



The OKR Migration Playbook

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Step-by-step guide to replacing Viva Goals with tools that actually work

Why This Playbook Exists

If you’re reading this, it’s probably because your team is using Viva Goals and now you need a new path forward.

Microsoft is retiring Viva Goals by the end of 2025. Support is ending. New features are done. And that leaves thousands of teams looking for their next move.

But this isn’t just about switching tools. It’s a chance to upgrade your entire approach to goal-setting.

The OKR Migration Playbook is built to help you:

- Move fast without losing context
- Choose the right tool for *your* team
- Rebuild a lightweight OKR system that drives execution

No fluff. No jargon. Just the practical steps to get moving now.

Pre-Migration Checklist

Before you even pick a new tool, make sure your OKR history is clean, usable, and export-ready.

Step	Task
✓ 1	Export all data from Viva Goals (CSV, PPTX, or API)
✓ 2	Audit your existing OKRs for relevance, structure, and ownership
✓ 3	Review your rollout: What worked? What fell flat?
✓ 4	Choose your new OKR platform (see comparison below)
✓ 5	Assign an internal owner to lead the transition
✓ 6	Inform your team about the switch early—set expectations
✓ 7	Plan your rollout: Pilot with 1–2 teams, then expand

Tool Comparison Matrix

Not all OKR tools are created equal. Some are built for speed. Others for scale. Here's how the top Viva Goals alternatives stack up:

Tool	Best For	Free Tier	Migration Ease
OKRs Tool	Startups, fast-moving teams	✓	★★★★☆
Tability	Async check-ins, remote teams	✓	★★★★☆
Profit.co	HR + strategy alignment	✓	★★★★☆
Teamflect	Microsoft 365 users	✓	★★★★★
Mooncamp	Strategy dashboards + visual OKRs	Trial	★★★★☆
Betterworks	Large enterprise orgs	Contact	★★★☆☆
Quantive	Data-rich, analytics-driven teams	Trial	★★★★☆
Lattice	HR-focused, people-first orgs	✓	★★★★☆

Tip: Don't just choose based on features. Choose based on your team's working style. If you need async check-ins, real-time visibility, or Microsoft-native workflows, pick accordingly.

Internal Rollout Plan

Here's a simple 3-week migration model used by other fast-moving teams.

Week 1: Prep

- Assign an internal OKR owner
- Export and clean your existing OKRs
- Pick your new platform
- Announce the plan to your team

Week 2: Pilot

- Set up OKRs in the new tool
- Test the rollout with 1–2 teams
- Collect feedback (async or live)

Week 3: Launch

- Roll out org-wide
- Host a live kickoff (or Loom recording)
- Establish a check-in rhythm (weekly is best)

This doesn't need to be perfect. It just needs to be consistent.

OKR Governance Framework (Optional, but recommended for scaling orgs)

If you want OKRs to stick beyond your next cycle, you'll need structure. Here's a lightweight model that balances clarity with autonomy:

- Set OKRs at **company and team** levels only
- Keep it tight: **3–4 objectives, 2–4 key results each**
- Require **weekly check-ins** (async or in-platform)
- Do **monthly reviews** to course-correct early
- Refresh goals **every quarter** (no carryover zombies)

Want to go deeper? Assign OKR champions to each function. Their job: help write, update, and review goals—not manage outcomes.

Final Thoughts

Viva Goals going away isn't the end of your strategy—it's a fresh start.

This is your chance to move away from bloated dashboards and back to what matters: clear goals, visible progress, and tools your team will actually use.

The OKR tools listed above can help you reset your system and move faster this quarter—not next year.

Optional Bonus: Share This with Your Team

Copy, paste, or drop this link into Teams:

"Here's a 5-minute guide to help us migrate from Viva Goals and rebuild a better OKR system. Clean, simple, and actually useful."

You'll save hours of explanation—and build buy-in from day one.

Ready to Switch? Try OKRs Tool (Built for Speed)

If you're looking for the simplest, fastest way to move away from Viva Goals - **OKRs Tool** is the easiest starting point.

It's built for lean teams that want alignment without the bloat. No steep learning curve, no endless configuration. Just clean UX, AI-suggested objectives, and real-time tracking your team will actually use.

Why switch to OKRs Tool:

- Migrate in under an hour
- Write better OKRs with built-in templates and AI
- Keep your team aligned without endless check-ins
- Works async, remote, or hybrid
- Free tier included—no credit card required

Next step:

→ [Create your free OKRs Tool workspace](#) and build your first cycle in minutes.

If you're already managing the switch from Viva Goals, this is the fastest way to reset and move forward—with less friction, more clarity, and real progress.