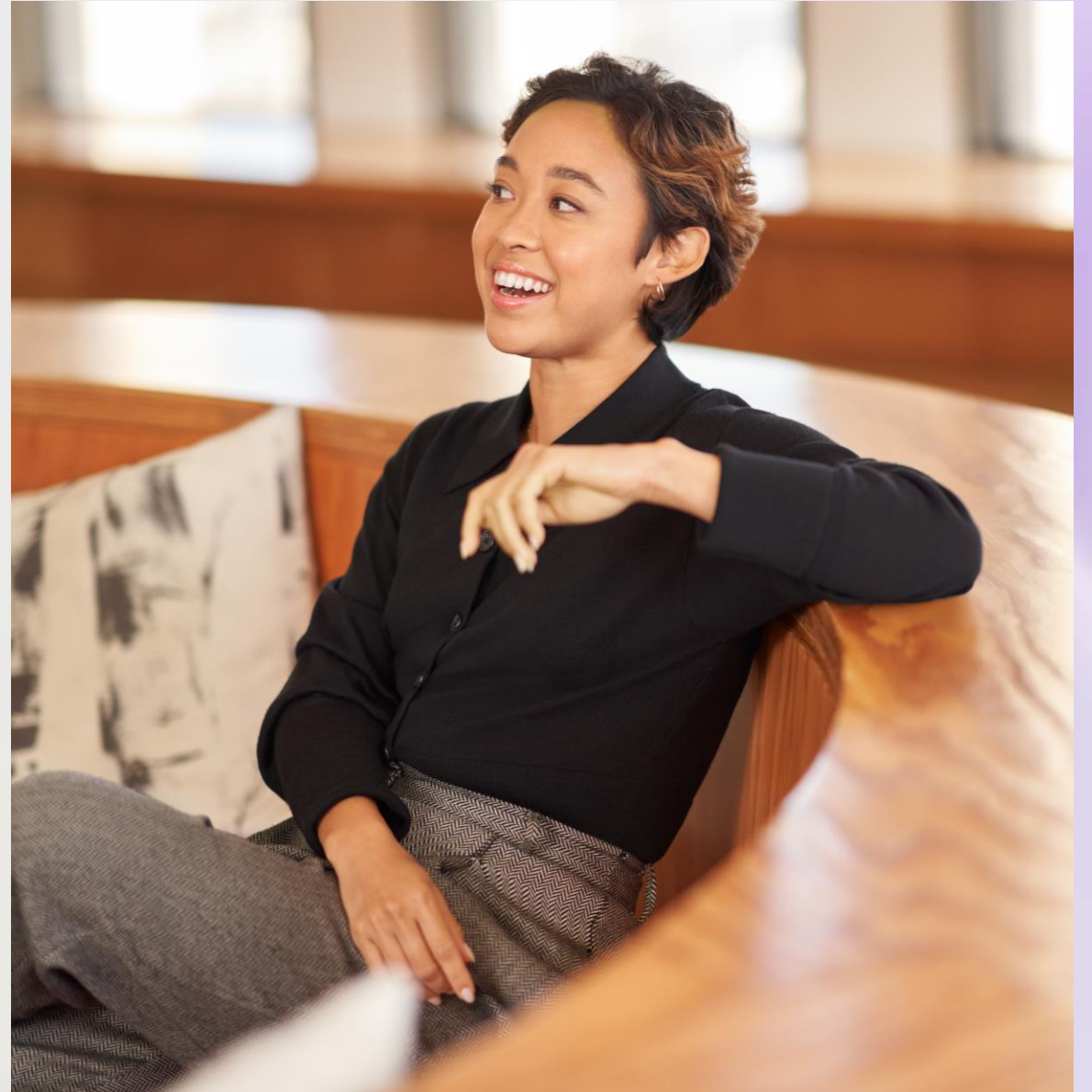




# What does it take to launch Viva Goals at scale?

**Microsoft Viva Goals**



# Agenda

1. How did Microsoft deploy Goals at scale?
2. How is Viva Goals evolving to better support scale deployments?
3. How can you get started with your own scale launch?
4. Q+A – what else is on your mind?

# Conference Participants



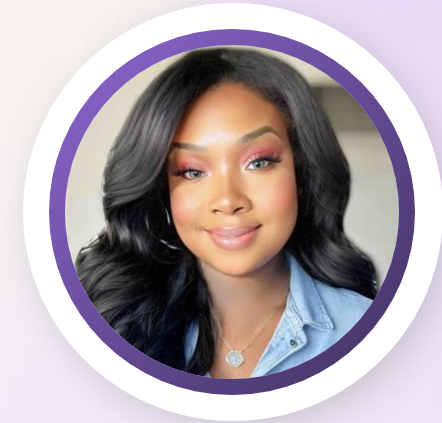
**Liz Pierce**

Liz is a Principal Product Management leader on the Viva Goals team, where she drives feature investments and experimentation associated with growing Viva Goals' Enterprise value and adoption, along with product strategy & planning for the overall Viva Goals product team.



**Preethi Vemu**

As a PM on the Viva Goals team, Preethi's key goal is to make deployment as frictionless as possible and reduce the no. of steps it takes for the users to get licenses and start using the product.



**Jatone Wilson**

Jatone is a Senior PM Manager for the Viva Goals CXP team, and previously held the role of Implementation Manager at Ally.io prior to its acquisition. Jatone is dedicated to helping our enterprise customers effectively implement and scale Viva Goals. Additionally, she takes charge of guiding customers in our Enterprise Adoption Program.

How did Microsoft Deploy at Scale?

# Microsoft E+D org | Getting aligned with Viva Goals



## Challenge

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



## Solution

Use Microsoft Viva Goals and adopting a more OKR-centric approach to increase cross-team visibility and help employees work more efficiently



## Benefits

- **Better alignment.** Knowledge sharing and cross-functional visibility highlight collaboration opportunities so teams can identify joint priorities
- **Greater focus.** Leaders have a heightened sense of clarity and accountability, and they can relay this to employees at org-wide meetings
- **More transparency.** Single source of truth for goals
- **Increased agility.** Healthy business rhythms emerge around goals
- **Elevated achievement.** The entire organization builds a portfolio of accomplishment and a culture of celebration

Read the [full customer story](#)



