

Mapping Viva Goals to WorkBoardAI



Leaders and teams use WorkBoardAI to achieve peak enterprise performance in a fast-changing world

ALIGN OUTCOMES → DRIVE OUTCOMES



- Set and link multi year strategy to OKRs
- AI suggests lead and lag targets
- Manage KR and KPIs together
- See strategy to execution and alignment gaps

- Scorecards and interactive MBRs / QBRs
- Executive Briefs eliminate meetings and show issues
- Heatmap with KR and KPIs with objective RYG
- Line of sight to direct reports' progress and risks



- AI drafts and improves OKRs
- Team, squad and individual OKRs
- AI suggests x-functional alignment
- Update KR from other systems

- Update KR from other systems and in MS Teams
- Monday Memo comes directly to users
- AI drafts the plan of action to achieve KR
- Manage workstreams and actions to achieve KR

Setting OKRs

Viva Goals

The screenshot shows the 'New Objective' form in Viva Goals. The title is 'Optimize investments and company resources so we can accelerate innovation'. The form includes sections for 'Details' (Aligned to: Not aligned to any OKRs, Owner: David Chase, When: Q1 2025, Team: Unassigned), 'Outcome' (Get to 100% complete), and 'Progress and Status' (Progress updated from Key Results). A bottom panel offers options to 'Create Objective and then add:' Another Objective, Key result (selected), Child objective, or Initiative. Buttons for 'Cancel', 'Copilot', and 'Create' are at the bottom.

WorkBoardAI

The screenshot shows the 'Add Team Objective and Key Results' interface in WorkBoardAI. The objective is 'Optimize investments and company resources so we can accelerate innovation' for the 'Information Technology' team from Jan 01, 2025, to Mar 31, 2025. A key result is added: '# Shift another 20% of our non-mfg workload to cloud' with a weight of 0% of 20%. Below, a key result name is entered: 'HR replaces all manual HR intake steps globally (43 locations)'. The interface includes a 'Take a tour' button, 'More actions' dropdown, and a 'Done' button. A note at the bottom says 'When you are finished adding key results, select Done.'

There are several options including a collaborate white board, but many people use the easy doc-like experience to enter their OKRs. The AI Co-Author drafts and improves the objectives and/or key results as they're set or after. AI also suggests which KRs to align or relate your KRs to.

Integrating apps to update key results

Viva Goals

The screenshot shows the 'Connect to Excel Online' configuration screen. At the top, there is a Microsoft Excel icon and the title 'Connect to Excel Online' with a connection name 'David Chase's Excel Online connection 1'. Below this, there are four dropdown menus: 'Workbook' (set to 'goals.xlsx'), 'Sheet' (set to 'Sheet1'), 'Column' (set to 'Column B'), and 'Row Number' (set to '2'). A 'View source' link is next to the workbook dropdown. At the bottom, a preview shows '10 (connected with Sheet1 B2)'.

WorkBoardAI

The screenshot shows the 'Pull data from external applications' configuration screen. It starts with a question 'How will you measure your key result?' and a 'Change measurement type' button. The 'Azure DevOps (ADO) organization*' is set to 'workboarddev'. The 'Project*' is 'Project Rosie - Robotic Process Automation'. Under 'How do you want to get issue completion data from ADO?', 'By Work Item Name' is selected. The 'Select which item(s) you want to measure*' dropdown shows '8 | HR replaces all manual HR intake steps globally (43 loca...'. At the bottom, 'Progress by All Work Items (Rollup)' is selected for capturing progress.

The screenshot shows the 'Set up Excel data source' configuration screen. It is connected to 'https://graph.microsoft.com'. Under 'Choose how to pull data from Excel for this key result. All fields are required.', 'OneDrive' is selected as the source. The 'Select a workbook*' dropdown is 'RPA cost takeout 2023.xlsx' and the 'Select a sheet*' dropdown is 'Sheet1'. Under 'Choose the cell to pull data from:', 'Type in the exact cell' is selected, with the cell 'N2' entered. An 'Advanced use cases' dropdown is at the bottom.

Easily connect to **Excel, Azure DevOps, Jira, Salesforce, Github, Smartsheet**, and many other apps as you create key results. The source of the KR shows on all the views as does the business owner.

