



# Why OKRs

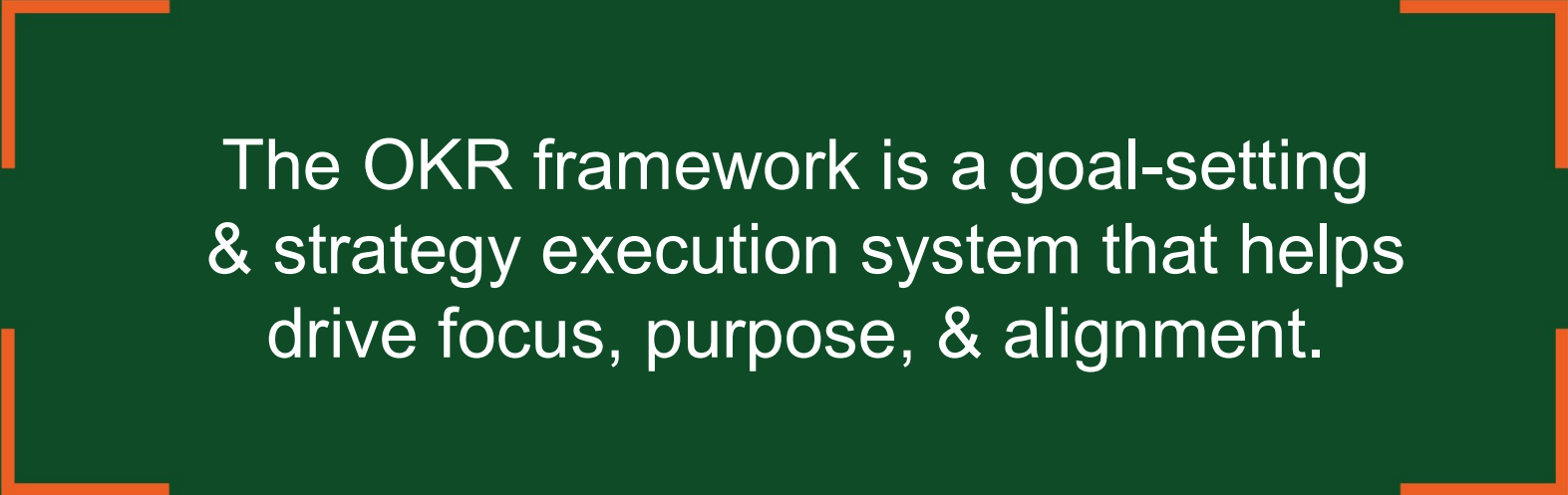
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# Viva Unifying Framework

Green: Show/Tell/Do    Amber: Roadmap





The OKR framework is a goal-setting  
& strategy execution system that helps  
drive focus, purpose, & alignment.

# Business challenges are more acute than ever



Businesses need to operate faster to deal with uncertainty.



COVID-19 accelerated the transition to remote and distributed work.



Employees often feel disengaged and disconnected.



Work is siloed, making visibility and alignment painful.



# Why OKRs

Leverage OKRs

Align teams on a common business goal-setting and management methodology

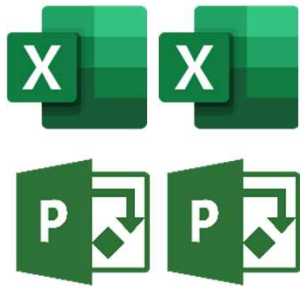


96%

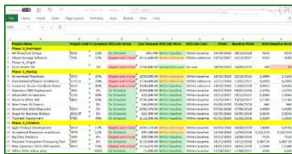
of employees who use OKRs understand how their work ties into broader company goals

# A daily reality

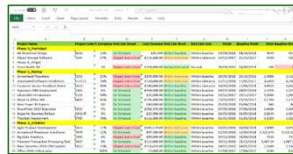
Inefficient. Manual. Repetitive. *A poor Employee Experience.*



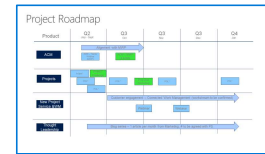
Disconnected data.



Manual aggregation.



Beautiful information.



