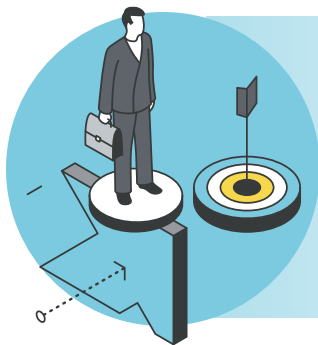


# Mapping Viva Goals to WorkBoardAI



# 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 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

The screenshot shows the 'New Objective' dialog box in Viva Goals. It has a title field with the text 'Optimize investments and company resources so we can accelerate innovation'. Below the title is a 'Details' section with fields for 'Owner: David Chase', 'When: Q1 2025', and 'Team: Unassigned'. There is a 'More Options' link and a 'Not delegated • Anyone can view • No tags • No description' note. The 'Outcome' section shows 'Get to 100% complete'. The 'Progress and Status' section shows 'Progress updated from Key Results • Status updated based on...'. At the bottom, there is a 'Create Objective and then add:' section with options: 'Another Objective', 'Key result' (selected), 'Child objective', and 'Initiative'. There are 'Cancel', 'Copilot', and 'Create' buttons at the bottom.

## WorkBoardAI

The screenshot shows the 'Add Team Objective and Key Results' interface in WorkBoardAI. It has a title field with the text 'Optimize investments and company resources so we can accelerate innovation'. Below the title is a 'Team' field with the text 'Information Technology • Jan 01, 2025 • Mar 31, 2025'. There is a 'More actions' dropdown and a 'Done' button. The 'KEY RESULTS' section shows a list of key results. The first key result is '# Shift another 20% of our non-mfg workload to cloud' with a subtext 'Danielle Levitz to update percentage every Friday • 0% of 20%'. There is a 'Change weights' link. Below the key results is a 'Key result name' field with the text 'HR replaces all manual HR intake steps globally (43 locations)'. There is a 'press enter when finished' prompt and a 'Use Co-Author' button. At the bottom, there is a 'When you are finished adding key results, select Done.' prompt.

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 interface shows a 'Connect to Excel Online' screen. At the top, there's a back arrow, an Excel icon, and the title 'Connect to Excel Online'. Below the title, it says 'Connection: David Chase's Excel Online connection 1'. The main section has four dropdown menus: 'Workbook' (set to 'goals.xlsx'), 'Sheet' (set to 'Sheet1'), 'Column' (set to 'Column B'), and 'Row Number' (set to '2'). There is a 'View source' link next to the Workbook dropdown. At the bottom, it says 'Preview: 10 (connected with Sheet1 B2)'.

## WorkBoardAI

The interface is titled 'How will you measure your key result?'. It has a 'Pull data from external applications' button and a 'Change measurement type' link. Below, it shows 'Azure DevOps (ADO) organization\*' with a dropdown set to 'workboarddev' and a '+ Connect to new instance' link. The 'Project\*' dropdown is set to 'Project Rosie - Robotic Process Automation'. Under 'How do you want to get issue completion data from ADO?', there are three radio buttons: 'By Work Item ID', 'By Work Item Name' (selected), and 'By Saved Query'. The 'Select which item(s) you want to measure\*' section has a search bar with the text 'Search for an epic, user story, task, etc.' and a 'Selected Items' list showing '8 | HR replaces all manual HR intake steps globally (43 loca...' with a close button. At the bottom, 'How would you like to capture progress made on the specified Work Items?' has three radio buttons: 'Only the specified Work Items', 'Progress by All Work Items (Rollup)' (selected), and 'Selected Work Items and any children'.