**Industry**  
Professional Services

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

**Country**  
United States

**Microsoft Viva app**  
Viva Goals

**Experience area**  
Purpose

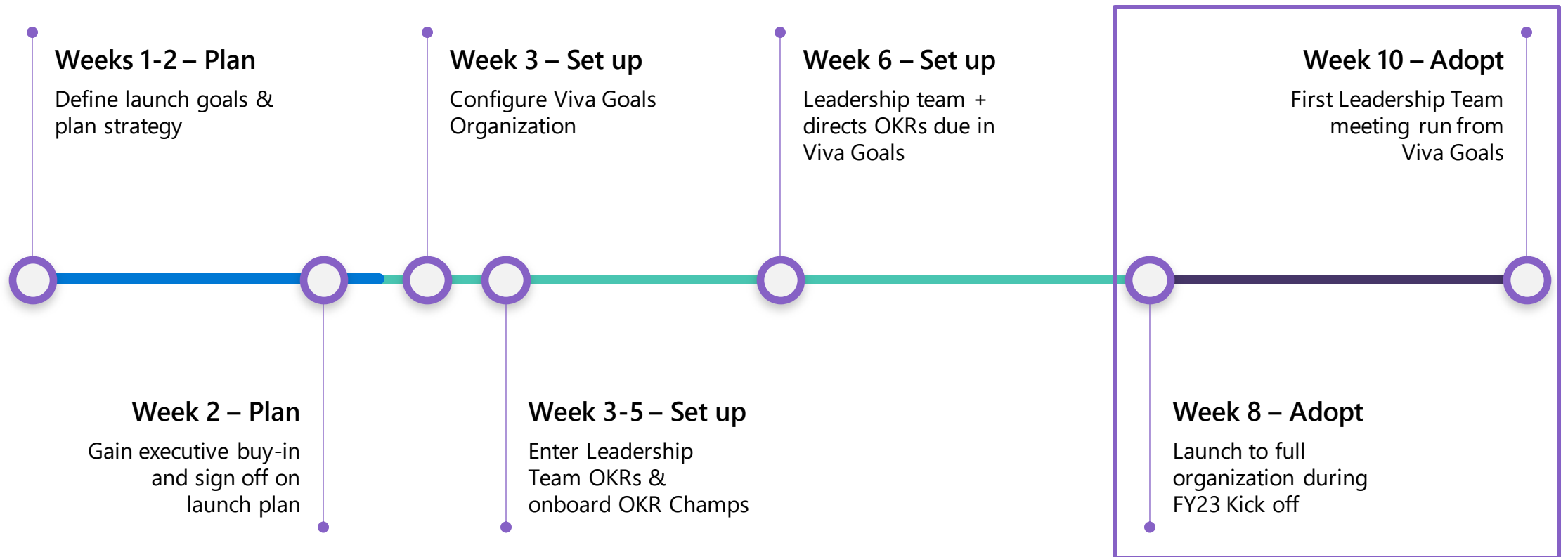
“OKRs allow anyone in the organization to see what other people are working on. Individuals can see the importance of their contributions to their team. Leaders can see how their objectives are being implemented by teams throughout their organization and initiate discussions to keep the work on track.”

**Jennifer Perret**  
Principal Group Program Manager  
Microsoft

# Microsoft E+D org | Timeline to launch



## Planning & Set Up: 8 weeks



# Microsoft E+D org | Program expectations



	E+D LT	L2s (Rajesh's Directs)	L3 and below (down to M1)	Individuals
<b>Program Management</b>	IDEAs	Self-managed by local OKR champs		<p><u>Not recommended.</u> Individuals should continue using Connects to manage and track individual priorities.</p>
<b>Tool</b>	Viva Goals			
<b>Adoption Expectation</b>	Required	Required	Optional	
<b>Cascade / Alignment</b>	Joint metrics from SLT / Field	<ul style="list-style-type: none"> <li>No strict cascade</li> <li>Multi-align KR across teams where delivery ownership is shared</li> </ul>		
<b>Rhythm of Program</b>	<ul style="list-style-type: none"> <li>Annual with H2 refresh</li> <li>Monthly Check Ins</li> <li>ROB review Monthly to LT &amp; Quarterly to XLT</li> </ul>	<ul style="list-style-type: none"> <li>Set <u>at least</u> Annually</li> <li>Check ins <u>at least</u> Monthly</li> <li>ROB <u>at least</u> Monthly with LT, <u>at least</u> Quarterly with broader organization</li> </ul>		
<b>Support from Viva Goals team</b>	Dedicated direct consult from OKR Center of Excellence and Viva Goals Product teams		<ul style="list-style-type: none"> <li>OKR Center of Excellence via <a href="https://aka.ms/OKRs">aka.ms/OKRs</a></li> <li>Product feature ideas crowdsourced <a href="#">via EES Ideas</a></li> <li>Product support offered <a href="#">via TechWeb</a></li> </ul>	

# Viva Goals Fiscal Year in Review

## Top-down Leadership Program

Total Org  
level OKRs:  
**150**

OKRs with  
Check-ins  
**99%**

**84%** of leadership  
KRs are public

**Over 26K E+D  
users** in Viva  
Goals

Over **900  
Teams** created  
OKRs

More than  
**32K Total  
OKRs in Fy23**

**99%** of full  
organization  
KRs  
are public

**85+% of OKRs**  
are aligned up

## Organic adoption in broader organization





Viva Goals has become a part of the **flow of work**, leveraging integrations with other critical business tools and with over **50% of users viewing OKRs monthly**

How is Viva Goals evolving to better support scale deployments?

# Viva Goals supports leaders and teams in every corner of an organization to create, manage, and track organizational and team goals in a single, secure repository.

*Without Viva Goals...*

Germanium Semester Top Priorities - 1 of 4

Business Priority	Engineering Status	Business Impact
Drive Revenue Growth	On Track	100%
Improve Customer Satisfaction	At Risk	85%
Reduce Operational Costs	On Track	90%

PPT

Metric	Progress	Objective	Completion	Results
Metrica in forma entro il 31/12/2020	100%	31%	10	20
Analisi e correzione della struttura (gestionale)	100%	100%	10	10
Analisi e correzione della struttura (contabile)	100%	100%	10	10
Analisi e correzione della struttura (fiscale)	100%	100%	10	10

Excel

Company objectives for Q4

Objective	Key Result	Value	Due Date
Objective 1: Build a growth machine	Growth in new users	> 7% each week	Mid Sept 5
Key Result 1	Run at least 2 growth experiments	each week	2
Key Result 2	Run at least 2 growth experiments	each week	2
Key Result 3	Run at least 2 growth experiments	each week	2
Objective 2: Users consistently find SaaS useful	Average number of sessions per user	> 2 each week	Mid Sept 5
Key Result 1	Run at least 2 growth experiments	each week	2.23
Key Result 2	Run at least 2 growth experiments	each week	2.23
Key Result 3	Run at least 2 growth experiments	each week	2.23
Objective 3: Continue to learn from customers	Interview at least 2 users	per week	Mid Sept 5
Key Result 1	Interview at least 2 users	per week	1
Key Result 2	Make sure at least 80% of people interviewed are from our core target group		
Key Result 3	Make sure at least 80% of people interviewed are from our core target group		

Word Docs

Sharepoint

Objective	Key Result	Value	Due Date
Objective: Deliver the best customer experience in our industry	Deliver the best customer experience in our industry		
Key Result 1	Deliver the best customer experience in our industry		
Key Result 2	Deliver the best customer experience in our industry		
Key Result 3	Deliver the best customer experience in our industry		