Shadow IT

# Microsoft 365 Work Management



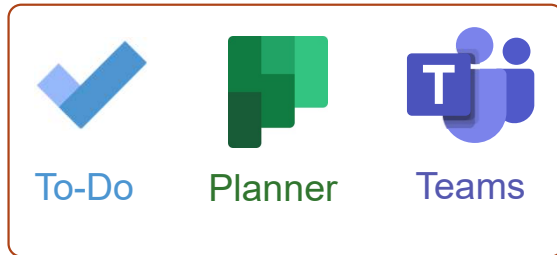
Integrate.



Power BI  
Analysis, reports & dashboards.

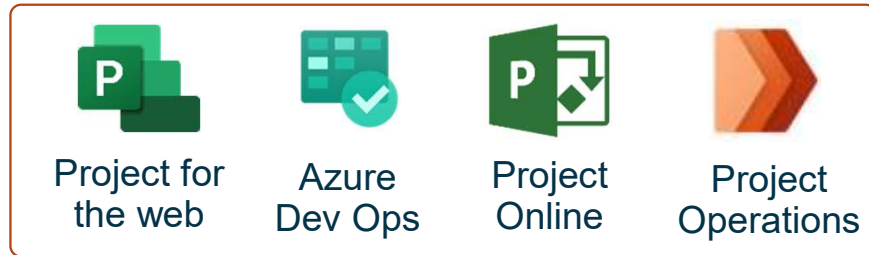


Viva Goals  
OKRs.



To-Do  
Planner  
Teams

Individuals & Teams.



Project for the web  
Azure Dev Ops  
Project Online  
Project Operations

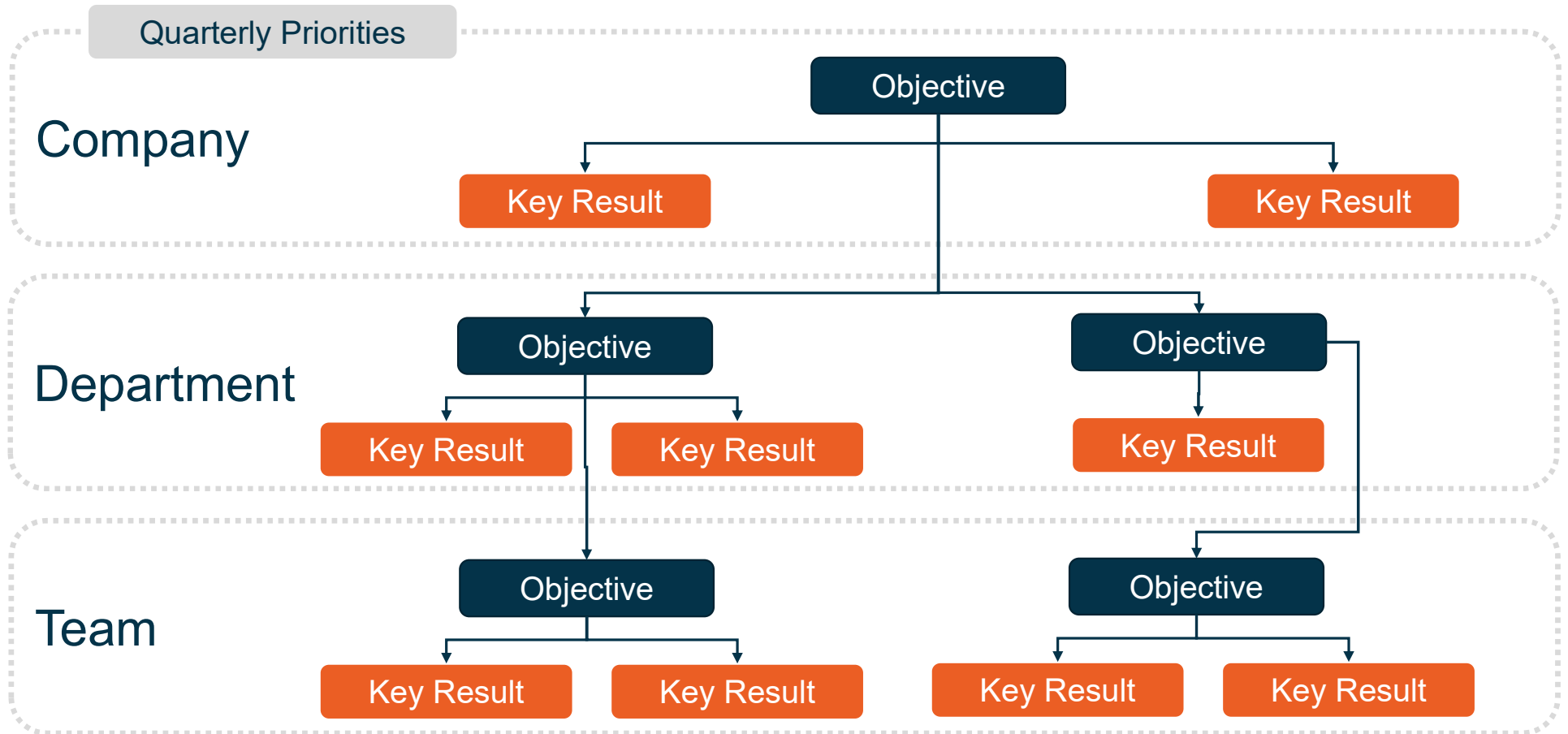
PPM Supporting Tools.

