals are:
 - Forgotten
 - Revisited infrequently
 - Out-of-date



With Viva Goals

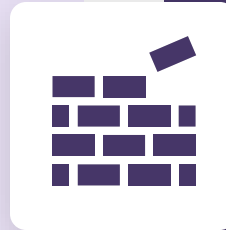
- Leadership sets goals as part of planning cycle, adding them to Viva Goals
- Goals are presented in an annual kick-off or corporate planning meeting and at regular cadences
- Goals are readily available in Viva Goals, via Teams or browser, with nudges and easy check-ins
- Goals are:
 - Easy to set and access
 - Brought into the flow of work



Tracking goal progress

Without Viva Goals

- Work and activity executed and tracked in independent, siloed systems and applications
- Goal progress is updated ad-hoc or infrequently, just in time for leadership or team reviews
- Cross-team goal updates can take hours to gather and consolidate



With Viva Goals

- Work and activity executed in different systems, and top priority progress is tracked in Viva Goals
- Goal progress is automatically updated in connected Key Results and Initiatives
- Integrations include M365 solutions (Power Bi, Azure Dev Ops, Project, Excel) and other solutions (Jira, Asana, Box, Trello, Salesforce)



Presenting goal results and outcomes



Without Viva Goals

- Business managers and leads aggregate goal updates from their teams, taking hours to gather and consolidate information
- Goals and statuses need to be exported and formatted into a presentation or email
- Each update takes time and energy to manually create / update slides or format email templates



With Viva Goals

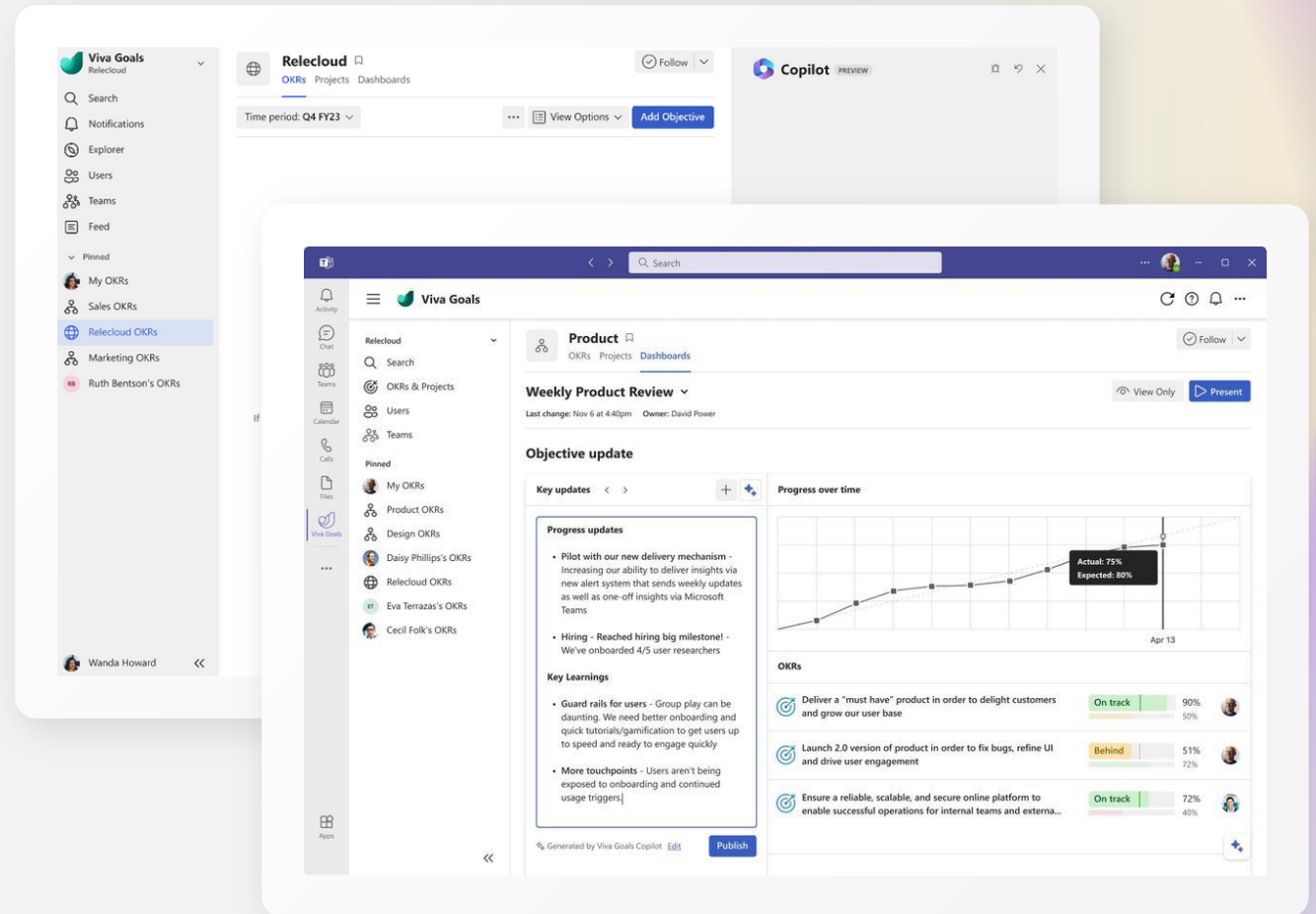
- Goals results are ready-to-go based on check-ins and automatic or regular updates
- Goal progress can be presented from customizable dashboards, with built-in widgets, text boxes, OKR display styles
- Share goal updates with employees or teams via emails with Broadcast capability
- Quickly create PowerPoint slides with goal updates using built-in export