Sharepoint

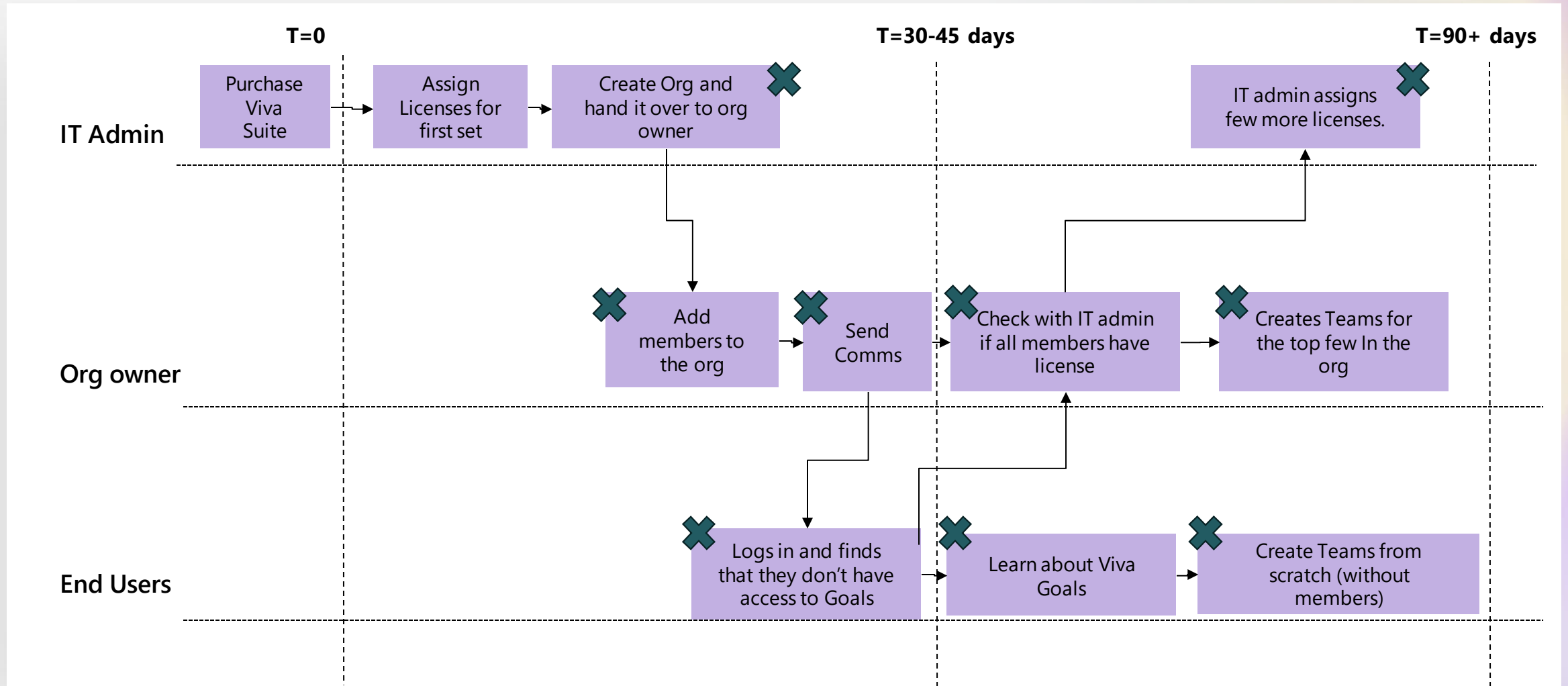
...and more

*With Viva Goals...*

The screenshot shows the Viva Goals interface. On the left is a navigation sidebar with options like 'My OKRs', 'Relecloud OKRs', 'Marketing OKRs', 'Reta Taylor's OKRs', 'OKRs & Projects', 'Users', and 'Teams'. The main area displays a dashboard for 'Customer Experience' for 'Q2 2022'. It lists several OKRs with their progress bars and status indicators:

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

# Too many steps in deployment...



# What might have taken 7+ steps should not take 3 steps...

## *Current*



## *New*



*Behind the scenes: Org Creation, Pre-set Microsoft 365 group teams, Welcome emails, Request License in bulk, Auto claim policy*

# Viva Goals Deployment & Adoption Innovations

## Frictionless deployment

- Self-serve trials & request license flows
- Standard welcome mail & Viva Goals collaboration space
- Microsoft 365 Groups backing for Viva Goals teams

## Flexible adoption

- Supporting broad goal management philosophies
- Enabling team-level settings management
- Improved first run experience

## Connected experiences

- Export to PPT & export API
- Enhanced share to Outlook & Teams experiences
- Viva Engage / Goals integrations

# Trial Experiences

***An easy way for users to explore Viva Goals on their own in a safe, non-intrusive and IT compliant way***

Viva Goals Sign out

## Try Viva Goals free for 60 days

Drive alignment, create focus, and collaborate on OKRs across your organization with Viva Goals.

You're signed in as **aadikapoor@relecloud.com**.

Microsoft may contact you about your trial. When you click "Start Trial", the following personal data will be collected from your Microsoft organizational account: name, email address, IP address, and user ID. This information will be subject to the Microsoft Privacy Statement.

Your use of this trial is governed by the [Trial Terms](#). Your organization will have full control over your account, including any data you provide through use of the trial.

To continue using Viva Goals after your trial ends, work with your IT admin upgrade to a paid subscription. If you do not upgrade when your trial ends, data associated with the trial will be handled in accordance with the [Trial Terms](#).

By clicking on "Start Trial", you accept the [Trial Terms](#) on behalf of your organization.

[Learn more](#) [Start trial](#)

Goals goals.microsoft.com

### Viva Goals

- Contoso
- Search
- Home
- Notifications
- More
- Pinned
  - Contoso
  - My OKRs
  - Design Garage
- Your teams
  - Engineering Pod
  - AI Broadcast
  - Show more
- Help
- Account settings

**Contoso** **OKRs** Projects Alignment Dashboards Updates + Objective

Time Period: All + Add filter Share

Title	Status and progress	Owner	Period	
<b>Enhance our application's stability to provide a seamless and consistent user experience</b>	Not started	-	Q1 FY24	
<b>Key Results</b> +	Measure as 100% complete			
<b>Initiatives</b>				

[+ Create Objective](#)

#### Tips

**Stay informed and connected**  
Explore Your Organizational updates through the feed  
[View Feed](#)

**See how your review meetings are shaping**  
Explore how your team is preparing the review meeting dashboard  
[View Dashboard](#)

# Request License Flow

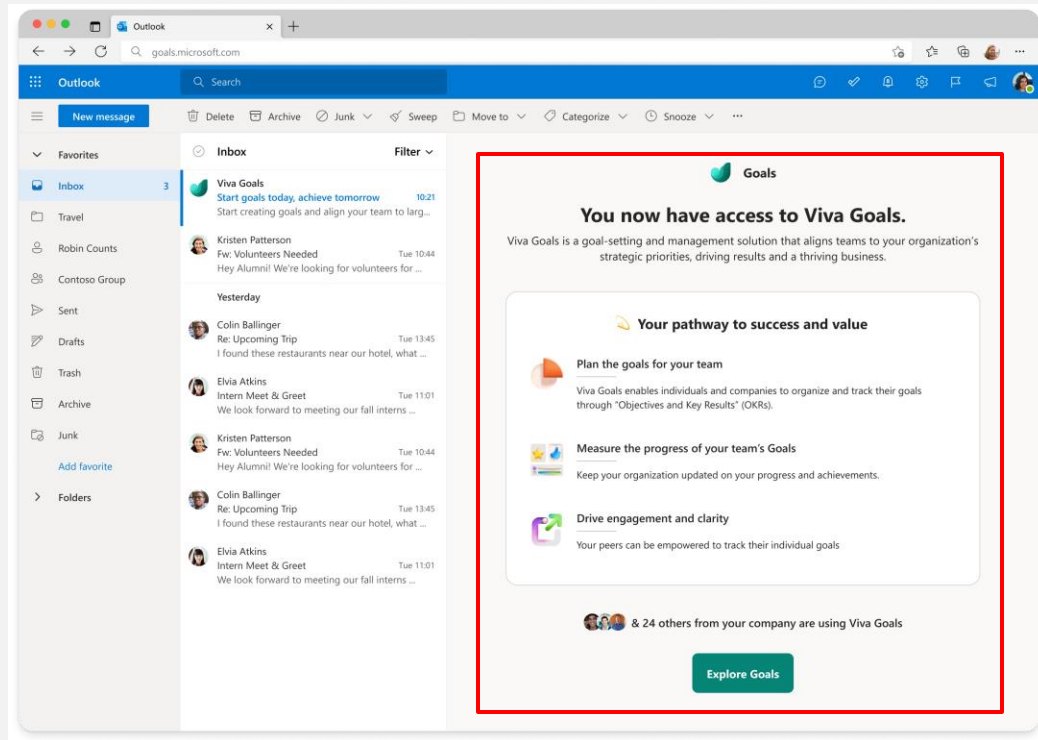
**No more hassles in raising request tickets for license access. A simpler way for IT admins to identify and grant license to high intent customers**