Viewing OKRs

Viva Goals

Title	Owner	Team	Status and progress	Last updated	Last check-in note
Optimize investments and company resources so we can accelerate innovation	David Chase	ACME	At Risk Measure as 100% complete 24%	Today	No check-in notes
Shift another 20% of our non-mfg workload to cloud	David Chase	ACME	At Risk Reach 20% 4.67%	Today	No check-in notes
HR replaces all manual HR intake steps globally (43 locations)	David Chase	ACME	At Risk Reach 41 11	Today	No check-in notes
RPA replaces all manual visa and passport intake and inquiry steps globally (43 locations)	David Chase	ACME	At Risk Reach 41 10	40m	No check-in notes
HR realizes \$3M in annualized run rate savings from RPA (measured by 3rd party service termination and h/c reallocation)	David Chase	ACME	Behind Reach \$11 \$7.48	Today	No check-in notes
Foster a culture of ambition and creativity that fuels Acme 2030	David Chase	ACME	On Track Measure as 100% complete 97%	Today	No check-in notes
Optimize investments and company resources so we can accelerate innovation	David Chase	Unassigned	Not Started Measure as 100% complete -	Today	No check-in notes

- Alerts at the top show what needs to be updated and where to improve alignment
- AI generates briefings on your OKRs or any combination
- Add and update from this list, the short list of due KR's, or from Teams

WorkBoard AI

WorkBoard AI Objectives Teamwork Meetings & Reviews

Search WorkBoard Create

My Objectives

Updates needed: 1 Check-ins: 5/22 Results to celebrate: 4 Draft OKRs: 22 Alignment opportunities: Expires: 03/23

My Briefing for: Digipay product brief

Objectives I Own

Team Individual

INFORMATION TECHNOLOGY

- 23%** Optimize investments and company resources so we can accelerate innovation
63 days · Feb 01, 2025 - Apr 30, 2025
- 4.67% of 20% Shift another 20% of our non-mfg workload to cloud
10 of 43 HR replaces all manual HR intake steps globally (43 locations)
10 of 43 RPA replaces all manual visa and passport intake and inquiry steps globally (43 locations)
7.48M of 33m HR realizes \$3M in annualized run rate savings from RPA (measured by 3rd party service termination and h/c reallocation)
- 89% Technology leads the way to a digital business
63 days · Feb 01, 2025 - Apr 30, 2025
- 3 of 3 3 of our 5 AI use cases achieve their value outcomes, including 1 in cyber security
5 of 6 Condition monitoring goes live in 6 NA locations
29 of 35 We have measurable outcomes, iteration cadence and instrumentation in place for 35 Tier 1 and Tier 2 initiatives
32.43K of 30k Digital workplace uptake drives >30,000 engagement points monthly
4 of 5 5 P1 vulnerabilities identified by AI
- 93% Foster a culture of ambition and creativity that fuels Acme 2030
63 days · Feb 01, 2025 - Apr 30, 2025
- 36% of 35% 35% of novel tech experiments are initiated at front line teams
311 of 320 An additional 25% of team members have completed all house agile courses (320 team members)
83 of 90 45% of our teams are using OKRs to define and measure business outcomes (90 teams)

Check ins – updating key results

Viva Goals

Title	Owner	Team	Status and progress	Last updated	Last check-in note
Optimize investments and company resources so we can accelerate innovation	David Chase	ACME	At Risk 24% Measure as 100% complete	Today	No check-in notes
Shift another 20% of our non-IT workload to cloud	David Chase	ACME	At Risk 48% Reach 20%	Today	No check-in notes
HR replaces all manual HR intake steps globally (3 locations)	David Chase	ACME	At Risk 11 Reach 41	Today	No check-in notes
HR replaces all manual HR intake and support intake and requests steps globally (3 locations)	David Chase	ACME	At Risk 10 Reach 41	20m	No check-in notes

Who can create organization OKRs or initiatives?
This question helps you control who can create organization OKRs or initiatives. Organization Owners should always have access to create organization OKRs or initiatives.

Anyone in ACME
 Only my team
 Only people using my business

Check in note template
Create a template for check-in notes for the goals assigned to this team.

Highlights
Provide a summary of the progress made toward the goal.

Challenges
Identify any obstacles or challenges encountered.

Next steps
Define the planned activities or tasks for the upcoming period.

Rich text editor with icons for bold, italic, underline, list, link, and image.

