

Leading XM-Centric Change: Strengths and Gaps

Original Report: *Introducing Employee-Engaging Transformation*

SUMMARY

Organizations today have ambitious goals for improving their Experience Management (XM), including customer experience, employee experience, product experience, and brand experience. But XM change isn't easy; it requires significant transformation across almost every aspect of a business's operations. This means that employees across the organization are going to need to change how they do their day-to-day jobs. Use this worksheet to help you identify existing gaps and strengths in your XM-centric change strategies.

FIVE STRATEGIES FOR XM TRANSFORMATION

XM transformation efforts must be focused on changing the way employees do their everyday jobs. XM Institute research examined how successful organizations approach this challenge and developed an approach to XM change that's focused on aligning employee attitudes and behaviors with the organization's desire to change. To succeed with this approach, organizations must incorporate five practices into their transformation approach:

- 1. Connect Employees with the Vision.** Many transformation efforts suffer from visions that are vague, too high-level, or fail to resonate with employees. XM transformation requires the organization to clearly define and convey not only what the future state is, but why moving away from the current state is imperative for the organization, its employees, and its customers.
- 2. Attack Ongoing Obstacles.** The difference between the success and failure of a change effort often comes down to the ongoing role that leaders play. XM transformation requires leaders to realize that change is a long-term journey and commit to working together until the organization has fully embedded the transformation into its systems and processes.
- 3. Enlist Key Influencers.** When undertaking large-scale change, companies often overlook middle managers, who, in reality, are an important, influential group of employees during any change effort. XM transformation requires middle managers to be invested in the transformation and understand their unique role in supporting their employees' change journeys.
- 4. Empower Employees to Change.** The heart of successful transformation is really the employees who actively participate in making change efforts a reality. XM transformation requires frontline employees to operate in an environment where they first help to shape the change and are then enabled to implement that change.
- 5. Share Impactful, Informative Messages.** Change efforts can falter when they share too little information, provide disjointed messages, or leave out compelling content like insights and success stories. XM transformation requires the organization to share information about the change through a variety of means that balance both the practical and the inspirational elements for each target audience.

HOW TO USE

To help you identify current strengths and existing gaps in your XM transformation efforts, you can use this tool in a number of ways:

- + **Self-evaluation.** Fill out this worksheet yourself by first marking existing strengths of your XM change efforts, then identifying gaps in your transformation action plan.
- + **Group discussion.** Use the worksheet in a group exercise. After each individual completes it, discuss the current strengths and gaps you each marked as well as areas of agreement and disagreement in the results.
- + **Action planning.** Develop plans for leveraging strengths and closing gaps in your XM transformation efforts. For inspiration and examples of how to lead XM-change efforts, read the original report, *Introducing Employee-Engaging Transformation*.

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First, in the “strength” column, check off the XM transformation practices that your organization is already consistently strong at. Then, in the “gap” column, mark practices where your change efforts require additional investment and work.

		STRENGTH	GAP
Connect Employees with the Vision	The company has a clear vision statement that explains why the change is important to the company, its employees, and its customers.		
	The company defines specific employee behaviors — from executives to the frontline — that are required to support the vision.		
	The vision for the change is reflected in the performance measures and metrics of both the company and of its employees.		
Attack Ongoing Obstacles	Leaders’ goals and objectives are aligned with what is needed for the transformation’s success.		
	Senior leaders are assigned specific responsibilities for communicating and reinforcing the change.		
	Leaders keep the company focused on the long-term benefits of the change during times when the company navigates obstacles or faces short-term setbacks.		
Enlist Key Influencers	The company specifically targets middle managers to build buy-in and support for the change.		
	Middle managers receive training and support on critical behaviors needed to support change in their specific organizations.		
	Middle managers are trained to help employees understand the connection between their individual contributions and their team’s role in helping the organization achieve its goals.		
Empower Employees to Change	The company actively solicits employee feedback throughout the transformation process to understand and overcome obstacles.		
	Employees are trained and coached on the new behaviors needed to succeed as the change takes hold.		
	The company designs recognition and reward programs that focus specifically on reinforcing employees who demonstrate the new behaviors required for the change to succeed.		
Share Impactful, Innovative Messages	The company has a well-structured, formal campaign to communicate the importance and the progress of the change to employees.		
	Experience management success stories are shared throughout all stages of the transformation process to reinforce the importance of the change.		
	The company creates opportunities for a two-way dialogue with employees about the change.		