The interface is titled 'Set up Excel data source'. It shows 'Connected to https://graph.microsoft.com' with a 'Change' link. Below, it asks 'Choose how to pull data from Excel for this key result. All fields are required.' with a 'Source:' section containing 'OneDrive' (selected) and 'SharePoint'. The 'Select a workbook\*' dropdown is set to 'RPA cost takeout 2023.xlsx'. The 'Select a sheet\*' dropdown is set to 'Sheet1'. The 'Choose the cell to pull data from:' section has two buttons: 'Type in the exact cell' (selected) and 'Define cell via starting range'. Below, the 'Pull data from this cell\*' dropdown is set to 'N2'. At the bottom, there is an 'Advanced use cases' dropdown.

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

The Viva Goals interface for David Chase shows a list of OKRs. At the top, there are tabs for OKRs, Initiatives, Dashboards, and Activity. Below this is a filter bar with 'Owner: David Chase', 'Time Period: Q1 2025', and an 'Add filter' button. A 'Summary' section is followed by a table of OKRs. The table has columns for Title, Owner, Team, Status and progress, Last updated, and Last check-in note. The first OKR is 'Optimize investments and company resources so we can accelerate innovation' with a progress bar at 24% and a status of 'At Risk'. The second OKR is 'Shift another 20% of our non-mfg workload to cloud' with a progress bar at 4.67% and a status of 'At Risk'. The third OKR is 'HR replaces all manual HR intake steps globally (43 locations)' with a progress bar at 11 and a status of 'At Risk'. The fourth OKR is 'RPA replaces all manual visa and passport intake and inquiry steps globally (43 locations)' with a progress bar at 10 and a status of 'At Risk'. The fifth OKR is 'HR realizes \$33M in annualized run rate savings from RPA (measured by 3rd party service termination and h/c reallocation)' with a progress bar at \$7.48M and a status of 'Behind'. The sixth OKR is 'Foster a culture of ambition and creativity that fuels Acme 2030' with a progress bar at 97% and a status of 'On Track'. The seventh OKR is 'Optimize investments and company resources so we can accelerate innovation' with a progress bar at 'Not Started' and a status of 'Not Started'.

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 Measure as 100% complete 4.67%	Today	No check-in notes
HR replaces all manual HR intake steps globally (43 locations)	David Chase	ACME	At Risk Reach 43 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 43 10	Today	No check-in notes
HR realizes \$33M in annualized run rate savings from RPA (measured by 3rd party service termination and h/c reallocation)	David Chase	ACME	Behind Reach \$33 \$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

## WorkBoardAI

The WorkBoardAI interface shows a dashboard for David Chase. At the top, there are tabs for Objectives, Teamwork, and Meetings & Reviews. Below this is a search bar and a 'Create' button. The 'My Objectives' section shows a summary of updates needed (1), check-ins (5/22), results to celebrate (4), draft OKRs (22), and alignment opportunities (1). Below this is a 'My Briefing' section for 'Digipay product brief' with a 'Generate' button. The 'Objectives I Own' section shows a list of objectives. The first objective is 'Optimize investments and company resources so we can accelerate innovation' with a progress bar at 23% and a status of 'At Risk'. The second objective is 'Technology leads the way to a digital business' with a progress bar at 89% and a status of 'On Track'. The third objective is 'Foster a culture of ambition and creativity that fuels Acme 2030' with a progress bar at 93% and a status of 'On Track'.

Team	Individual
Team	Individual

### INFORMATION TECHNOLOGY

#### 23% Optimize investments and company resources so we can accelerate innovation

63 days · Feb 01, 2025 - Apr 30, 2025

Progress	Task	Owner	Due Date	Count
4.67% of 20%	Shift another 20% of our non-mfg workload to cloud	Jackie Shafer	As of Feb 23	11
10 of 43	HR replaces all manual HR intake steps globally (43 locations)	Stephan Terhorst	As of Feb 25	1
10 of 43	RPA replaces all manual visa and passport intake and inquiry steps globally (43 locations)	Shreenath Panditirao	As of Feb 23	19
7.48M of 33M	HR realizes \$33M in annualized run rate savings from RPA (measured by 3rd party service termination and h/c reallocation)	Danielle Levitz	As of Feb 25	11

