

# Agenda

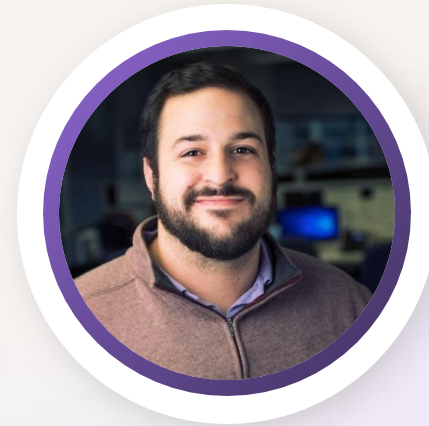
1. Demo of Copilot in Viva Goals
  - a. What is it? How do we use it?
  - b. Using Copilot to generate Goals
  - c. How Copilot summarize Goals?
2. How Copilot is Solving Customer Pain-Points
3. Q&A

# Conference Participants



## Mohanraj Ganesan

Mohan is a Product Manager for the Viva Goals Copilot. Mohan explores how to leverage Microsoft Copilot to improve Viva Goals workflows to write better Goals, leverage Copilot in Viva Goals to summarize goals or prepare for a check-ins and lot more



## Jake Singer

Jake is a Senior Program Manager on the Viva Goals team. Jake works with large enterprise customers to help them understand the 'art of the possible' and help these organizations deploy Viva Goals as part of their larger digital transformation. Jake has helped hundreds of organizations leverage the power of Viva Goals to drive better business outcomes.

# Poll

How frequently do you currently use Viva Goals?

