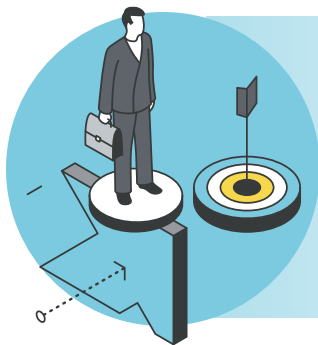# Mapping Viva Goals to WorkBoardAI

WorkBoard

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 KRs and KPIs together
- See strategy to execution and alignment gaps

- Scorecards and interactive MBRs / QBRs
- Executive Briefs eliminate meetings and show issues
- Heatmap with KRs 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 KRs from other systems

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

Setting OKRs

Viva Goals

WorkBoardAI

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.

WorkBoard

Integrating apps to update key results

Viva Goals

WorkBoardAI

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.

WorkBoard

Viewing OKRs

Viva Goals

- 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 KRs, or from Teams

WorkBoardAI

Check ins – updating key results

WorkBoardAI

- 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
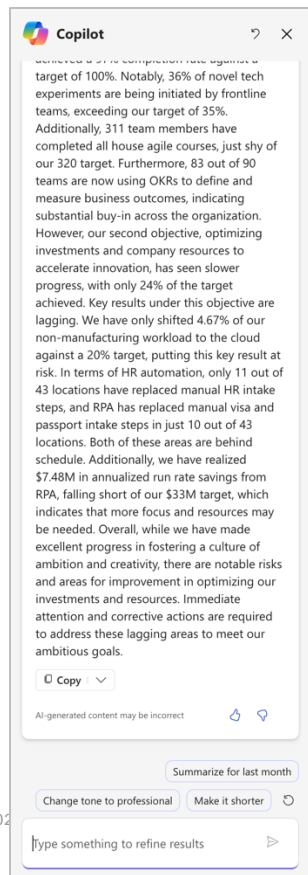
WorkBoardAI
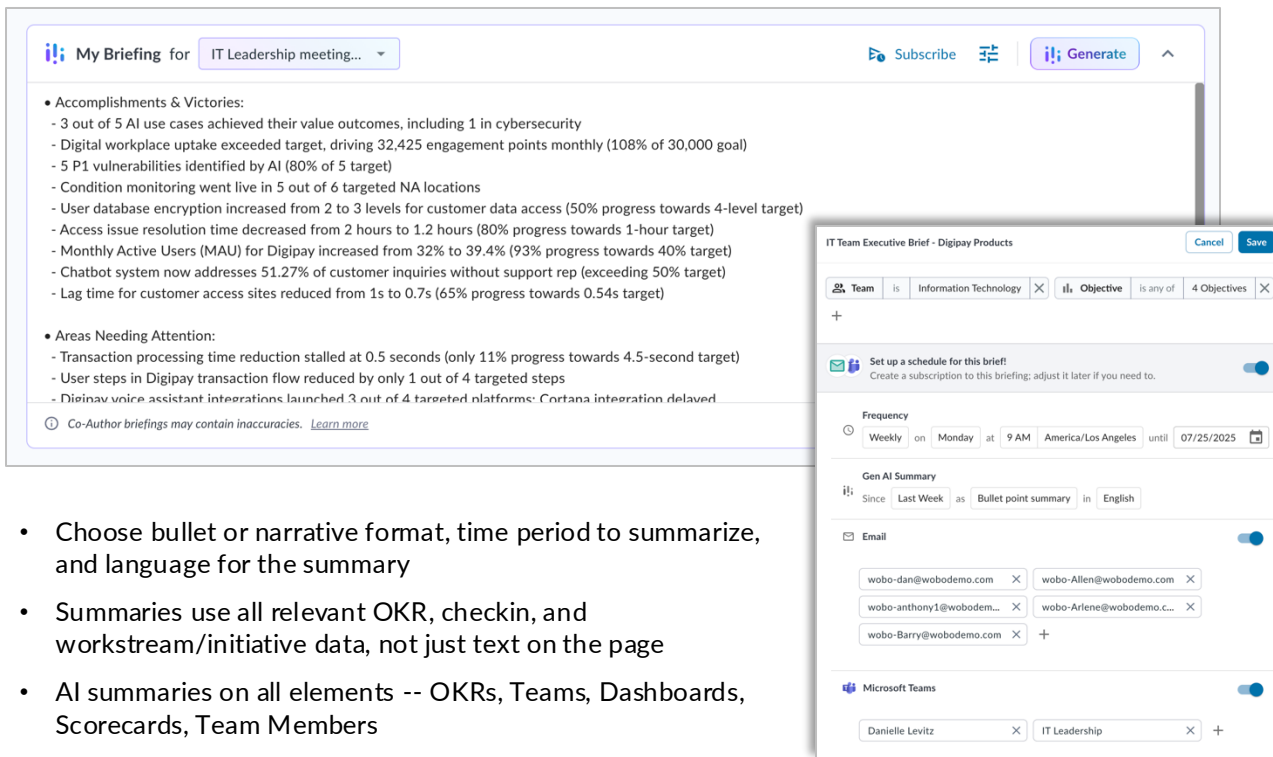
- Choose bullet or narrative format, time period to summarize, and language for the summary

