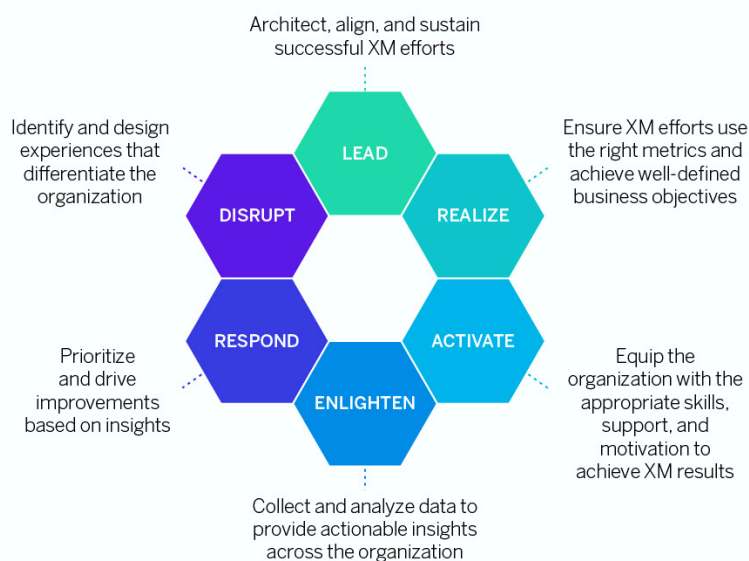# Prioritizing Improvements across CX Skills and Actions

Original Report: *Operationalizing XM*

SUMMARY

Organizations embrace the discipline of Experience Management (XM) by mastering **6 XM Competencies** and **20 XM Skills**. The XM Skills come to life in an organization through a set of **XM actions**. While some of these actions are common across all XM domains, some of them are specific to different areas, such as customer experience, employee experience, brand experience, and product experience. While the universe of potential actions for each XM Skill is large, there are some fundamental actions that are indicative of a well-functioning XM program. Use this worksheet to evaluate how well your organization is demonstrating a suggested set of actions across each of the 20 XM skills. Then, based on your answers, prioritize your efforts for closing your Skills/Actions gaps and begin making plans for improving the XM capabilities of your CX program.

SIX XM COMPETENCIES

For XM to create value, an organization needs to alter how it operates on a day-to-day basis. The six XM Competencies represent *the skills and actions that establish XM as a* discipline. These Competencies encompass how an organization leads a multi-year transformation program, realizes value from XM, activates the organization for change, enlightens the organization with insights, responds to insights with actions, and disrupts the status quo with design. These competencies are demonstrated through a set of 20 XM Skills.

Architect, align, and sustain successful XM efforts

Identify and design experiences that differentiate the organization

Ensure XM efforts use the right metrics and achieve well-defined business objectives

LEAD — **REALIZE** — **DISRUPT** — **ACTIVATE** — **RESPOND** — **ENLIGHTEN**

Equip the organization with the appropriate skills, support, and motivation to achieve XM results

Prioritize and drive improvements based on insights

Collect and analyze data to provide actionable insights across the organization

HOW TO USE

To help you and your team prioritize which actions to focus on to optimize your performance across the 20 XM Skills in your CX program, use this tool for:

1. **Self-evaluation.** Fill out the worksheet individually, identifying strengths and gaps across the representative actions of the 20 XM skills within your CX program.

2. **Group discussion.** Use the tool in a group exercise with your CX team. After each individual completes the evaluation, use the tally page to summarize and then discuss the strengths and gaps the team identified, as well as areas of agreement and disagreement in the results. This tool can be a valuable in a workshop setting with team members to gain alignment around a shared set of priorities to enhance key XM skills.

3. **Action planning.** Develop plans for closing gaps across the 20 XM skills. Use the final page of this tool to track your commitments. For more information on the 20 XM skills, read the original report, *Operationalizing XM*.

Prioritizing Improvements across CX Skills and Actions

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LEAD

Architect, align, and sustain successful XM Efforts. To effectively manage customers' experiences, an organization needs to articulate a clear CX strategy and then coordinate the execution of that strategy across a number of different people and projects over multiple years.

Directions: Review the list of suggested actions for each of the CX skills below. In the column to the right of each action, place a plus (+) next to any actions that are *strengths* and a minus (-) next to any actions that are *missing* or *underperforming* in your CX program.

