

Employee Experience Maturity: Assessment

SUMMARY

Organizations don't master employee experience (EX) overnight. XM Institute research shows that they evolve through five stages of maturity as they gradually build the six XM Competencies and 20 XM Skills. Use the EX Maturity Assessment to evaluate how you are currently performing in each of these Competencies and Skills and determine where your EX program falls across the five maturity stages. Then review the information provided on pages 3 through 8 to develop plans for making progress towards your EX goals.

FIVE STAGES OF EMPLOYEE EXPERIENCE MATURITY

Any company can improve portions of its employee experience (EX), but only those that go beyond superficial changes will be able create lasting differentiation and increase employee loyalty. As organizations go about mastering the six XM Competencies – LEAD, REALIZE, ACTIVATE, ENLIGHTEN, RESPOND, and DISRUPT – they will evolve through five stages of maturity:

- 1. Stage 1: INVESTIGATE.** The organization is not focused on EX as a strategic opportunity. Companies in this stage should work on identifying the “best” first steps and building buy-in with senior executives to acquire the resources needed for moving forward.
- 2. Stage 2: INITIATE.** As leaders see the potential value in EX, they investigate how EX can help their organization and kick off isolated pockets of EX activities. An ad-hoc or part-time team is usually formed, often drawing from existing employees in other roles, to head up the company's effort to take coordinated actions to educate executives, define the initial strategy, and formalize Voice of Employee efforts.
- 3. Stage 3: MOBILIZE.** Once executives view EX as a strategic priority, the organization taps into full-time EX staff who distribute insights and drive experience improvements. This is a powerful stage where the organization begins to see results by finding and fixing pain points, sharing insights, involving employees in closing the loop, and defining what good EX looks like for the entire organization.
- 4. Stage 4: SCALE.** With strong EX practices in place, the organization systematically uses insights to identify and improve experiences and invests in engaging the entire workforce in EX. Companies in this stage should work on consistently using EX metrics and insights to improve EX and track the impact of their EX efforts. They should also deeply integrate EX into HR processes to reinforce good EX behaviors in all employees.
- 5. Stage 5: EMBED.** In this final stage, EX Skills are ingrained across the organization and it is able to rapidly adapt to shifts in the marketplace. Mature EX programs enable an organization to continuously learn, propagate insights, and rapidly adapt to the needs and expectations of all relevant stakeholders.

HOW TO USE

To help you gauge your organization's progress on its employee experience journey, you can use this tool in a number of ways:

- + **Self-assessment.** Take this assessment yourself and identify the strengths and weaknesses of your organization's EX management efforts.
- + **Group discussion.** Use the assessment in a group exercise. After each individual completes it, discuss the strengths and weaknesses identified, as well as the areas of agreement and disagreement in the results.
- + **Action planning.** Develop plans for making progress towards becoming an employee-centric organization using the information provided after the assessment.
- + **Progress tracking.** Repeat the assessment every six to twelve months to track your progress.

Employee Experience Maturity: Assessment

To what extent does your organization's EX program demonstrate the following behaviors ("1" to "5")?

1 = Never **2** = Infrequently **3** = Often **4** = Almost Always **5** = Always

1. Maintain a clear and shared vision for employee experience efforts	
2. Track your progress against a well-defined program roadmap	
3. Maintain governance structures that provide appropriate decision-making, alignment, accountability, and conflict resolution for your efforts	
LEAD average	
4. Forecast the business value of your EX efforts	
5. Adjust your efforts to make sure you deliver on your forecasts	
6. Prioritize your EX activities based on a well defined set of metrics	
REALIZE average	
7. Keep employees and partners informed about the value and progress of your efforts	
8. Create mechanisms to build and enhance key EX skills across the organization	
9. Ensure employees have the training and motivation to adopt employee-centric behaviors	
ACTIVATE average	
10. Combine employee experience data and operational data to generate actionable insights	
11. Capture appropriate signals from targeted employees at the appropriate times	
12. Analyze employee experience data and operational data to prioritize actions	
13. Distribute tailored insights to stakeholders that make it easy for them to take action	
ENLIGHTEN average	
14. Systematically follow up with employees to fix problems that are uncovered from insights	
15. Make ongoing improvements to operational processes based on employee experience insights	
16. Make strategic decisions based on employee experience insights	
17. Infuse employee experience insights into key operating processes and systems	
RESPOND average	
18. Uncover opportunities for transformative employee experiences	
19. Apply human-centric design approaches to the improvement of employee experiences	
20. Ensure new experiences are delivered consistently when they are rolled out across the organization	
DISRUPT average	

