



Viva Goals Enterprise Maturity Model

2023 Edition

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As you work to drive a shift in the culture of your organization, how do you know what the next step is in your Viva Goals journey?

Since releasing our original Maturity Model, a lot has happened. A global pandemic introduced unprecedented challenges for most businesses worldwide. An improved employee experience, including a clearer sense of purpose and understanding of the impact of their daily work, is becoming central to the value prop employees expect from their employers (learn more in the [Forrester State of Goal-Setting report](#)). Economic uncertainty has led to companies wanting to 'do more with less' and marshal their limited resources for maximum impact.

To navigate all of the above, more enterprise organizations than ever before are adopting tools to drive goal-setting to get clarity and achieve alignment for teams. While working with thousands of clients to implement goal-setting programs with Viva Goals this year, it became clear that we needed to revise our Maturity Model to include the many new insights we've gleaned. That's why we've iterated and expanded the concepts initially introduced in our prior versions and now present you with a re-invented Viva Goals Maturity Model for 2023.

Our maturity model focuses on how an organization can tactically move from having no centralized goal-setting tool to embracing a standardized approach across an organization. Each stage is broken down in greater detail to make it easy to identify where your business stands and the progressive stages of maturity it can aspire to reach.

Note: this model is primarily intended as a 'how to' for Enterprise-scale adoptions, coordinating across multiple large groups in an organization. There is still significant value in using Viva Goals within smaller teams – in fact, small teams can sometimes be at an advantage to be nimble and see value even faster.

If you are planning to drive Enterprise-wide adoption, we recommend starting your organization's Viva Goals deployment from the most senior level you have enthusiasm and buy in.

To decide the right place to start for your organization, consider:

- **How does your organization approach planning today?** What are your existing "centers of gravity" – is planning centralized vs. decentralized?
- **Who has appetite and enthusiasm for change?** Of those planning centers of gravity identified, which is eager for a new solution, or has expressed interest in OKRs?

Based on your answers to the above, you can choose the best roll-out approach:

Company-wide adoption starting with C-suite leadership

For organizations with appetite for change at the most senior leadership level, our recommended path is to follow the [Viva Goals Maturity Model](#) with the Launch phase focused on C-suite leadership to model behavior for the broader organization and drive for universal adoption over time.

Group-first adoption starting at a departmental/divisional/business group level

For organizations with decentralized planning, or where there is not yet appetite for change at the C-suite, you can still leverage the [Viva Goals Maturity Model](#) with leadership of a unified 'planning group' eg a department, division, or business group within the company as the "Launch" cohort. In this approach, you first focus on building "down" into the sub-group planning cadences. Then, you can seek to expand adoption "up" to the C-suite or "over" to other planning groups. To support this process, use the [Program Impact template](#) to communicate value and re-start the Maturity Model framework starting from that next groups most senior launching point.

First things
first –
where to
start?

The Viva Goals Enterprise Maturity Model



Viva Goals Enterprise Maturity Model: Value at every stage

Launch: *Start your journey*

What it takes

- Pilot (if needed) and define launch scope and goals
- Leadership (1-2 levels max) onboarding with clarity on initial program expectations
- Invite broad organization to consume and interact with org-level goals
- Set expectations that Viva Goals is the source of truth and recommended tool for team goal management

What you get

- + **Visibility** for broader org on top goals to drive accountability
- + **Focus** for leaders on top goals with a single, ongoing source of truth to track progress

Model: *Encourage use in your organization*

- Drive leadership rhythms and programs in Viva Goals
- Broadcast leadership goals to the broader organization via Viva Goals
- Group and Team encouraged to experiment with Viva Goals for local use
- Start building an active community of champions and enthusiasts

- + **Alignment** across and up/down to show dependencies and track progress

Scale: *Commit to the practice*

- Leadership and standalone programs are refining their Viva Goals muscle
- Group onboarding for those who didn't opt-in themselves; groups invest in identifying shared goals for tracking
- Viva Goals is expanding more widely into business rhythms at the departmental level (driving meetings + broadcasting goals to their groups)