Strategy to delivery and back again.

# Classic model



In classic model, departments & teams can define their own set of OKRs that align with company's priorities.





# | The benefits of OKRs



Alignment



Focus



Transparency



Adaptability



Growth



# OKRs align individuals & teams around a proven business goal-setting and management methodology



## Objectives

---

Qualitative, aspirational goal for an individual, team, or company



## Key results

---

Measurable outcomes that contribute to the achievement of an objective



## Initiatives and projects

---

Projects and collections of tasks that will be taken to achieve key results

# OKRs align individuals & teams around a proven business goal-setting and management methodology



## Objectives

---

Lead the OKR software Market in product features in order to consistently beat out the competition



## Key results

---

1. Achieve 90% win-rate against top 3 competitors
2. Launch 3 differentiated product features
3. Increase daily active users (DAUs) from 1,200 to 2,000



## Initiatives and projects

---

- Launch the new Collaboration Boards feature
- Submit Gartner application by Feb 18
- Develop a new enterprise sales playbook

# OKR formula



We will

Objective

as measured by

Key Results

via

Projects

*optional / maybe*

What do I do with this?

# | A good objective

What you want to accomplish

A single sentence that is

1. Qualitative & Inspirational
2. Time bound
3. Actionable by individuals / the team independently

## Good

- Launch an awesome MVP that delights our product managers
- Own the B2B Managed Service business in the South-West
- Transform Manchester's public transport habits

## Bad

- Sales numbers up 30%
- Double the user base
- £2M in revenue

These are bad as they are Key Results

## Write an Objective

**Verb + What you want to do +**  
**In order to / for / so that (*what you aim to achieve*)**

### Example

**Drive better attendance at our conference**  
**to improve the customers' networking experience**

### Good OKR Examples

#### Objective

**Increase brand recognition** (to bring in more customers)

#### Objective

**Improve internal employee engagement** (to increase job satisfaction)

#### Objective

**Develop a sustainable candidate lead strategy** (in order to hire top talents)

# Viva Goals example OKRs (Sales specific)



Company

Sales

Marketing

Finance

People

Product Management

Engineering

Administration

Customer Success

Design

## Achieve record revenues while increasing profitability

- Hit quarterly revenue of over \$100000
- Start sales in 2 new countries/regions and achieve first quarter revenues totaling over \$100000
- Increase gross profit % margin from 23% to 54%

Add

## Kickstart sales process activity indicator improvements

- Increase calls per salesperson from 5000 to 6000 per quarter
- Achieve at least 300 demo calls per salesperson per quarter
- At least 33% of online signups are called back
- Have each salesperson spend at least 84 hours per month on support chat

Add

## Increase recurring revenues

- Reach monthly recurring revenue (\$ MRR) of \$250k
- Increase the share of monthly subscriptions vs one-time contracts sold from 80% to 85%
- Increase average subscription size from \$150 to \$300 per month
- Increase annual renewals from 50% to 75%
- Reduce churn % from 3% to 1% monthly

## Collect more accurate sales leads data

- Make sure at least 75% of leads have the obligatory question answers filled in
- Create the list of lead metrics and scripted questions to collect in CRM
- With development automate the data collection from our backend to CRM
- Redesign signup form to ask for 3 new obligatory screening questions

Your turn...