The screenshot shows the Viva Goals interface for a user named David Power. A red box highlights a notification in the top left corner that reads: "Your Viva Goals trial expires in 14 days. At the end of your trial, you'll need to obtain a paid license to continue using Viva Goals. You can request a license from your administrator. Request license". Below this, the interface displays a list of OKRs for the "Sales" department for Q3 2022. The OKRs include: "Deliver the best customer experience in our industry" (On track, 50%), "Provide delightful customer support" (Behind, 60%), "Decrease support ticket resolution time to 43hrs (from 55hrs)" (At risk), "Increase 'positive experience' survey score to 95 (from 90)" (Behind), "Decrease response time to 5hrs (from 6hrs)" (On track), "Every customer quickly and easily sees ROI from using our products and services" (On track), "Our customer success teams are empowered with best-in-class tools to ensure customers are successful" (On track), "Share critical insights with our product and service delivery teams to keep our offers best in class" (On track), and "Recruit and develop the best customer experience talent so we can better support our customers!" (Behind).

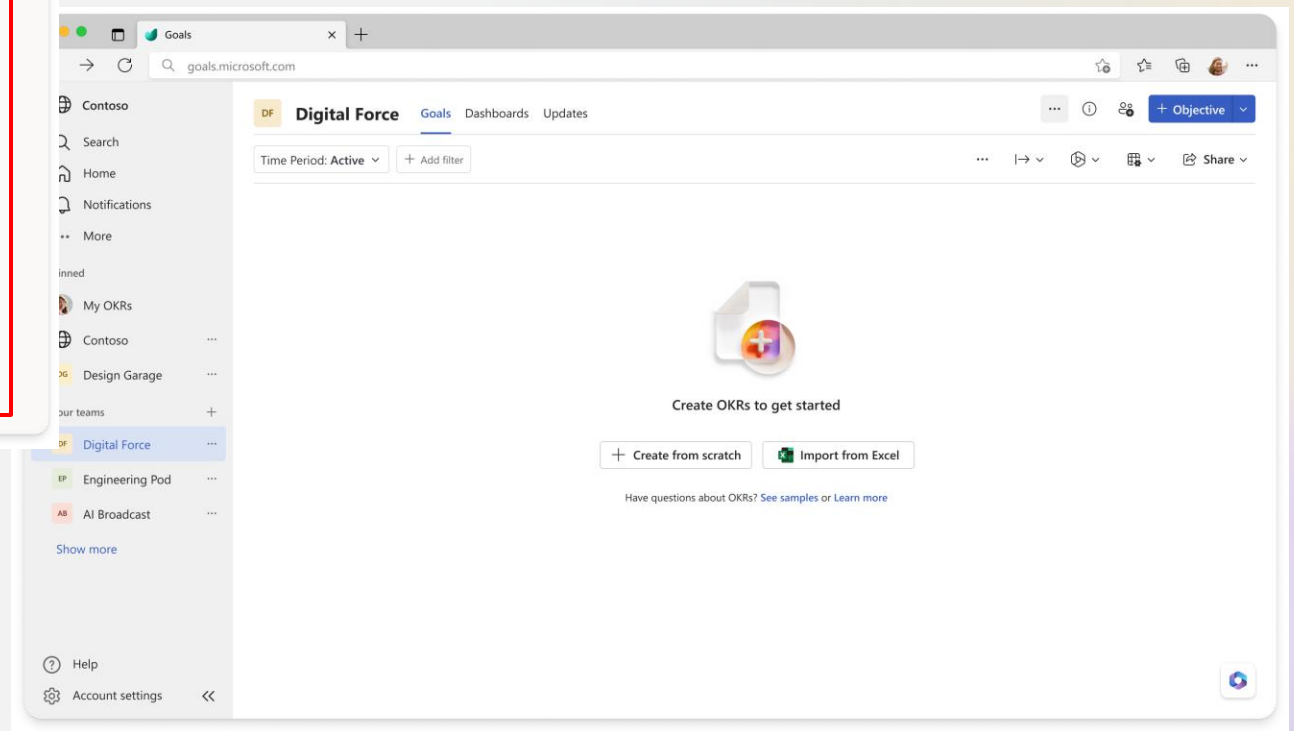
The screenshot shows a "Your license has expired" notification screen. The notification text reads: "The data for the organizations you own in Viva Goals will be deleted within 90 days, on August 4, 2023, and other users will no longer be able to access them. To retain access, request a license from your administrator." Below the text, a red box highlights two buttons: "Learn more about Viva Goals" and "Request license".



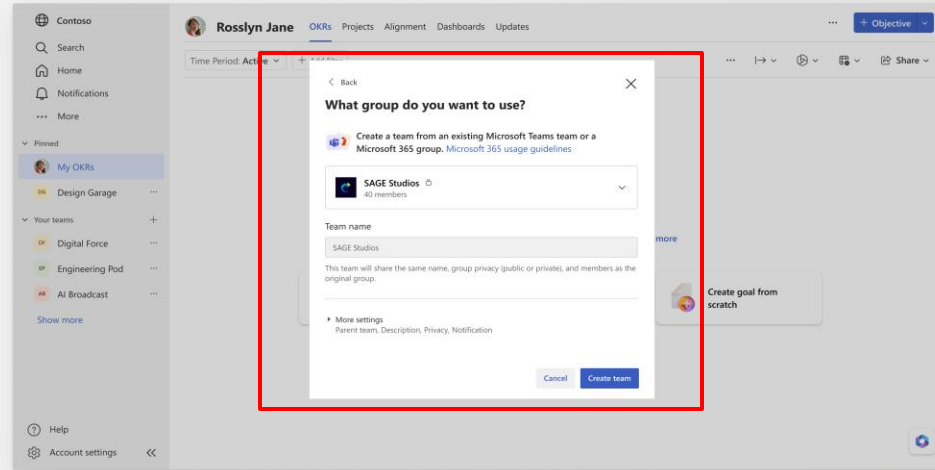
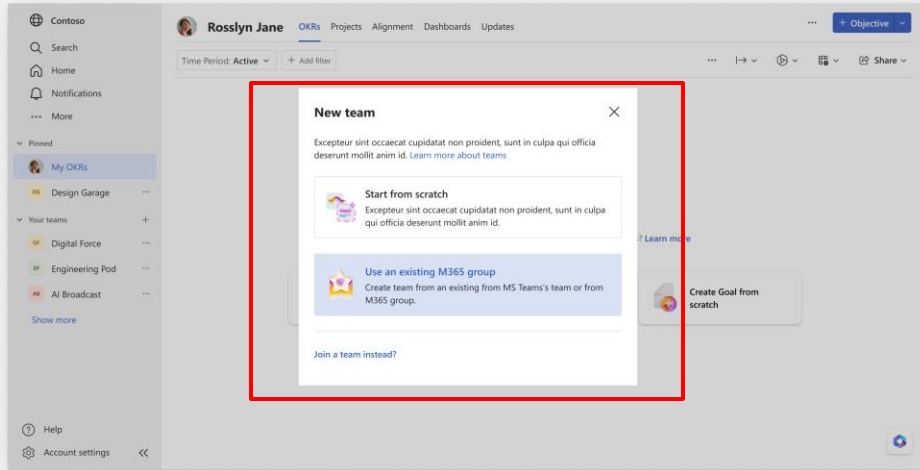
# Standard welcome email and default collab space