OVERALL total

EVALUATE THE RESULTS:

XM Competencies (average scores):

Less than **2.60**: **Very Weak**
2.60 to **3.29**: **Weak**
3.30 to **3.89**: **Adequate**
3.90 to **4.49**: **Strong**
4.50 to **5.00**: **Very Strong**

Maturity Stage (overall total):

6 to **14**: Stage 1: **Investigate**
15 to **18**: Stage 2: **Initiate**
19 to **22**: Stage 3: **Mobilize**
23 to **26**: Stage 4: **Scale**
27 to **30**: Stage 5: **Embed**

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COMPETENCIES are the skills and actions that establish XM as a discipline.

COMPETENCIES	DEFINITIONS	XM SKILLS	EXAMPLES
LEAD	Architect, align, and sustain successful XM efforts.	<ul style="list-style-type: none"> + Strategy + Program Roadmap + Governance 	<ul style="list-style-type: none"> - Program vision, mission, goals, priorities - Workstreams of initiatives, resource allocation, progress tracking - Makeup of EX team & steering committee - Plan for holding people and teams accountable for EX results
REALIZE	Track and ensure that XM efforts achieve well-defined business objectives.	<ul style="list-style-type: none"> + Value Planning + Value Delivery + Metrics Management 	<ul style="list-style-type: none"> - Setting goals and monitoring progress - Business impact/ROI modeling, demonstrating value (retention, productivity, promotions) - Metrics being tracked (engagement, satisfaction, key drivers, etc.)
ACTIVATE	Ensure organization has the skills, support, and motivation to achieve desired results.	<ul style="list-style-type: none"> + Ecosystem Communications + Expertise Building + Role-Based Enablement 	<ul style="list-style-type: none"> - Internal communications, external communications - Employee training, coaching, tools, and support - Integration into HR processes - Rewards, recognition, celebrations
ENLIGHTEN	Provide actionable insights across the organization.	<ul style="list-style-type: none"> + X- and O-Data Integration + Experience Monitoring + Insights Discovery + Insights Distribution 	<ul style="list-style-type: none"> - Survey design & sampling methodology - Measurement of key "moments that matter" and critical segments - Dashboards deployed and role-based distribution and alerts - Advanced analytics (predictive, text/speech, etc.)
RESPOND	Prioritize and drive improvements based on insights.	<ul style="list-style-type: none"> + Immediate Response + Continuous Improvement + Strategic Decision-Making + Process Integration 	<ul style="list-style-type: none"> - Use insights to improve experiences, diagnose root cause, prioritize initiatives - Integrate insights into strategic decision and internal processes (enterprise transformation, process improvement, innovation, etc.)
DISRUPT	Identify and create experiences that differentiate the organization.	<ul style="list-style-type: none"> + Experience Visioning + Experience Design + Experience Integration 	<ul style="list-style-type: none"> - Employee journey mapping & persona development - Pilot programs, employee co-creation - Human-centric design, Design Thinking - Coordinated planning and support of new experience roll-out

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Stage 1: INVESTIGATE

Not every organization understands the importance of EX. In this first stage of maturity, the organization is not yet focused on EX as a strategic opportunity, although it supports essential HR functions and may be investing in “Employee Satisfaction” or similar survey. A single “champion” emerges to encourage an exploration of EX and what it can mean for the organization.