WorkBoardAI

Monday, February 24th

WorkBoard APP 6:31 AM

Happy Monday, L
outcomes you are

Updates needed
5 results need updating

Update Key Results

Deliver our best business results while improving team engagement and motivation
Danielle Levitz 62 days left

Key Result	Metric	Confidence	Date	Update Value	Narrative
Get a nomination for regional CIO awards	0 of 1 Shows last update	▶	Feb 21	# update	Application accepted and 3 references stories - good feedback from the committed
Technology leads the way to a digital business					
Condition monitoring goes live in 6 NA locations	0 of 6 Shows last update	---	Feb 21	# update	Enter an optional narrative to provide details f...

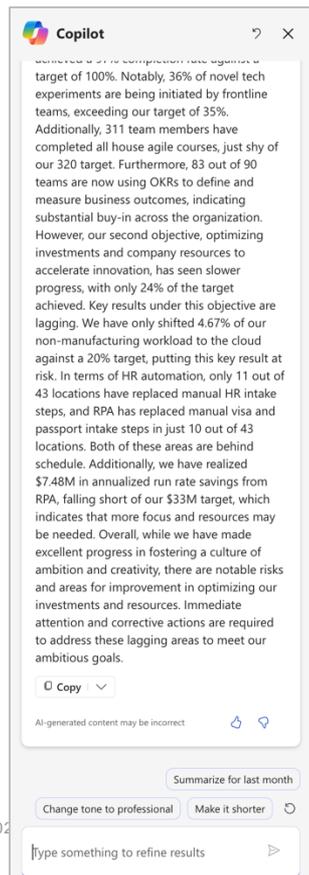
Update Cancel

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- Alert on OKRs page and via Teams takes you to the specific KRs to update
- Streamlined update experience with narrative and numerical value in line
- Add a subjective RYG flag to the progress calculated by WorkBoardAI
- Change the confidence assessment any time, even when no change to measure
- Update and change history time stamped is easily accessible

AI Summaries

Viva Goals



Copilot

generates 100% completion rate against a target of 100%. Notably, 36% of novel tech experiments are being initiated by frontline teams, exceeding our target of 35%. Additionally, 311 team members have completed all house agile courses, just shy of our 320 target. Furthermore, 83 out of 90 teams are now using OKRs to define and measure business outcomes, indicating substantial buy-in across the organization. However, our second objective, optimizing investments and company resources to accelerate innovation, has seen slower progress, with only 24% of the target achieved. Key results under this objective are lagging. We have only shifted 4.67% of our non-manufacturing workload to the cloud against a 20% target, putting this key result at risk. In terms of HR automation, only 11 out of 43 locations have replaced manual HR intake steps, and RPA has replaced manual visa and passport intake steps in just 10 out of 43 locations. Both of these areas are behind schedule. Additionally, we have realized \$7.48M in annualized run rate savings from RPA, falling short of our \$33M target, which indicates that more focus and resources may be needed. Overall, while we have made excellent progress in fostering a culture of ambition and creativity, there are notable risks and areas for improvement in optimizing our investments and resources. Immediate attention and corrective actions are required to address these lagging areas to meet our ambitious goals.