# Key results

How you will measure success (outcome)

- Growth
- Engagement
- Revenue
- Performance
- Loyalty
- Other

## Launch an awesome MVP...

1. 40% of users come back twice in one week
2. Increase recommendation score to 8/10
3. “How did you hear of us?” survey results for Friends & Family up 20%

### Consider this formula

Verb + what you're going to measure + from “x to y”

### Example

Increase attendance from 350 to 500 people



# Basics of Setting KRs

Move your team from **output** thinking to **outcome** thinking

## 1. Review your Objective

*“Our customers love us so much they are our sales team”*

If the above is true, what numbers would move?

## 2. Can you quantify any words?

Love = NPS

Sales = referrals

## 3. Key Results

NPS > 7

Referrals +25%

*“How did you hear of us”* survey results: Friends & Family up 20%

# Thinking about Key Results

An approach to developing your KRs

1. Use a sticky note (IRL or virtual whiteboard)
2. Write down as many metrics for KRs as you can
3. Stack rank the metrics
  - a. Best indicators of progress at the top
  - b. Less trustworthy at the bottom
4. Consider the consequences of these Key Results <sup>(notes)</sup>
  - a. Customers love us... what's the balance?
  - b. *Revenue up while customer service calls down*
5. Common pairings  
 long/short term | qualitative/quantitative | process/outcome | internal/external
6. Baseline | Easy to measure? | Strong or weak signals?

# | Projects

Projects are the outputs you decide to undertake in order to support your outcome.

- Deliverables that help to achieve an Objective
- Set with the hope they bring success YET do not guarantee it
- Subject to change if they do not bring expected results
- Cumulative result of all your daily tasks and activities

## Example

In order to achieve the objective *“Expand our market presence to EMEA markets to establish global presence”*, the measure of success will be *“Sales metrics (Revenue € # of customers) in new geographies.”*

A project to ensure we meet the objective / measure of success could be *“Develop a GTM plan for EMEA”*

# | Projects

Project completion should not be a Key Result

1. It locks you in even if it doesn't work (deliver)
2. Don't commit to a tactic that turns out to be a bad choice
3. Aim for an outcome
4. Example
  - 0: Customers love us so much; they are our sales team.
  - KR: *New self-service help area***
  - KR: Love-driven marketing with TV commercials
  - KR: Customer service completes sales training



# Projects

If you spot a task or project listed as a Key Result, ask a few questions:

1. Why this project?  
Why is it important?
2. What will it accomplish?  
What will change?
3. How do you know if it's successful?
4. What numbers will move if it works?
5. How does it tie into company Objectives?

**If you see an OKR that looks like this:**

O: New self-serve help area

KR: Better search

KR: New FAQ

KR: Forums

**You can push and ask questions until it becomes this:**

O: The company helps our customers succeed when they are struggling.

KR: "Did this help" rating rises 15%

KR: "Problem resolved" rating on FAQ improves 30%

KR: Peer-to-peer help forum DAU=2K (down from 10K)

## Additional considerations

1. KRAs should be difficult, not impossible.
2. Metrics first approach.
3. OKRs are based on giving employees freedom on outcomes.
4. Weekly / bi-weekly update cadence.
5. Successful adoption 6/9/12 months +



# Viva Goals Example



# | The benefits of OKRs



## Alignment

Ensuring everyone is “rowing in the same direction”, and driving towards the same purpose, across the organisation.



## Focus

3-5 OKRs per team, per quarter. The ability to prioritize what is most important.



## Transparency

Clearly defined ownership of core outcomes across the organisation creates accountability, and surfaces dependencies and roadblocks.



## Adaptability

Faster and better decision making based on dynamic real-time data and insights.



## Growth

Striving for ambitious outcomes, stretch goals and reaching for what’s possible.





