



# Viva Goals Office Hours

Communications Planning  
for Your OKR Program

Wednesday, May 24<sup>th</sup>  
8am PST / 11am EST

# Agenda

- Welcome (5 min)
- Communications Planning for Your OKR Program – featuring Erin Donoso (25 min)
- Viva Goals Product Deep Dive: Viva Goals in Teams app (10 min)
- AMA (15 min)

# Welcome and Hello!



## Erin Donoso

### Senior Program Manager

Microsoft OKR coach and expert within Viva Goals. Lead the internal Microsoft Viva Goals training program, OKR Excellence and Community, and am the OKR Champion for the Viva Goals team. Over 21 years of experience leading teams. Scaled Agile certified (SPC Certification) and uses this knowledge to bring the vision of Agile and OKRs to life.

# Viva Goals Overview

**The Viva Goals Organization is improving employee experience and business outcomes by leveraging the OKR framework and Viva Goals**

- 150+ employee organization
- Partnering across multiple functions which include Product, Marketing, Engineering, Customer Experience and Sales
- Managing 296 Objectives and Key Results
- Conduct monthly OKR reviews
- Conduct quarterly close outs
- Leverage best in class practices
- Delivering and maturing a healthy OKR program
- Set OKR standards for Microsoft

## OKR RoB

- Determine meetings, cadence, and milestones
- Create workback schedule and schedule meetings on the calendar
- Schedule your communications cadence
- Leverage Review Dashboards and Send Reminder Emails
- Send post-meeting email with CTA to add notes/action items to tracker
- Send follow-up email with survey and recording for meeting, including key upcoming dates

# Determine meetings, cadence, and milestones

## Monthly OKR Review

**When:** Monthly

**What:** Review your OKRs on a monthly basis to discuss state

**Why:** Make sure we are on track and provide help/ask for help if needed

**Format:** Discuss what went well/completed, key learnings and opportunities to improve, risks and help needed

## Quarterly OKR Review

**When:** Quarterly

**What:** Lookback on how the quarter went/progress of the previous quarter

**Why:** Quarterly closeout and planning for next quarter

**Format:** Discuss what you will start, stop, and continue for the next quarter

# Workback Schedule – Reviews

Pull together  
your workback  
schedule and get  
meetings on the  
calendar

Example Schedule																																							
OKR Workback Schedule - FY24																																							
July										August										September										Out of Office/Vacation					Important Dates				
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	7/1-7/9	Jane	6/28	Annual Planning															
						1			1	2	3	4	5			3	4	5	6	7	8	9	7/24-8/11	Jeff	7/13	Quarterly Review (Q4 FY23)													
2	3	4	5	6	7	8	6	7	8	9	10	11	12	10	11	12	13	14	15	16			8/3	Monthly Review (July)															
9	10	11	12	13	14	15	13	14	15	16	17	18	19	17	18	19	20	21	22	23			9/6	Monthly Review (August)															
16	17	18	19	20	21	22	20	21	22	23	24	25	26	24	25	26	27	28	29	30			9/7	LT Offsite - Q2 FY24 Planning															
23	24	25	26	27	28	29	27	28	29	30	31													9/11-9/22	Q2 FY24 Planning														
30	31																							9/28	Quarterly Planning Review														
October										November										December										Out of Office/Vacation					Important Dates				
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat			10/5	Quarterly Review (Q1 FY24)															
1	2	3	4	5	6	7				1	2	3	4						1	2			11/9	Monthly Review (October)															
8	9	10	11	12	13	14	5	6	7	8	9	10	11	3	4	5	6	7	8	9			12/6	Monthly Review (November)															
15	16	17	18	19	20	21	12	13	14	15	16	17	18	10	11	12	13	14	15	16			12/7	LT Offsite - Q3 FY24 Planning															
22	23	24	25	26	27	28	19	20	21	22	23	24	25	17	18	19	20	21	22	23			12/11-12/22	Q3 FY24 Planning															
29	30	31					26	27	28	29	30			24	25	26	27	28	29	30			12/18-12/29	No Meetings - Winter Break															
														31																									
January										February										March										Out of Office/Vacation					Important Dates				
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat			1/9	Quarterly Planning Review															
	1	2	3	4	5	6						1	2	3						1	2			1/11	Quarterly Review (Q2 FY24)														
7	8	9	10	11	12	13	4	5	6	7	8	9	10	3	4	5	6	7	8	9			2/8	Monthly Review (January)															
14	15	16	17	18	19	20	11	12	13	14	15	16	17	10	11	12	13	14	15	16			3/6	Monthly Review (February)															
21	22	23	24	25	26	27	18	19	20	21	22	23	24	17	18	19	20	21	22	23			3/7	LT Offsite - Q4 FY24 Planning															
28	29	30	31				25	26	27	28	29			24	25	26	27	28	29	30			3/11-3/22	Q4 FY24 Planning															
														31										3/28	Quarterly Planning Review														