# Copilot in Viva Goals

## What is it?

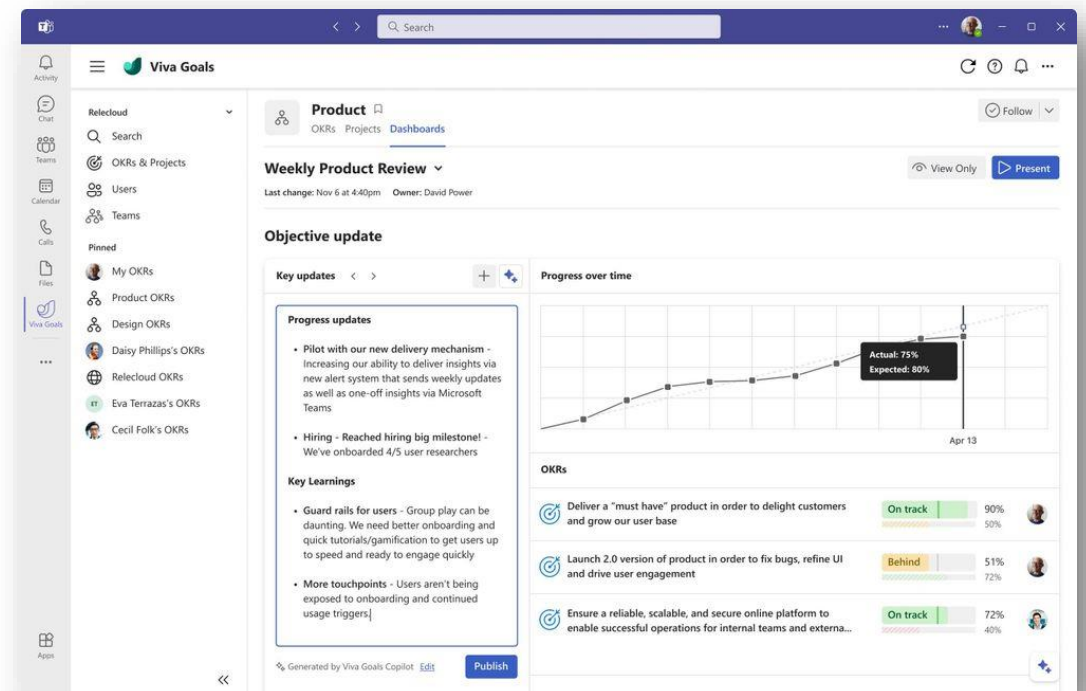
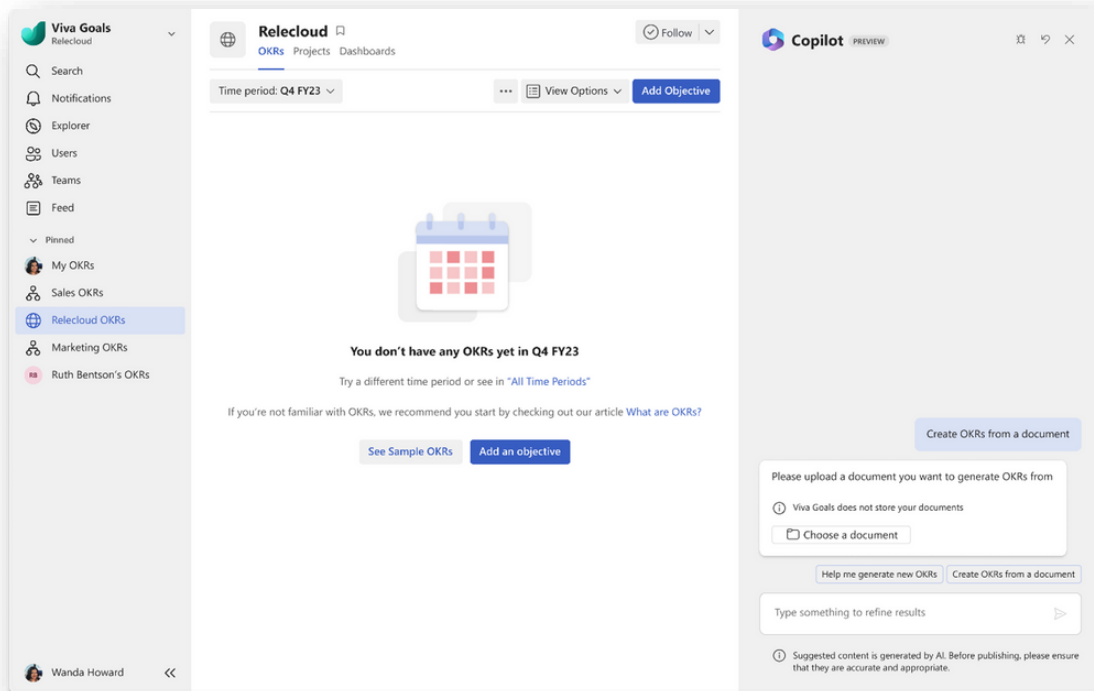
Copilot in Viva Goals uses AI to simplify and improve goal-setting and management by generating goal recommendations from existing strategy documents, generating and refining suggestions with conversational AI, and publishing progress summaries based on contextual data.

# Copilot in Viva Goals helps you achieve your outcomes

Generate goals from an existing strategy document

Get coaching to refine your goals

Automatically summarize to abstract overall progress from detailed updates



**Generate OKRs from a  
document**

**Refine OKRs**

# OKR Summarization



# Poll

How much do you think Copilot will simplify your work?

# Navigating Customer Pain Points with Copilot

# Customer Experience: Scaling OKR Learning

## Customer Story

Customer "A" is a large Fortune-100 organization with a 2023 FY initiative around ensuring their hybrid workers feel empowered and engaged with the work they're doing. As part of their larger digital transformation, they are rolling out OKRs from L1 to L4. While the organization has selected Viva Goals as its tool of choice, there is much help needed with crafting OKRs for the L3 and L4 levels.