# Phased approach



Fully embrace company-wide integration

1

## Beginning

### Starting your OKR journey

- No usage of OKR methodology
- No structured business rhythm
- Limited alignment of goals between levels

2

## Piloting

### Validating OKRs in your organization

- Organizational experimentation with OKR methodology via pilot group
- Small group learning OKR concept and building into business rhythm
- Small group trying to understand how OKRs will work for them at scale

3

## Adopting

### Committing to the OKR practice

- Executive Sponsorship
- Top levels of the organization are developing the OKR muscle and habit
- OKRs are expanding more widely into business rhythms
- OKR tool selection begins

4

## Scaling

### Rolling out OKRs broadly

- Executive Sponsorship
- OKRs are rolled out to the rest of the company and baked into large, organization-wide initiatives
- OKRs are firmly embedded in business rhythms throughout the organization, from top to bottom
- OKR tool is selected and used across the organization

5

## Centering

### Unlocking cultural buy-in for OKRs

- Executive Sponsorship
- Team members reference OKRs in every decision, big and small
- OKRs are firmly entrenched in business rhythms, becoming a global mindset Of focus and alignment
- Employees feel there is purpose at the center of everything they do



Optional



# What about everything else you must do?

OKRs are part of the management approach

## 1. Health Metrics

## 2. Cadence is key to success w/ OKRs

Monday team meeting to check progress towards OKRs

- Commit to the tasks that will help meet the objectives
- Intention for the week
- Forecast for the month
- Status towards OKRs
- Health metrics

# | Four Square (option)



<b>Priorities this week</b>	<b>OKR Confidence</b>
P1 – Close deal with C3-Ceramic P1 – New order flow P1 – Interview 3 sales candidates	Launch an awesome MVP... KR: 40% of users come back twice in one week KR: Recommendation score = 8/10 KR: 15% email newsletter open rate
<b>Upcoming big projects</b>	<b>Health metrics</b>
New self-service option for Channel Metrics for Channel on Prop Sales Hire Channel Manager	Amber: Team: Struggling with pivot Green: Channel satisfaction Red: Conversion of subscribers



# Viva Goals sample use cases

# Viva Goals: Purpose and alignment



**Create clarity and stay aligned at scale**  
 Define success as a team, connect work to outcomes, and align at all levels of the organization



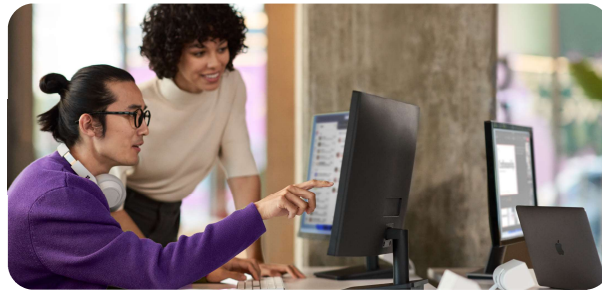
**Focus teams on impact, not output**  
 Share progress and insights across the organization, focus on work that moves the business forward, and stay agile at scale



**Bring goals into the flow of everyday work**  
 Brings data and actions seamlessly into where people are working



# Viva Goals help various stakeholders in an organisation



## Executives



- ✓ Better understanding of progress of largest business initiatives throughout time periods
- ✓ Stronger cross collaboration between departments and teams
- ✓ Creating initiatives based on the Mission and Vision of the company
- ✓ High-performing, empowered employees

## Team Managers



- ✓ More focused priorities and team meetings
- ✓ Transparency and collaboration between teams and departments
- ✓ Clear alignment to Business initiatives
- ✓ Clear accountability and ownership on OKRs
- ✓ Better understand where to provide resources

## Individual Contributors



- ✓ Understand how day to day work aligns with the goals / strategic priorities of the company
- ✓ Provides more purpose to their work
- ✓ Transparency on biggest priorities for the company and teams
- ✓ Ability to better prioritize growing number of tasks

# Viva Goals – Key Pillars



## Alignment

Empowers people and teams to focus on impact and align to achieve results.

**Shared understanding of goals and priorities:** Keep employees focused on the work that contributes to business mission and priorities

**Connect daily work to business impact:** Help employees prioritize and perform at a high level by giving visibility into how their projects connect to team-wide and organization-wide OKRs.

**Create the right rhythms and communication touchpoints:** Reduce friction and develop the habits needed to drive real results

## Agility

Empowers organizations to roll out and adopt OKRs at speed and scale.