# Workback Schedule – Annual Planning

## Key Meetings/ Milestones

1. LT Offsite:  
Brainstorming Session
  - Big Bets Identified & Owners Determined
2. Regular Check-Ins and Report Outs from the Big Bet Owners
3. Plan Finalization

Annual Planning - FY24																							
April							May							June									
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat			
						1		1	2	3	4	5	6						1	2	3		
2	3	4	5	6	7	8	7	8	9	10	11	12	13	4	5	6	7	8	9	10			
9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17			
16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24			
23	24	25	26	27	28	29	28	29	30	31				25	26	27	28	29	30				
30																							
July							August							September									
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat			
						1			1	2	3	4	5						1	2			
2	3	4	5	6	7	8	6	7	8	9	10	11	12	3	4	5	6	7	8	9			
9	10	11	12	13	14	15	13	14	15	16	17	18	19	10	11	12	13	14	15	16			
16	17	18	19	20	21	22	20	21	22	23	24	25	26	17	18	19	20	21	22	23			
23	24	25	26	27	28	29	27	28	29	30	31			24	25	26	27	28	29	30			
30	31																						

Detailed Annual Planning Schedule (4/24-5/25)	
4/14-5/19	Memo writing time (5 weeks)
4/19	Joe K check in
4/24	LT Kick Off - Lunch + 2 hours brainstorming
4/27	90 min check in
5/4	90 min check in
5/4	Monthly Review (April)
5/11	90 min check in
5/15-5/17	Daily check in for Plan finalization
5/19	<b>Final Memo to Joe K Due</b>
5/22-6/2	Finalize/Tweak as needed
6/7	Monthly Review (May)
6/8	LT Offsite - Q1 FY24 Planning
6/14	LT Q1 Planning Review
6/12-6/23	Q1 Department Planning
6/29	Q1 Dept. Planning Review
6/30	All plans in VG and Finalized
7/11	Townhall
7/13	Q4 Closeout meeting



# Communications

- Set up a repeatable, predictable comms cadence
- Send out check-in requests, emails and pre-reads at least a week prior to the review meeting
- Use multiple modes of communication

The image shows a screenshot of an email management interface. On the left, a list of email templates is displayed under the heading 'Email Templates'. The templates are:

- (T-6) Pre-Read Request
- (T-3) Pre-Read: Monthly OKR Review
- (T-2) Reminder: Monthly Review Department Questions Request
- (T-1) Subject: Action Required: Monthly Pre-Read due 4/28
- (T-0) Hello,
- (T-0) The month end is quickly approaching, and our next monthly review meeting is scheduled for 5/4.
- (T+1) **In preparation for our meeting, please send me the link to your review dashboard by 5pm PT on**

On the right, a preview of an email is shown. The sender is 'OKR Reviews' with a profile picture and a notification badge showing '5/3'. The email body text is:

You: Hello Everyone, Please find the consolidated...

As a reminder, content for your dashboard should focus on Objectives and Key Results to avoid de

Please ensure the content you will be presenting will fit into the allotted time noted below for you meeting.

Thank you for attending the OKR Monthly Review meeting on 5/4.

Please make sure to add in your OKR review meeting notes here: [20230504 - Viva Goals Monthly OKR Review.docx](#) and action items here: [Viva Goals OKR Review Action Items.xlsx](#). All action items should have Owners and Due Date populated by Monday 5/8. An OKR Monthly Review Summary email will be sent out to all attendees on Monday, 5/8.

If you missed a meeting or would like to go back to review for notes/action items, please find the list of dashboards and meeting links below.