- + **Adaptability** with decision making aided by access to real-time info

Optimize: *Roll out broadly*

- Viva Goals is visible in business rhythms throughout the organization
- Viva Goals is adopted down to the team level to drive day-to-day work and decision making
- Employees can see the direct impact of the work they do and how it drives the business forward
- Ongoing, goal-setting practices continue to be refined and improved as your organization realizes the value of unified planning

- + **Growth** to build a culture of stretch and reaching beyond the expected

Viva Goals Enterprise Maturity Model: What it looks like

- In our experience, focusing on building the goal-tracking muscle in your organization works best from the top → down
- As you model and grow your leadership practice, establish Viva Goals as the standard for goal monitoring & encourage usage throughout your organization
- Over time, you build towards a “North Star” of a program broadly adopted and connected top to bottom across programs with shared & aligned goals

Launch:
Start your journey

Model:
Encourage use in your organization

Scale:
Commit to the practice

Optimize:
Roll out broadly



What does it look like?

- Launch with a focus on leadership
- Engage your entire organization with your goals

- Focus on running robust leadership program
- Communicate status and progress with full organization
- Facilitate other groups and teams to start to using in their local groups and teams

- Onboard additional layers to your coordinated program, seeking to run collaborative cross-group planning
- Continue to support standalone usage among interested teams

- Seek to run a top-to-bottom program with active and productive cross-group partnerships
- Drive for adoption at all levels across your organization
- Continue to grow the muscle around cross-group and cross-team planning

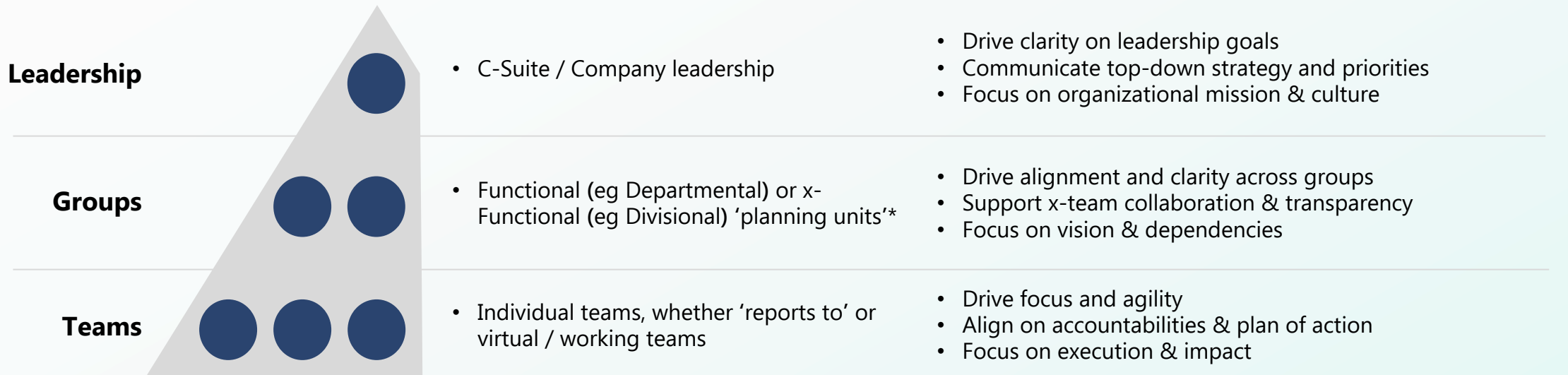
- Active Viva Goals program
- Connected Viva Goals programs (eg aligned goals)
- ▲ Actively coordinated Viva Goals programs
- ▲ Users encouraged to use Viva Goals

