



SECTION 09

Goals

What are you working toward?



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Goals

Goals is where you write down what you're working toward, then watch the work get you there. A goal can be your own (pass the certification, run the 10k) or belong to a project, program, portfolio or client account (cut the cutover downtime, keep the client).

There are two kinds:

- **A goal** fills its progress bar from the tasks you link to it. Finish a task, the bar moves.
- **An objective** is a goal with **key results**: measurable outcomes like *downtime under 2 hours* or *95% of users migrated*. You check in on each one, and the objective's progress comes from them. This is the OKR way of doing it, and it's part of the Pro plan.

Open it from **Goals** in the left menu.

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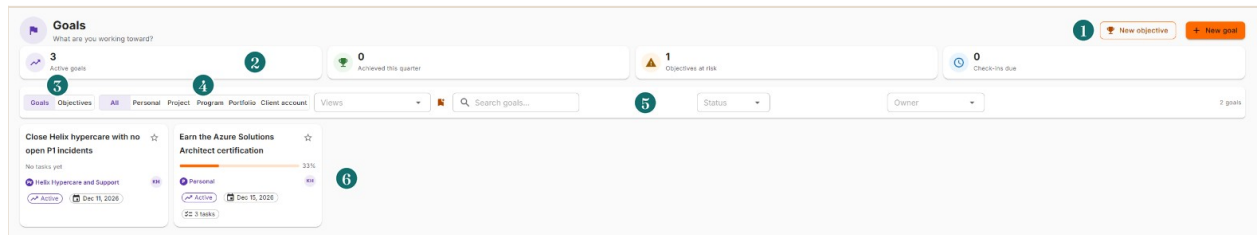


Three questions Goals answers

QUICK START

- 1 Am I getting there?** Every goal shows how far along it is, and why.
- 2 Which objective needs help? Objectives at risk** lists the ones whose owners have stopped feeling confident.
- 3 What should I check in on? Check-ins due** lists the key results that are waiting on an update.

The lay of the land



The Goals page, with the main areas numbered

- 1 New objective and New goal.**
- 2 The four numbers.** Two of them are filters. More on those below.
- 3 Goals and Objectives.** Which kind you're looking at.
- 4 The level:** All, Personal, Project, Program, Portfolio or Client account.
- 5 Views, search, Status and Owner.**
- 6 Your goals,** one card each.



The four numbers

CARD	WHAT IT COUNTS
Active goals	Your active goals and objectives together
Achieved this quarter	Goals marked Achieved since this calendar quarter began, in your own time zone
Objectives at risk	Active objectives whose key results' latest check-ins average below 5 out of 10 for confidence
Check-ins due	Key results waiting on a check-in

Objectives at risk and **Check-ins due** are buttons. Click one to show only those objectives, and click it again (or **Show all objectives**) to go back. Under Check-ins due, each card lists the key results to check in to, so each one is a click away.

NOTE

An objective nobody has checked in on yet isn't counted as at risk. No news isn't bad news. It's just no news.

Finding goals

CONTROL	WHAT IT DOES
Goals / Objectives	Shows plain goals or objectives
All and the levels	Narrows to one level. Levels your plan doesn't include aren't offered
Views	Saved sets of filters, the same as on Tasks. The bookmark beside it saves the current one
Search goals...	Matches the name
Status	Active, Achieved or Cancelled
Owner	Whose goals. You're listed as Me



The count on the right says how many match. When nothing does, the page says so and offers **Clear filters**.

Reading a card

- **The name.** Click anywhere on the card to open it. A trophy beside the name means it's an objective.
- **The star** adds it to your favorites, for you alone.
- **Progress.** A bar and a percentage, or *No tasks yet / No key results yet* when there's nothing to measure. An empty goal reads as empty, not as 0% and failing.
- **What it belongs to:** *Personal*, or the project, program, portfolio or client account, like *Helix Hypercare and Support*. The owner's initials are on the right.
- **Status**, the **target date**, and how many tasks are linked. A goal past its target date says **Overdue** in red, with the date.