“Employees satisfied with Viva Goals are **3x times** as likely to agree they understand how their work contributes to the company’s success.”

Employee Experience (EX) Outcomes,
Viva Usage and Satisfaction Study

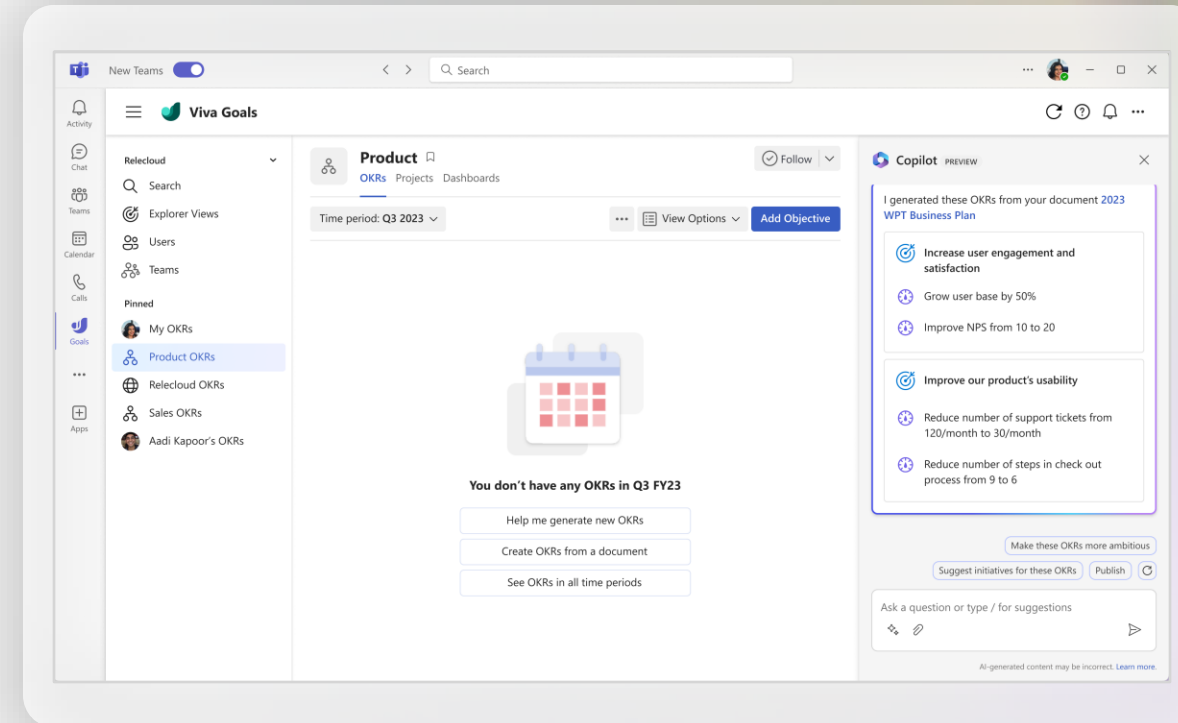
The future of goal management: Copilot in Viva Goals

- 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 left sidebar shows navigation options like Search, Notifications, Explorer, Users, Teams, and My OKRs. The main content area shows a list of OKRs for Q3 2023, including '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), and 'Ensure a reliable, scalable, and secure online platform to enable successful operations for internal...' (On track). A Copilot-generated summary is shown on the right, providing a concise overview of the Q3 FY23 progress, highlighting key achievements and risks. The summary includes a 'Copy' button and a 'Make it shorter' button. A 'Generating summary, please wait...' message is visible at the bottom right.

