



Viva Goals Office Hours

5 Tips for OKR Planning in 2023

December 7th, 2022
9am PST/12pm EST

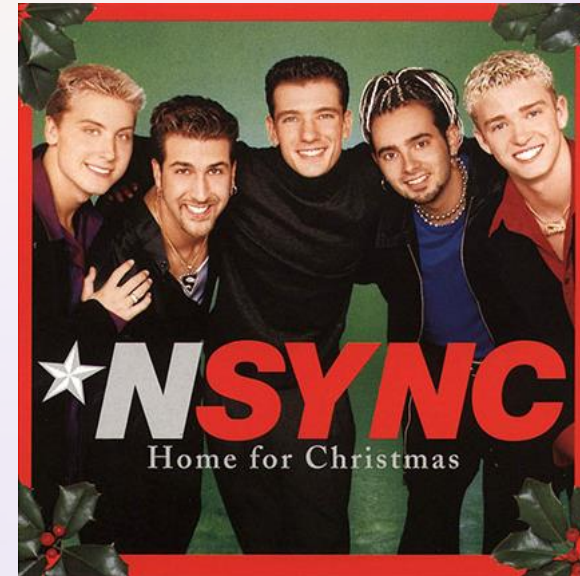
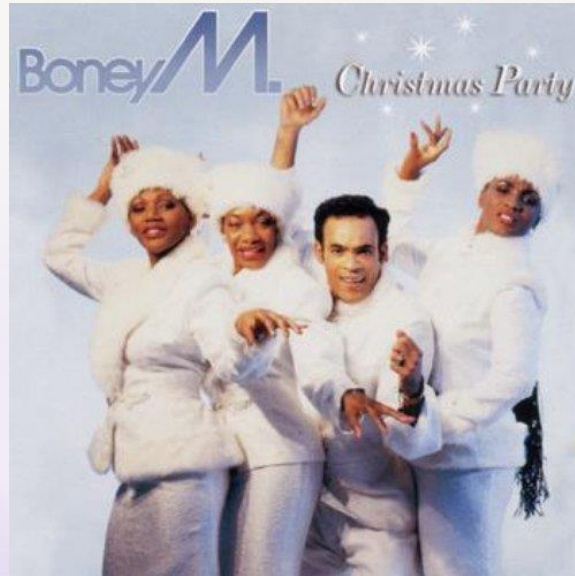
Agenda

- Welcome and Icebreaker (5 min)
- 5 tips for OKR planning in 2023 – Featuring – OKR Coach for 10+ years, Wendy Pat Fong (15 min)
- Breakout rooms (15 min)
- Viva Goals Product Deep Dive: Admin Configurations (10 min)
- AMA (15 min)

Icebreaker

Icebreaker

What's your favorite holiday song to sing along to? Add the song name to the chat or share a GIF that represents the song! We'll go first!



5 Tips for OKR Planning for 2023

with OKR Expert Wendy Pat Fong

5 areas of OKR Planning

- Reflection
- Writing Great OKRs
- Alignment
- Setting Expectations
- Rhythm of business

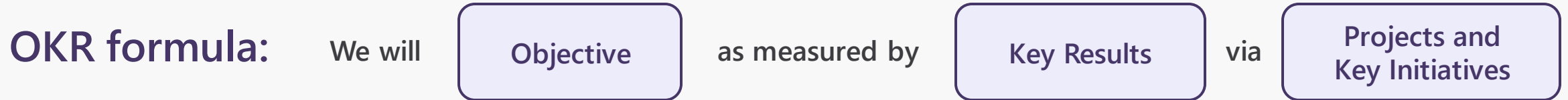
Tip #1: OKR Reflection

- A reflection/post-mortem session should be included to apply learnings for the new OKRs.
- A commonly used template:
 - Wins; Celebrate the achievements. Reflect on what made the OKRs successful. Think about how to replicate success.
 - Blockers; Identify the roadblocks/obstacles. Discuss what should we stop/start doing to avoid these issues in the future.
 - Actions; Integrate feedback into OKRs
- **Prioritization**
 - Understand the risks/benefits/impact of choosing specific OKRs.

Tip #2: OKR Writing

- Verb + What you're going to do + In order to/so that
- Highlight both the "What" - what specific actions/themes we need to do and the "Why" - why is this OKR important to our vision and mission
- Opportunity to story tell and speak a common language across the whole organization to drive engagement
- Finalize the Key Results (outcomes) first before the Projects (outputs)
 - Projects are a means to an end, they do not guarantee success of the KR

OKR Creation & Finalization Cheat Sheet



Objectives

- What is the most important area of our business that we need to focus on?
- Why does that matter for us now?
- How would we write it into a statement that inspires our team?

Key Results

- How will we know we were successful?
- What is the impact of our work?
- What metric would let us know that we were successful?
- Do we currently measure that metric?
- What is our target?

Projects

- What do we need to do to achieve our key results?
- Who needs to be involved?
- What can we get done in the next X months?

OKR Refinement

- Does the Objective still hold true to the Key Results?
- Are each of the Key Results well-defined with targets?
- Will we see progress on each of our Key Results during the timeframe?

