**Technical Documentation for Utilizing Viva Goals to Create OKRs, Key Results, and Initiatives**

Introduction

Viva Goals is a comprehensive tool designed to facilitate the creation, tracking, and management of Objectives and Key Results (OKRs) within an organization.

This technical documentation outlines the step-by-step process of using Viva Goals to create OKRs, define Key Results, and establish Initiatives to achieve organizational objectives effectively.
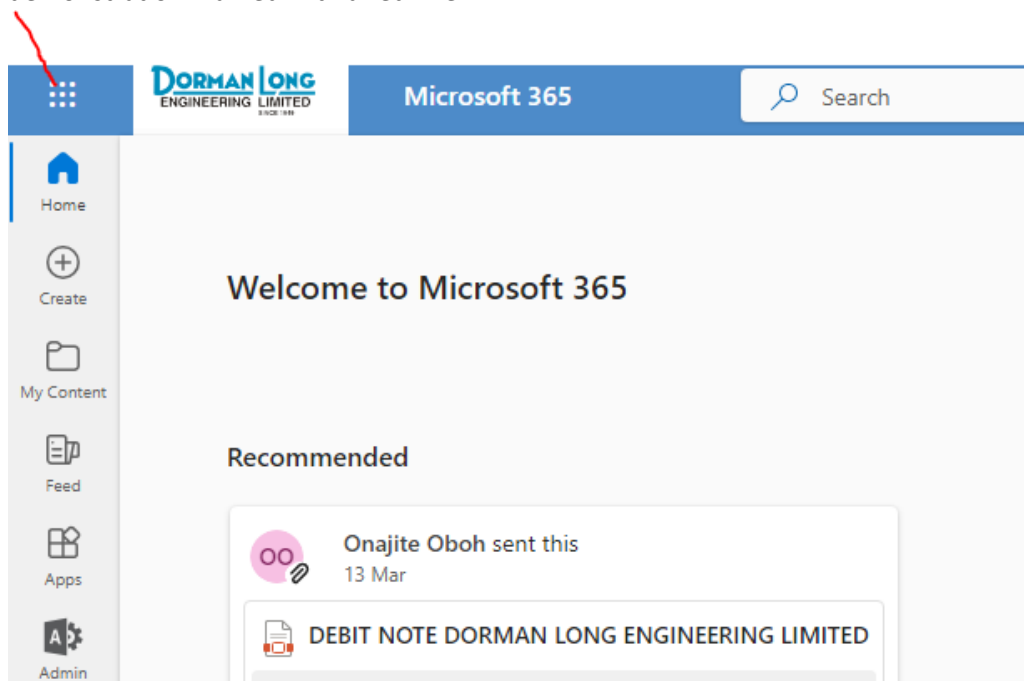
# Step 1:  How to access Viva Goals