Note: for simplicity, we refer to sub-C suite planning units as “groups” in this model – but you think of these as the planning unit nomenclature that resonates with your organization (division, business, planning unit, function, etc)

Viva Goals Enterprise Maturity Model: How you plan

- Planning happens at different levels and scopes within every organization
- Viva Goals can bring value at any level, and regardless of the number of other teams that are onboard – though the value scales with broader adoption
- Below you can find more about the typical ‘centers of gravity’ for planning and how these various planning programs can collaborate with Viva Goals

Planning Models



**Viva Goals is a flexible tool that can be used however your company plans – whether that is strictly hierarchical with each sub-C suite leader driving their own strategy, or x-functional where horizontal planning groups set vision for a particular product, business, or customer segment.*

Viva Goals Enterprise Maturity Model: Who is involved

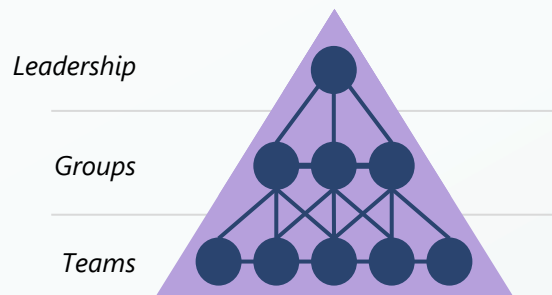
- Building your team and understanding the roles of those involved is a key part of ensuring the success of your program
- These core roles are most important to the success of your program; the following slides discuss how their roles evolve at each stage

Champion

The central expert and axis that keeps programs on track and connected. Drives overall program and rhythm of business across multiple teams.

Typical titles: Chief of Staff; Planning, Strategy, & Operations Leader

An entire organization may have only one champion, or for larger organizations there may be a network of champions.

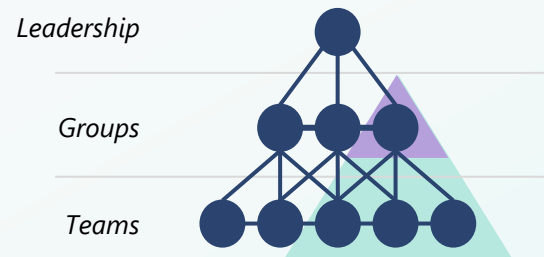


Business Leader

Leader who drives company strategy, approves team/organizational goals, and reviews progress. Change agent for their team who drives urgency.

Typical titles: C-suite, Vice President, General Manager

Every active Viva Goals program should have a business leader – though for lower-level teams this may be the same person as the program manager.

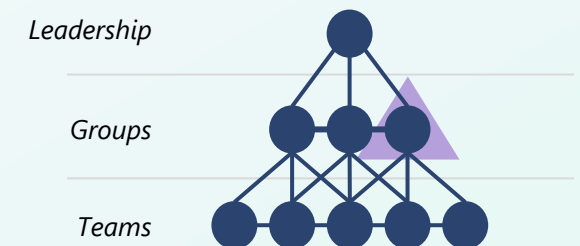


Planning Manager

Person who drives planning & tracking process on a given team. They ensure check-ins, reporting, and meetings follow prescribed rhythm of business.

Typical titles: Team Manager, Business Manager

Every active Viva Goals program should have a planning manager.

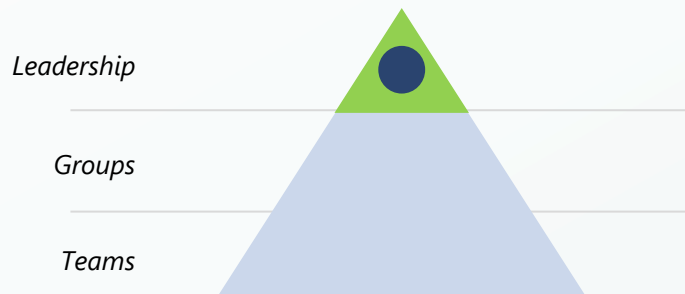


- Active Viva Goals program
- Connected Viva Goals programs (eg aligned goals)
- ▲ Primary scope of persona
- ▲ Secondary scope of persona (if applicable)

Launch: Start your journey



The Launch stage focuses on onboarding only the first 1-2 layers of your organization.