Copy

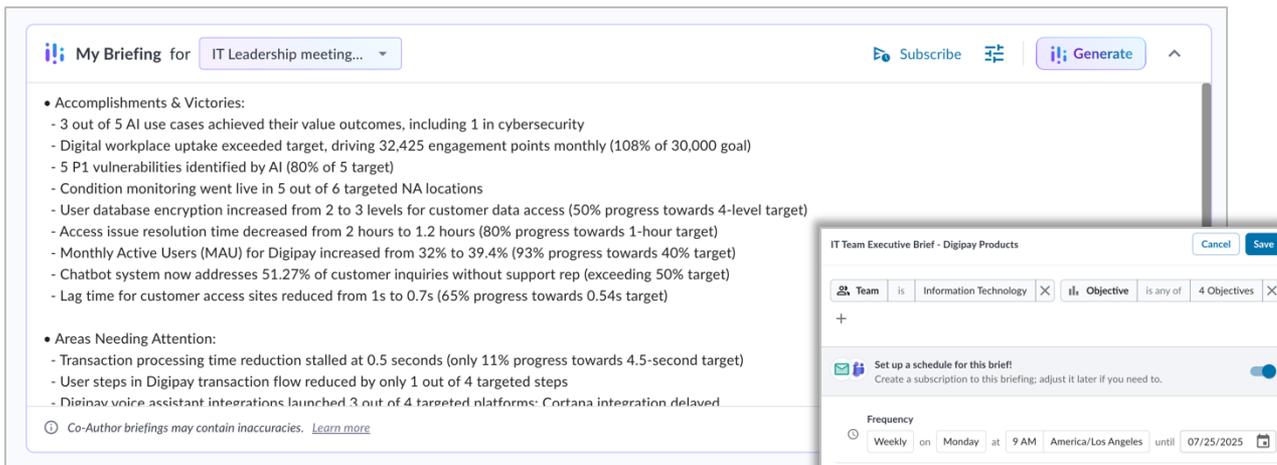
AI-generated content may be inaccurate

Summarize for last month

Change tone to professional Make it shorter

Type something to refine results

WorkBoardAI



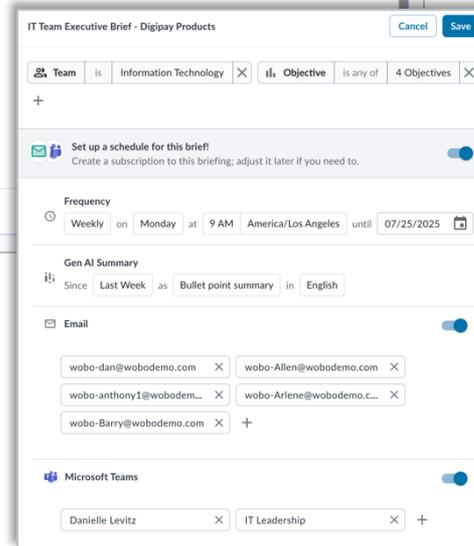
My Briefing for IT Leadership meeting...

Subscribe Generate

- Accomplishments & Victories:
 - 3 out of 5 AI use cases achieved their value outcomes, including 1 in cybersecurity
 - Digital workplace uptake exceeded target, driving 32,425 engagement points monthly (108% of 30,000 goal)
 - 5 P1 vulnerabilities identified by AI (80% of 5 target)
 - Condition monitoring went live in 5 out of 6 targeted NA locations
 - User database encryption increased from 2 to 3 levels for customer data access (50% progress towards 4-level target)
 - Access issue resolution time decreased from 2 hours to 1.2 hours (80% progress towards 1-hour target)
 - Monthly Active Users (MAU) for Digipay increased from 32% to 39.4% (93% progress towards 40% target)
 - Chatbot system now addresses 51.27% of customer inquiries without support rep (exceeding 50% target)
 - Lag time for customer access sites reduced from 1s to 0.7s (65% progress towards 0.54s target)
- Areas Needing Attention:
 - Transaction processing time reduction stalled at 0.5 seconds (only 11% progress towards 4.5-second target)
 - User steps in Digipay transaction flow reduced by only 1 out of 4 targeted steps
 - Diginav voice assistant integrations launched 3 out of 4 targeted platforms: Cortana integration delayed

Co-Author briefings may contain inaccuracies. [Learn more](#)

- Choose bullet or narrative format, time period to summarize, and language for the summary
- Summaries use all relevant OKR, checkin, and workstream/initiative data, not just text on the page
- AI summaries on all elements -- OKRs, Teams, Dashboards, Scorecards, Team Members
- Instantly post to Teams and/or schedule and distribute summaries via WorkBoardAI, email and MS Teams channels



IT Team Executive Brief - Digipay Products

Cancel Save

Team is Information Technology Objective is any of 4 Objectives

Set up a schedule for this brief! Create a subscription to this briefing; adjust it later if you need to.