- 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

WorkBoard

Customizing dashboards

Viva Goals
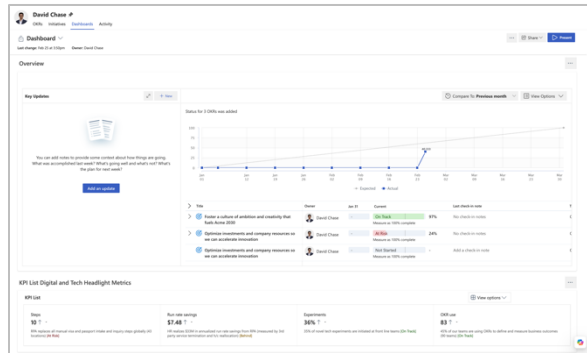
WorkBoardAI
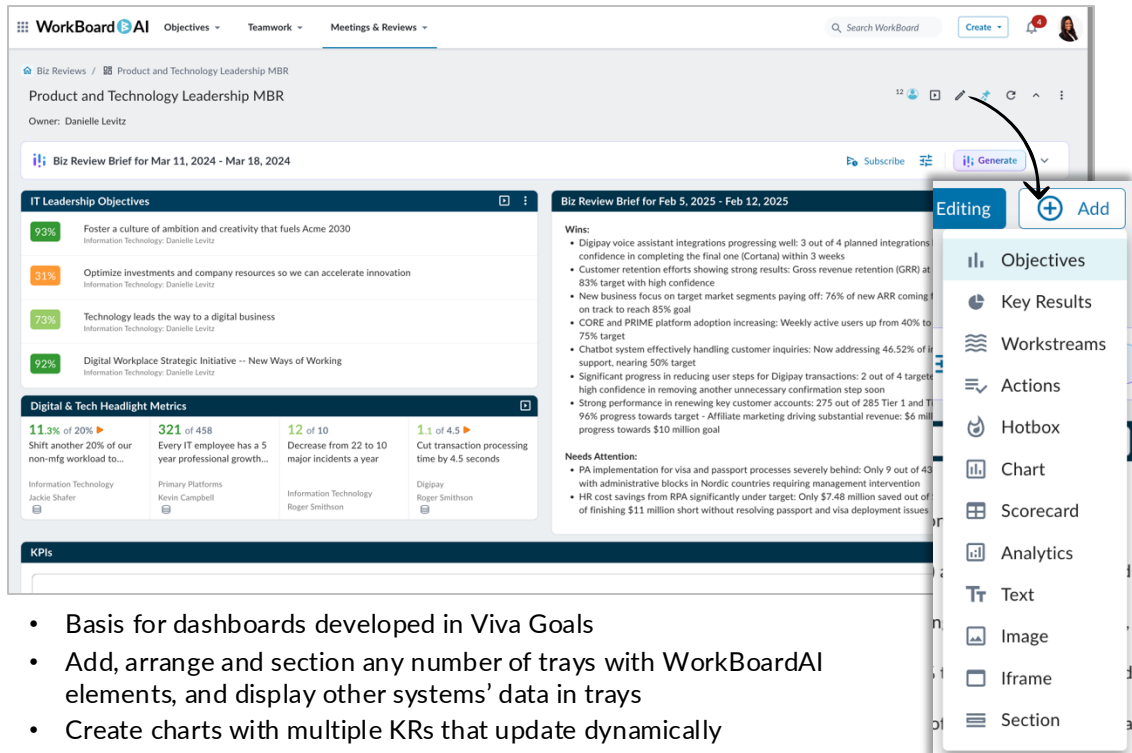
- Basis for dashboards developed in Viva Goals
- Add, arrange and section any number of trays with WorkBoardAI elements, and display other systems' data in trays
- Create charts with multiple KRs that update dynamically
- Generate, display and distribute AI summaries as meeting pre-reads or "net change" 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

CARMAX

"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

AstraZeneca

"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

Virgin media O2

"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 KRs 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