



Viva Goals Office Hours

OKR Writing Workshop

February 22nd
9am PST / 12pm EST

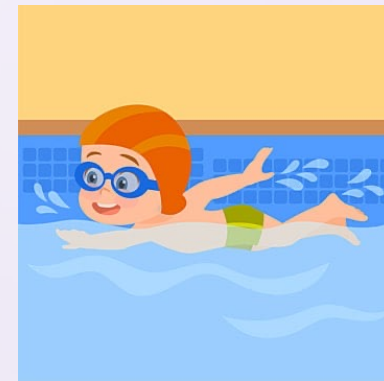
Agenda

- Welcome and Icebreaker (5 min)
- OKR Writing Workshop – with Strategic OKR Expert and Coach Wendy Pat Fong (20 min)
- Breakout rooms (20 min)
- Feedback session (15 min)

Icebreaker

Icebreaker

What's something you're looking forward to learning this year? Type it out or share a GIF that represents it in the chat! We'll go first!



OKR Writing Workshop

Writing Best Practices



Definitions Recap

Objectives

are what you want to accomplish

Key Results

are how you will measure success
(outcome)

Initiatives/Projects

are focused efforts (outputs)

Best practices / Common Pitfalls

Common Pitfalls	Recommendations
Too many Objectives and Key Results	Maximum of 5 objectives with 3-5 key results each
Objective is too broad	Make sure that objective has a specific action with the purpose
Key Results are not measurable	Focus on making the key results as specific and quantifiable as possible
Key Results are too tactical	Important to outline the outcomes vs the outputs

Writing Framework



OKRs

A quick review on how to write both Objectives and Key Results

Begin with the basic formula below for Objectives:

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

For example: "Drive better attendance at our conference to improve the customers' networking experience".

And use this formula for Key Results:

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

For example: "Increase attendance from 300 to 500 people."

Project Example: "Event Marketing Campaign"

Let's write an objective

Once you select the type of objective, it's time to start writing

Begin with the basic formula below for Objectives:

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

For example: "Drive better attendance at our conference to improve the customers' networking experience".

Objectives should be:

- Actionable (verb)
- Aspirational (what you want to do)
- Meaningful (why/what you hope to achieve)

Good OKR Examples:

- Objective: Increase + brand recognition (to make ACME Skye Rockets the market leader)
- Objective: Improve + internal employee engagement (to ensure our employees are proud to work with us)
- Objective: Develop + a sustainable candidate lead strategy (in order to build the best team)

Let's write a key result

Once you select the type of objective, it's time to start writing

And use this formula for Key Results:

**Verb + what you're going to measure
+ from "x to y"**

For example: "Increase attendance from 300 to 500 people."

Key Results should be:

- Focused (what you want to measure)
- Measurable (from x to y)
- Ambitious (level of stretch between x and y)

Good OKR Examples:

- Key Result: Increase + headcount + from 0 to 24 (2400% change)
- Key Result" Decrease + lead time + from 5 days to 2 days (60% change)

Necessary and Sufficient Test

Ensuring you have the right Key Results for your Objective

Look at your objective and its key results and ask: **“Are all these key results necessary?”**

- ✓ If the answer is yes, then they pass the necessary test.
- ✗ If the answer is no, spend more time refining the OKRs to be more relevant and measurable.

Repeat the exercise, but this time ask, **“If I accomplish all my key results, will I have achieved my objective?”**

- ✓ If the answer is yes, then they pass the sufficient test.
- ✗ If the answer is no, you need to spend more time defining stronger key results.

OKR Coaching Question Cheat Sheet

OKR Formula



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?

Key Initiatives

- 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?

OKR Framework / Examples

What is the Objective?

Expand to Mars

Questions to ask:

- Is it actionable, aspirational, and meaningful?
- What is the root cause?
- Is it business as usual?

OKR Framework / Examples

What is the Objective?

Open a storefront on Mars in order to expand our interplanetary footprint.

Questions to ask:

- Is it actionable, aspirational, and meaningful?
- What is the root cause?
- Is it business as usual?

OKR Framework / Examples

What are the Key Results?

1. Hire more people
2. Send goods to Mars
3. Improve Communication with Earth

Questions to ask:

- Are they focused, measurable, aggressive?

OKR Framework / Examples

What are the Key Results?

1. Increase our headcount from 0 to 24
2. Design 5 products that can withstand Mars environment
3. Reduce Earth communications latency from 22 mins to 3 mins

Questions to ask:

- Are they focused, measurable, aggressive?