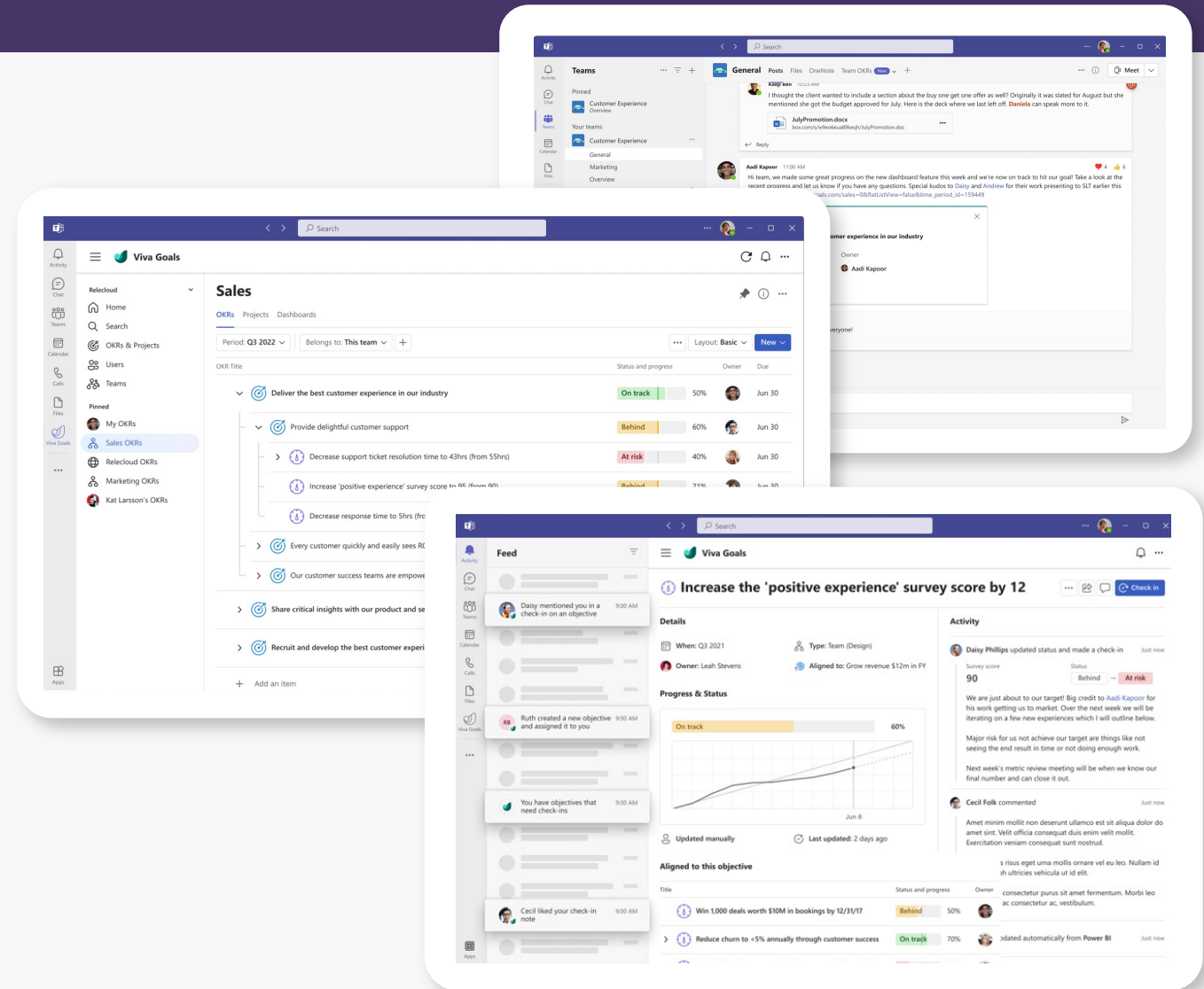
# Using the Viva Goals Teams Integration to communicate about OKRs

## Bring Viva Goals into your Teams workflow

Create a collaborative Teams experience for purpose-driven teams to communicate effectively

Align and focus on the strategic priorities by pinning OKRs, toggling across departmental OKRs and viewing in app notification

Provide richer admin experiences and dashboards capabilities where users can present and author content within Teams



# OKR Meeting Structure Guidance

## Monthly Review Meeting Structure (35 min meeting)

**10 min:** OKR Summary and Help Needed

**10 min:** Red Key Results Review – Q&A format  
*(Key Result owners to answer questions)*

**10 min:** Yellow Key Results Review – Q&A format  
*(Key Result owners to answer questions)*

**5 min:** Summarize action items for Objective owner

## When reviewing Red/Yellow OKRs, owners discuss the following for each OKR

- What went well/completed
- Key Learnings and opportunities to improve
- Risks and help needed

# OKR Meeting Structure Guidance

## Quarterly Review Meeting Structure (1 hour meeting)

5 min: OKR Summary

10 min: Celebrate the WINS

40 min: OKR Reviews – Q&A format  
*(Key Result owners to answer questions)*

5 min: Summarize action items for Objective owner

When reviewing your quarterly closeout, owners will discuss the following for each OKR