**One place for end-to-end goal management:** A central hub to access and update goals, check in on progress, and see a shared view of team priorities.

**Built-in best practices and sample OKRs:** Build and manage OKRs in one place, with in-product guidance and structure that accelerates adoption.

**Define success at all levels with approval workflows:** Make OKR approvals, delegations, and check-ins a seamless process for employees across the organization.

## Integration

Brings goals into the flow of everyday work with Microsoft Teams and ADO apps, a Teams messaging extension, and 20+ third-party integrations into critical work systems.

**OKRs embedded in the employee experience:** Bring data and actions seamlessly into the tools people are using today, like Microsoft Teams and ADO, as well as native integration with M365.

**Rally conversation around OKRs:** Communicate, collaborate, and check-in on goals with the message extension in Teams chat.

**Keep track of progress at all times:** Increase visibility into goals and progress with integrations into 20+ critical work systems like Jira, Tableau, and ZenDesk.



# Viva Goals - Scenario analysis



	Shift from a manual OKR process in Excel, SharePoint to a tool	Set up business execution rhythms to run effective meetings using OKRs & Viva Goals and replace manual process	Remove silos across departments & business units and bring them together to accomplish strategic priorities	Use OKRs successfully in conjunction with Projects / Project Management Tools
<b>Why</b>	OKR mature organizations that are maintaining OKRs in excel or similar tools find it difficult to visualize the alignment, progress or cross-functional work items as the number of users increase	Keep goals top-of-mind for employees by integrating into the flow of work and key business rhythms	In some organizations, the work across departments & business units remains siloed that makes it challenging to connect the work across these departments / BUs to that of the organization's priorities	Different parts of an organization work on projects that are either maintained in excel or other Project Management tools such as ADO, Jira,... and it becomes important to align these projects to the OKRs to bring more focus
<b>How</b>	<ul style="list-style-type: none"> <li>Shift from manual OKR process to a more structured &amp; easier-to-use interface</li> <li>Visualize alignment at all levels of the organization with OKR approval workflows and Organizational, Team, and Individual goal pages, and Chart View.</li> <li>Set permissions, reminders at all levels across the organization</li> </ul>	<ul style="list-style-type: none"> <li>Utilize custom dashboard feature to pull relevant OKRs and share progress &amp; key highlights.</li> <li>Share dashboard links to relevant stakeholders as pre-read prior to meetings</li> <li>Focus discussions, provide context and simplify reporting with custom dashboards and OKRs that dynamically update.</li> <li>Use OKRs to discuss progress in your company townhalls, departmental meetings and 1:1 discussions.</li> </ul>	<ul style="list-style-type: none"> <li>Cascading goals across the organization starting from the Executive Leadership level all the way to Business Units, Departments, Teams and Individuals help connect the work done by various layers of an organization</li> <li>Mapping cross-functional stakeholders to an OKR enables collaboration that breaks silos. Ownership and accountability can be driven using OKRs in Viva Goals</li> </ul>	<ul style="list-style-type: none"> <li>Ability to create Projects, Tasks and assign ownership + tentative completion timelines within Viva Goals and align to relevant OKRs that are identified for that specific time period</li> <li>Integration ability with project management tools such as ADO, Jira to connect the Output-oriented work (Projects / Tasks) to Outcomes (OKRs)</li> </ul>