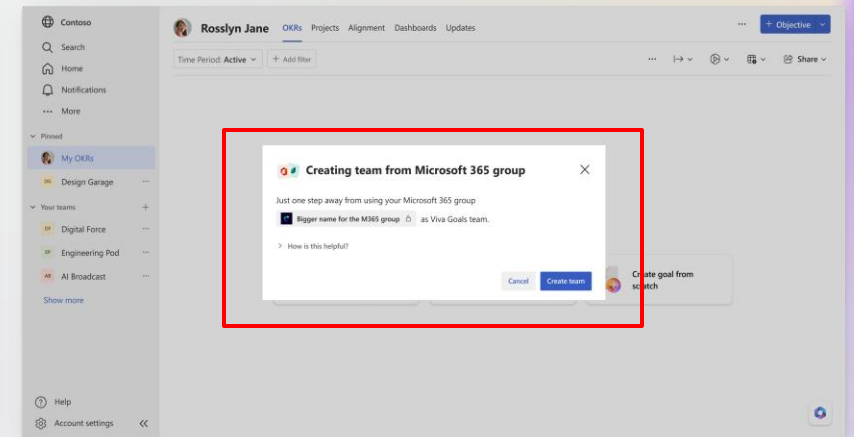
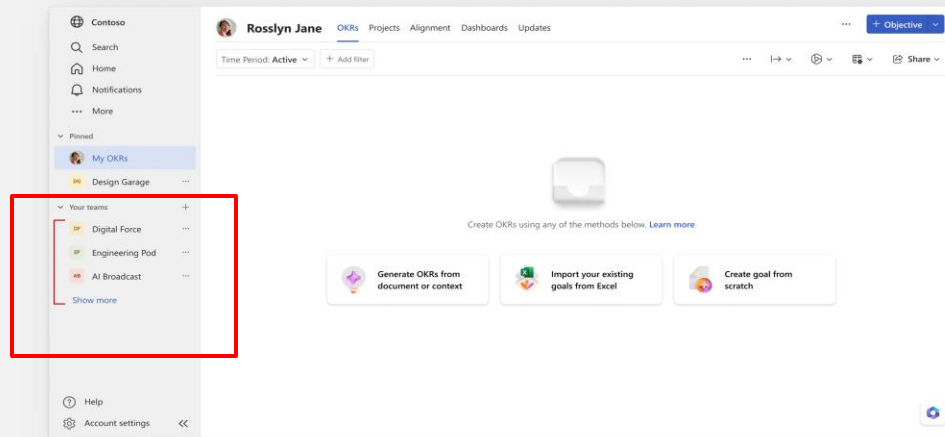
***No need to worry about Org creation and member addition hassles. With default org, set up your Goal programs instantly***



# Microsoft 365 group backed Teams



***Bring your team from M365 groups and Microsoft Teams into Viva Goals in no time***



# Custom Terminology

Viva Goals admin portal

General  
Terminologies  
Integrations  
Organizations

### Custom Terminology

Customize terminology used in Contoso Preview Reset all terms

Allow org admins to override this setting

Default terms	Current terms	Description
OKR	OKR	A framework for setting, tracking, and achieving goals, represented as "Objectives" and "Key Results."
Objective	Objective	A clearly defined goal that is significant, actionable, and ideally inspiring.
Key Result	Objective	Measurable outcomes used to track the progress and achievement of an objective.
Initiative	Goal	Actions or projects undertaken to drive progress toward key results and ultimately, the objective.

***Is your team using different terms for Goals?  
Leverage custom terminology to make Viva  
Goals work for your team in the way you want***

Viva Goals  
Relecloud

Search  
Notifications  
Explorer  
Users  
Teams  
Feed  
Admin  
Pinned  
My OKRs  
Sales OKRs  
Relecloud OKRs  
Marketing OKRs  
Ruth Bentson's OKRs

## Admin

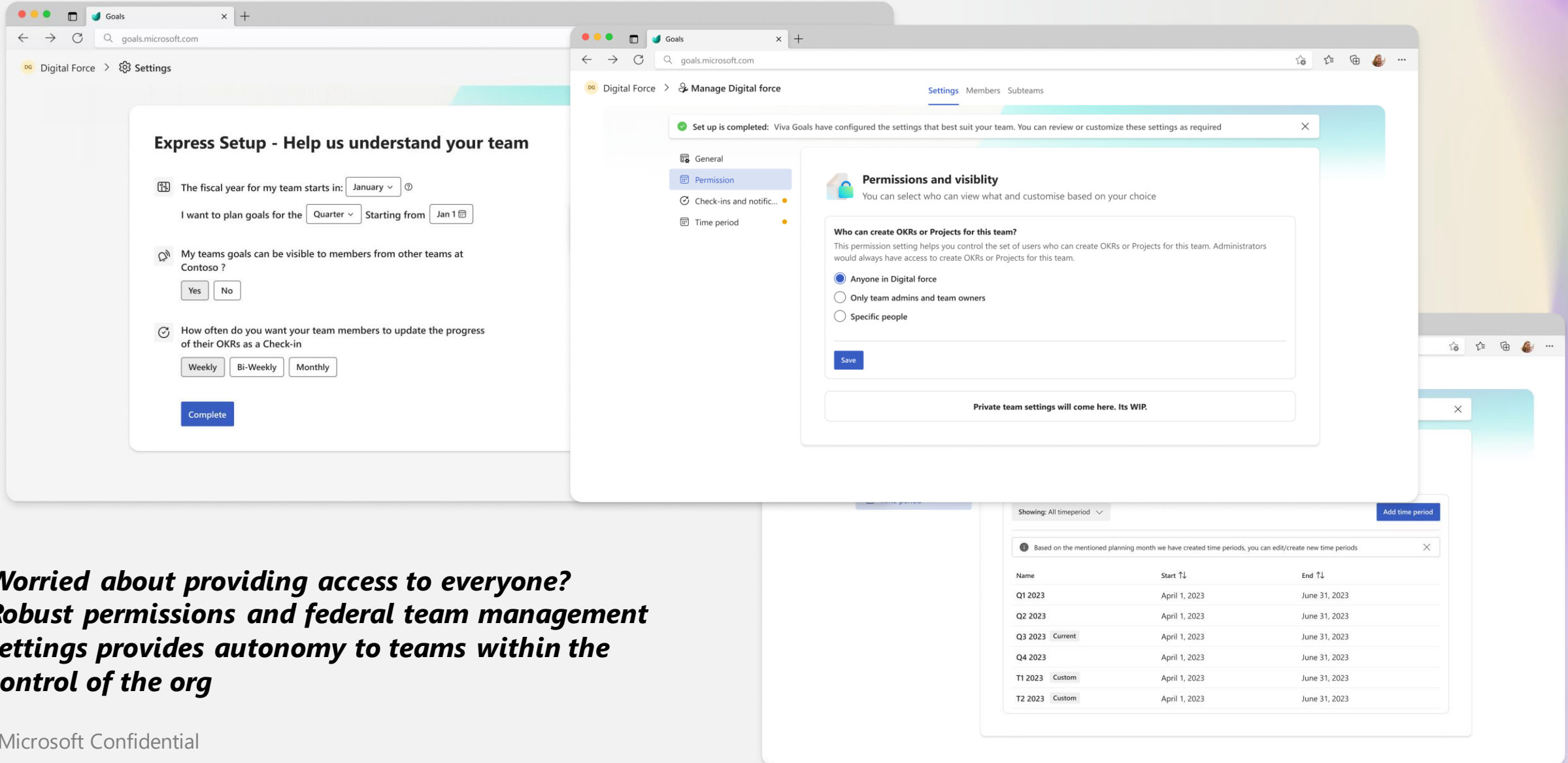
General Users Teams Timeperiods Notifications Integrations OKR model configuration OKRs and Initiatives **Custom Terminology** Import data