## Challenges Faced

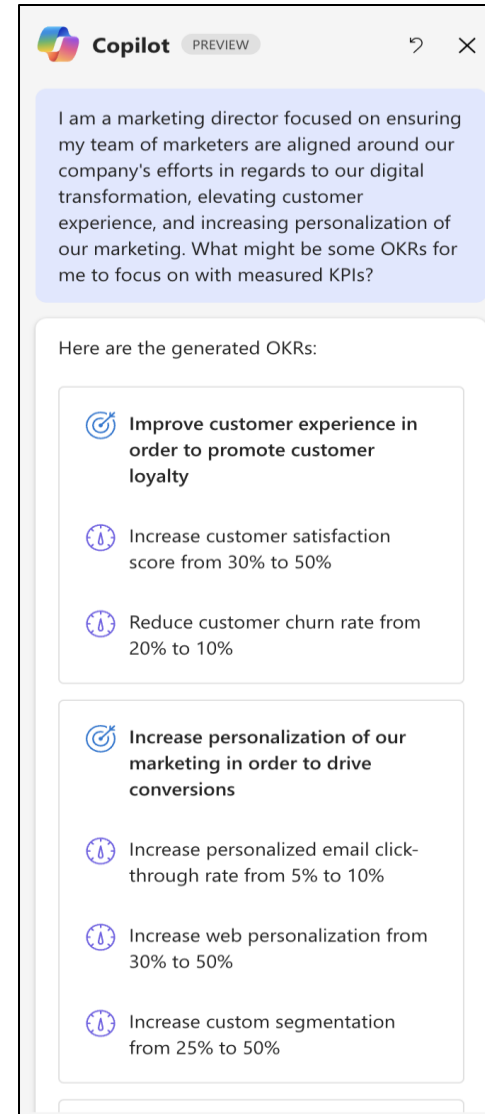
Customer "A" cascaded Goals from L1 to L4. As part of their process; L1 created their goals first and shared with L2. L2 then created goals based on their L1's goals. L3 created goals based on L2, and L4 created goals based on L3.

While the organization offered a few learning sessions on OKRs, leaders who were new to OKRs were still unsure of what would be good OKRs for their specific teams to support the higher-level goals.

Insert Viva Goals + Copilot.

## Copilot in Viva Goals Solution

**By providing Copilot prompts around their role and function, as well as their leaders OKRs, Copilot was able to recommend starting point OKRs for the leaders to consider.**



The screenshot shows the Copilot interface with a prompt and generated OKRs. The prompt is: "I am a marketing director focused on ensuring my team of marketers are aligned around our company's efforts in regards to our digital transformation, elevating customer experience, and increasing personalization of our marketing. What might be some OKRs for me to focus on with measured KPIs?". The generated OKRs are:

- Improve customer experience in order to promote customer loyalty
- Increase customer satisfaction score from 30% to 50%
- Reduce customer churn rate from 20% to 10%
- Increase personalization of our marketing in order to drive conversions
- Increase personalized email click-through rate from 5% to 10%
- Increase web personalization from 30% to 50%
- Increase custom segmentation from 25% to 50%

## Prompt

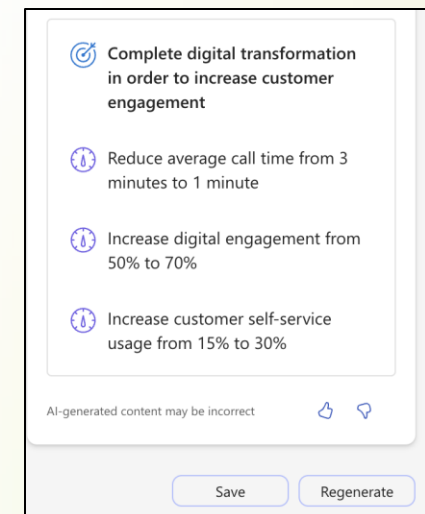
Give context to your role and the priorities your leaders are focused on

## Generated OKRs

While not 100% perfect, the generated responses give you the ability to edit, or add in additional details to better calibrate.

## Time Saving

Not only can you save time with help ideating, but you can also quickly save and have Viva Goals auto enter the goals into the system.