SUGGESTED ACTIONS TO MASTER CX SKILLS IN THE LEAD COMPETENCY

Skill	Action	+/−
XM Strategy — Develop and maintain a clear and shared vision for XM efforts.	Utilizes a clearly defined CX strategy that ties to business and brand objectives	
	Develops the strategy with cross-functional input, including input from executive sponsor and key stakeholders	
	Communicates the CX strategy broadly to ensure employees understand why it matters and how they play a role in implementing it	
	Aligns CX strategy to the organization's mission and values	
	Reviews and updates the CX strategy on an ongoing basis to ensure it continues to focus on the right priorities	
XM Program Roadmap — Develop and track progress against a plan with well-defined streams of effort.	Identifies which experiences (customers, journeys, products/services) are the key area of focus	
	Defines a handful of activity streams that will persist over several years, inside of which projects will change	
	Requires all CX projects to have defined objectives, timelines, budgets, and success measures	
	Assigns teams and individuals to be accountable for executing on roadmap items	
	Reviews and modifies roadmap items on a regular basis to ensure efficacy and alignment	
XM Governance — Establish and maintain organizational structures that provide appropriate decision-making, alignment, accountability, and conflict resolution.	Enlists a member of top management as an executive sponsor to support and advocate for the CX program among peers	
	Establishes a steering committee comprised of senior leaders, who buy into and support the CX program (including budget/headcount)	
	Uses the steering committee to prioritize initiatives and hold the organization accountable for taking action	
	Mobilizes a cross-functional working group to tackle roadmap projects and issues identified from customer insights	
	Uses a strong core CX team to lead the effort, defining methodologies and managing the day-to-day activities of the CX program	

Prioritizing Improvements across CX Skills and Actions

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REALIZE

Track and ensure that XM efforts achieve well-defined business objectives. For CX efforts to have a lasting positive impact, they need to generate strategic and financial value for the organization. This competency is about identifying and tracking the right metrics to ensure CX efforts achieve well-defined business objectives.

Directions: Review the list of suggested actions for each of the CX skills below. In the column to the right of each action, place a plus (+) next to any actions that are *strengths* and a minus (-) next to any actions that are *missing* or *underperforming* in your CX program.

SUGGESTED ACTIONS TO MASTER CX SKILLS IN THE REALIZE COMPETENCY $+/-$

Skill	Action	+/−
Value Planning Forecast the specific business value of XM efforts and define how it will be tracked.	Defines key loyalty behaviors desired as an output of improved CX (e.g. increased renewal, new purchases, decreases in attrition)	
	Creates models that show how changes in key CX metrics affect desired loyalty behaviors	
	Determines success measures for the CX program based on desired business and brand objectives	
	Defines the best methods and tools for tracking the business impact of key CX initiatives	
	Outlines messaging about the value forecast to communicate out to the broader organization	
Value Delivery Track the value being delivered and make adjustments to ensure success.	Regularly measures inputs and metrics that are drivers in the value model	
	Measures overall value being delivered by CX efforts, and reports findings to executive sponsors	
	Reviews and adjusts CX program to ensure that it delivers on the forecasted value	
	Refines value goals based on new learnings and changing market conditions	
	Refines underlying value model based on new learnings and business priorities	
Metrics Management Develop and utilize metrics using X- and O-data to drive operational priorities.	Specifies a core CX metric that is consistently used to prioritize and align CX activities	
	Identifies the underlying key drivers (both operational and experience) that impact the core CX metric	
	Defines realistic targets for the core CX metric and the key driver metrics based on their influence on desired business outcomes	
	Uses incentives (monetary and non-monetary) to align organizational actions with CX metrics	
	Provides ongoing access to the status of the CX metrics, and regularly reports on successes and failures	

Prioritizing Improvements across CX Skills and Actions

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ACTIVATE

Ensure the organization has the appropriate skills, support, and motivation to achieve desired XM results. People tend to gravitate towards the status quo, so a successful CX program must overcome people's inertia and their natural resistance to change.

Directions: Review the list of suggested actions for each of the CX skills below. In the column to the right of each action, place a plus (+) next to any actions that are *strengths* and a minus (-) next to any actions that are *missing* or *underperforming* in your CX program.