OKR Finalization

- If we fulfill all our Key Results, does that mean we were successful in our Objective?
- Are all our Key Results necessary to fulfill our Objective?
- Who owns which components of our OKR?

Tip #3: Alignment

- Identify white spaces; areas of work that need to be done but no clear accountability on who owns them.
- 80/20 alignment guideline is recommended
- Look at alignment from both a top down, bottom up perspective AND lateral.
- Avoid creating OKRs in silos

Tip #4: Set Expectations

- **Invest time and resources in creating a playbook to standardize expectations across the organization**
 - By providing clear guidelines, employees understand what is expected from them and how they are crucial to the success of OKRs.
- **Customize the process to make it your own**
 - No one solution fits all in OKRs. The more customized, the higher adoption.
- **Ask for feedback to reiterate the process from all perspectives**

Example: OKR Program Expectations

	LT	L2s	L3	L4 and below (down to M1)	Individuals
OKR Expectation	Required	Required	Recommended	Optional	<i>Not recommended. Individuals should participate fully in their team OKRs and projects</i>
Program Management	Exec Sponsors/OKR Team lead	Self-managed by local OKR champs			
Tool	Viva Goals				
Cascade / Alignment	Cross-listing of key metrics & responsibilities from SLT and Field	<ul style="list-style-type: none"> No strict cascade (eg each level in org writes their own OKRs & aligns where logical) Inherited / sub-team owned KRs multi-aligned where check in ownership is delegated Recommend min. of 1 OKR aligned to level above and 1 multi-aligned OKR with peer team 			
Rhythm of OKR Program	<ul style="list-style-type: none"> Annual with H2 refresh Monthly Check Ins Reporting ROB: <ul style="list-style-type: none"> Monthly to LT Quarterly to XLT 	<ul style="list-style-type: none"> Set <i>at least</i> Annually; Potentially Semesterly / Quarterly depending on team planning cycles Check ins <i>at least</i> Monthly; Potentially Bi-weekly / Weekly depending on team review cycles ROB <i>at least</i> Monthly with LT; Recommend <i>at least</i> Quarterly with broader organization 			

Tip #5: Update your ROB

- Identify your OKR value drivers and map it to your current business cadence
- Consolidate meetings to allow for better habit building
- Create a rhythm of business along with the OKR program expectations to support the desired behaviors such as check-in cadence from each level
- Communicate progress regularly to keep OKRs top of mind

How do we integrate OKRs into existing rhythms?

OKR value driver	How OKRs help	How this may fit in existing ROBs
Drive team progress	<ul style="list-style-type: none"> • Drive day-by-day and week-by-week progress & status updates within your team • Key content: project status, help needed 	<p>Weekly Team meeting</p>
X-departmental / program alignment	<ul style="list-style-type: none"> • Drive alignment on commits, clarity on shared objectives / dependencies, and continuous discussion on progress & help needed • Key content: what we accomplished this period, what we learned this period, help needed 	<p>Quarterly planning & Monthly x-dept check ins</p>
Executive facing reporting	<ul style="list-style-type: none"> • Leveraging OKRs to 'report up' to leadership on overall progress from your team • Key content: what we accomplished this period, what we're doing next, what risks might exist to keep us from achieving our goals (eg zoom in on "at risk" KR's) 	<p>Quarterly meeting with your CVP/EVP</p>
Organizational communication	<ul style="list-style-type: none"> • Using OKRs to 'report out' to your broader organization about successes, learnings, and next steps • Key content: what we accomplished this period / celebrations, what we learned this period, what we're doing next 	<p>Monthly team All Hands</p>

Breakout Rooms

Breakout Room Conversation Starters

1

What is the most challenging part of strategic planning for 2023?

2

What aspect of planning has your organization mastered? Do you have any planning tips you'd like to share?

Product Feature Deep Dive: Viva Goals Admin Configurations

Viva Goals Admin Dashboard

Customize your Viva Goals instance, OKR structure & rhythm to better reflect your strategy.

- Viva Goals Admin Dashboard is accessible to the users who have been assigned the role of 'organization admin' or 'organization owner'.
- The admins can leverage this dashboard to customize configurations within Viva Goals for your organization, which creates efficiency and confidence in Microsoft Viva Goals.
- Other users can reach out to their team/organization admins for any configuration related discussions and requests.

[Navigate the Viva Goals Admin Dashboard](#)

Viva Goals Admin Configurations Demo

Key Takeaways

1. Alignment between key stakeholders within your organization on the requirements of each OKR in the instance is essential to set the correct OKR model configurations in the Admin Dashboard.
2. The configurations that your team sets up in the Admin Dashboard will vary, depending on your organization's ROB and OKR best practices.
3. All changes made to the configuration model within the Admin Dashboard should be made at the beginning or end of a time period to avoid inconsistency and confusion amongst users.

AMA

Thank you!

Please make sure to take our exit poll so we can better serve you next time!

Have questions? Reach out to GoalsOfficeHours@Microsoft.com