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

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

See more

Copy

AI-generated content may be incorrect

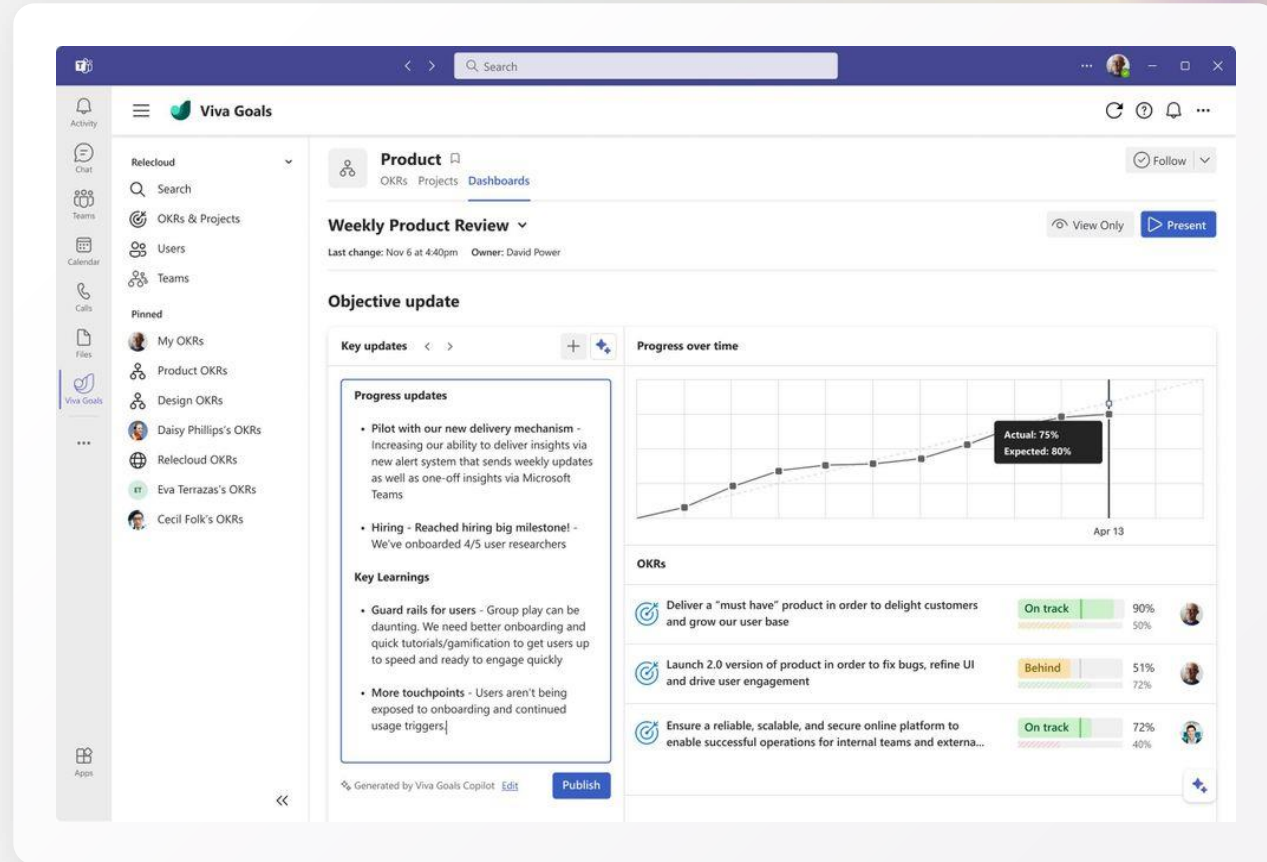
Make it shorter

Stop generating

Generating summary, please wait...

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 Goal Broadcast (Coming December 2023) 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



What Copilot in Viva Goals users are saying:

"Previewing Copilot in Viva Goals has shown great potential for critical time savings and more impactful goal-setting and management. We are especially seeing the value in assisting users as they create better goals and craft more relevant progress summaries, so we can free up time for improved productivity and innovation."



Charles Bowles

Manager, Workplace Experience
Advisory, , Avanade

"As someone deeply passionate about the endless possibilities of AI, I find the integration of Copilot into the world of OKRs and Viva Goals truly exhilarating. The fusion of these technologies has the potential to revolutionize how we craft and pursue meaningful goals. **With Copilot in Viva Goals, we're not just setting objectives; we're harnessing the power of data-driven insights** to sharpen our focus, create more relevant targets, and elevate our goal-setting game to new heights."



