

## How to set SMART Objectives

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### Introduction

A couple of months ago I mentioned I'd started working with Concern Worldwide on a pretty massive Drupal/CiviCRM project and was excited about the work we'd done in defining our objectives. We're now just one week away from completing our first development sprint, and although I'm pretty much all about that at this point, I still want to write about the objectives we've set for the project (and especially *today* — long story but I had to bow out of my faculty position at Social Tech Training in Toronto this week where I was meant to lead a session on setting objectives...Christopher Roy has kindly agreed to deliver the session on my behalf and I guess writing this now is partly an attempt to be there in spirit).

1. Understand organisational and/or program goals
2. Define SMART objectives
3. Test SMART objectives

*The three steps this article proposes you take when setting SMART project objectives.*

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Notwithstanding the fact that many project teams very often forget or intentionally skip setting objectives, taking the time to set them is important for a number of reasons:

- Objectives help project teams focus
- Objectives get people "on the same page"
- Objectives help define "what done looks like"
- Objectives allow us to evaluate project outcomes

Collective focus on project outcomes is pretty critical to project success, and setting objectives allows us to achieve collective focus, so we set them. That is, we *should* set them — a lot of teams don't set objectives because they find it hard, or because they

don't know how, or because they'd rather just "get on with it" (and deal with the consequences later — bad).

To make setting objectives on your projects easier, I've done a bit of research and put together the following step-by-step instructions. Enjoy!

## 1. Understand organisational and/or program goals

Back in 2006, I don't think I really understood the difference between objectives and goals. This is pretty (embarrassingly) clear if you go back and look at the "objectives" set for the Drupal migration project I worked on with Greenpeace UK that year. Those weren't objectives; those were goals. Goals and objectives are different<sup>1</sup>:

- Goals are broad; objectives are **narrow**
- Goals are general; objectives are **specific**
- Goals are long term; objectives are **short term**
- Goals cannot be measured; objectives are **measurable**

Objectives map onto goals. And once met, objectives *contribute* to the achievement of goals. So before you set project objectives, you should really understand the overarching goals of the organisation undertaking the project, or the goals of the program of which the project is a part. Right?

The project I'm working on right now with Concern is part of its "Next-Generation Web" (NGW) program (i.e. it is one of many projects to be undertaken by Concern as part of the NGW program), which has the following goals:

1. To create a world-class NGO web presence; and
2. To continuously meet or exceed the needs of Concern supporters.

To contribute to the achievement of these goals by a certain date and for a certain amount of money, we've set some narrow, specific, short term and measurable objectives for our project :)

## 2. Define SMART objectives

Narrow, specific, short term and measurable objectives are good, but SMART<sup>2</sup> objectives are even better. SMART objectives are objectives that are:

1. **Specific** — they describe a specific outcome
2. **Measurable** — they are linked to a rate, number, percentage or frequency
3. **Achievable** — with a reasonable amount of effort, they can actually be achieved
4. **Relevant** — the people involved have the necessary knowledge, authority and skill
5. **Time-based** — they include clearly defined finish and/or start dates

With Concern we've used the following format for defining our SMART project objectives, which I think has worked well and which I recommend using:

By **[INSERT DATE]**, **[INSERT WHO]** will have **[INSERT WHAT]** resulting in **[INSERT RESULTS]** by **[INSERT DATE]**.

Without the actual values inserted the above doesn't seem to have a lot of, well, *value*, I realise — here are the three SMART objectives we set for our project (I've removed the measurements because they're for internal use only at this point, but you'll get the picture):

1. By the end of August 2008, Concern's main site (<http://concern.net>) will have been re-designed, re-built, user-tested, integrated with new and/or existing e-communications, CRM and backend systems and re-launched to the public, resulting in X.X million unique website visits by December 2009
2. By the end of November 2008, 4 Concern campaign sites will have been re-designed, re-built, user-tested, integrated with new and/or existing backend systems and re-launched to the public, generating online campaign donations of € X.X million by February 2009
3. By the end of November 2008, Concern will have designed, built, user-tested, integrated with new and/or existing backend systems and launched user account management and personalisation services within Concern's main site, which, by December 2009, will result in a XX% increase in e-newsletter and RSS subscriptions, visitors staying XX% longer on the sites and XXX more personal fundraising pages being created

It took us a bit of time to figure these out, a bit of discipline, but we got through it, and once done, we were able to validate our work by testing for SMARTness :)

### 3. Test SMART objectives

Once you've written your SMART project objectives, it's good to test them as a team, or even better, with stakeholders on the project but external to the core team (i.e. those who may influence outcomes but who are not part of the day-to-day). Get them in a room or on the phone with you and test each objective one by one. Like so<sup>3</sup>:

- Is each objective specific? Ask these questions:
  - What exactly are we going to do, with and for whom?
  - Is it clear who is involved?
  - Is the intended outcome clear?
- Is each objective measurable? Ask these questions:
  - How will we know the intended change has occurred?
  - Can these measurements be obtained?

- Is each objective achievable? Ask these questions:
  - Can we get it done in the proposed timeframe?
  - Can we do this with the resources we have?
  - Is this even possible?
- Is each objective relevant? Ask these questions:
  - Can the people with whom the objective has been set make an impact on the situation?
  - Do they have the necessary knowledge, authority and skill?
- Is each objective time-based? Ask this question:
  - When will this objective be accomplished?

## Conclusion

One of the huge benefits to going through a process like this is determining whether the objectives you've set for your project are *relevant* — in my experience when teams do set objectives they often set them for people other than themselves, objectives they don't actually have the ability to achieve (e.g. objectives having to do with organisational changes they'd like to see happen but can't really influence). That and measurability. You've got to set measurable objectives. Even though you could be long gone before the outcomes of your project become measurable. SMART objectives are measurable if nothing else :)

### Endnotes:

- <sup>1</sup> Goal vs. Objective — Difference and Comparison (n.d.). Retrieved June 24, 2008, from [http://www.diffen.com/difference/Goal\\_vs\\_Objective](http://www.diffen.com/difference/Goal_vs_Objective).
- <sup>2</sup> SMART (project management) (n.d.). Retrieved June 24, 2008, from [http://en.wikipedia.org/wiki/SMART\\_\(project\\_management\)](http://en.wikipedia.org/wiki/SMART_(project_management)).
- <sup>3</sup> Setting SMART Objectives (n.d.). Retrieved June 24, 2008, from <http://www.thepracticeofleadership.net/2006/03/11/setting-smart-objectives/>.

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For more information, go to: <http://importantprojects.co.uk>