1. First step is to sign in to viva Goals, you can access it by going to office.com
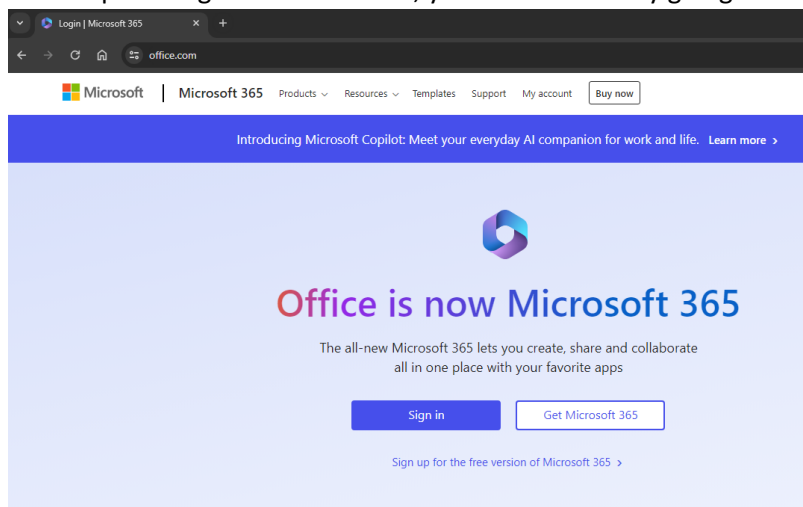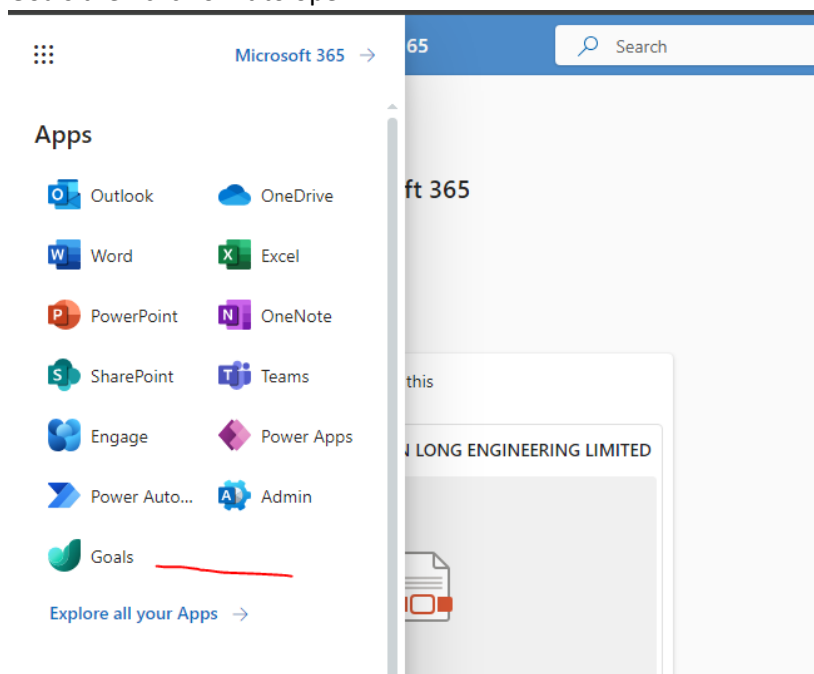


2. Click on sign-in, you should see a page like the image below
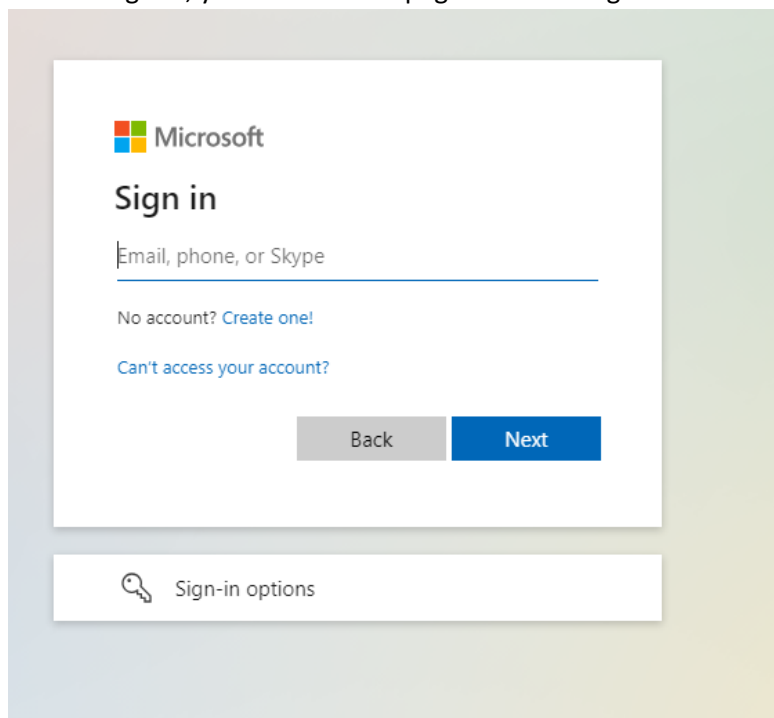
3. Then sign-in using your organization details provided to you
4. Now the next step is to click on the menu icon at the top left corner, see the image below for demonstration marked with a red line