#### 89% Technology leads the way to a digital business

63 days · Feb 01, 2025 - Apr 30, 2025

Progress	Task	Owner	Due Date	Count
3 of 3	3 of our 5 AI use cases achieve their value outcomes, including 1 in cyber security	Adorina Neeman	As of Feb 23	3
5 of 6	Condition monitoring goes live in 6 NA locations	Serena Security	As of Feb 23	3
29 of 35	We have measurable outcomes, iteration cadence and instrumentation in place for 35 Tier 1 and Tier 2 initiatives	Jackie Shafer	As of Feb 23	3
32.43K of 30K	Digital workplace uptake drives >30,000 engagement points monthly	Dana Chamin	As of Feb 23	7
4 of 5	5 P1 vulnerabilities identified by AI	Danielle Levitz	As of Feb 23	1

#### 93% Foster a culture of ambition and creativity that fuels Acme 2030

63 days · Feb 01, 2025 - Apr 30, 2025

Progress	Task	Owner	Due Date	Count
36% of 35%	35% of novel tech experiments are initiated at front line teams	Dana Chamin	As of Feb 23	5
311 of 320	An additional 25% of team members have completed all house agile courses (320 team members)	Roger Smithson	As of Feb 23	5
83 of 90	45% of our teams are using OKRs to define and measure business outcomes (90 teams)	Kevin Campbell	As of Feb 23	3

# Check ins – updating key results

## Viva Goals

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

Who can create organization OKRs or initiatives?

This permission setting helps you control the set of users who can create organization OKRs or initiatives. Organization Owners would always have access to create organization OKRs or initiatives.

☒ Anyone in ACME

☐ Only my power

☐ Specific users along with my team

Save

---

☒ Check in note template

Check in note template is a note format for goals assigned to the team.

**Header**

Provide a 200 character summary of the progress made toward the goal.

**Length:**

1000 characters or less (no challenge exceeded)

**Next Steps**

Outline the planned activities or tasks for the upcoming period.

1 2 3 4 5 6 7 8 9 10

☒ New Note Template will appear only for check in objectives or initiatives assigned to this specific team.

Save Cancel

## WorkBoardAI

Monday, February 24th

WorkBoard AI 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	<span>At Risk</span>	Feb 21	# update	Application accepted and 3 references stories - good feedback from the committed
Technology leads the way to a digital business Danielle Levitz: Information Technology					
Condition monitoring goes live in 6 NA locations	0 of 6 Shows last update	<span>At Risk</span>	Feb 21	# update	Enter an optional narrative to provide details f...