Making a goal

Click **New goal** (on this page, or on Home).

New goal

What are you working toward? —
Close Helix hypercare with no open P1 inc

Why it matters (optional) —
A clean handover is what the client remembers.

Target date (optional) —
12/11/2026

Level —
Project

Which project? —
Helix Hypercare and Support

☐ Make this an Objective (OKR)

Cancel Create

The New goal dialog

- **What are you working toward?** The name. The only thing you have to fill in.
- **Why it matters (optional).** Future you will want to know.
- **Target date (optional).**



- **Level.** Personal, or the project, program, portfolio or client account it belongs to. Pick a level and a box appears to choose which one.
- **Make this an Objective (OKR).** Turns it into an objective with key results. **New objective** opens the same form with this already on.

Click **Create** and the goal opens.

LEVEL	COMES WITH
Personal	Every plan
Project	Every plan
Program	Pro
Portfolio	Enterprise
Client account	Enterprise
Objectives (any level)	Pro

A level or switch your plan doesn't include is shown greyed out, with the plan that adds it and **See plans**.

A program's or portfolio's own page has a **Goals** card with a **+**, and a client account's plan has **Strategic Goals** with **New goal**. Goals made there are already set to that level and that record.



A goal's page

The screenshot shows a goal page for "Earn the Azure Solutions Architect certification". At the top, it's labeled as a "Personal goal" and "Active". A progress bar indicates "1 of 3 tasks complete" at 33%. The "Basics" section has input fields for "Name", "Why it matters", and "Target date". The "Linked tasks" section lists three tasks: "Book the AZ-305 exam", "Take two practice exams", and "Finish the AZ-305 learning path". The right sidebar includes sections for "Assignees", "Comments", "Notes", and "Files".

A goal's page

At the top: the back arrow, the name, the **status**, the **star**, **Save** and the **:** menu. Under the name: the level, what it belongs to (a link), and *Overdue by 3 days* when it is. Under that: the progress bar.

Basics holds the **Name**, **Why it matters** and **Target date**. Change them and click **Save**. **Discard changes** puts them back. Leave with unsaved changes and Nexus asks first.

When AI is on for your workspace, Basics also has **AI access**: whether AI features may read this goal. It doesn't change who can see the goal.

If someone else saved the goal while you were editing, Save stops and says so, with **Reload**. Nothing gets overwritten.

Status

Click the status to change it: **Active**, **Achieved** or **Cancelled**.

Mark one Achieved and Nexus says "Achieved: that's a win worth marking." It is. Take the moment.

Linked tasks and progress

A goal's progress comes from the tasks linked to it.

- **Link a task** (the link icon) searches tasks you can see. **Quick-create** makes a new task already linked.



- The bar shows the share of linked tasks completed: *1 of 3 tasks complete*.
- **Cancelled tasks don't count**, for or against.
- The switch at the top of the panel **weights progress by estimated hours**, so a 20-hour task counts for more than a 1-hour one. A task with no estimate counts as one hour.
- Tick a task's circle to complete it, or click its name to open it. The broken-link icon unlinks it.

A task belongs to one goal at a time. If a task you pick is already linked somewhere else, it says **Move**, and linking it here moves it.

You can also link from the task's side: the task's **Goal** card has **Link a goal**.

The right-hand side

- **Owner**. Who holds the goal. **Change owner** hands it to another member.
- **Assignees**. People working on it with you.
- **Comments, Notes and Files**, the same as on a task.

Objectives and key results

An objective is the outcome. Key results are the proof. *Deliver the smoothest cutover Helix has ever seen* is the objective. *Cut cutover downtime to 2 hours* is how you'll know.



An objective with four key results

Turning a goal into an objective

On a goal's page, open and choose **Convert to objective (OKR)**. While an objective has no key results, **Convert back to a plain goal** is at the bottom of the panel. Once it has key results, remove them first.