- Active Viva Goals program
- Connected Viva Goals programs (eg aligned goals)
- ▲ Actively coordinated Viva Goals programs
- ▲ Users encouraged to use Viva Goals

What will you be doing?

- Learning about Viva Goals and goal-setting best practices
- Documenting program expectations and socializing with LT
- Building the case for change for the broader organization
- Planning Rhythm of Business (ROB) and engagement moments
- For more suggestions, refer to the [Viva Goals Adoption Guide](#)

Who is involved?

- The *Champion* of your broader organizational program
- The *Business Leader* of your leadership program
- The *Planning Manager* of your leadership program
- You don't yet need to have the *Champions / Planning Managers* of your broader group and team programs identified, though you can start to keep track of likely partners who may eventually play this role

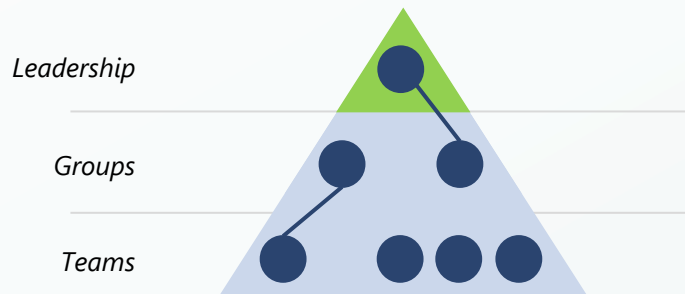
When are you ready to move forward?

- Clear executive buy in and sponsorship within leadership team
- Adoption and engagement in leadership team program

Model: Encourage use in your organization



The Model stage builds the Viva Goals muscle in leadership, and allows others to opt in.



- Active Viva Goals program
- Connected Viva Goals programs (eg aligned goals)
- ▲ Actively coordinated Viva Goals programs
- ▲ Users encouraged to use Viva Goals

What will you be doing?

- Focusing on building a strong leadership program
- Sharing Leadership Team goals with organization regularly
- Supporting standalone adoption of Viva Goals from interested groups & teams
- Do not overly focus on managing a cascade/alignment across teams at this stage
- Begin building an planning manager & champion community (get more ideas [here](#))

Who is involved?

- The *Champion* curates centralized resources for other teams looking to onboard to Viva Goals (training, program expectations, etc)
- The *Champion* also starts to build the community of *Planning Managers* from the broader organization – ideally at least one per active Viva Goals program
- The *Business Leader* and *Planning Manager* of your leadership program build the muscle and embed Viva Goals in their existing ROBs

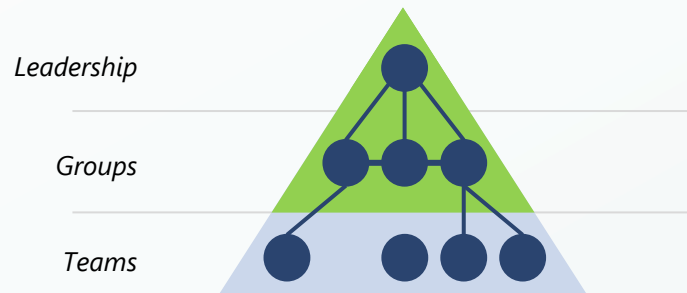
When are you ready to move forward?

- Strong engagement in leadership program
- Organic adoption momentum at the departmental / team level
- Increasing awareness / visibility with broader organization

Scale: Commit to the practice



The Scale stage drives adoption down 2-3 layers in the organization, continuing to support opt-in usage outside of the managed program.