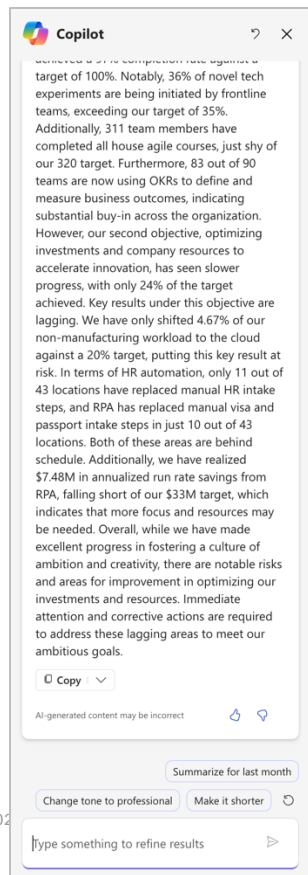
Update Cancel

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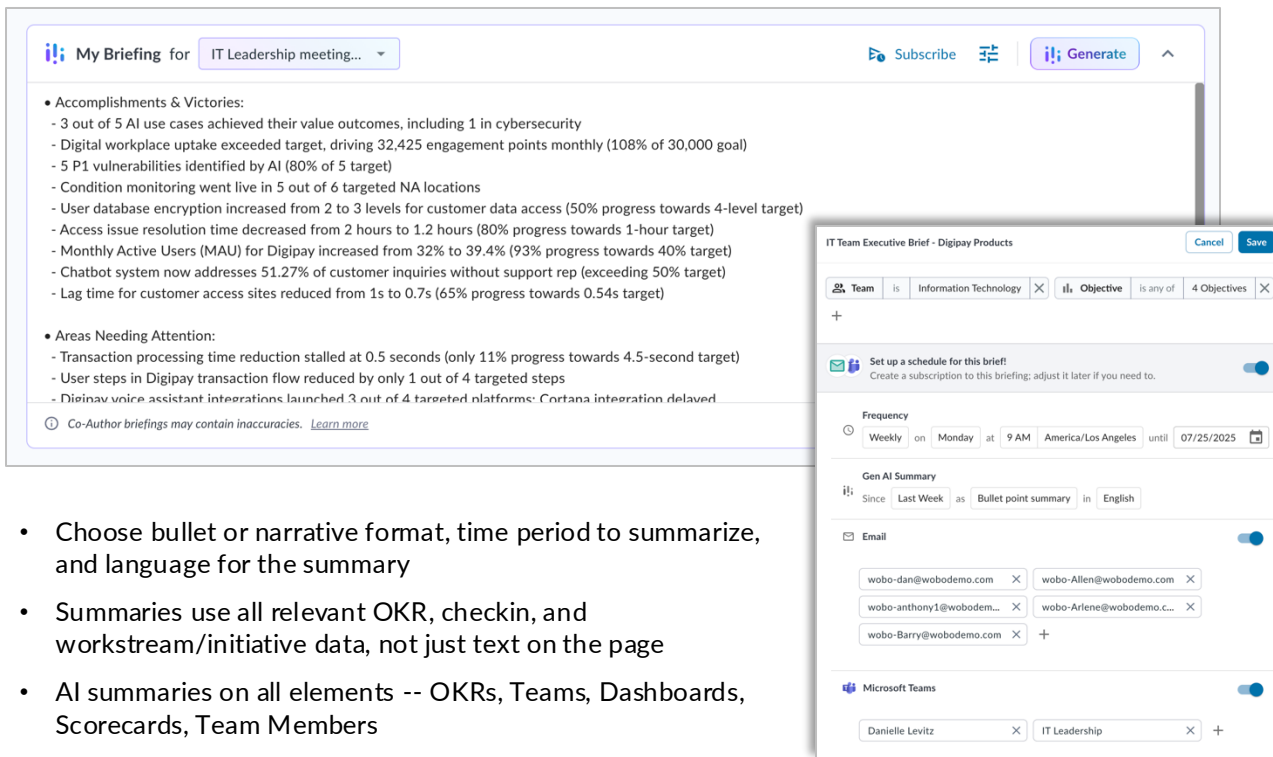
- Alert on OKRs page and via Teams takes you to the specific KRs to update
- Streamlined update experience with narrative and numerical value in line
- Add a subjective RYG flag to the progress calculated by WorkBoardAI
- Change the confidence assessment any time, even when no change to measure
- Update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