The screenshot shows the Viva Goals interface with generated OKRs. The OKRs are:

- Complete digital transformation in order to increase customer engagement
- Reduce average call time from 3 minutes to 1 minute
- Increase digital engagement from 50% to 70%
- Increase customer self-service usage from 15% to 30%

At the bottom, there is a note: "AI-generated content may be incorrect" and buttons for "Save" and "Regenerate".

# Customer Experience: Repurposing Time for Efficiency

## Customer Story

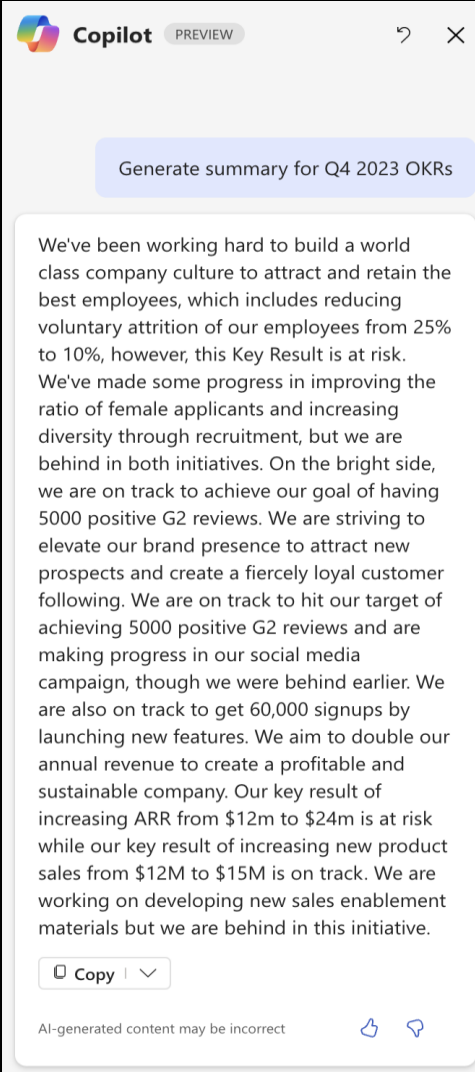
Customer "B" is a large enterprise organization with over 20,000 Viva Goals users. Customer "B" leverages Viva Goals to track not only their strategic initiatives, but their digital transformation initiatives as well. With over 20,000 users they have thousands of various KPIs, metrics, and projects in the system.

## Challenges Faced

Viva Goals was the tool of choice to allow Customer "B" to pull in all the various data sources they use for tracking this work, into one place to report. Even though Viva Goals has expedited their ability to report across these initiatives, it was still very tedious to summarize all the progress at scale. Customer "B" wanted the ability to understand which Goals were behind or at risk at scale.

## Copilot in Viva Goals Solution

**Copilot allows summarization of Goals and can put hours back into your day by giving updates on progress, what's falling behind, and overall movement of your KPIs and strategic initiatives.**



The screenshot shows the Copilot interface with a "PREVIEW" label. A button at the top says "Generate summary for Q4 2023 OKRs". Below it, a text box contains a summary of Q4 2023 OKRs. At the bottom, there is a "Copy" button and a disclaimer: "AI-generated content may be incorrect".