Recommendations:

- + Just get started educating yourself and executives
- + Review data that’s already been collected
- + Focus on a few key listening points
- + Share insights in a tailored format with select people
- + Demonstrate value with quick wins

TYPICAL EX ACTIONS

LEAD

- ❑ HR is compliance-focused with most attention directed at core functions like compensation, benefits, and administration
- ❑ Senior leaders are skeptical of the value of EX and the topic is not clearly or consistently understood
- ❑ Begin to identify and expand the visibility of any “EX” activities across the organization

REALIZE

- ❑ No established core EX metrics or clear articulation of the value that EX will create for the organization
- ❑ People-related activities perceived as costs and approached with “check the box” mindset

ACTIVATE

- ❑ Individual or small team of EX advocates consume information about EX, feedback, metrics, etc. from a variety of external sources
- ❑ Begin to educate senior executives about EX

ENLIGHTEN

- ❑ May identify some limited customer feedback being collected in silos in the organization, typically around a visible service touchpoint
- ❑ Use a simple approach/tool to send a survey or surveys to customers. Survey design and sampling approach are rudimentary

RESPOND

- ❑ Any action limited to communication of results with no deeper insights or recommendations

DISRUPT

- ❑ Limited understanding of key employee moments that matter. Little to no consistency in understanding the employee population and unique segments

Employee Experience Maturity: Assessment

Stage 2: INITIATE

As leaders see the potential value in EX, they start to investigate how EX can help their organization and kick off pockets of EX activities. This second stage of maturity usually begins with the organization assigning responsibility to HR for developing a better understanding of what the organization needs to focus on to improve its EX. It also begins to consider how to be more strategic with its employee feedback efforts.

Recommendations:

- + Develop initial EX strategy and continue to focus on raising executive understanding and buy-in
- + Focus on a few use cases
- + Start looking into an XM platform
- + Use insights to drive action on specific pain points
- + Kick off internal communications that explain why EX is important
- + Identify preliminary business impacts of EX

TYPICAL EX ACTIONS

LEAD

- HR leader steps into EX leadership, often as an additional assignment to their primary job. An ad-hoc team is formed
- Expand senior leaders' understanding of EX and jointly define EX vision and what "success" looks like to employees and organization
- Identify a few opportunities where EX can help the organization. Draft a preliminary EX roadmap and estimate the required resources

REALIZE

- Build a preliminary business case around the ROI of EX, often using external benchmark data not own data
- Put initial EX metrics in place – although those may be referred to as employee satisfaction or engagement measures or limited to one or two lifecycle moments

ACTIVATE

- Begin to communicate about EX and employee feedback to all employees, especially people managers, tapping into existing communication channels. Focus is on building trust in the process and emphasizes why it's important and stories about what good EX looks like

ENLIGHTEN

- Focus is on measurement and monitoring of core metrics more than action
- Basic reporting delivered to top leaders on periodic basis
- Basic integrations created between EX and the HRIS system, primarily to enable a program based on organizational hierarchy

RESPOND

- Senior leaders identify a few EX pain points to work on improving
- Individual groups or teams drive some action planning but do not share or discuss

DISRUPT

- Might begin to talk about designing an experience that reflects the organization's employer brand/employee value proposition
- Begin to recognize unique employee segments

Employee Experience Maturity: Assessment

Stage 3: MOBILIZE

Once executives view EX as a strategic priority, full time HR or EX staff distribute insights and drive experience improvements. Organizations in this third stage of maturity are often investing more to augment and expand their Voice of Employee programs to drive action, beginning to construct employee journey maps, and engaging all employees in understanding and demonstrating good EX behaviors.

Recommendations:

- + Establish active, cross-functional EX governance model
- + Further expand experience monitoring use cases and analytics capabilities
- + Create EX-centric tools, training, and recognition efforts
- + Shift focus from fixing isolated problems to improving cross-functional operational processes
- + Start using employee journey mapping and design personas

TYPICAL EX ACTIONS

LEAD

- ❑ EX confirmed as strategic priority and a full-time EX core team established. Cross-functional governance structure for EX efforts in place to involve entire organization
- ❑ HR emerging as strategic function as value of EX begins to be embraced
- ❑ Define EX strategy, roadmap, and resource requirements with key stakeholder input

REALIZE

- ❑ Define and start tracking core EX metrics and begin analysis to identify key drivers of those metrics; metrics typically being monitored at company and some lifecycle moments
- ❑ “Scores” may provide much of the vocabulary to talk about EX
- ❑ EX metrics are regularly reviewed by senior leaders
- ❑ Begin to monitor the relationship between core EX metrics and business outcomes/O-data to refine the EX ROI model

