

# Responsibilities of an XM Core Team: Strengths and Gaps

Original Report: *The Federated Customer Experience Model*

## SUMMARY

Whether an organization is managing experiences – like customer, employee, brand, or product – individually or in a cohesive governance model, an *XM core team* is an essential component of XM efforts. It works with senior leadership to set the strategic direction of the XM program and defines the standardized methodologies, tools, and approaches used across the organization. This core team is also responsible for generally managing the portfolio of XM activities on a daily basis and circulating best practices across the organization. Use this worksheet to help you identify your XM core team's current responsibilities as well as opportunities to expand and strengthen the areas the team owns and manages.

## FIVE AREAS OF AN XM CORE TEAM'S RESPONSIBILITIES

XM core teams serve as the main coordinator of XM efforts across an organization, overseeing the setting of collective goals and objectives, enforcing enterprise-wide standards to prevent localized deviation, and acting as a hub for cross-pollination of ideas and success stories. To be effective, the XM core team should facilitate:

- 1. Enterprise XM Strategy and Governance.** Working with the CEO and other senior leaders, the XM core team defines a common XM vision, strategy, and priorities for the organization. This includes aligning the XM strategy to business and brand strategies and prioritizing how XM resources will be invested to support the strategy. The XM core team also establishes a governance model to drive on-going oversight and accountability for executing XM initiatives across the organization.
- 2. Insights, Metrics, and Reporting.** The core focus of any XM effort is to measure and improve experiences. The XM core team manages the approaches and tools that provide relevant and timely insights to the organization. The XM core team coordinates everything from the data rules and metrics and measurement frameworks to how data and insights will be reported and distributed across the organization.
- 3. Standard Methodologies and Tools.** It's hard for an enterprise XM effort to be successful when different parts of the organization are not acting consistently. The XM core team introduces and institutionalizes standard XM tools and processes. This includes identifying emerging practices and tools and defining how they will be used and collaborating with other teams to shape XM-related training, systems, tools, performance management, and recognition approaches.
- 4. Central XM Storyline.** The XM core team defines the enterprise-wide XM communication plan and creates the storyline for the company by identifying key themes derived from both the company's XM strategy and its customer and employee feedback. This work includes customizing key messages for distinct audience segments and coaching executives on the content of their XM-related communications.
- 5. Portfolio Management.** As XM-related efforts become distributed across the company, the XM core team focuses on the portfolio of work being done by others in order to track progress across the organization. This includes identifying collaboration opportunities, cross-pollinating key learnings across projects and teams, and monitoring other teams' progress on their XM commitments.

## HOW TO USE

To consider the current and potential future responsibilities for your XM core team, you can use this tool for:

- + **Self-evaluation.** Fill out this worksheet yourself by first marking existing strengths of your XM core team, then identifying gaps in your team's responsibilities.
- + **Group discussion.** Use the worksheet in a group exercise. After each individual completes it, discuss the current strengths and gaps you've identified as well as areas of agreement and disagreement in the results.
- + **Action planning.** Develop plans for expanding strengths and closing gaps in your XM core team's responsibilities. Or, if you are in the later stages of maturity, identify which responsibilities you may want to enable other teams to take ownership for executing.

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First, in the “strength” column, check off the activities that your XM core team successfully owns and manages. Then, in the “gap” column, mark responsibilities that the team should consider taking on or improving.

|  |  | STRENGTH | GAP |
|--|--|----------|-----|
| <b>Enterprise XM Strategy and Governance</b> | Aligns XM strategy to business and brand strategy  |          |     |
|  | Builds buy-in among senior executives for company’s XM strategy  |          |     |
|  | Prioritizes how XM resources (time, money, people) will be invested to support XM strategy   |          |     |
|  | Establishes governance model and engages regularly to share updates, gather input, and request assistance                                |          |     |
|  | Implements accountability model for line of business XM efforts  |          |     |
|  | Builds and manages network of company-wide XM champions  |          |     |
| <b>Insights, Metrics, and Reporting</b>      | Manages all elements of enterprise insights program, including standard surveys and reporting  |          |     |
|  | Defines universal XM metrics and measurement frameworks  |          |     |
|  | Delivers all executive-level XM reporting  |          |     |
|  | Selects insights vendors and other service providers and identifies emerging practices and tools   |          |     |
|  | Monitors insights efforts across distributed teams or functions to ensure compliance with enterprise standards                           |          |     |
| <b>Standard Methodologies and Tools</b>      | Identifies established and emerging XM practices and tools, and defines how they are used at the company                                 |          |     |
|  | Selects vendors and other service providers to support use of standard XM methodologies and tools  |          |     |
|  | Collaborates to shape XM related employee training, performance management, incentives, and feedback processes at the company level      |          |     |
|  | Establishes a process assurance approach to review the effectiveness of other groups and teams in using standard methodologies and tools |          |     |
| <b>Central XM Storyline</b>                  | Defines enterprise-wide XM communication plan that cascades across the business  |          |     |
|  | Identifies key XM messages and how they need to be adapted for each target audience  |          |     |
|  | Coaches executives on content of their XM related messages   |          |     |
|  | Contributes input to customer-facing messages about XM   |          |     |
| <b>Portfolio Management</b>                  | Shares key learnings and best practices across the company   |          |     |
|  | Identifies cross-functional collaboration opportunities  |          |     |
|  | Monitors other teams’ progress on their XM commitments   |          |     |
|  | Engages with distributed centers of excellence to support overall XM strategy  |          |     |
|  | Looks for signs indicating company’s XM priorities or investments need to be adjusted  |          |     |