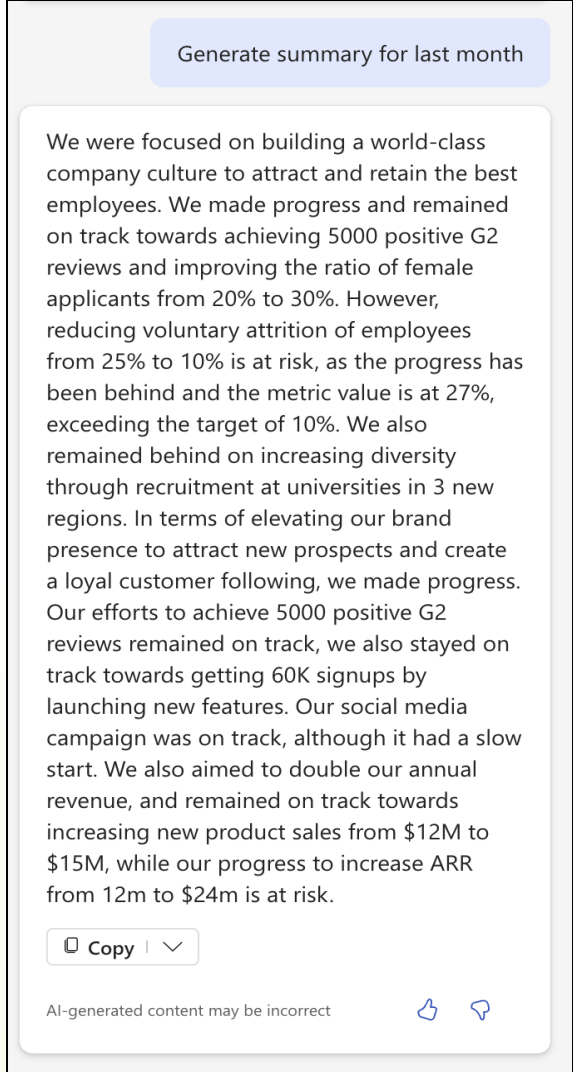
**Copilot** PREVIEW

Generate summary for Q4 2023 OKRs

We've been working hard to build a world class company culture to attract and retain the best employees, which includes reducing voluntary attrition of our employees from 25% to 10%, however, this Key Result is at risk. We've made some progress in improving the ratio of female applicants and increasing diversity through recruitment, but we are behind in both initiatives. On the bright side, we are on track to achieve our goal of having 5000 positive G2 reviews. We are striving to elevate our brand presence to attract new prospects and create a fiercely loyal customer following. We are on track to hit our target of achieving 5000 positive G2 reviews and are making progress in our social media campaign, though we were behind earlier. We are also on track to get 60,000 signups by launching new features. We aim to double our annual revenue to create a profitable and sustainable company. Our key result of increasing ARR from \$12m to \$24m is at risk while our key result of increasing new product sales from \$12M to \$15M is on track. We are working on developing new sales enablement materials but we are behind in this initiative.

Copy

AI-generated content may be incorrect



The screenshot shows the Copilot interface with a button at the top that says "Generate summary for last month". Below it, a text box contains a summary of last month's performance. At the bottom, there is a "Copy" button and a disclaimer: "AI-generated content may be incorrect".

Generate summary for last month

We were focused on building a world-class company culture to attract and retain the best employees. We made progress and remained on track towards achieving 5000 positive G2 reviews and improving the ratio of female applicants from 20% to 30%. However, reducing voluntary attrition of employees from 25% to 10% is at risk, as the progress has been behind and the metric value is at 27%, exceeding the target of 10%. We also remained behind on increasing diversity through recruitment at universities in 3 new regions. In terms of elevating our brand presence to attract new prospects and create a loyal customer following, we made progress. Our efforts to achieve 5000 positive G2 reviews remained on track, we also stayed on track towards getting 60K signups by launching new features. Our social media campaign was on track, although it had a slow start. We also aimed to double our annual revenue, and remained on track towards increasing new product sales from \$12M to \$15M, while our progress to increase ARR from 12m to \$24m is at risk.

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AI-generated content may be incorrect