On an objective, linked tasks are context. Progress comes from the key results.



Adding a key result

Click **Add key result**.

The New key result dialog

- **Key result.** What you'll measure. **Detail (optional)** for the rest.
- **How is it measured?**

TYPE	PROGRESS
Number	From the Start value to the Target . It works downhill too: from 8 hours of downtime to 2
Percentage	The same, in percent
Yes / no	Nothing until it's marked done, then all of it
Task count	Completed tasks linked to this key result, toward a Target (tasks)

- **Weight.** Its share of the objective, out of 100. It starts at whatever is left of the 100.
- **Check-in cadence.** **Weekly**, **Bi-weekly** or **Monthly**.
- **Owner.** Who checks in on it. It starts as you.



HEADS UP

Click **Add key result**. The type can't be changed later, so pick carefully.

Weights

Every objective has **100 points** of weight to share among its active key results. The bar above them reads **Weights: 80/100** and turns green at 100.

- Short of 100 is allowed, and said plainly: *this objective can reach at most 80%*. It won't stretch the others to make up the difference.
- Over 100 is refused.
- **Redistribute evenly** shares the 100 equally, in one click.

There's no overdraft on the weight budget. We checked.

Reading a key result

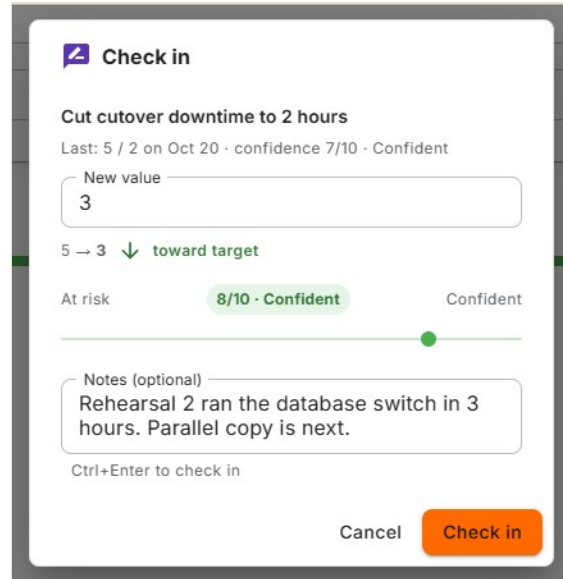
Each row shows the type icon, the name, then:

- **Where it is:** 5 / 2 or 40% / 95%, and how far it has moved, like 50% *done*.
- **Its weight**, its **status** (Not started, In progress, Achieved or Retired), its cadence and when it was last checked in on.
- **due** in orange when a check-in is waiting.
- For a task count: how many tasks are linked. **Link tasks** opens them, with their own **Link a task** and **Quick-create**.
- On the right: the owner, **Check in**, **History** and **:**.



Checking in

Click **Check in** on a key result. The dialog opens with the last check-in at the top, so you can see where you left off.

A screenshot of the 'Check in' dialog box. At the top, it says 'Check in' with a purple icon. Below that, the title is 'Cut cutover downtime to 2 hours'. The last check-in is 'Last: 5 / 2 on Oct 20 · confidence 7/10 · Confident'. There is a 'New value' input field with the number '3'. Below the input field, it shows '5 → 3' with a green downward arrow and the text 'toward target'. A progress bar shows 'At risk' on the left, '8/10 · Confident' in the middle (highlighted in green), and 'Confident' on the right. Below the progress bar is a 'Notes (optional)' text area containing the text 'Rehearsal 2 ran the database switch in 3 hours. Parallel copy is next.' Below the notes is the text 'Ctrl+Enter to check in'. At the bottom right are 'Cancel' and 'Check in' buttons.

Checking in on a key result

- **New value.** The current number. Nexus shows the move ($8 \rightarrow 5$) and whether it's **toward target** or **away from target**. For yes/no, it's a switch. For a task count, there's nothing to type: the count of completed linked tasks is recorded for you.
- **Confidence**, from 0 to 10: **At risk** (0 to 3), **Uncertain** (4 to 6) or **Confident** (7 to 10). How sure are you it'll get there?
- **Notes (optional).** What moved it, or what's in the way.