SUGGESTED ACTIONS TO MASTER CX SKILLS IN THE ACTIVATE COMPETENCY $+/-$

CX Skill	Suggested Action	+/−
Ecosystem Communications Keep employees and partners informed about the value and progress of the XM efforts.	Develops and maintains a plan to keep the entire ecosystem informed about the progress of the CX efforts	
	Actively communicates the value and progress of CX efforts, while highlighting employees and partners who have supported the efforts	
	Defines and cascades key messages through management layers and across teams to reach all levels of the organization	
	Crafts a range of messages and formats to resonate with different internal audiences, tapping as much as possible into existing communications channels	
	Uses feedback from influential employees to refine communications vehicles and messages	
Expertise Building Create organizational mechanisms to build, propagate, and enhance key XM skills across the organization.	Identifies and maintains a list of key CX capabilities that the organization needs to master internally	
	Develops Centers of Excellence to enhance key capabilities and to share best practices across the organization	
	Partners with external organizations for training and support to build and enhance key internal capabilities	
	Provides training and coaching to extend capabilities across the organization and beyond just the experts	
	Facilitates the sharing of best practices to enhance expertise	
Role-Based Enablement Ensure that employees and partners have the skills, training, tools, and motivation to adopt XM-centric behaviors.	Provides training and coaching to managers and employees who should be using customer insights	
	Defines how employees in different roles can change their operating routines to improve customer experience in an ongoing manner	
	Recognizes and celebrates employees and teams who embody desired customer-centric behaviors	
	Solicits and responds to employee feedback on how to help them sustain and enhance customer-centric behaviors	
	Embeds desired behaviors into HR processes like competency models, performance reviews, and on-boarding	

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ENLIGHTEN

Provide actionable insights across an organization. To improve the experiences it delivers, an organization must be capable of collecting and processing a constant flow of X-data and O-data, and then transforming all that data into useful information. This competency is about capturing, analyzing, and distributing actionable insights.

Directions: Review the list of suggested actions for each of the CX skills below. In the column to the right of each action, place a plus (+) next to any actions that are *strengths* and a minus (-) next to any actions that are *missing* or *underperforming* in your CX program.

SUGGESTED ACTIONS TO MASTER CX SKILLS IN THE ENLIGHTEN COMPETENCY | +/—

CX Skill	Suggested Action	+/—
X- & O- Data Integration Combine experience data (X-data) and operational data (O-data) in order to generate more actionable insights.	Connect X-data & O-data, such as customer profiles, product ownership, lifetime value, and historical interactions, together into one system to facilitate advanced analytics	
	Prioritize specific X-data and O-data to integrate based on the anticipated business value of the combined data	
	Use operational data to improve feedback efficiency by better targeting specific types of customers with specific questions at specific moments	
	Design interfaces for sharing X-data within customer-facing operational systems	
	Build customer segmentations that combine X-data and O-data	
Experience Monitoring Identify and capture appropriate signals from the appropriate audiences at the appropriate times.	Apply robust market research approaches for survey design and sampling	
	Oversample feedback from customer segments and interactions where the resulting insights will be most valuable to the organization	
	Adjust the portfolio and design of listening posts based on latest findings and organizational priorities	
	Collect unsolicited and unstructured customer feedback (e.g. social media, contact centers) along with customer behavioral data when it's available	
	Use a variety of survey types—transactional, relationship, journey, and ad hoc—to fully monitor the customer experience	
Insights Discovery Analyze X- and O-data to uncover actionable insights and prioritize the most valuable actions.	Monitor core CX metrics, identifying changes & longer-term trends by customer segment	
	Analyze X-data and O-data to pinpoint operational activities that result in positive and negative customer experiences	
	Use qualitative research methods to develop a deeper understanding of key customer issues or opportunities	
	Identify sentiment and topics within unstructured customer interactions using text and speech analytics (where appropriate)	
	Use predictive analytics to project feedback from a small group of respondents onto a broader population of customers	
Insights Distribution Distribute X- and O-data insights in the right form at the right time and tailored to the people who can take action on them.	Support employees across the organization with training and coaching to help them understand and utilize customer insights	
	Disseminate insights at regular intervals to support the decision-making and operational cadences of internal stakeholders	
	Tailors the format, content, and timing of customer insights to meet the needs of employees based on their roles and responsibilities	
	Provide customized alerts to relevant employees when there is significant customer insight about their focus areas	
	Provide customer experience data within customer management applications alongside other information about customers	

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RESPOND

Prioritize and drive improvements based on insights. Gathering and disseminating insights is all well and good, but ultimately, value is only generated when an organization acts on what it learns. This competency is about building organizational mechanisms to continuously take action based on insights.

Directions: Review the list of suggested actions for each of the CX skills below. In the column to the right of each action, place a plus (+) next to any actions that are *strengths* and a minus (-) next to any actions that are *missing* or *underperforming* in your CX program.