### Custom Terminology

Customize terminology used in Contoso Preview Reset all

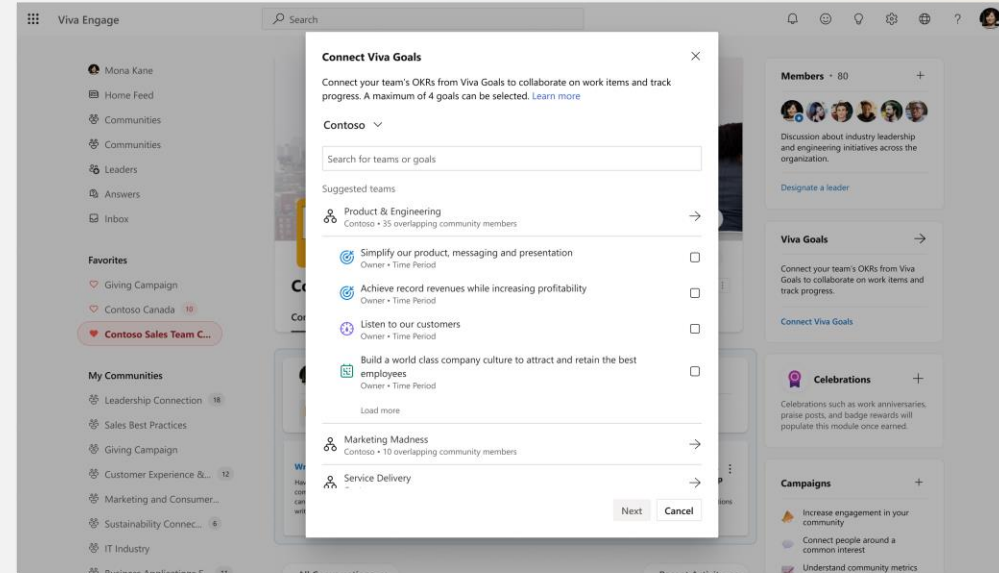
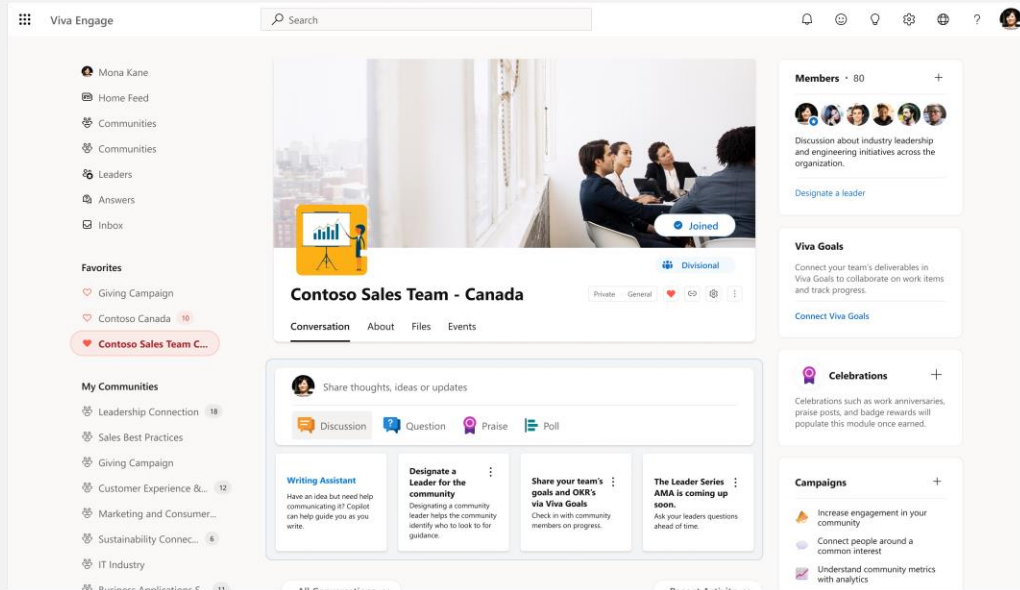
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Key Result	Key Result	Measurable outcomes used to track the progress and achievement of an objective.
Initiative	Initiative	Actions or projects undertaken to drive progress toward key results and ultimately, the objective.

# Enabling Team level settings management

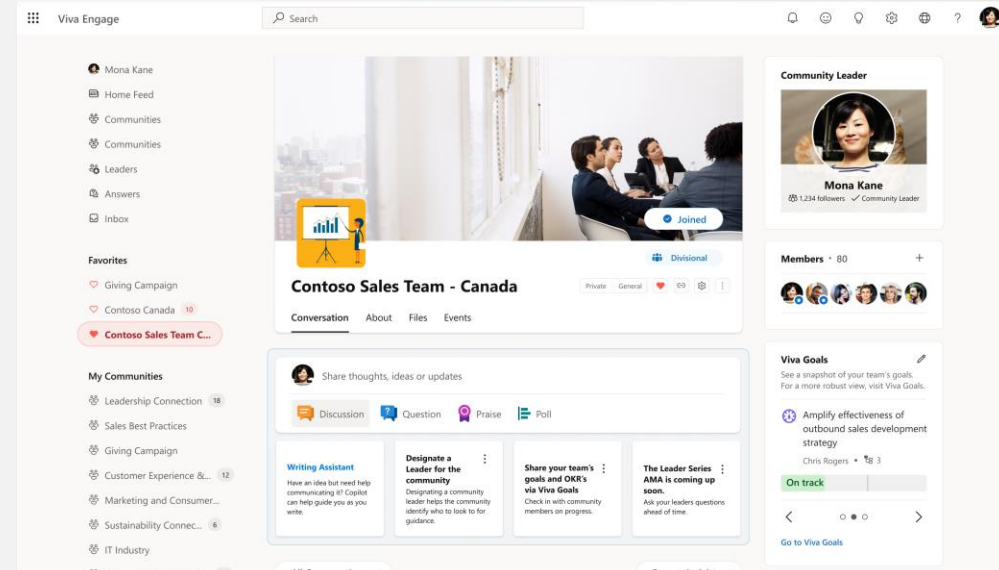


***Worried about providing access to everyone?  
Robust permissions and federal team management  
settings provides autonomy to teams within the  
control of the org***