- Active Viva Goals program
- Connected Viva Goals programs (eg aligned goals)
- ▲ Actively coordinated Viva Goals programs
- ▲ Users encouraged to use Viva Goals

What will you be doing?

- Continued investment in a strong leadership program
- Active engagement with group leaders to support their program growth
- Seek to establish cascade/alignment process among groups to ensure coordinated work and goals
- Sharing relevant goals and progress with organization / groups regularly
- Investing in and scaling your planning manager & champion community

Who is involved?

- For each group program you are onboarding, your *Champion* should identify and engage with the *Business Leader* and *Planning Managers* of those groups
- Your *Champion* leads the community of *Planning Managers* from the broader organization – ideally at least one per active Viva Goals program
- The *Business Leader* and *Planning Manager* of your leadership program

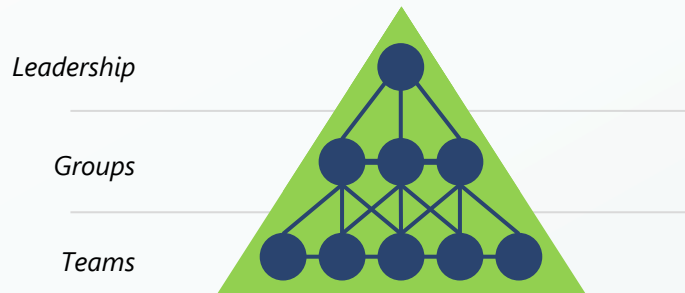
When are you ready to move forward?

- Strong engagement in leadership + departmental programs
- Organic adoption momentum at team level
- Increasing awareness / visibility with broader organization

Optimize: Roll out broadly



The Optimize stage encourages use of Viva Goals throughout the organization.



- Active Viva Goals program
- Connected Viva Goals programs (eg aligned goals)
- ▲ Actively coordinated Viva Goals programs
- ▲ Users encouraged to use Viva Goals

What will you be doing?

- Viva Goals is firmly entrenched in business rhythms, becoming a global mindset of focus and alignment at all levels
- Employees (from the leadership team down through individual contributors) regularly reference and align their work to organizational and team goals
- Sharing relevant goals with organization / groups / teams regularly
- Leveraging your champion & program manager community to share best practices and wins and support grassroots momentum and adoption

Who is involved?

- The *Champion* continues to lead the network of *Planning Managers*
- Each active program should have their *Business Leader* and *Planning Manager* identified and engaged (across all levels)
- Depending on the scale of your organization, you may end up with *Champions* at the group level, who you can then rely on to lead the *Planning Managers* in their groups

How do you continue to improve your program?

- Adopting a new goal-setting tool is a journey! We recommend focusing on and seeking to optimize the following key aspects of your organization's use over time:
 - ✓ Adoption (eg 100% of teams have goals entered in Viva Goals)
 - ✓ Usage (eg 75%+ of goals have been checked in recently)
 - ✓ Engagement & Value (visibility, alignment, focus, and adaptability)

Tip: OKRs for your Viva Goals program

In our [Viva Goals Adoption Guide](#) we laid out recommended OKRs for launching your Viva Goals program, which we believe are valid through the Launch and Model stages of your journey. You can build on these initial launch OKRs to assess performance and growth of your program over time. Consider the “OKRs for your OKR program” laid out below; you can monitor your org and team performance against these using [OKR Program Analytics](#).

At each stage these OKRs should be considered ‘aspirational targets’ which help you identify areas of opportunity in which to focus and improve your program – not ‘passing grades’ you need to be meet before continuing to evolve.