Frequency Weekly on Monday at 9 AM America/Los Angeles until 07/25/2025

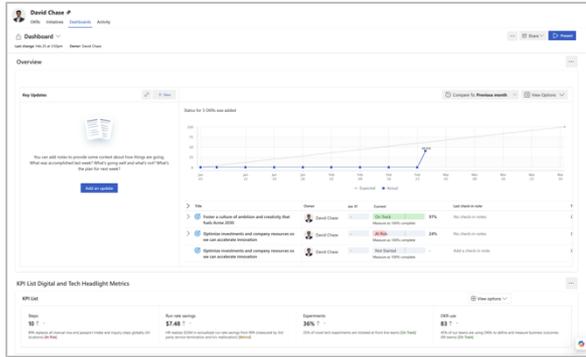
Gen AI Summary Since Last Week as Bullet point summary in English

Email wobo-dan@wobodemo.com wobo-Allen@wobodemo.com wobo-anthony1@wobodem... wobo-Arlene@wobodemo.c... wobo-Barry@wobodemo.com

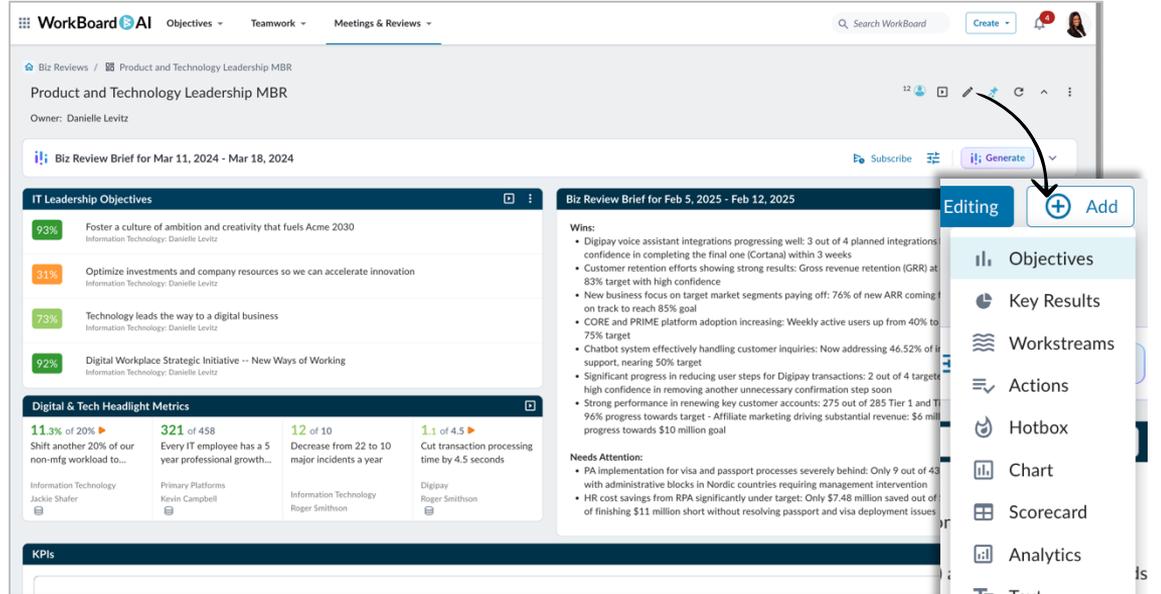
Microsoft Teams Danielle Levitz IT Leadership

Customizing dashboards

Viva Goals



WorkBoardAI



- Basis for dashboards developed in Viva Goals
- Add, arrange and section any number of trays with WorkBoardAI elements, and display other systems' data in trays
- Create charts with multiple KR's that update dynamically
- Generate, display and distribute AI summaries as meeting pre-reads or "net change" updates on the data elements (not just page text)

Tabular dashboards

- Use single quarter or multiple quarter templates
- Include and arrange any combination of Objectives, Key Results, and KPIs
- Show dependencies and related work, including items in other systems
- Choose and arrange columns, change labels and formatting
- Update dynamically as relevant new KRs are created

WorkBoardAI

The screenshot displays the WorkBoardAI interface. At the top, there are navigation tabs for 'Objectives', 'Teamwork', and 'Meetings & Reviews'. A search bar and a 'Create' button are also visible. The main content area shows a 'Scorecard Brief' for 'Dependencies and collaborators'. Below this, there is a table with three rows, each representing a Key Result (KR) and its dependencies.