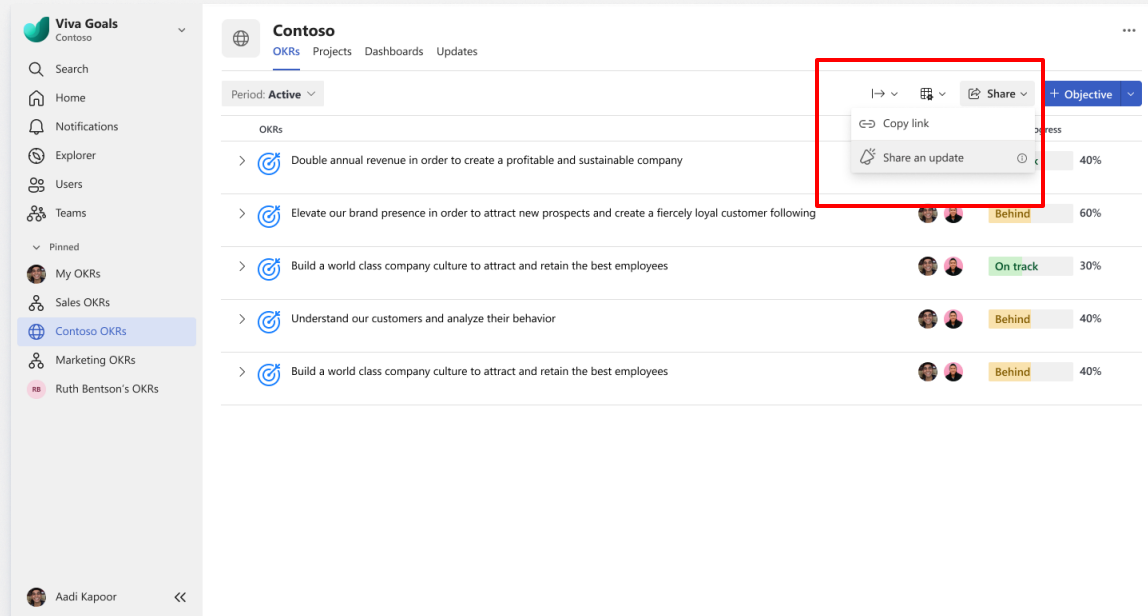
# Viva Engage – Goals connected experiences



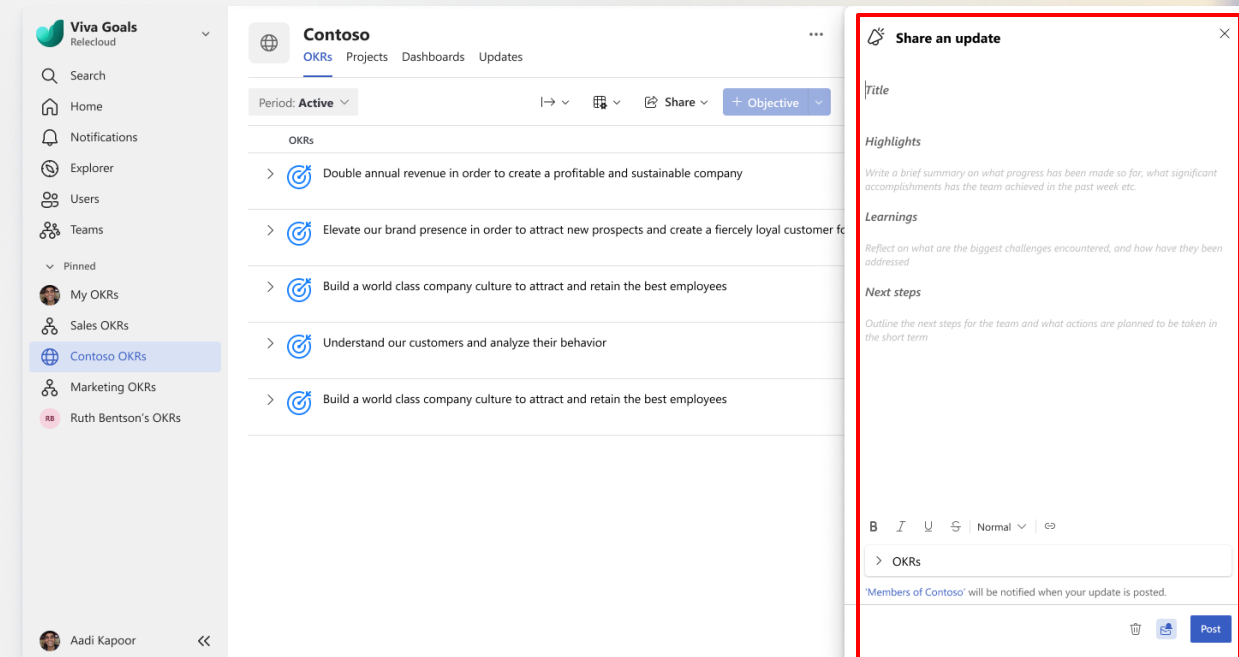
**Leverage the power of Engage in taking your organization Goals and updates to all the members**



