

Expanding XM: Current and Potential Use Cases

Original Report: *Operationalizing Experience Management*

SUMMARY

Organizations are systems, which means that the experiences they deliver – whether to customers, employees, partners, prospects, etc. – are all interlinked. Therefore, as a company matures its Experience Management (XM) program, it must also begin applying its newfound XM capabilities to a broader and broader array of activities, areas, and interactions. Use this tool to help you determine which use cases your organization currently manages as part of its XM efforts and identify opportunities to expand into additional use cases to support the company's long-term XM program roadmap.

FOUR PHASES OF XM EXPANSION

As organizations invest in improving their Experience Management capabilities – including customer experience (CX), employee experience (EX), product experience (PX), and brand experience (BX) – they need to be mindful that they are not overinvesting in maturing only a few, isolated experiences or, conversely, spreading their resources too thinly across too many experiences. To establish a sustainable foundation for long-term Experience Management success, organizations must mature and diffuse their XM capabilities in tandem. The path for XM Expansion is made up of four phases:

- 1. Phase 1. Isolated Experiences.** Organizations will start practicing XM in one use case or across a few tightly related use cases. For example, a organizations may kick off its XM efforts by taking action based on the results of a relationship NPS survey and a contact center post-transaction survey or by conducting an annual engagement study and a quarterly employee pulse survey.
- 2. Phase 2. Expanded Experiences.** After building some XM maturity and seeing the value in the initial use cases, organizations will expand into other similar areas or enhance their existing capabilities. For instance, based on the results of its initial NPS and post-transaction surveys, an organization may increase the number of its CX listening posts and add more advanced capabilities, such as text and predictive analytics.
- 3. Phase 3. Adjacent Experiences.** Once there are several use cases underway, organizations will find that there are elements of other experiences that impact the success of those use cases, so they will incorporate those experiences into their XM program. After expanding XM across multiple CX use cases, for instance, organizations often recognize that they need to incorporate EX activities into those efforts to achieve their CX goals. Or efforts might start with EX and then expand into BX after the organization recognizes that brand perception is a critical obstacle to attracting new talent.
- 4. Phase 4. Extended Experiences.** Once organizations have applied XM to the major experience areas (CX, EX, BX, and PX), they will look to apply XM to each new experience they create, whether it's launching a new product or rolling out a new community fundraising event. They'll also start to focus on experiences that are outside of their control but within their sphere of influence, such as the EX delivered by recruiting partners or the CX delivered by distributors or other channel partners.

HOW TO USE

To help you identify opportunities for diffusing your XM capabilities across your organization, you can use this tool in a number of ways:

- + **Self-evaluation.** Fill out this worksheet yourself by first identifying the use cases your team is currently driving as well as use cases in adjacent experiences that your team is collaborating on to some extent. Then determine where there are opportunities across the experiences to explore other use cases.
- + **Group discussion.** Use the worksheet in a group exercise. After each individual completes it, discuss the current and potential use cases you each marked as well as areas of agreement and disagreement in the results.
- + **Action planning.** Develop plans for applying XM capabilities to more use cases across the organization. For more information on diffusing and maturing XM, read the original report, *Operationalizing Experience Management*.

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Review the list of common use cases within the experience area(s) your team is currently responsible for managing (CX, EX, PX, or BX). Put a checkmark in the “current” column next to the use cases you are currently driving and in the “potential” column next to the use cases you would like to explore further. Then look across the adjacent experiences you are not currently responsible for driving and put a checkmark in the “current” column next to the use cases where you are currently collaborating to some degree with the team who owns those experiences. Finally, put an checkmark in the “potential” column next to the use cases in adjacent experiences that you like to consider expanding your collaboration into.

| | | CURRENT | POTENTIAL |
|----------------------------|--|---------|-----------|
| Customer Experience | Relationship survey | | |
| | Post-purchase survey | | |
| | Post-support survey | | |
| | Digital/website feedback (intercepts) | | |
| | Other interaction-based survey(s) | | |
| | User Experience research (UX testing, usability) | | |
| | Website/Mobile Experience Optimization | | |
| | In-product Feedback | | |
| | CX Feedback from Employees | | |
| | Online reputation management (social listening) | | |
| | Customer lifetime value studies | | |
| | CX competitive benchmarking | | |
| | Ad hoc market research | | |
| Employee Experience | Employee Engagement annual survey | | |
| | Employee Pulse surveys | | |
| | Candidate Experience survey | | |
| | Exit interviews | | |
| | Onboarding/New Hire survey | | |
| | Training Feedback survey | | |
| | Other employee lifecycle survey(s) | | |
| | Online reputation management (social listening) | | |
| | Benefits Optimization | | |
| | Feedback on tools and technology | | |
| | Ad hoc employee research | | |
| Product Experience | In-product Feedback | | |
| | Feature prioritization study | | |
| | Pricing study | | |
| | Product concept testing | | |
| | User Experience research (UX testing, usability) | | |
| | Launch Feedback | | |
| | Online reputation management (social listening) | | |
| | Market Trends study | | |
| Brand Experience | Brand Awareness testing | | |
| | Brand Perception survey | | |
| | Brand Loyalty tracking | | |
| | Attitude and Usage Studies | | |
| | Creative / Ad testing | | |
| | Market segmentation (demographic, psychographic, etc.) | | |
| | Competitor Analysis | | |
| | Online reputation management (social listening) | | |