What is the start, stop, continue for the next quarter

# OKR Dashboard Guidance

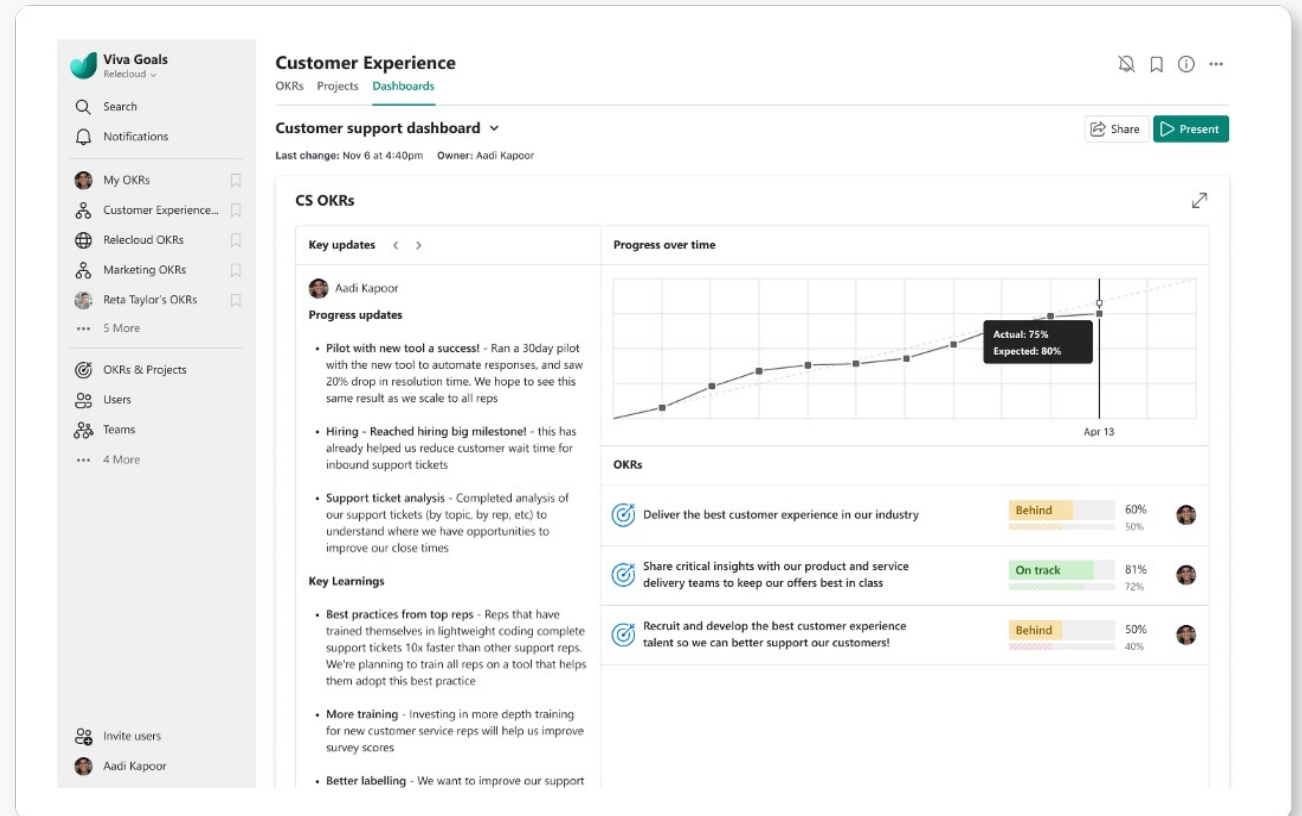
## Recap Progress:

- 2-3 data points and highlights covering what was achieved and not achieved.
- Focus on progress.

## Reflect on efforts and discuss learnings:

- Discuss what the teams have learnt from the previous quarter and what you will do differently for the upcoming quarter.
- Focus on what you will start/stop/ continue doing.

**Note:** Assign an individual from your team who will be responsible for taking notes and sharing action items.



# Sample OKR Retrospective Questions

- 1 Were the OKRs you set the right OKRs for the quarter?
- 2 What are some objectives/key results/projects that had the greatest impact this quarter?
- 3 What are some key factors that contributed to success?
- 4 What were some efforts that didn't have any results and why?
- 5 What were the major blockers during the quarter?
- 6 How can we prevent or limit blockers/challenges next quarter?
- 7 What were the major dependencies during the quarter?
- 8 Were the dependencies know or unknown?
- 9 Did you have cross-functional OKRs?
- 10 What should we stop/start/continue doing to facilitate better results?

