

Writing Effective PI objectives

SMART PI 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.

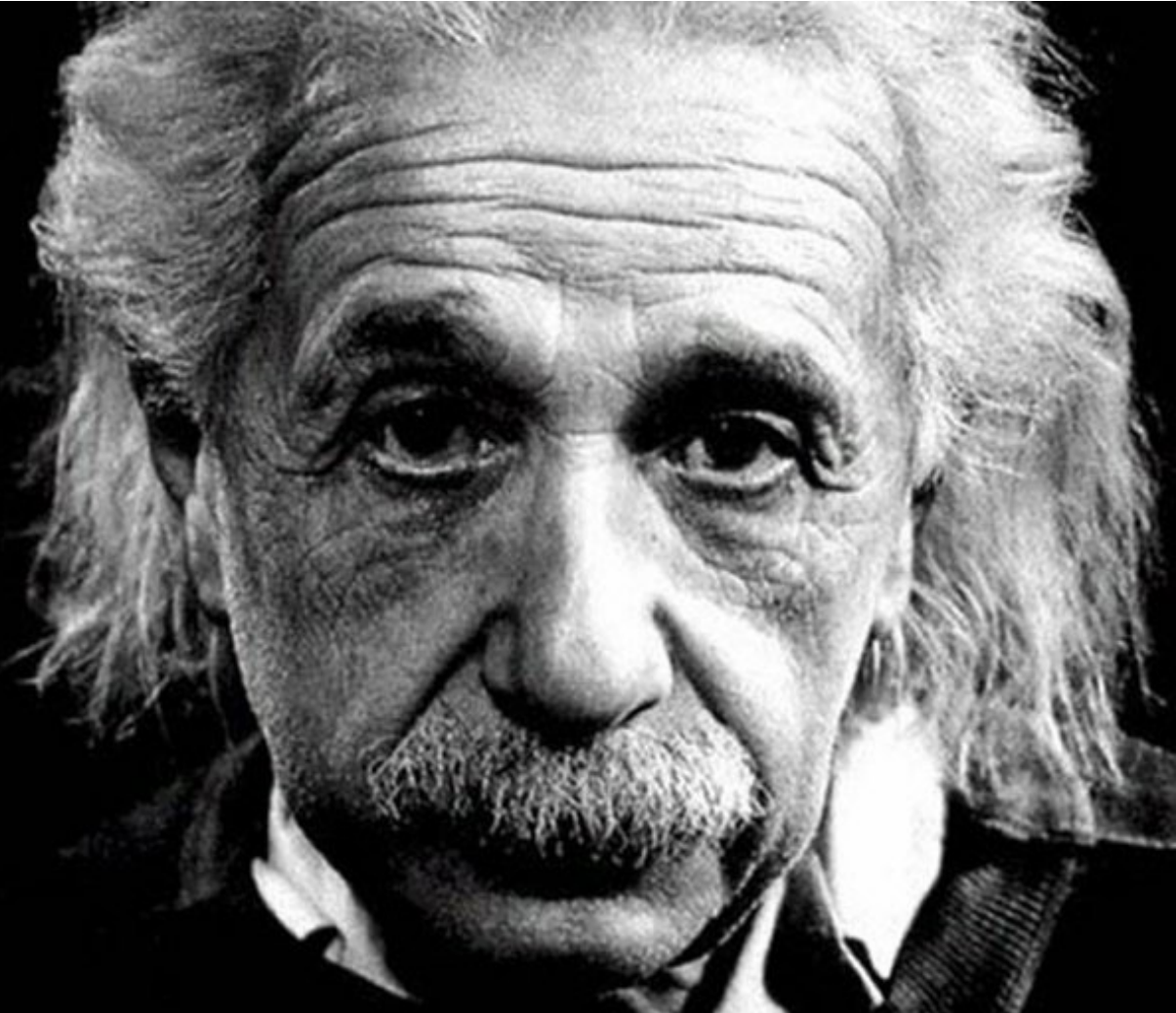
Sample PI objectives

- 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)

What I want to say is ...

If you can't
explain it to a
six year old,
you don't
understand it
yourself.

ALBERT EINSTEIN



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.

Example PI objective 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

✓ Who

✓ User Value

✓ Business Value



Example PI objective 2

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.

✓ **Action**

✓ **User Value**

✓ **What**

✓ **Business Value**

✓ **Who**