Breakout Rooms

Breakout Room Instructions

- You are part of Acme Inc. For the purpose of this exercise, assume that Acme Inc. is in the SaaS business.
- There will be a different scenario given to each group and a member of the Viva Goals team will be in each room to take notes. Using the scenarios, write out an appropriate OKR with a minimum of 2 KR's, and 1 Project
- Once we re-group, each group can appoint a representative to talk about the OKR they crafted and how it fits into the best practices of OKR writing that we discussed
- Breakout rooms are 20 minutes

Breakout Room 1

- You are the Head of Operations in your organization. One of the key strategic directions provided by your CEO is to optimize cost and improve margins. Given this context, **Frame an OKR for Operations department aligned to organization OKR for Q1 2023**

Breakout Room 1 – Operations

Frame an OKR for the Operations department aligned to the organization
OKR for Q1 2023

Objective	Optimize cost and Improve margin in order to invest in ourselves
KR 1:	Increase profit margin for specific product line A by X%
KR 2:	Decrease average transaction cost from 1.2k to 1k
KR 3:	Cap our cost by 10%
Initiative/ Project 1	Identify areas for cost saving

Breakout Room 2

- You are the Head of Marketing in your organization. One of the priorities that you have decided and agreed upon with your leadership is to improve brand presence by focusing on becoming a thought leader in the category that you are present in. Given this context, **Frame an OKR for Marketing department aligned to organization OKR for Q1 2023**

Breakout Room 2 – Marketing

Frame an OKR for the Marketing department aligned to the organization
OKR for Q1 2023

Objective	To improve our brand presence to identified/specific clients We dominate Social Media in order to lead our category as a thought leader
KR 1:	Brand Visibility Rollout to our 50 clients we have identified by March 2023
Initiative/ Project	Outline steps in achieving brand visibility rollout. Tasks: Drafting, Revising, Submitting, Implementing
KR 2:	Carry out roadshows targeting 5 organisations where our targeted clients are located
KR 3:	Improve brand recognition on consumer surveys by 5% by the end of the quarter
Initiative/ Project	Publish 20+ articles in relevant special interest channels that receive good feedback/social sharing etc...

Breakout Room 3

- You are part of the Customer Experience team in your organization. One of the key priorities is to deliver a great onboarding experience to new customers. Given this context, **Frame an OKR for Customer Experience department aligned to organization OKR for Q1 2023**

Breakout Room 3 – Customer Experience

Frame an OKR for the Customer Experience department aligned to the organization OKR for Q1 2023

Objective	Improve our SaaS onboarding CX to be best in class
KR 1:	improve customer satisfaction with onboarding from 85% to 95%
KR 2:	reduce onboarding time from 3 hours to 1 hour
KR 3:	improve implementation on time delivery performance from 80% to 90%
Initiative/ Project 1	

Breakout Room 4

- You are part of the Product Marketing team and report to the Head of Product Management in your organization. One of the key priorities for you is to support increasing the reach of the newly released product features. Given this context, **Frame an OKR for Product Marketing team aligned to organization OKR for Q1 2023**

Breakout Room 4 – Product Marketing

Frame an OKR for the Product Marketing department aligned to the organization OKR for Q1 2023

You are part of the Product Marketing team and report to the Head of Product Management in your organization. One of the key priorities for you is to **support increasing the reach of the newly released product features.** Given

this context, **Frame an OKR for Product Marketing team aligned to organization OKR for Q1 2023**

Objective	Increase the reach of the newly release product features in order to increase our customer base and break into new market segments
KR 1:	Have 70% of market adoption of the new "Y" feature
KR 2:	Increase 25% reach to new customers in the first quarter
KR 3:	Grow our marketing reach through 100k new followers on TikTok
Initiative/ Project 1	Enter the European market with product "X" within Q1

Breakout Room 5

- You are part of the Learning and Development team reporting to the HR Head of your organization. One of the key priorities that you are tackling is to ensure that the employees are upskilled constantly resulting in retention & improved productivity. **Frame an OKR for L&D team for Q1 2023**

Breakout Room 5 – Learning and Development

Frame an OKR for the L&D team for Q1 2023

Objective	Build skillset of the future to clarify learning paths to ensure agile mindset and customer centric culture We understand/know the skills our employees need to build in 2023 to clarify learning paths to ensure agile mindset and customer centric culture
KR 1:	For 90% of staff we conducted a capability delta measurement
KR 2:	80 out of 100 Team leaders booked trainings etc for their employees
KR 3:	
Initiative/ Project 1	Set up Viva Learning internally

Feedback Session

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