# AI Summaries

## Viva Goals



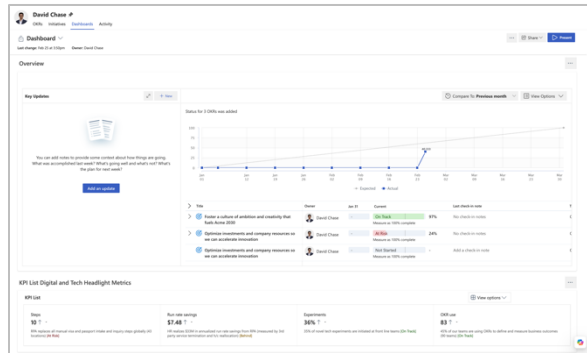
## WorkBoardAI



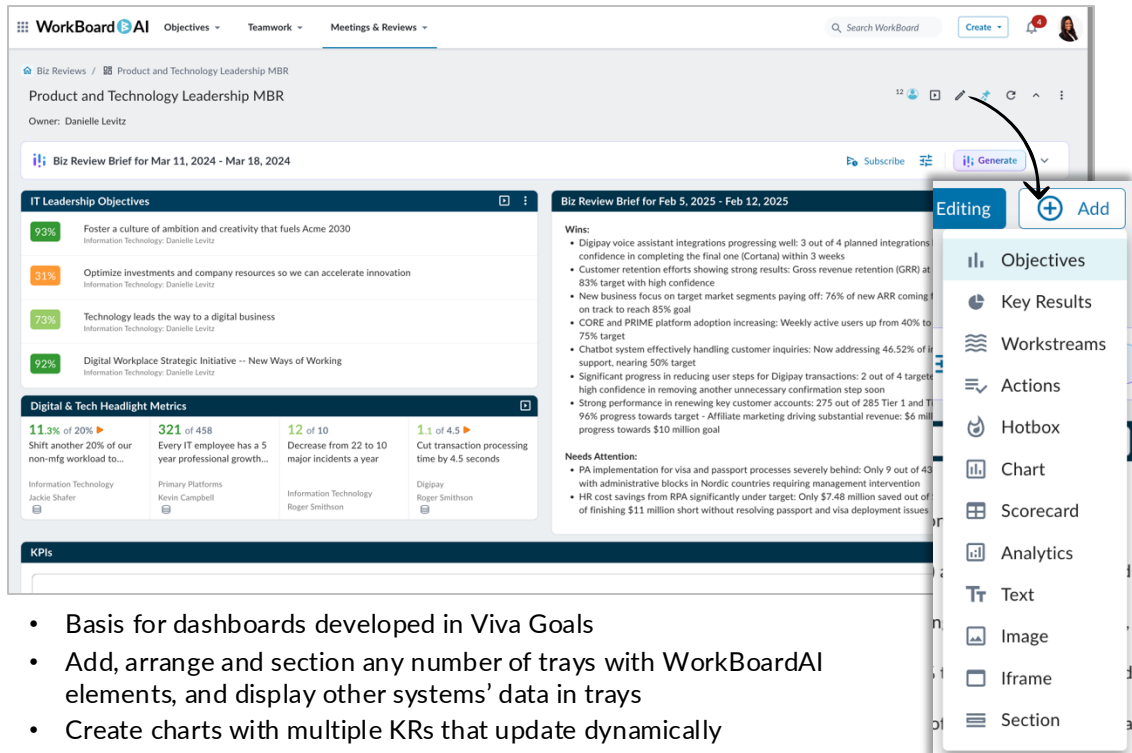
- Choose bullet or narrative format, time period to summarize, and language for the summary
- Summaries use all relevant OKR, checkin, and workstream/initiative data, not just text on the page
- AI summaries on all elements -- OKRs, Teams, Dashboards, Scorecards, Team Members
- Instantly post to Teams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

# 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

## WorkBoardAI

- 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

Objectives

Teamwork

Meetings & Reviews

Search WorkBoard

Create

4

Biz Reviews

Dependencies and collaborators

Dependencies and collaborators

Present

Scorecard Brief

Subscribe

Generate

Adjust the filters and click on generate brief button

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

Publish

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

Single-period Scorecard

Rows (3)

Columns (3)

Tr Key Result

↑ Frozen

Dependencies All

Owner

Add column

Search for attributes

123 Key Result | Actual

Key Result | Comments

Key Result | Confidence flag

Tr Key Result | Confidence narrative

Key Result | Data source

Key Result | End date

123 Key Result | Initial value

Key Result | Last comment date

Key Result | Last update date

Tr Key Result | Name



“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



## WorkBoard AI 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