5. Then click on Goals, if you don't see Goals, click on "**Explore all your Apps"** and look for Goals then click on it to open
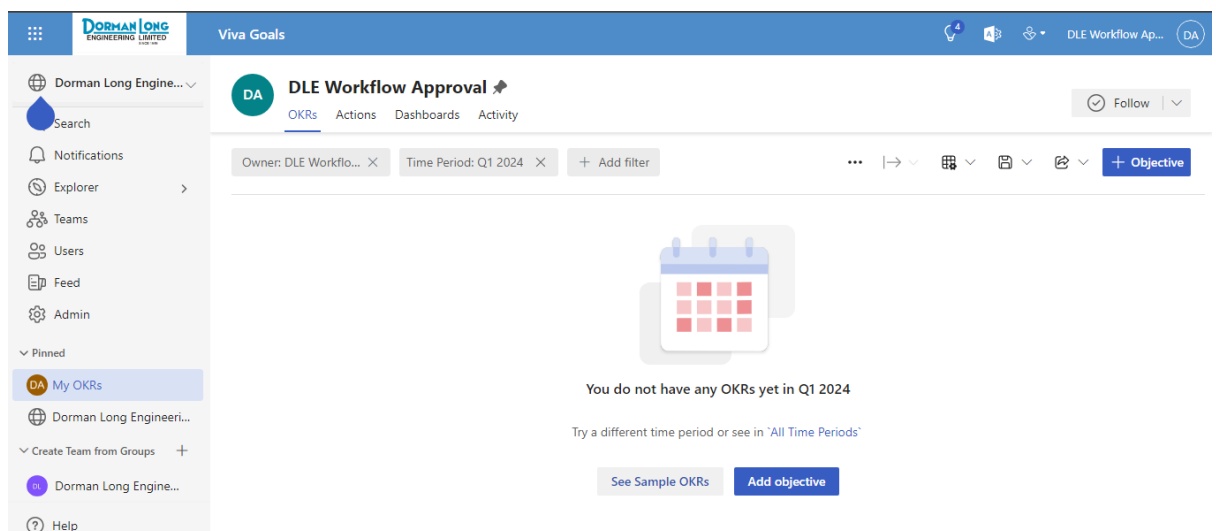


6. Once it opens you should see a page like the image below
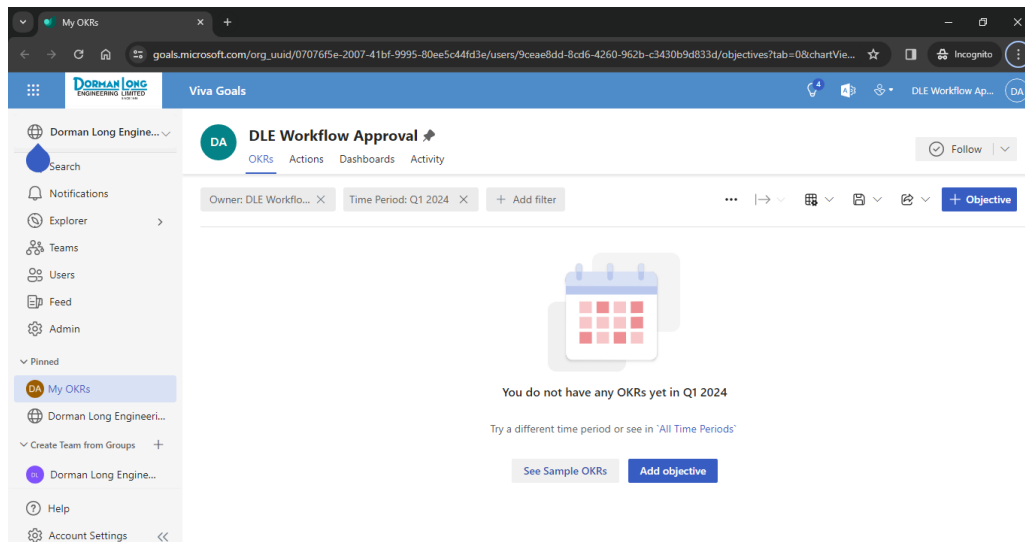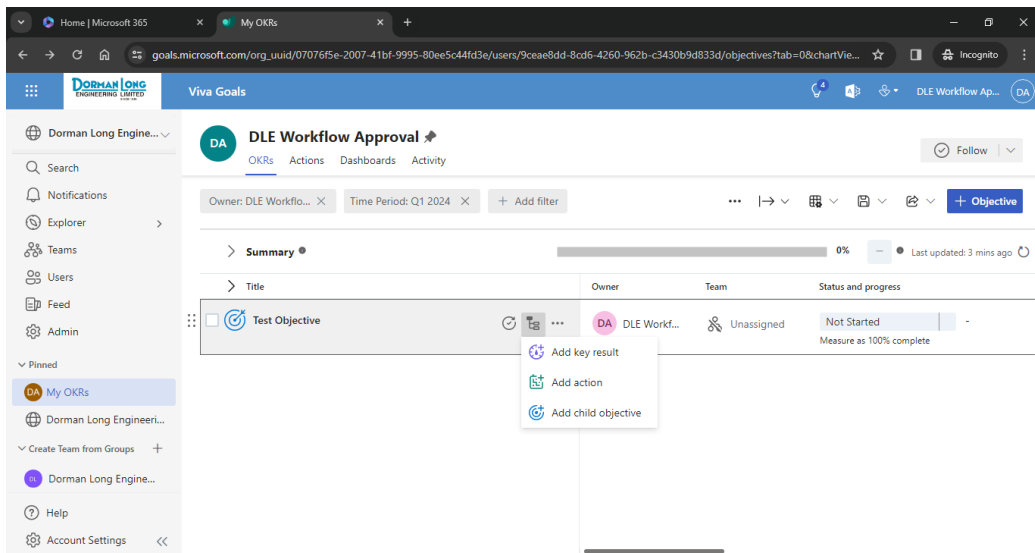
## Step 2: How to create an OKR