Key Result	Dependencies	Owner
Cut transaction processing time by 4.5 seconds	<ul style="list-style-type: none">DEPENDS ON<ul style="list-style-type: none">Deliver Platform MVP to productionBLOCKS<ul style="list-style-type: none">Launch 3 innovative product features with a customer satisfaction score of 4.5+Increase NPS by 50% (from +4 to +8)DEPENDENCY FOR<ul style="list-style-type: none">Drive gross revenue retention (GRR) above 83%SUPPORTED BY<ul style="list-style-type: none">Strategic Use Cases	Roger Smithson
Launch 4 Digipay voice assistant Integrations (Google Assistant, Siri, Alexa, Cortana)	<ul style="list-style-type: none">SUPPORTS<ul style="list-style-type: none">Action Plan for Launch 4 Digipay voice assistant Integrations (Google Assistant, Siri, Alexa, Cortana)HR realizes \$33M in annualized run rate savings from RPA (measured by 3rd party service termination and h/c reallocation)Apple Pay launched for self-sign upChatbot 3.1 user stories are ready for launchDEPENDS ON<ul style="list-style-type: none">Digipay Dev Plan (increment)BLOCKS<ul style="list-style-type: none">Digipay Voice AssistantsBLOCKED BY<ul style="list-style-type: none">Digipay issues in progress	Roger Smithson
Users see 0 seconds of spinning wheel in transaction flow (as reported by users - from 2 seconds)	<ul style="list-style-type: none">DEPENDENCY FOR SUPPORTED BY<ul style="list-style-type: none">Increase NPS by 50% (from +4 to +8)Complete UAT of Digipay 2.0Digipay Dev Plan (increment)https://wobodemo.atlassian.net/issues/?qj=project%20in%20(%22Digipay%22)%20and%20type%20in%20(%22Story%22%2C%20%22Epic%22)%20and%20s...	Allen Benny

On the right side, a configuration panel for a 'Single-period Scorecard' is shown. It includes options for 'Rows (3)' and 'Columns (3)', a 'Frozen' button, and a list of attributes to include in the scorecard, such as 'Key Result | Actual', 'Key Result | Comments', 'Key Result | Confidence flag', etc.



“On Day 1 of a quarter, we have our OKRs in place, dependencies resolved, and major milestones captured in a workstream all in WorkBoard so we are ready to execute well in the quarter.”

Summers Hutchings
Director, Product Delivery & Portfolio
Strategy, Carmax



“Using WorkBoard and OKRs we get cross-functional prioritization. We get closer to simplicity in a very complex environment. And when we create that simplicity, we can focus.”

Kate Villari
Sr Director, Transformation, Strategy &
Performance, AstraZeneca
[Read the AstraZeneca OKR story](#)



“We use WorkBoard OKRs, Biz Reviews, Workstreams, Meetings, the Canvas, Heatmap — all of it — to advance our transformation agenda.”

Chris Rome
Head of Delivery Operations, Virgin Media
O2

WorkBoard AI Solution for Viva Goals Customers



WorkBoardAI is a complete solution for strategy execution and OKRs

3M, AstraZeneca, Cisco, CrowdStrike, Ford, Humana, Mars, Renault and others use WorkBoard today. It connects company strategy, teams' OKRs, and individual goals while simplifying cross-functional, team, and 1on1 conversations to drive progress on the most important outcomes. No technical expertise is needed to create scorecards from multiple OKRs, update KRAs via business systems, or generate presentations for business reviews, so it's easy to move from documenting OKRs to driving them.

Microsoft is an investor in WorkBoard through its M12 Ventures arm.



Enterprise Infrastructure & Security

- ✓ Hosted on Azure in Microsoft's US and European data centers
- ✓ ISO/IEC 27001, SOC 2, and TiSAX certifications with GDPR compliance.
- ✓ Encrypted by design and BYOK available
- ✓ Workday-certified goals and org structure integrations
- ✓ Workday Trustworthy AI certification



What sets WorkBoard apart from other options?

- ✓ Purpose-designed for strategy execution with OKRs in 2014 and innovation leader in the OKR domain
- ✓ Complete capabilities for 1) **setting OKRs** with features like OKR Co-Author and 2) **driving progress** with features like scorecards, business reviews, and Monday Memos
- ✓ Only provider with enterprise scale with customers like 3M, Astra Zeneca, Cisco, CrowdStrike, Ford, Humana, Mars, Renault and deployments over 30,000 employees
- ✓ On Microsoft infrastructure - not competitive
- ✓ Certified Workday integrations



Easy Operation, Migration, and Integration

- No sysadmin needed with self serve entity and team creation
- 1-step data migration from Viva Goals via API or selective movement via Excel or PowerPoint
- Microsoft Teams and Azure DevOps integrations + Salesforce, Jira, Excel, Smartsheets and more

