

Microsoft Viva Goals Roles and Responsibilities Cheat Sheet

Curious about roles and responsibilities as you roll out Viva Goals?

You've come to the right place. Not every organization will require all of these roles at the beginning of their goal setting process, but we have outlined the roles we consider important from day one, no matter your organization size.

Viva Goals Personas



Business Leader

Leader who drives company, group, or team strategy, creates and approves team / organizational goals, and reviews progress.

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



Champion

Central expert and axis that keeps programs on track and connected. Drive overall program and rhythm of business across the entire organization (or multiple teams).

Typical titles: Chief of Staff, Planning Lead, Strategy & Operations



Planning Manager

Individuals and team managers who drive 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, Chief of Staff, Data Analytics Manager



Goal Owner

Users who own goals and are accountable to drive and report progress on goals.

Typical titles: Anything from Individual Contributor to Vice President or beyond.



Stakeholder

Users who engage with updates on progress of goals.

Typical titles: Anything from Individual Contributor to Vice President or beyond.



Tech Admin

User who is responsible for the technical setup, managing the software, ensuring licenses are assigned, and meeting security / compliance needs.

Typical titles: IT Admin, Technical Operations

Persona "Jobs to be Done" Summary

Business Leader	Champion	Planning Manager	Goal Owner	Stakeholder	Tech Admin
• Drive company success by ensuring org has a cohesive goal setting strategy and process • Designate key team members to execute on that strategy • Remove blockers by sponsoring and enabling leaders and team members to easily create and share goals • Approve high level company goals	• Oversee and drive entire planning and goal setting process across org • Set company rhythms and reporting cadence across org • Create company-wide objectives with Business leaders and/or Tech Admin • Set up Viva Goals with the Tech Admin • Functions as ongoing goal expert and liaison between teams and Planning Managers • Run org-wide reporting meetings on goals and progress	• Drive planning process across team to align with broader org • Ensure team members understand the goal planning process • Establish business rhythm and check on team goal progress • Report on goals to team/leaders across the org via dashboards • Set up Viva Goals for their team • Develop team goals and align with company-wide goals • Support team with goal setting and best practice questions	• Aware of team and company goals and any shifts in focus • Develop team and individual goals and initiatives • Track and update progress on goals they own in Viva Goals • Collaborates with team goals and contributes to initiatives • Understand how my goals contribute to the org and properly align them • Basic understanding of how goals work • Basic understanding of how to use Viva Goals	• Understand how my impact aligns to team and company goals • Aware of team and company goals and any shifts in focus • Collaborates with team goals and contributes to initiatives • Basic understanding of how goals work • Basic understanding of how to use Viva Goals	• Create a safe, secure, easy to follow software environment for the org to use for creating and sharing goals • Ensure that licenses, roles, and permissions comply with goals of the program • Understand enough about goals, rhythms, org structure, and software to configure properly and communicate with stakeholders