

Agenda

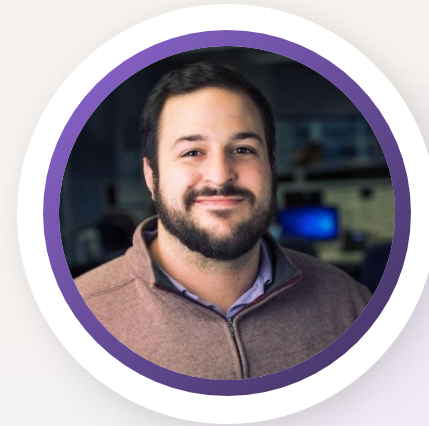
1. Demo of Copilot in Viva Goals
 - a. What is it? How do we use it?
 - b. Using Copilot to generate Goals
 - c. How Copilot summarize Goals?
2. How Copilot is Solving Customer Pain-Points
3. Q&A

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?

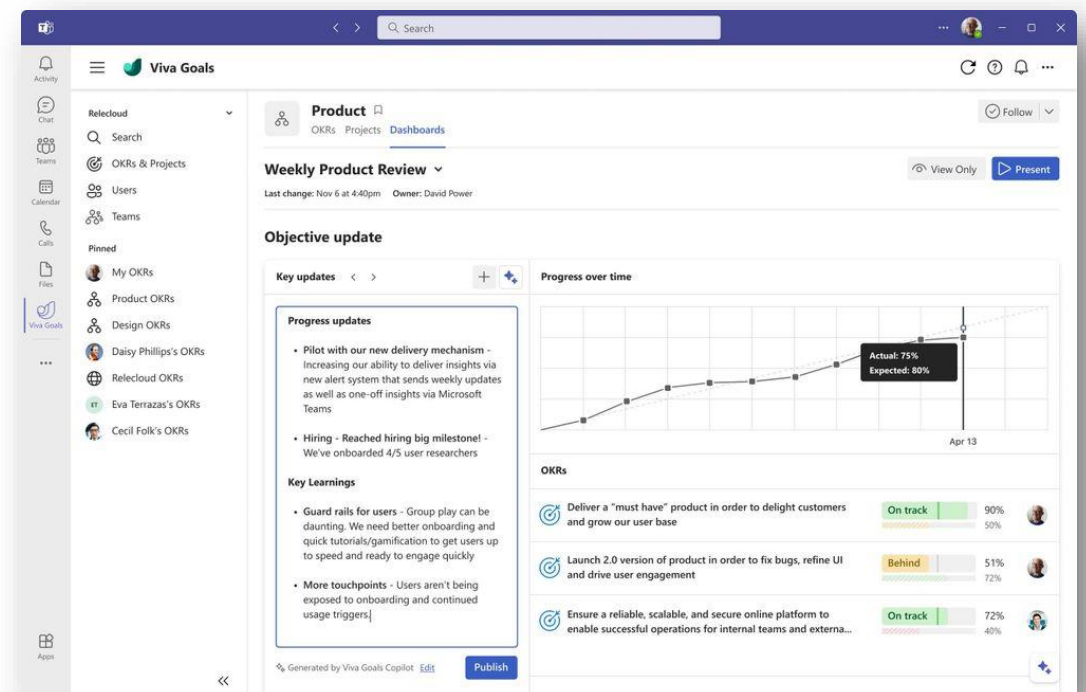
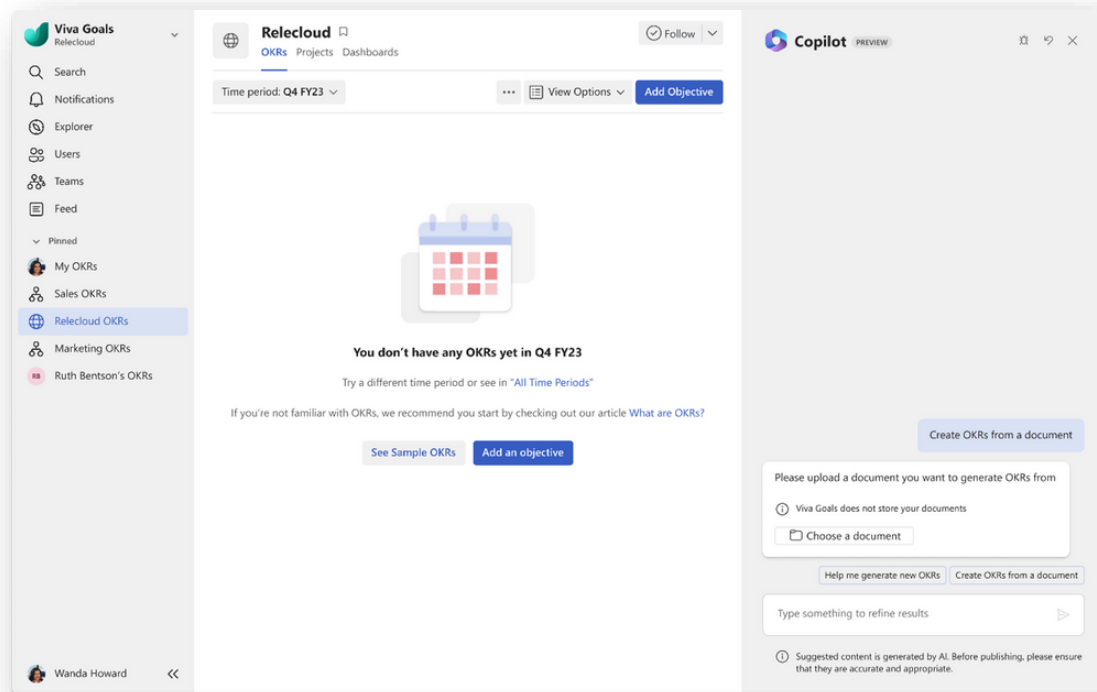
Copilot in Viva Goals uses AI to simplify and improve goal-setting and management by generating goal recommendations from existing strategy documents, generating and refining suggestions with conversational AI, and publishing progress summaries based on contextual data.