# OKR Meeting Structure Guidance Cheat Sheet

## Monthly Review Meeting Structure

(35 min meeting)

- 10 min: OKR Summary and Help Needed
- 10 min: Red Key Results Review – Q&A format  
*(Key Result owners to answer questions)*
- 10 min: Yellow Key Results Review – Q&A format  
*(Key Result owners to answer questions)*
- 5 min: Summarize action items for Objective owner

## Quarterly Review Meeting Structure

(1 hour meeting)

- 5 min: OKR Summary
- 10 min: Celebrate the WINS!
- 40 min: OKR Reviews – Q&A format  
*(Key Result owners to answer questions)*
- 5 min: Summarize action items for Objective owner

### Monthly Review Guidance

#### Recap Progress:

2-3 data points and highlights covering what was achieved and not achieved.

Focus on progress.

### Quarterly Review Guidance

#### Reflect on efforts and discuss learnings:

Discuss what the teams have learnt from the previous quarter and what you will do differently for the upcoming quarter.

Focus on what you will start/stop/continue doing.

### **Note:**

Assign an individual from your team who will be responsible for taking notes and sharing action items.

# Continuous Improvement

Send follow-up email with survey and recording for meeting, including key upcoming dates

## Viva Goals OKR Review Meeting Feedback

Please take a moment to provide your valuable feedback on how we can improve the Viva Goals OKR Review process for FY23 H2.

2. Overall, how would you rate the meeting? \*

(1 = Poor, 5 = Excellent)

1  2  3  4  5

3. What went well about the meeting?

Enter your answer

4. What could be improved?

Enter your answer

5. Anything else?

Enter your answer

Hello,

Thank you for attending the monthly OKR review. We had productive sessions with great feedback.

As we continue to mature our approach/process, please take a moment to fill out the [Viva Goals OKR Review Feedback](#) survey. We've had some great feedback from previous meetings that we continue to implement, and I'm looking forward to the next round of feedback to incorporate.

Thank you in advance for investing in our continued growth.

Erin



# Continuous Improvement Reporting

## Viva Goals OKR Review Meeting Feedback

### Monthly OKR Meeting Feedback

5.00

Current Average

3.33

Previous Average

Average Rating by Monthly OKR Meeting



Latest Monthly Meeting Feedback

### Quarterly OKR Meeting Feedback

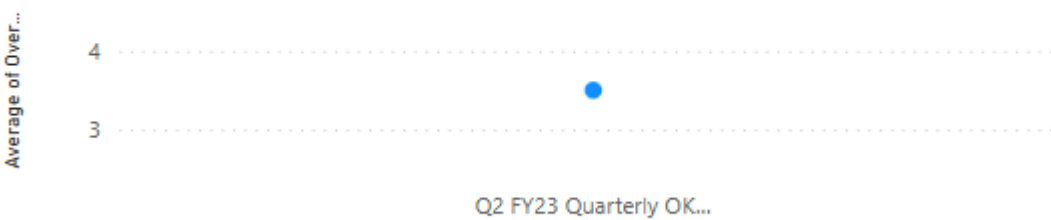
3.50

Current Average

-

Previous Average

Average Rating by Quarterly OKR Meeting



Latest Quarterly Meeting Feedback

# Tips and Takeaways

- ➔ Use multiple communication formats (emails, group chats)
- ➔ Take into account OOF schedules for key leaders and stakeholders when scheduling meetings
- ➔ Provide a one calendar view of all meetings so that everyone can see the entire schedule for the year
- ➔ Always look for ways to continuously improve

# Special resources for you!

- [Sample workback schedule](#) (PDF)
- [Sample email templates](#) (Word doc)
- You can also find these templates [here](#)
- COMING SOON!
  - Erin's blog post
  - [AMA in Viva Community](#) with Erin on 5/31 at 10am PT



# Product Feature Deep Dive: Viva Goals Microsoft Teams app

# Viva Goals Microsoft Teams App

## **Manage OKRs in your daily flow of work:**

- Add, update and manage your OKRs directly within Microsoft Teams.

## **Microsoft Teams Messaging Extension:**

- Add more context to your conversations by surfacing specific OKRs and initiatives within your Teams chats.
- Discuss progress, highlight risks and focus areas.
- Update OKRs without leaving your chat.

# Stay in the loop with Microsoft Viva Goals

**Subscribe here**, to stay informed on everything going on within Microsoft Viva Goals, including upcoming events like office hours, the launch of the Viva Community and more!

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](mailto:GoalsOfficeHours@Microsoft.com)