



How To Create and Manage Goals in Jira Cloud



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Overview

Learn how to create, locate, and view goals/OKRs in Jira Cloud. Goals are useful for tracking progress at the portfolio, product, and individual employee levels. Portfolio and product goals are determined by Portfolio Directors and Product Managers, while individual goals are determined by employees and their managers.

All goals, whether organizational or individual, are created and managed within [Atlassian home](#).

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▼ Learn More About Goals and the OKR (Objectives & Key Results) Framework

Create a Goal

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This section describes how to create a goal from [Atlassian home](#). [Atlassian home](#) is a hub that connects your work across Atlassian products, including Jira Cloud.

1. Navigate to [Jira Cloud](#).
2. Select the **Switch to** menu in the upper left corner.



3. Select [home](#).
4. Select **Create** in the top nav.
5. A dropdown menu will appear. Select **Goal**.
6. A dialogue box will appear. Enter the **goal's name**.
 - **Note:** *The goal name should be descriptive and state what action is being taken.*
7. Choose the **target date** for the goal's completion.
8. Select **Create**.
9. Review the section [Add a Goal's Description and Other Attributes \(required\)](#).

Add a Goal's Description and Other Attributes

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1. Within the goal, select the **About tab*** under the Goal's name.
 - *The About Tab is not the default selection. You will need to select this tab in order to edit it.
2. In the **Description** field, briefly describe why this goal is important and how success is measured.
3. Update the remaining Goal tabs as desired.
 - Note: **Projects** in Atlassian home are different than project spaces in Jira Cloud. We recommend leaving this tab blank for now.
4. In the right panel, update other attributes (such as **Followers**, **Teams***, **Tags**, **Sub-goals**, **Parent goals**, and **Start date**) as needed*.
 - *If you would like to link this goal to a functional team, use the Teams attribute.
 - Only tags are required. It is each manager's discretion as to whether they want to use other attributes such as nesting parent and sub-goals.
5. Review the section [Update a Goal's Tags \(Required\)](#).

Update a Goal's Tags (Required)

Tags allow you to easily search for goals grouped by different criteria.

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1. Within the Goal select **Tags +** in the right menu.
2. A search box will appear.
3. Type the following tags into the search box. Select, then **enter**.
 - a. **Portfolio name** (Use the actual name of the portfolio that the goal is being managed under; ex: digital-enablement).
 - b. Add a **tag** to indicate whether this is a Portfolio, Product, or Individual goal.
 - i. **Portfolio:** Use only for goals/OKRs created by a Portfolio Director.
 - ii. **Product:** Use only if this is a product goal/OKR.

- iii. **Individual:** Use only if this is an individual person's goal.

Note: If a tag does not already exist, you will need to create one. Portfolio names should match the official names of each portfolio with hyphens in between words (ex: digital-enablement).

Link Jira Work to Track Your Goal's Progress (Optional)

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An effective way to keep your work and goals aligned is by linking your goals to Jira work. You can link initiatives, epics, user stories, tasks, and subtasks.

However, not all goals will have corresponding work in Jira (ex: personal goals). Use this function to fit a specific goals' needs.

1. Select the **Jira** tab.
2. Select **Add Jira issue**
3. Paste a **Jira URL**

Note: You can add multiple Jira links that fall within the scope of a given goal.

Search for Goals

In Atlassian home, you can view goals together by tag, status, owner, team, following, metrics, and reporting line. (The latter is helpful for functional managers!).

Searching by Portfolio

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1. From Atlassian home, select **Goals** in the top nav.
 - Note: Depending on screen size, goals may be nested within the menu title *More* in the top navigation.
2. Select **Filter by Tag**.
 - a. A search box and dropdown menu will appear.
3. Begin typing the **name of the portfolio** (without the "#" symbol) that you are looking for.
 - a. Example: Type the phrase *digital-enablement*.
 - b. As you type the **portfolio name** the dropdown menu will display and filter the relevant options.
4. Select the **name of the portfolio tag** from the dropdown.
5. All results associated with that portfolio will display at the bottom of the screen.
 - Note: Goals may be collapsed. Use the carrot menu to the left of a portfolio's goal to expand portfolio, product, and individual goals within that portfolio.

Make Tags Visible in Search Results

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Enabling tags in an **active column** allows you to view all tags associated with a specific portfolio goal. Tags will display whether a goal belongs to an individual, the portfolio, or a product. Once you have generated a list of search results, follow these instructions to make tags visible.

Goals Can Have Different Descriptive Tags

1. [Search for portfolio goals](#) in the Goals page.
2. Select the **Columns** icon to open a dropdown.
3. Scroll down the list.
4. Toggle **# Tags** on.
5. The following tags may appear in the active column: **#portfolio**, **#the name of a portfolio**, **#product**, and/or **#individual**.
6. Open the goal to modify tags, description, and other fields.

Creating and Viewing Goal Updates

To Create a Goal Update:

1. In [Atlassian home](#), select **Goals** in the top menu.
2. Your active goal(s) should appear in the dropdown menu.
3. Select your goal that you'd like to update.
4. Select **updates**.
5. In the *Post your update* field, type your update.
 - a. Note: There is a character limit, but you can select the **add more detail icon** to add additional text.

To View Goal Updates:

There are a few ways to view goal updates.

From the updates feed

1. Navigate to Atlassian home.
2. In the left menu, select **Goal Updates**.
3. You'll see updates for **goals that you're following**, organized by month.
4. To navigate to other months, select the arrows to the left and right of the month name.

From the list view

1. Navigate to **Goals** in the top menu of [Atlassian home](#).
2. Filter by tag, reporting line, or other criteria.
3. Select each goal to view the update.

Scoring Product and Portfolio Goals (OKRs)

Scoring is done at the end of the OKR cycle to help the team use objective and subjective data to evaluate the success of the OKR. Success is relative to achieving the goal *and* about the actual quality of the OKR (we may find that we should have approached a KR differently, for example). It is expected that each OKR owner is reflective about the goal itself (what was achieved) and about the process (what did I do well/not so well in creating this goal? What would I do differently if I had a do-over?).

To score your OKR:

1. Navigate to your goal.
2. Select **Learnings**.

2. Select **Add a new learning**.

3. Add a summary (title) of your learning (Ex: OKR Scoring)

4. Add a reflection, including your score, in the text box:

- .7-1 (We delivered)
- .4-.6 (We made progress but fell short of completion)
- .0-.3 (We failed to make real progress)

KR Example	Score	Classification	Self-Assessment Example
Bring in 10 new customers	.9	We delivered	Due to the slump in the market, OKR was significantly tougher than expected. 7 new customers represented an exceptionally good outcome.
Bring in 10 new customers	.6	We made progress	Signed 8 new customers – more luck than hard work - one customer brought 5 with her.
Bring in 10 new customers	.3	We failed to make real progress	Managed to land 9 customers but discovered that 7 of those would bring in very little revenue

5. Select **Save**.

Jira Cloud Resources

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- [Jira Cloud SharePoint page](#)

