

# Responsibilities of an EX Core Team: Strengths and Gaps

Related Report: *The Federated Customer Experience Model*

## SUMMARY

A centralized employee experience (EX) team is an essential component of any organization's EX effort as this team will work with leadership to set the strategic direction of the EX program and define the standardized methodologies, tools, trainings, processes, and procedures used across the company. This core team is also responsible for circulating best practices and recipes for success along with generally managing the portfolio of EX activities on a daily basis. Use this worksheet to help you identify your centralized EX team's current responsibilities as well as opportunities to expand and strengthen the areas the team owns and manages.

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

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

- 1. Enterprise EX Strategy and Governance.** Working with the CEO, CHRO, and other senior leaders, the centralized EX team defines a common EX vision, strategy, and priorities for the organization. This includes aligning the EX strategy to business and brand objectives and prioritizing how EX resources will be invested to support the strategy. The EX core team also establishes a governance model to drive ongoing oversight and accountability for executing EX initiatives across the organization.
- 2. Insights, Metrics, and Reporting.** The main focus of any EX effort is to measure and improve employee experiences. The EX core team manages the approaches and tools that provide relevant and timely insights to the organization. The EX 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.** EX efforts are unlikely to be successful if different parts of the organization are not coordinated. The EX core team introduces and institutionalizes standard EX methodologies and processes, which includes identifying emerging practices and tools, defining how they will be used, and collaborating with other teams to shape any process, policy, and technology changes that may impact the employee experience.
- 4. Central EX Storyline.** The EX core team defines an enterprise-wide EX communication plan and creates the storyline for the organization by identifying key themes derived from both the company's EX strategy and ongoing employee feedback. This work includes customizing key messages for distinct audience segments and coaching executives on the content of their EX-related communications.
- 5. Portfolio Management.** As EX-related efforts become distributed across the company, the EX core team tracks the progress of these initiatives by managing the portfolio of EX work being done by others. This includes identifying collaboration opportunities, cross-pollinating key learnings across projects and teams, and monitoring other teams' progress on their EX commitments.

## HOW TO USE

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

- + **Self-evaluation.** Fill out this worksheet yourself by first marking existing strengths of your EX 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 EX 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. For inspiration and examples from the related field of customer experience (CX), read the report, *The Federated Customer Experience Model*.

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First, in the “strength” column, check off the activities that your core EX 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 EX Strategy and Governance</b> | Aligns EX strategy to business and brand strategy  |          |     |
|  | Builds buy-in among senior executives for company’s EX strategy  |          |     |
|  | Prioritizes how EX resources (time, money, people) will be invested to support EX strategy                             |          |     |
|  | Establishes a governance council and engages regularly to share updates, gather input, and request assistance          |          |     |
|  | Implements accountability model for line-of-business EX efforts  |          |     |
|  | Builds and manages network of company-wide EX champions  |          |     |
| <b>Insights, Metrics, and Reporting</b>      | Manages all elements of the enterprise employee listening program, including standard surveys and reporting            |          |     |
|  | Defines universal EX metrics and measurement frameworks  |          |     |
|  | Delivers executive-level EX reporting  |          |     |
|  | Selects EX vendors and other service providers and identifies emerging practices and tools                             |          |     |
|  | Monitors employee listening efforts within lines-of-business to ensure compliance with enterprise standards            |          |     |
| <b>Standard Methodologies and Tools</b>      | Identifies established and emerging EX practices and tools and defines how they are used within the company            |          |     |
|  | Selects EX vendors and other service providers to support use of standard methodologies and tools                      |          |     |
|  | Collaborates to shape process, policy, and technology changes that may impact the employee experience                  |          |     |
|  | Establishes a process assurance approach to review the effectiveness of COEs in using standard methodologies and tools |          |     |
| <b>Central EX Storyline</b>                  | Defines enterprise-wide EX communication plan that cascades across the business  |          |     |
|  | Leverages employee social networks to support enterprise and local EX efforts  |          |     |
|  | Coaches executives on content of EX-related messages   |          |     |
|  | Advertises changes that originate from employee feedback   |          |     |
| <b>Portfolio Management</b>                  | Shares key learnings and best practices across the company   |          |     |
|  | Identifies cross-functional collaboration opportunities  |          |     |
|  | Monitors line-of-businesses’ progress on their EX commitments  |          |     |
|  | Engages with COEs to support overall EX strategy   |          |     |
|  | Looks for signs indicating company’s EX priorities or investments need to be adjusted                                  |          |     |