



Case Study

# What matters to this leading insurance group is uniting employees around core objectives for success

Do what matters

**A global insurance and financial services company enhanced its employee engagement and organizational efficiency by integrating Microsoft Viva Goals to manage its Objectives and Key Results (OKRs), which is a framework used to navigate its overarching team goals. Our partnership streamlined communication and collaboration, helping employees align closely with their core objectives. Through a pilot program, we implemented Viva Goals to educate and empower people on formulating and tracking OKRs effectively, fostering a culture of continuous improvement and stronger teamwork across the organization.**

## Inspiring change: Simplifying the hierarchy

The team at this leading insurance group embarked on a journey to standardize the ways its people work, particularly across IT and business change functions. Recognizing the need for better alignment and a shared focus among teams, leaders sought to simplify the hierarchy and eliminate silos. Their goal: Increase efficiency and communication using Objectives and Key Results (OKRs) — a framework businesses often use to define, coordinate and accomplish their goals — to drive necessary alignment for the team. We collaborated to first redefine the group's OKRs, including how and why they matter, for a more unified approach.

**“What matters to us is reconnecting our people toward one common goal. Viva Goals has helped us to boost productivity and refocus our organizational objectives. It’s not just about adopting a new tool, but rather embracing a smarter way to work that leads to tangible results.”**

– Leading Insurance Group

## Driving innovation: Transforming operating models

In our previous successful engagements with the group, we previewed how managing OKRs in Microsoft Viva Goals, a goal-alignment solution, can help unlock better collaboration. Viva Goals was the optimal choice, using the team's framework to connect priorities provided by stakeholders (across senior leadership, architecture, wealth, digital, customer and Cloud & DevOps) to unite them around the mission and drive business results as determined by OKRs.

**Company Name:** Leading Insurance Group

**Country:** UK

**Company Size:** ~1,200 employees

**Industry:** Insurance

**Solution:** Microsoft Viva Goals

Leaders decided to move forward with a Viva Goals pilot to support OKR training, adoption and change management, ensuring employees would also be aligned on the value of the solution.

Together, we launched a six-week pilot, with the first three weeks centered on workshops to pinpoint core areas of the company strategy, scenarios where they were looking to use OKRs, groups to use it, and the required information to configure the Viva Goals platform. We initiated the program with 40 employees to gauge the effectiveness of the solution.

The leadership and training workshops shaped OKRs — how to formulate them and how to use Viva Goals to efficiently maintain them. Following the workshops, we supported office hours-style sessions for modifying OKRs in the platform, and shared best practices from pilot groups — including insights on integration into **Microsoft Dynamics 365, Power BI and Teams**. Integrating Viva Goals with these applications streamlined goal-setting and tracking processes, providing valuable insights, boosting collaboration and ultimately contributing to improved organizational performance.

With integrated tracking and easier reporting capabilities, Viva Goals helped the team to visually evaluate OKR performance and adjust goals and strategies as needed, and our engagement throughout ensured people were consistently well-informed and tracking via dashboards to quickly correct potential issues. This iterative approach to goal management promotes a culture of continuous improvement and agility within the organization.

**“Building a truly aligned organization isn’t just about processes; it’s about empowering our people to connect with a shared purpose. With Viva Goals, we’ve transformed our flow of work and developed a culture where every individual’s contribution matters.”**

– Leading Insurance Group

## **Achieving what matters: Fostering new ways of working**

We collaborated with the group to deliver a seamless experience for the pilot users by building in processes for new ways of working — fostering mutual understanding and confidence at all levels. With Viva Goals integrated into the existing workflows and processes for enhanced productivity, they saw increased adoption within just two weeks, helping to redirect separate teams to a central source.

Our partnership underscores the group's commitment to continuing the rollout of Viva Goals across its IT and business teams, with potential for further expansion across the entire organization. With employees better focused on their objectives, they're now able to centralize their efforts and deliver a consistent culture, ultimately improving customer services.

As part of this partnership, we helped the team realize:

- How OKRs can be analyzed in Viva Goals to track progress and foster collaboration
- Integration of Viva Goals into ongoing processes, enabling teams to better align their efforts with refined objectives
- Improved communication across the respective teams toward new ways of working



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