Click **Check in**, or press **Ctrl+Enter** in the notes.

TIP

Confidence is the honest part. A 9 on a key result that's going nowhere fools exactly one person, briefly. The at-risk card runs on these numbers, so a low score is how you get help.

A key result's value only changes through check-ins. **Edit** changes the name, detail, targets, weight, cadence and owner, never the current value. A wrong check-in is fixed with a new one, or by deleting it (below).



History

History (the chart icon) shows every check-in, newest first: the date, the value, the change from the one before, the confidence, who checked in, and the note. With more than one check-in, a chart shows the trend. *Lower is better* is noted when the target is below the start.

The **undo arrow** on the newest check-in deletes it, and the key result goes back to the value before. Only the newest one can go, so the history stays in order.

Retire, reactivate, delete

The **⋮** on a key result:

- **Edit.**
- **Retire.** It stops counting toward the objective and its weight leaves the budget. Its check-ins are kept. **Reactivate** brings it back if its weight still fits.
- **Delete.** Removes it for good. Only offered while it has no check-ins. After that, retire it instead.

Check-in reminders

When a key result's check-in is due, its owner gets a notification: *Time to check in on Cut cutover downtime to 2 hours*, with the objective and when it was last checked in on. Click it and the check-in opens.

- Weekly is due 7 days after the last check-in, bi-weekly 14 days, monthly one calendar month.
- One reminder per cadence, however long it's been ignored. Nexus nags, but politely.
- Reminders also go by email as a daily digest. Change that in **User settings → Notification preferences**.
- An owner with no Nexus account (an outside contact) gets no reminders.

Goals elsewhere in Nexus

- **Tasks.** A task's **Goal** card links it to a goal. On an objective's **Linked tasks**, each task lists the key results it counts toward under **Counts toward**. One task can count toward several.
- **Home.** The **Goals & focus** widget lists objectives at risk. The **Personal Goals** and **Goal Progress** quick views and the **OKR Alignment** widget can be added from **Add widget**.
- **Programs and portfolios** show their goals on their dashboards. **Client accounts** show them on the account plan under **Strategic Goals**.



Who can see a goal

A goal is seen by its **owner**, its **assignees**, anyone it's **shared** with or holds a RACI role on it, and anyone standing in for the owner. A goal that belongs to a project isn't opened up to everyone on that project, so add the people who should see it.

Change owner hands a goal to another member. Unless it's shared with you, you keep only what your other rights on it give you.

Deleting and bringing back

ⓘ → **Delete goal** (or **Delete objective**) asks first. It says what goes with it, like *with its 4 key results and 3 check-ins*, and how long the recycle bin keeps it. The linked tasks stay as they are and are linked again if it comes back.

The message afterwards has **Undo** for ten seconds. After that, restore it from the **recycle bin**.

Common questions

Why does my goal say "No tasks yet" instead of 0%?

| Nothing is linked, so there's nothing to measure. Link a task and the bar appears.

Why can't my objective reach 100%?

| Its weights add up to less than 100. Raise one, or use **Redistribute evenly**.

Why can't I change a key result's current value?

| Values move through check-ins, so the history stays true. Check in with the right number, or delete the latest check-in.

Why can't I delete a key result?

| It has check-ins. **Retire** it instead.

I can't turn on Make this an Objective.

| Objectives come with the Pro plan. On other plans the switch is greyed out and says so.



Why is my objective at risk when two key results are fine?

At risk averages the latest confidence of every key result that has a check-in. One low score can pull the average under 5.

Can someone else check in on my key result?

Its owner can, and so can anyone who can edit the objective.

Where did my reminder go?

Reminders go to the key result's owner, once per cadence. If the owner is an outside contact, nobody is reminded.