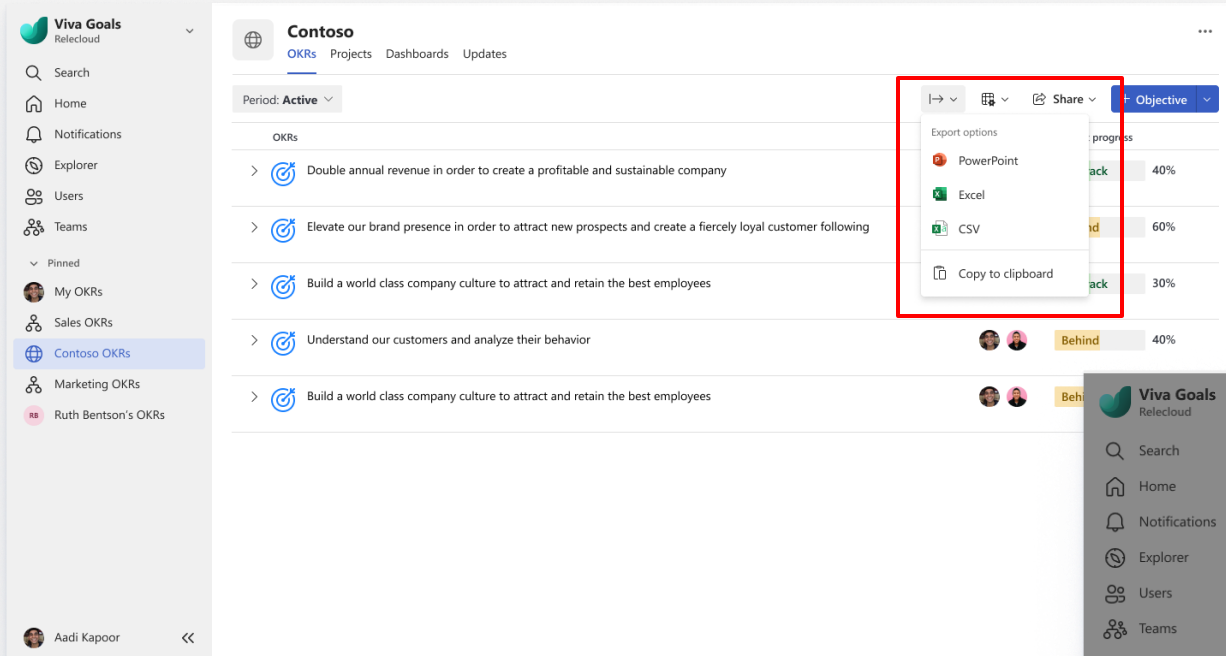
# Viva Goals Broadcast



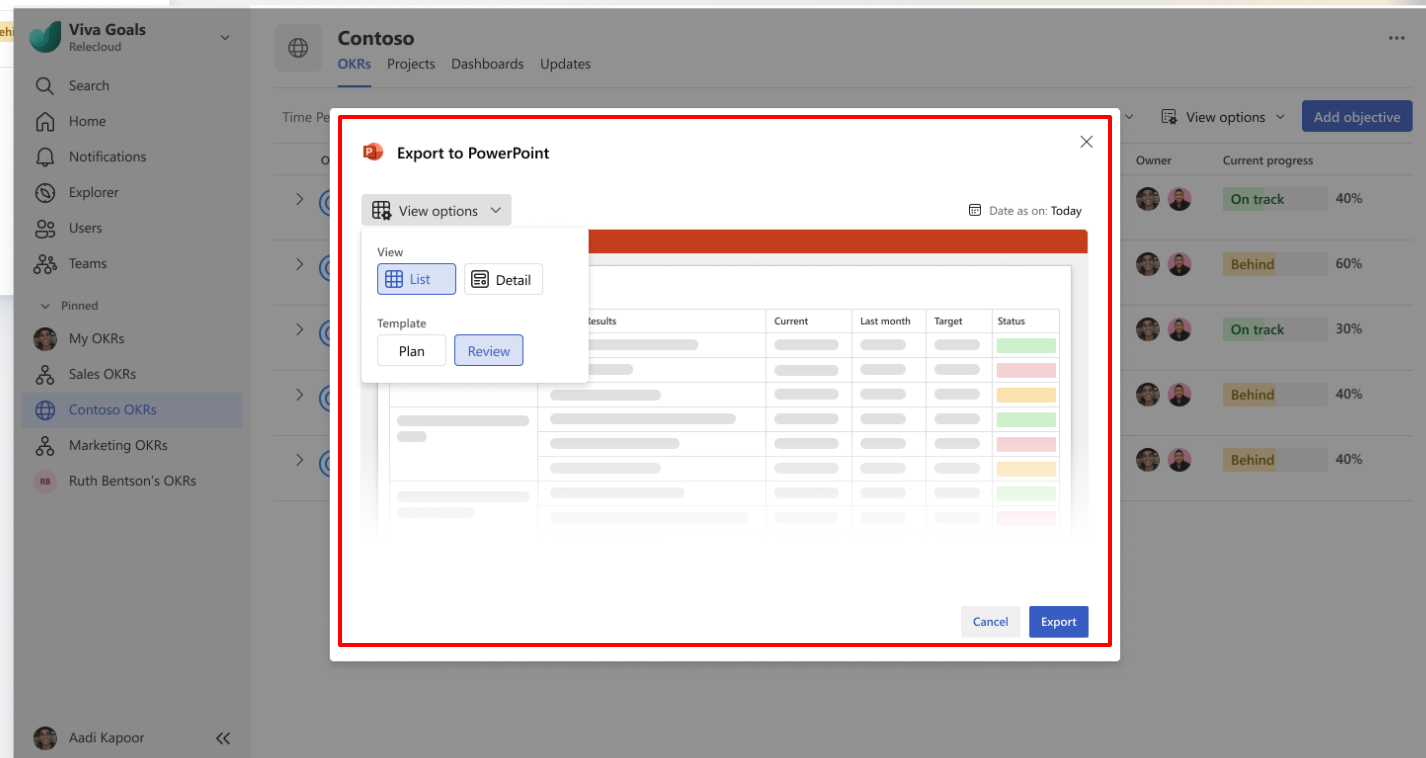
**Share updates up-line and down-line seamlessly through Viva Goals Broadcast.**



# Viva Goals Export to PPT



***Get prepped up for your business meetings in no time, by exporting the live Viva Goals content to PPT in any format you like.***



How to get started with your own scale launch



# Viva Goals Implementation Phases

## Sample Timeline

### Initiate

Internal kickoff to **validate**:

- Intent to deploy
- Commitment to engage
- Timeline, milestones and activities

### Deployment

Sept-Oct 2023

Weekly check-in for deployment planning and execution, including:

- Define **key scenarios**
- Scope rollout timeline against **critical events**
- **Activate all licenses**
- **Foundational set-up** of Viva Goals
- **Establish integrations** and validate key **functionalities**
- Identify and resolve **critical deployment blockers**

### Adoption

Oct-Nov 2023

Weekly check-in to roll out to **end users** in targeted population:

- **Teams start to embrace Viva Goals**
- **Quickstart** sessions begin
- **Validate key functionalities** and **collect feedback** from end users
- Identify and resolve **adoption blockers**

### Optimize

Nov-Feb 2023

Roll out to **all end users** in targeted population:

- Communicate availability for **org-wide use**
- Bi-weekly or Monthly check-in
- Collect feedback from end users
- Fine-tuning the Viva Goals Setup
- Identify critical adoption blockers and/or feature asks for further adoption or expansion opportunity
- Monitor usage

### Graduate

February 2024

Customer can operate Viva Goals by themselves.

- Monthly reviews using Viva Goals
- Established Community
- Organic adoption – consistent uptick in MAU

# Viva Goals Implementation FAQ | Your burning questions answered

1

Who's necessary for implementation, and what's the time commitment and frequency required?

---

Engage these [key players](#); consider dedicating a full-time employee to oversee Viva Goals implementation and coordinate resources as needed.

2

What's the estimated timeframe for fully implementing this across our organization?

---

Plan for a 6 to 12-month full rollout. Allow a few months for setup, onboarding, and adoption, with ongoing check-ins for success.

3

If we initially adopted a top-down approach, when should we consider transitioning to organic adoption?

---

Start with a top-down approach for clear alignment and direction but transition to organic when scale becomes necessary.

4

Starting informally with independent teams in the tool, how do we ensure organizational alignment?

---

Use cross-team goal alignment sessions, leadership guidance, and encourage leaders to track goals with the tool.

Q&A What else is on your mind?

**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"