Now that you're logged in the next step is to know how to create an OKR (Objective Key Result)

1. Navigate to the team or department where you want to create the OKR. In this case an OKR has been created for you now the next step is to create a clear and concise objective



2. Click on the "Objective" button.
3. Define a clear and concise Objective. Remember, it should be ambitious yet achievable.

4. Once the objective has been created you should get this result, look at the image below



## Step 3: Developing Key Results:

1. Once the Objective has been created, hiver your mouse on the objective and click on the "**Add child item"** then click on add key result

2. Each Key Result should be specific, measurable, achievable, relevant, and time-bound (SMART).

3. Define a **target value** for each Key Result. To create a target value click on "**Add Metric**" This quantifies success.

4. Define the target value or metric associated with the key result.

5. Assign ownership of the key result to the appropriate individual or team responsible for its attainment.

6. Repeat the process to add additional key results as necessary to fully capture the scope of the objective.
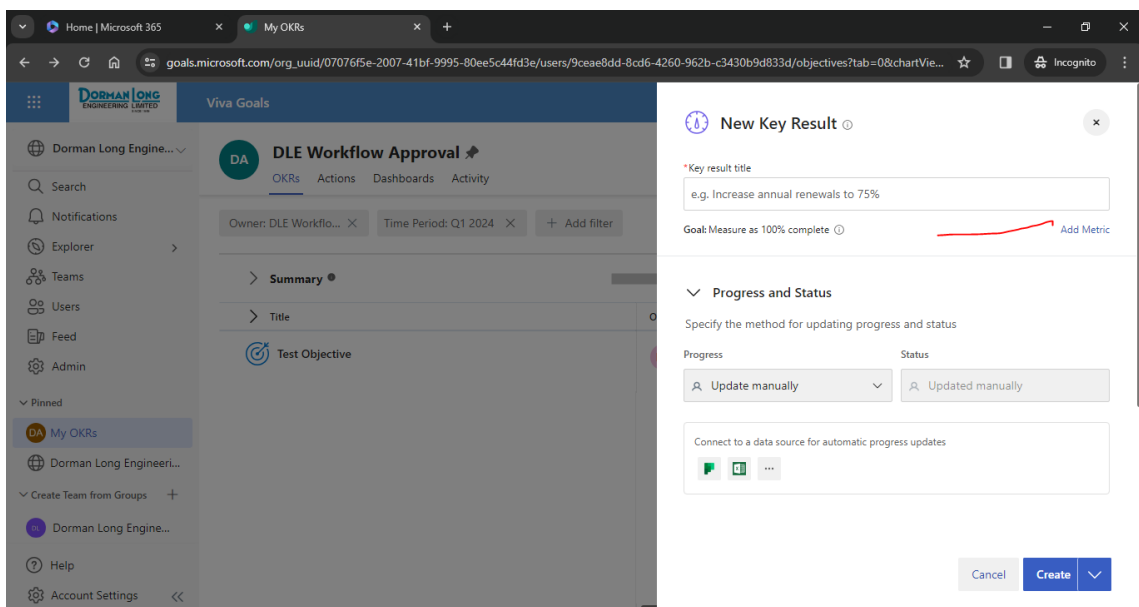