# Customer Experience: Repurposing Time for Efficiency

## Customer Story

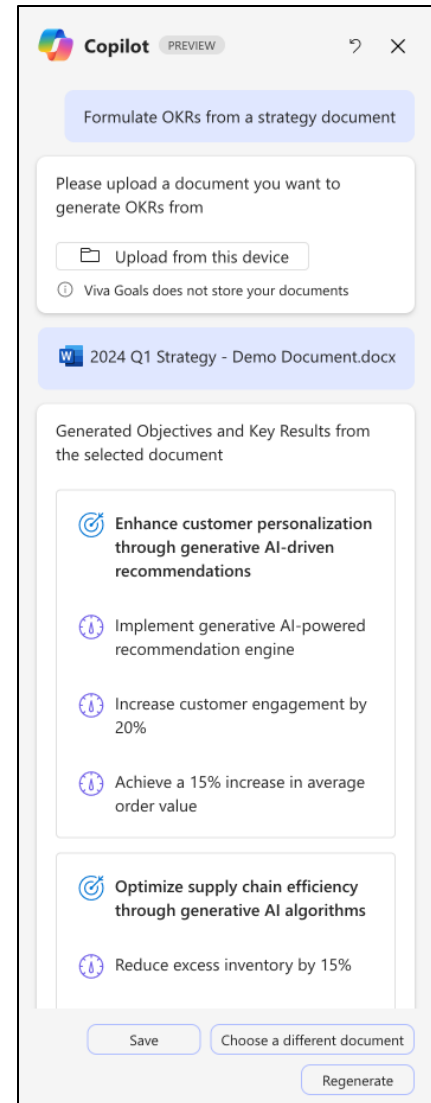
- Customer "C" does their strategic planning across various M365 tools, but finalizes their goals in a Word document. This document contains many Goals that would take significant time to input manually one by one or via Excel template. To more work efficiently, Customer "C" leverages the Copilot functionality to upload this documents goals directly into Viva Goals.

## Challenges Faced

Wanting to automate data entry, and put time back in their workers day, Customer "C" wanted a better way to enter large amounts of goals.

## Copilot in Viva Goals Solution

**Copilot allows customers to upload strategy documents to expedite the Goal creating process and put time back in employees' day.**



## Prompt

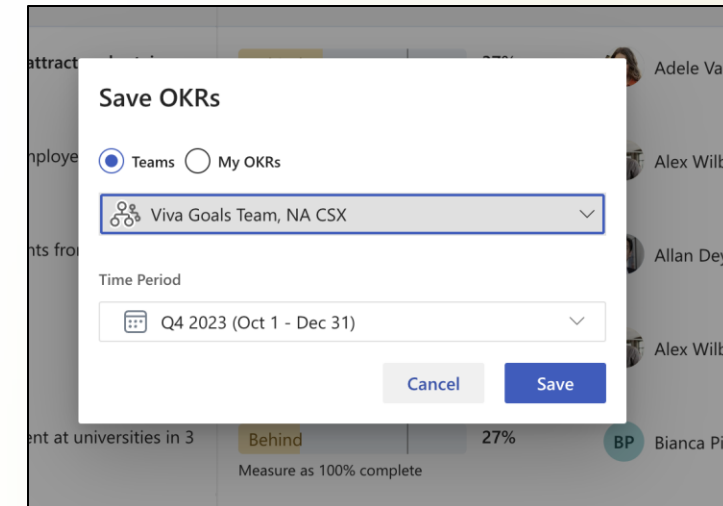
Upload the document via Copilot chat

## Generated OKRs

Copilot scans the document and formats your Goals into the Objective, Key Result, and Initiative framework

## Time Saving

You can pick which team owns the goals, and which time period to measure the goals in. From here, Copilot automatically creates these goals within the system



# Poll

Which feature are you most excited about?



# Additional Resources on Copilot in Viva Goals :

## Where can I learn more about Copilot in Viva Goals? (live)

- Video on webpage (<https://aka.ms/VivaGoals>)
- Initial Announcement [Viva Moment blog](#)
- Ignite [Copilot in Viva Goals Introduction](#)

Q&A What else is on your mind?



# Poll

Exit Questions: Please help us improve!

**Before  
you go....**

## Join our Private User Group (PUG)!



- Forum for you to ask questions and have ongoing engagement with Viva Goals' experts
- Early access to register for our monthly events
- Access to our library of articles and event recordings curated for customers

## How do I sign up for PUG?

1. Click on [this link](#)
2. Click "Sign in" (top right of page)
  - a. Sign in or create an account for Viva Community
3. Click "Request to join this Private User Group"

**Before  
you go....**

## Sign up for Copilot in Viva Goals Public Preview

- [Click here](#) to sign up for Public Preview and get early access to Copilot in Viva Goals