

Experience Management Maturity: Assessment

SUMMARY

Organizations don't master Experience Management (XM) overnight. XM Institute's research shows they evolve through five stages of maturity as they gradually master the six XM Competencies and 20 XM Skills. Use the XM Maturity Assessment to evaluate how you are currently performing across each of these Competencies and Skills and determine where your XM program falls across the five maturity stages. Review the information provided on page 3 to help you develop plans for accelerating your capabilities in each of the six Competencies.

FIVE STAGES OF EXPERIENCE MANAGEMENT MATURITY

Experience Management (XM) refers to *the discipline of using experience and operational data to measure and improve the four core experiences of a business: customer experience (CX), employee experience (EX), product experience (PX), and brand experience (BX).** While any company can improve portions of its XM capabilities, only those that go beyond superficial changes will be able to create lasting differentiation and increase loyalty. As organizations go about mastering the six XM Competencies (see page 3), they will evolve through five stages of maturity:

- 1. Stage 1: INVESTIGATE.** The organization is not focused on XM 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 XM, they investigate how XM can help their organization and kick off isolated pockets of XM 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 insights programs, including Voice of Customer and Voice of Employee efforts.
- 3. Stage 3: MOBILIZE.** Once executives view XM as a strategic priority, the organization taps into full-time XM 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 XM looks like for the entire organization.
- 4. Stage 4: SCALE.** With strong XM practices in place, the organization systematically uses insights to identify and improve experiences and invests in engaging the entire workforce in XM. Companies in this stage should work on consistently using XM metrics and insights to improve experiences and track the impact of their XM efforts. They should also deeply integrate XM into HR processes to reinforce good XM behaviors in all employees.
- 5. Stage 5: EMBED.** In this final stage, XM Skills are ingrained across the organization and it is able to rapidly adapt to shifts in the marketplace. Mature XM 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 Experience Management 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 XM 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 and progress tracking.** Use the descriptions and examples of the six XM Competencies and 20 XM Skills provided on page 3 to develop plans for making progress towards becoming an XM-centric organization. Repeat the assessment every six to twelve months to track your progress.

**For experience-specific recommendations, check out our CX Maturity Assessment and EX Maturity Assessment tools.*

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To what extent does your organization's XM program demonstrate the following behaviors?

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

1. Maintain a clear and shared vision for experience management 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 XM efforts	
5. Adjust your efforts to make sure you deliver on your forecasts	
6. Prioritize your XM 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 XM skills across the organization	
9. Ensure employees have the training and motivation to adopt XM-centric behaviors	
ACTIVATE average	
10. Combine experience data and operational data to generate actionable insights	
11. Capture appropriate signals from targeted individuals at the appropriate times	
12. Analyze 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 individuals to fix problems that are uncovered from insights	
15. Make ongoing improvements to operational processes based on experience insights	
16. Make strategic decisions based on experience insights	
17. Infuse experience insights into key operating processes and systems	
RESPOND average	
18. Uncover opportunities for transformative experiences	
19. Apply human-centric design approaches to the improvement of experiences	
20. Ensure new experiences are delivered consistently when they are rolled out across the organization	
DISRUPT average	

EVALUATE THE RESULTS:

OVERALL total

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 XM team & steering committee - Plan for holding people and teams accountable for XM 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 - ROI modeling, demonstrating value - Metrics being tracked
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 segments and key "moments that matter" - 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"> - Follow up with dissatisfied individuals - Use insights to improve experiences, diagnose root cause, prioritize initiatives - Integrate insights into company processes (new product development, 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"> - Journey mapping & persona development - Pilot programs, co-creation - Human-centric design, Design Thinking - Coordinated planning and support of new experience roll-out