ACTIVATE

- ❑ Hires HR/EX team members with the skills, capability, and expertise to support both EX strategy and enablement of teams
- ❑ Educate senior leaders about what it takes to change EX and their role in driving transformation and accountability
- ❑ Begin to define employee behaviors and embed into formal communications and training across the organization, especially with people managers and individuals responsible for “closing the loop”/acting on employee feedback
- ❑ Adjust internal celebrations and award programs to reinforce desired employee behaviors
- ❑ Develop an approach for identifying, celebrating, and sharing EX best practices to the people who are driving EX changes

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Stage 3: MOBILIZE (continued)

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TYPICAL EX ACTIONS

- | | |
|------------------|---|
| ENLIGHTEN | <ul style="list-style-type: none">□ Listening posts are expanded to more touchpoints and go beyond surveys□ Reporting moves closer to real-time and dynamic and role-based insights are shared broadly across the organization□ Shift focus away from total scores and more focus on the underlying experiences and insights on how to improve□ Advanced analytics utilized to draw deeper insights and to combine EX data with O-data and X-data□ As employee listening channels proliferate, takes preliminary steps to mitigate survey fatigue |
| RESPOND | <ul style="list-style-type: none">□ Deliver personalized recommendations automatically alongside insights to empower all employee to own their own experience and act based on insights□ Define closed-loop process to both enable action and to monitor impact at manager and leader levels□ Single action-planning system across organization with both top-down and bottom-up planning / monitoring progress□ Discussions and sharing around EX actions and behaviors happening increasingly occur across the basis on a regular basis□ Systems are in place to create accountability for closed loop feedback |
| DISRUPT | <ul style="list-style-type: none">□ Experiment with employee journey mapping and start focusing on a holistic view of experiences and touchpoints□ Begin to identify EX “moments that matter”□ Begin to experiment with defining employee segments relevant to understanding employee feedback data□ Begin to identify key trends that will shift employee needs and expectations and enable new types of work models into the future |

Employee Experience Maturity: Assessment

Stage 4: SCALE

With robust EX practices in place, the organization systematically uses insights to identify and improve experiences, and infuses EX into its overall strategic priorities. In this advanced stage of EX maturity, organizations integrate EX into HR processes like hiring, performance management, promotion, and incentive systems to reinforce good EX behaviors. They also redesign many of operational processes, work routines, and tools using employee insights and actively use EX metrics to measure its impact on the business.

Recommendations:

- + Deeply integrate EX action planning into day-to-day routines at all levels
- + Use advanced analytics to combine experience, operational, and behavioral data for deeper understanding
- + Link EX metrics to business outcomes with ROI assessments
- + Translate key EX drivers into employee behaviors that support positive employee experiences

TYPICAL EX ACTIONS

LEAD

- ❑ “EX program” is defined holistically, with measurement and action-taking processes designed to support program objectives
- ❑ EX strategy and roadmap are clearly aligned to business objectives and teams are assigned accountability for executing on roadmap. Activity streams feed into single point of oversight that regularly reviews for simplicity and alignment.
- ❑ Strong EX team and cross-functional governance are in place, with EX champions recruited from across the business at all levels
- ❑ Senior executives are visibly engaged and mandating changes to how the business operates based on insights

REALIZE

- ❑ EX metrics captured at key “moments that matter” for important employee segments and journeys
- ❑ Regularly run ROI model to confirm the value of overall EX program
- ❑ Connect all EX projects with targeted metrics and business impact, and regularly report results on successes and failures
- ❑ Begin exploring connection between EX and CX metrics (X- and O-data)

ACTIVATE

- ❑ Language inside company around EX is now “we and us” not “HR or them.” Everyone shares same understanding of what EX is and why it is important and the role they play
- ❑ Has clear change management plan for transformation, along with mindset and behavior changes to get there. Employee groups know what will happen to them and what change is required from them
- ❑ Begin to distribute EX capabilities across the organization
- ❑ Include EX behaviors in competency models for all employees. Use rewards and recognition programs to align behaviors with EX metrics
- ❑ Institute mechanisms for employees to share ideas and feedback on other XM efforts and opportunities at the organization (embedded processes for VoE on XM)

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Stage 4: SCALE (continued)