# Viva Goals - Scenario analysis



	Create clarity and stay aligned at scale	Focus teams on impact, not output	Bring goals into the flow of everyday work
<b>What</b>	Define success as a team, connect work to outcomes and align at all levels of the organization	Share progress and insights across the organization, focus on work that moves the business forward, and stay agile at scale	Bring data and actions seamlessly into where people are working
<b>Why</b>	Employees want to be part of the company mission and align to a common goal. OKRs make working with cross-functional teams and remote workers easier	Employees want to know, What is the most important thing you want me to focus on today? OKRs let them focus on work that matters, and give them permission to say no	Employees want data-driven decisions and measurable outcomes. Viva Goals integrations pull from a single "source of truth," so less hunting around for answers
<b>How</b>	<ul style="list-style-type: none"> <li>Define success by creating OKRs from scratch or with built-in templates.</li> <li>Align at all levels of the organization with OKR approval workflows and Organizational, Team, and Individual goal pages, and Chart View.</li> <li>Connect work to outcomes with Projects and Tasks aligned to OKRs.</li> </ul>	<ul style="list-style-type: none"> <li>Focus discussions, provide context and simplify reporting with custom dashboards and OKRs that dynamically update.</li> <li>Share progress and insights across your organization with sharable links to dashboards.</li> <li>Stay focused on work that moves the needle, with Individual, Team and Organizational goal pages.</li> </ul>	<ul style="list-style-type: none"> <li>Stay in the flow of work with the Viva Goals app in Teams and Azure Dev Ops.</li> <li>Communicate, collaborate and check-in on goals with the message extension in Teams chat.</li> <li>Increase visibility into progress with integrations into critical systems of work like Jira, Tableau, and ZenDesk.</li> </ul>
<b>Tech</b>	Viva Goals offers integrations with industry-leading tools and platforms you use every day so that your OKR implementation process is as simple, effective and seamless as possible. Use integrations to automatically update OKRs when your work gets done and foster ongoing feedback around your goals. Some integrations include Azure DevOps (ADO), Excel Online, GitHub, GitLab, Jira, Salesforce, Tableau, Trello, Zendesk, monday.com and more ( <a href="#">Azure DevOps integration   Microsoft Learn</a> )		



# Service Offerings



# Build intent workshops (MCI)



## Set the direction

### Assessment

- Pre-Engagement Kick-off Conversation
- OKR Maturity Questionnaire

### Art of the Possible

- Art of the Possible Kick-off Conversation
- OKR Fundamentals & Value
- Viva Goals Overview and Demo

### Build the Plan

- Build the Plan Kick-off
- Use Case and Scenario Discovery
- Adoption & Change Management Planning
- Report and Recommendations

*Can extend to a fixed price POC*



# Pre-defined Pilot

Pre-Requisite: **Completed Build Intent Workshop with customer.**  
Duration: **60-90 days**



## Plan

- Confirm stakeholders
- Review Viva Goals workshop - align on top scenario to solve for during pilot
- Run an OKR Maturity Assessment
- Kick-off & Scoping
- Identify pilot user group

## Enable

- Deploy Licenses & configure Viva Goals
- Train users in OKRs and Viva Goals
- Assist in the development of top-level OKRs (for pilot scope)
- Assist in the creation of Dashboards for OKR review
- Enable Viva Goals in Teams

## Grow

- Executive Readout
- Showcase next steps for acquiring licenses and reaching full deployment
- Attach additional consulting services and offers to deliver on additional prioritized business use-case scenarios

### 1. Leadership-Only Pilot Group

One of the most popular ways to roll out an OKR program is from the top-down. The benefit of going this route is that leadership is fully behind the program, and OKRs are very well aligned. Here's how it goes:

- **In the first quarter, OKRs are set by the executive team.** Because OKRs are transparent in nature, the entire organization will have visibility into these goals.
- **Throughout that first quarter, a weekly cadence for check-ins is set as an example.** Meeting agendas are structured around measurement of OKRs.
- **After a successful first quarter, Team Managers are trained.** They develop their OKRs, which are aligned with the senior leadership team.
- **After another quarter or two, Team Managers expand their Key Results.** At this point, individual team members become involved.
- **Ask participants to take the [OKR Leadership Program learning path on-demand](#).** So that every pilot participant feels empowered to educate, engage, and upskill their employees in OKR methodology and software.

### 2. Department Pilot Group

Another popular rollout method is for one individual department or group (for example, the marketing or IT department, or a product engineering team) to run a top-to-bottom rollout involving team managers and individual employees. Here's how it goes:

- **With formal or informal support of upper management, the group adopts a weekly cadence for check-ins for 1 to 2 quarters, experimenting with what works and making agile changes.** Along the way, team managers report back to management regarding successes, challenges, and recommendations.
- **Once the individual department and management is comfortably in a rhythm, a training plan is formulated to roll out OKRs to the rest of the organization.** This plan uses the lessons from the individual department to make the process as smooth as possible for the organization as a whole.
- **Ask participants to take the [OKR Leadership Program learning path on-demand](#).** So that every pilot participant feels empowered to educate, engage, and upskill their employees in OKR methodology and software.



Thank you

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