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

Are you leveraging AI in your strategic goal-setting process?

Navigating Customer Pain Points with Copilot

Customer Experience: Scaling Goal Learning

Customer Story

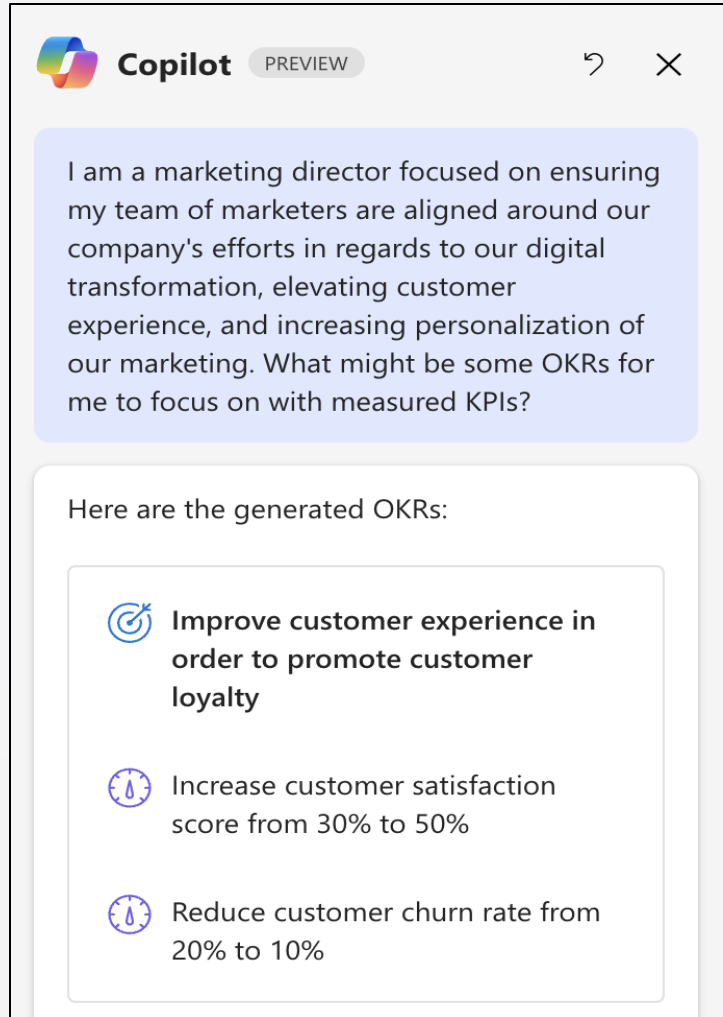
Contoso Electronics is an enterprise organization with a goal of ensuring their hybrid workers feel empowered and engaged at work. As part of this initiative, they are rolling out Viva Goals to support their strategic initiative tracking.

To ensure clarity, they need to create company-wide goals that employees can align their work to. They know what their L1 and L2 goals are, but they need help creating sub goals for their L3 and L4 leaders and teams.

Challenges Faced

- Ensuring top-bottom goal alignment (C-suite to individual contributors)
- Translation of strategy documents into actionable goals
- Time-constraint on educating all managers on how to write goals

Copilot as a Jump-Start Solution



The screenshot shows the Copilot interface with a user query and generated OKRs. The user query 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%

Copilot Benefits:

- **Writer → Editor**
Copilot eliminates writer's block and provides a starting point for you to refine and edit your goals.
- **Natural Language Conversation**
Provide Copilot with extra context, feed it strategy docs or ask it to edit its suggestions.
- **Time Saving**
No training on goal-writing required, strategy docs translated into goals automatically, and auto-entry of goals from Copilot into Viva Goals.



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](#)

Poll

Are you interested in expanding Viva Goals usage at your company?

Q&A What else is on your mind?

Parting Gift:

Expand your
AI Experience

Sign up for Goals in M365 Copilot Chat Private Preview

Customers must have M365 and Viva Goals or Suite license

- Email soumikmaji@microsoft.com to request admission to private preview

**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"