Area	Metric	Launch	Model	Scale	Optimize
Adoption	% of teams with OKRs established	100% of top-level teams		100% of groups	100% of all teams
Usage	% of OKRs checked in within last 30 days	>75%			
Engagement	% of team members engaging with Goals	>50%			
Best Practice	% of OKRs aligned up			>80%	
	% of teams with <5 Objectives				100%
	% of OKRs automated				>50%

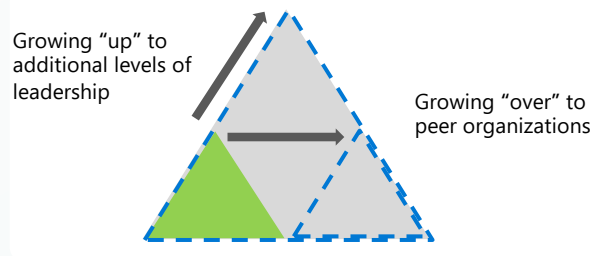
Tip: *What if our circumstances are different?*

Our standard recommendation is to drive adoption of Viva Goals top-down from the most senior level you have enthusiasm and buy in. But we know every organization is different – here are some common challenges we’ve navigated both with customers and internally at Microsoft.

Expansion from Pilot Cohort

What’s the challenge?

You started at the most senior level you had sponsorship – which was a few clicks below the C Suite. Now there is interest and enthusiasm in the tool and improved goal-setting from others in the organization, but you need to figure out how to navigate expanding ‘up’ or ‘over’.

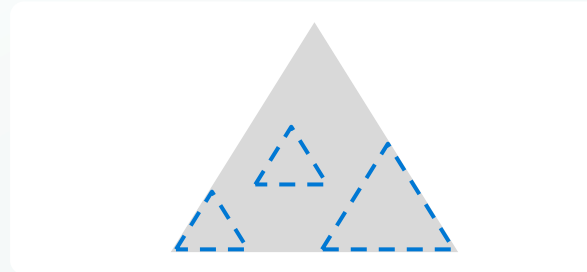


Recommended approach

- Profile the success of your program and provide clarity on the business impact of your investment using the [program impact template](#) for inspiration
- Support new leaders in understanding how to scale your program's success out to their teams, leveraging the [Viva Goals Maturity Model](#) starting from their new senior most level of leadership for the "Launch" phase

Multiple Teams Interested at Once

There are multiple groups & teams interested in leveraging Viva Goals for improved goal-setting practices, but they are in different pockets of the organization with no centralized business leader to sponsor the overall roll-out.



- Where you lack centralized leadership sponsorship, we find the best option is to enable Viva Goals broadly and support scaled organic adoption vs. managing cohorts too narrowly
- Assign licenses to all employees and share details on opt-in availability in internal announcements with links to self-serve resources to get started
- Build an [OKR community](#) for organic users to crowdsource information & best practices

Initial Enthusiasm, But Tapering Off

You saw strong adoption when you initially launched Viva Goals, and a burst of enthusiasm for the value it brings as a central source of truth. But now usage is tapering off; OKRs are not being checked in, and visits are declining.



- Ensure the Viva Goals product is working with and for you – make sure [check in reminders](#) & summaries are set up at the organizational level
- Leverage the [program impact template](#) to highlight the value Viva Goals has brought to deeply adopted groups & teams
- Run internal awareness campaigns focused on the value of specific Viva Goals features (eg [ADO integration](#) or [Dashboards](#))

Viva Goals Program Impact (TEMPLATE)






Select Inputs from "Success Measures"

Adoption

Engagement

Business Value

- The Contoso group started their adoption journey with Viva Goals in **June 2022**
- Since then, they onboarded **100** teams and engaged over **3,000** users who have created **1,500** OKRs
- There is significant momentum, with over **50%** of users viewing OKRs monthly and more than **75%** of OKRs being checked in at least monthly

