Beyond SMART How to Write an Effective PI Objective That Business can easily assign the Business Value

John Pavlov
Partner
Director, Emerging Technologies
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SMART Objectives

Specific
State the intended outcome as simply, concisely, and explicitly as possible.

Measurable
It should be clear what a team needs to do to achieve the objective.

Achievable
Achieving the objective should be within the team’s control and influence.

Realistic
Recognize factors that cannot be controlled.

Time-bound
The time period for achievement must be within the PI.
Sample PI Objectives

• S.M.A.R.T is excellent at providing the framework to create PI Objectives but is lacks practical guidance

• Actual PI Objectives that I have seen:
  • Improve PCP selection
  • Implement Apple Pay
  • Follow RMA guidelines
  • Create QA database

• Difficult for the business to understand, and most importantly assign a Business Value (BV)
Explain it to me like I’m a four-year old
Effective PI Objectives

- **Action**: Verb – i.e., Enable, Improve, Create, Modify, etc.
- **What**: Noun – i.e., Website, Mobile, Portal, QA DB, Reports, Branding, etc.
- **Who**: The Audience – i.e., Participants, Members, Customers, Mobile Users, etc.
- **User Value**: Benefit to the User – i.e., Improved experience, Faster, New Capability, etc.
- **Business Value**: Benefit to us – i.e., Increased average sale, reduced call volume, reduced shopping cart abandonment, etc.
Effective PI Objectives – Example 1

Improve the Primary Care Physician (PCP) Selection on the Member Portal for the Member so that they can easily select their PCP thereby reducing calls to the Call Center by 20 percent.

- **Action**
- **What**
- **User Value**
- **Business Value**
- **Who**
Enable new **Digital Wallets** so that customers with Apple Pay & Google Pay can buy goods with an improved check out experience and increase sales by five percent.
Effective PI Objectives – Example 3

Modify Financial Reports for Store Finance to align to Retail Method Accounting (RMA) to consistently report Financial information based on industry standards.

- Action
- What
- Who

User Value
Business Value
Effective PI Objectives – Example 4

Create robust QA Database so that teams can accomplish end-to-end testing in 25 percent less time and reduce live site defects by 30 percent.

- **Action**
- **What**
- **User Value**
- **Business Value**
- **Who**
Questions?

Contact me to continue the conversation.

**John Pavlov**  
Partner  
Director, Emerging Technologies  
john.pavlov@cgi.com  
1-508-245-9162  
linkedin.com/in/johnpavlov/  
@john_pavlov