7. Once you create the key result with the target value, you should get a result like this
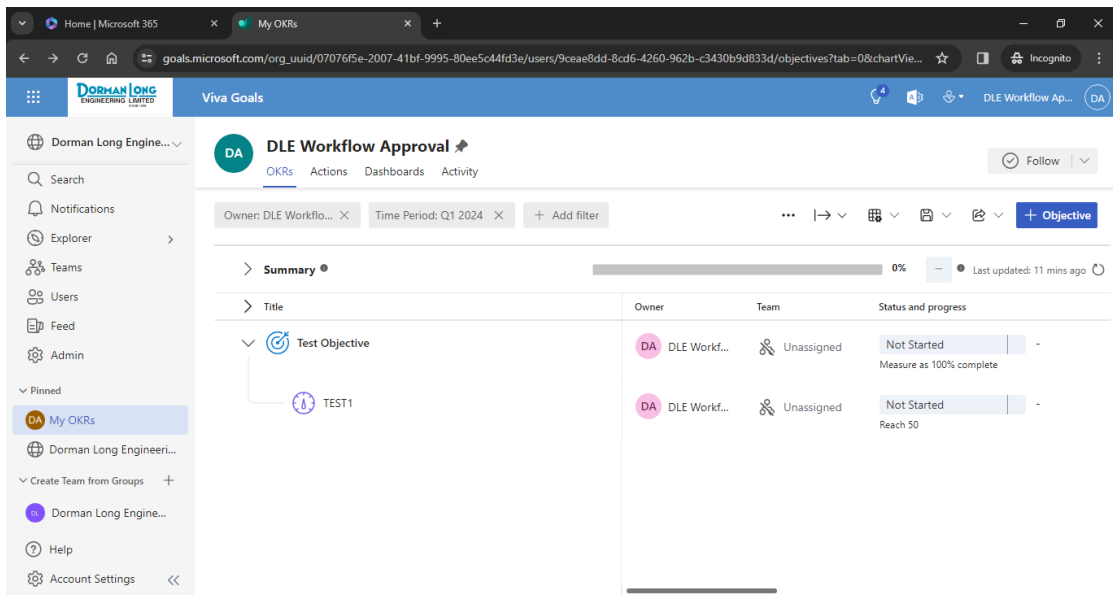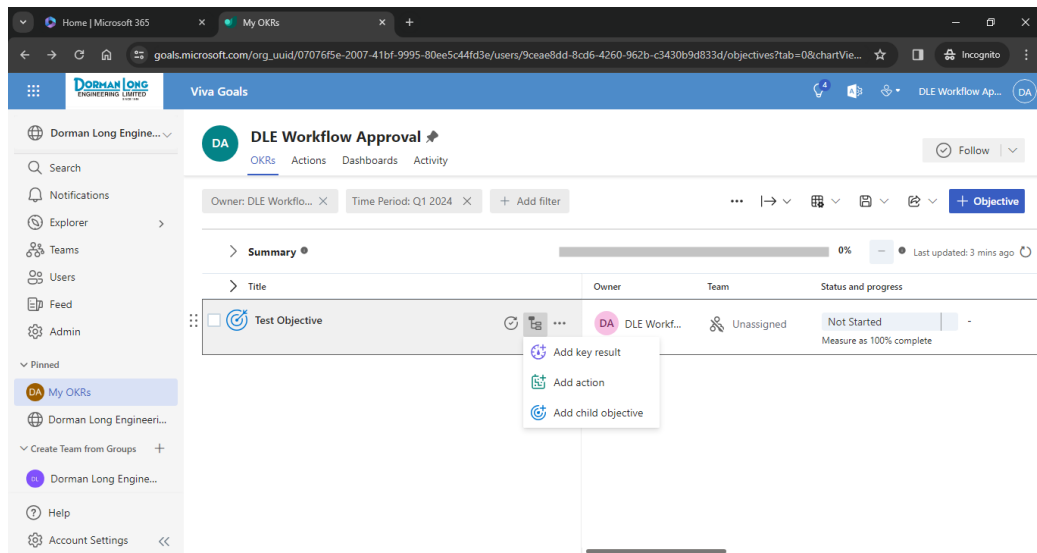
8. You can add multiple Key Results by clicking on the chevron drop down arrow and click "**Another Key result**" to comprehensively measure progress towards the Objective.
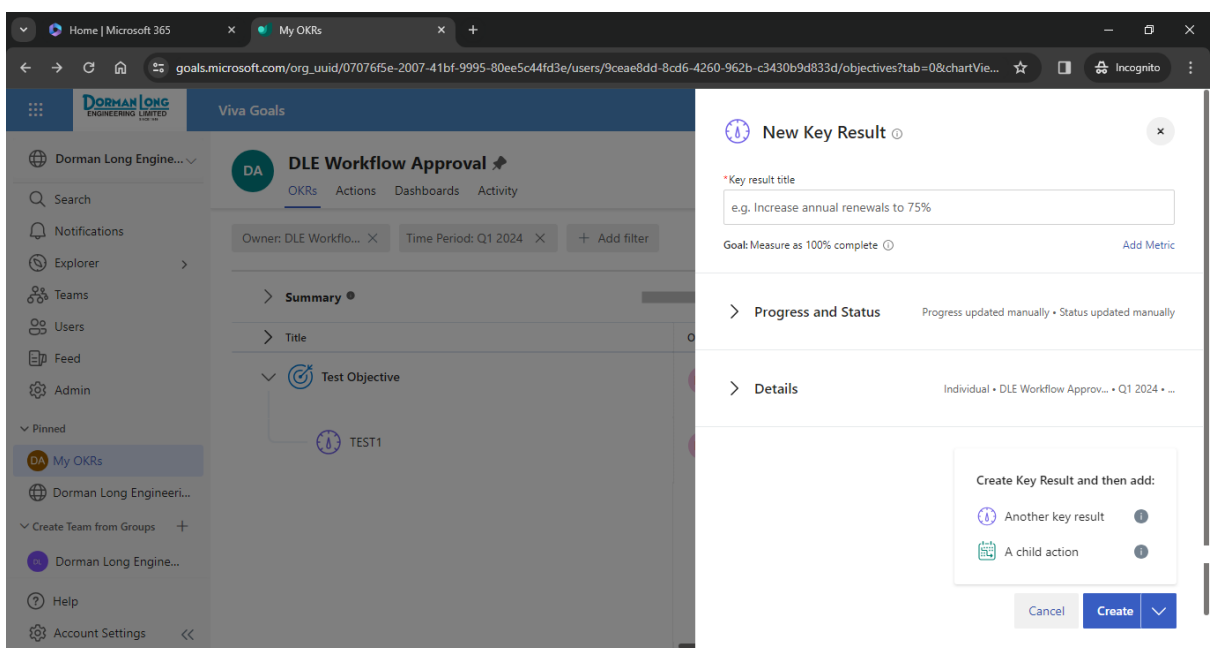


## Step 4:  Establishing Initiatives

1. Also, you can create initiative by hovering your mouse on the Objective created and click on "**Add Action"**

2. Provide a descriptive title for the initiative that outlines the actions or projects required to support the objective.
3. Include details such as the initiative's purpose, expected outcomes, and any relevant resources or stakeholders involved.
4. Specify the start and end dates for the initiative to establish a clear timeline for execution. Assign ownership of the initiative to the individuals or teams responsible for its implementation.
5. Optionally, link the initiative to specific key results to demonstrate its alignment with the overarching objective.