	<i>Before</i>		<i>Now</i>
Visibility 	<ul style="list-style-type: none"> • Limited understanding outside of the leadership team on what the top organizational goals were 	→	<ul style="list-style-type: none"> • Steady user growth since launch, with >50% of all Contoso employees having viewed OKRs at least once • 99% of OKRs in the system are 'public', enabling broad visibility
Focus 	<ul style="list-style-type: none"> • Scorecards included 20+ metrics, lacking clarity on top priorities 	→	<ul style="list-style-type: none"> • Teams are driving radical focus in work; 80% of teams have fewer than 5 Objectives and 90% of objectives have fewer than 5 Key Results
Alignment 	<ul style="list-style-type: none"> • Individual teams planned in silos, with limited shared objectives on outcomes • Focus was on dependencies, not shared goals 	→	<ul style="list-style-type: none"> • Employees to understand how their day-to-day work contributes up towards the broader organizational strategy, as over 80% of OKRs are aligned up to parent OKRs
Adaptability 	<ul style="list-style-type: none"> • Significant copy/paste prep time moving information between systems; information only 'fresh' once per month at PPT update 	→	<ul style="list-style-type: none"> • Significant decrease in prep time for review meetings and amount of employee time copy/pasting numbers in multiple end points • 35% of OKRs are being automatically updated via integrations
Growth 	<ul style="list-style-type: none"> • Organizational fear of underachievement led to unambitious goal setting 	→	<ul style="list-style-type: none"> • Leaders believe that a cultural shift towards setting ambitious goals is helping drive better results both for our org and our customers.

Inputs for Template: Success Measures

- Leverage the table below to identify metrics and examples relevant to your experience adopting Viva Goals and OKRs
- Many items can be found in OKR Program Analytics, while other may require anecdotal storytelling or running a brief local survey to collect data

Area	Metric	How can you find this
Adoption	<ul style="list-style-type: none"> • # of teams added and % of teams with OKRs • # of OKRs added • # users added 	<ul style="list-style-type: none"> • Viva Goals Program Analytics • Viva Goals Program Analytics • Viva Goals Program Analytics
Usage / Engagement	<ul style="list-style-type: none"> • % of OKRs checked in • % of users logging in • Behavior: Embedding/use of OKRs in local ROBs • Sentiment: % if users who agree "I believe my organizational and team OKRs are relevant to me and my work" 	<ul style="list-style-type: none"> • Viva Goals Program Analytics • Viva Goals Program Analytics • Local survey • Local survey
Business Value	Visibility <ul style="list-style-type: none"> • % of OKRs public • % of users logging in • Sentiment: % of users who agree "My organizational leaders share information on goals broadly and regularly" 	<ul style="list-style-type: none"> • Viva Goals Program Analytics • Viva Goals Program Analytics • Local survey
	Focus <ul style="list-style-type: none"> • % of teams with <5 Objectives / % of Objectives <5 KR • Average # of OKRs per owner • Behavior: Examples of leaders and teams 'saying no' based on their OKRs • Sentiment: % of users who agree "I know what is expected of me when I come to work every day" 	<ul style="list-style-type: none"> • Viva Goals Program Analytics • Viva Goals Program Analytics • Local survey • Local survey
	Alignment <ul style="list-style-type: none"> • % of OKRs aligned upwards / downwards • % of Shared OKRs • Sentiment: % of users who agree "We feel like one organization working together towards common goals" 	<ul style="list-style-type: none"> • Viva Goals Program Analytics • Viva Goals Program Analytics • Local survey
	Adaptability <ul style="list-style-type: none"> • % of check ins automated • # of different product integrations active • Behavior: System/cost saving eg time saved on manual reporting/cost saved/ integrations utilized • Sentiment: % of users who agree "My organization and team make decisions using OKRs" 	<ul style="list-style-type: none"> • Viva Goals Program Analytics • Viva Goals Program Analytics • Local survey • Local survey
	Growth <ul style="list-style-type: none"> • Behavior: Example stories of choosing a higher-than-expected goal enabled steps/change thinking / achievement • Sentiment: % of users who agree "I believe using Viva Goals and OKRs inspires my team to take on bigger goals and achieve them" 	<ul style="list-style-type: none"> • Local survey • Local survey



Thank you