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TYPICAL EX ACTIONS

- | | |
|------------------|--|
| ENLIGHTEN | <ul style="list-style-type: none"><input type="checkbox"/> Listening is dynamically driven and adapts to the current needs of the business<input type="checkbox"/> Use O-data to improve feedback efficiency by better targeting employees with specific questions at key moments<input type="checkbox"/> Insights are automatically generated and distributed for all levels of the organization - not dependent on analysts<input type="checkbox"/> Use predictive analytics to identify and address undesirable employee outcomes (e.g., attrition, no leadership bench)<input type="checkbox"/> Analytics combine feedback with operational and behavioral data for deeper understanding<input type="checkbox"/> Insights are integrated into existing everyday workflows and tailored to employee needs<input type="checkbox"/> Business leaders take ownership of experience monitoring and shaping what insights they seek from the program |
| RESPOND | <ul style="list-style-type: none"><input type="checkbox"/> Maintains balance of problem and opportunity focus - closing gaps and continuous growth towards excellent experiences for all employees<input type="checkbox"/> Guidance on actions and behaviors are based on proven impact on core EX metrics and business objectives<input type="checkbox"/> Taking action happens informally and formally, ingrained into day-to-day routines of managers and employees, supported by behavioral-based “nudges” or reminders<input type="checkbox"/> X- and O-data are combined to prioritize EX continuous improvement projects and changes to operating processes<input type="checkbox"/> EX insights feed strategic planning processes and enterprise-level prioritization of key objectives<input type="checkbox"/> EX insights are an input for CX, BX, and PX and collaboration is happening more regularly across groups |
| DISRUPT | <ul style="list-style-type: none"><input type="checkbox"/> Develop approaches for tracking, measuring, and designing employees’ entire journeys and lifecycle<input type="checkbox"/> Develop employee segmentation based on behavior, sentiment, preferences, and performance<input type="checkbox"/> Identify and prioritize the most impactful employee “moments that matter” for experience improvement<input type="checkbox"/> Regularly integrate findings into employee brand/value proposition shared externally |

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Stage 5: EMBED

In this final stage of maturity, EX skills and capabilities are engrained across the organization and employee insights are captured across multiple, integrated touchpoints. Employee experience is the basis for its ongoing differentiation. The organization has integrated EX into everyday decisions, processes, and routines and is aligned on the value of EX.

Recommendations:

- + Integrate EX insights into leader and manager decision-making tools
- + Reinforce desired EX behaviors through all people processes and tools to enable work
- + Deeply involve diverse population of employees in design of experience improvements
- + Continue to diffuse XM efforts into other experience areas

TYPICAL EX ACTIONS

LEAD

- ❑ View employee experience as a core differentiator and competitive advantage of the organization
- ❑ EX strategy and roadmap help the company maintain focus on EX as other priorities emerge in the business and compete for attention and resources
- ❑ Everyone in the organization understands they have responsibility for EX and what that means in their role
- ❑ Gather input from employee representatives across organization on critical EX governance actions

REALIZE

- ❑ Monitor and report on a robust EX ROI model in place.
- ❑ Equal or stronger focus on employee behaviors that support EX as on ROI models
- ❑ Embed EX metrics in executive scorecards alongside key operational and financial metrics
- ❑ Relevant EX metrics and drivers measured and reported for people managers as part of performance management processes

ACTIVATE

- ❑ Use federated centers of excellence to distribute specialized EX capabilities across all business units
- ❑ Employees understand key EX drivers and goals how they play a part in their own and others' experiences at work
- ❑ Reinforce desired EX mindsets and behaviors through all employee-facing processes including hiring, performance management, promotion, and rewards/recognition

ENLIGHTEN

- ❑ Employee feedback is seen as a valuable input to decision making and people actively seek out new insights
- ❑ Insights are seamlessly integrated into leader and employee tools and X- and O-data is used to monitor shifts and accelerate action on employee experience gaps
- ❑ Key organizational behaviors are driven by employee insights, alongside other metrics

RESPOND

- ❑ EX insights always used as part of strategic decision-making
- ❑ Recommendations are delivered on an ongoing basis and in-context of the moment
- ❑ Daily action taking place based on EX insights
- ❑ Frontline employees are empowered to act

DISRUPT

- ❑ Involves employees in designing not only EX improvements but also product innovations and customer experience improvements through co-creation and ongoing testing
- ❑ Assembles cross-functional team to roll-out and enable new experiences to employees