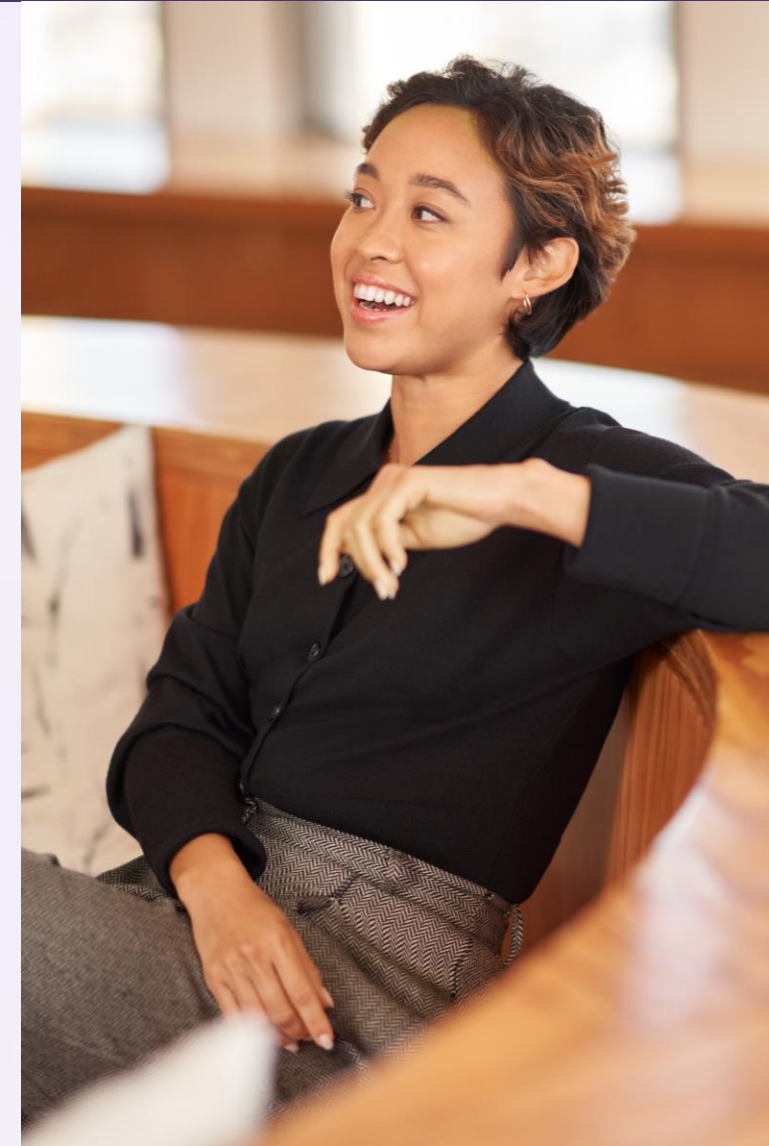
Scott Blackwell

Microsoft Digital Employee
Experience

Live Demo of Copilot in Viva Goals

Special resources for you!

- [Learn more](#) about Copilot in Viva Goals and Goal Customization
- [Sign up](#) for Copilot in Viva Goals Private Preview
- [Video - How to drive clarity & alignment with Copilot in Viva Goals](#)



AMA

Microsoft Viva Goals Community Events

Viva Goals December Office Hours

2023 Retros and 2024 Goal Planning with Viva Goals

- Featuring Vivian Ajetunmobi, Viva Goals Advisor, Viva Goals, and Wendy Pat Fong, Viva Goals Advisor, Viva Goals
- December 13th at 8:00 am PST / 11:00 am EST
- [Register here](#)

Tech Community YouTube Live: How to Drive Team Performance and Results with Viva Goals

- Featuring Jeff Kotz, Director of the Microsoft Channel Alliance at McChrystal Group, and Kevin Cole, Implementation Program Manager at McChrystal Group
- [Watch recording here](#)

Tech Community YouTube Live: How to Improve Collaboration and Results on Your Product Team with Viva Goals and ADO

- Featuring Mark Myers, Senior Program Manager, Digital Security and Resilience, Microsoft, and Johnny Jones Jr., Senior Technical Program Manager, Microsoft Security Response Center, Microsoft
- [Watch recording here](#)

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Where to find upcoming live events:

- [Microsoft Viva Goals Community](#)

Join our newsletter:

- [Subscribe here](#), to stay informed on everything happening within Microsoft Viva Goals, including upcoming events like office hours, events happening in the Viva Community and more!

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