SUGGESTED ACTIONS TO MASTER CX SKILLS IN THE RESPOND COMPETENCY $+/-$

CX Skill	Action	+/-
Immediate Response Systematically follow up with people who are affected by an experience—as indicated by their feedback or insights—and fix problems that are uncovered.	Follows up with customers based on their feedback using a clearly defined process with rules regarding timing, frequency, and approach	
	Designs follow-up interactions to be a positive experience for customers, and trains employees on how to deliver this positive follow-up experience	
	Includes responsibilities to complete customer follow-up activities in employees' performance goals and evaluations	
	Automates and manages a closed-loop process with tools such as ticket management, status updating, and tracking	
	Actively extracts broader lessons-learned from individual follow-up interactions with customers	
Continuous Improvement Make changes to operational processes based on ongoing X- and O-data insights.	Maintains a cross-functional process to evaluate and take action on trends and issues uncovered from customer insights	
	Uses a well-defined process for prioritizing potential areas of improvement based on CX impact and business needs	
	Tracks and reports on the status and progress of improvement efforts	
	Deploys process improvement teams to make changes to address high-priority items	
	Measures and monitors the impact of new or redesigned experiences to confirm CX improvements	
Strategic Decision-Making Make strategic decisions based on X- and O-data insights.	Reviews CX insights and metrics as an explicit part of criteria when making large-scale strategic decisions	
	Cascades enterprise-wide CX goals and objectives from the executive team throughout the rest of the organization	
	Requires explicit review of CX impact as part of the planning and budgetary cycles	
	Has leaders who continually ask how decisions will impact CX and the organization's ability to live up to its brand promises	
	Consistently lists CX objectives and progress as one of the organization's top priorities	
Process Integration Infuse X- and O-data insights into key operating processes and systems.	Uncovers opportunities for making customer insights accessible to employees through systems that they already use	
	Embeds customer insights in systems and processes used by front-line employees when they interact with customers	
	Includes the use of customer insights as explicit steps throughout product development and rollout planning processes	
	Infuses deep customer insights within applicable enterprise transformation efforts, such as lean, six sigma, or lean startup	
	Uses customer segmentations across the business that are driven by traditional customer demographics along with X-data and O-data	

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DISRUPT

Identify and create experiences that differentiate the organization. While finding and fixing problems is necessary, just responding to explicit issues is not sufficient to capture people's hearts and minds. This competency is about using approaches and tools to take a human-centric approach to designing and delivering new experiences.

Directions: Review the list of suggested actions for each of the CX skills below. In the column to the right of each action, place a plus (+) next to any actions that are *strengths* and a minus (-) next to any actions that are *missing* or *underperforming* in your CX program.

SUGGESTED ACTIONS TO MASTER CX SKILLS IN THE DISRUPT COMPETENCY $+/-$

Skill	Action	+/−
Experience Visioning Uncover opportunities for disruptive new experiences.	Uses customer personas (or equivalent mechanism) to understand and share information about important customer segments	
	Creates journey maps to understand customer needs and perceptions, and to uncover opportunities for improvement	
	Identifies key trends that will shift customer needs and enable the development of new types of interaction models	
	Looks for inspiration for new CX practices from different industries and domains	
	Disproportionally examines insights from customers who represent most promising targets for emerging strategies	
Experience Design Apply human-centric approaches to the creation or improvement of experiences.	Uses a variety of qualitative techniques to understand customers' needs, expectations, and preferences	
	Follows a defined user-centered design process when creating or improving experiences	
	Involves customers in the design of experience improvements through co-creation and ongoing testing	
	Involves departments and teams that will be impacted by changes in the design of those experiences	
	Uses rapid prototyping to test concepts as they evolve	
Experience Integration Develop the processes, systems, and training to enable the organization to deliver new experiences in a consistent fashion.	Follows repeatable processes for the delivery of all new experiences (e.g. pilots, which teams are involved, etc.)	
	Actively manages a portfolio of new experience introductions to minimize employee and customer confusion	
	Assembles cross-functional teams to roll-out and enable new experiences	
	Ensures all customer-facing employees and partners are prepared to support new or redesigned products or services prior to their launch	
	Keeps resources assigned to new experience deployments until it's been demonstrated that those experiences are creating the desired customer perceptions	

Prioritizing Improvements across CX Skills and Actions

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Group Discussion Directions: Review the Skills/Actions strengths and gaps you identified across the previous pages and use this worksheet to tally your results across the 20 XM skills. In the table below, record the numbers of "+" and "-" you had for each skill.

Then, as a group, compare your results and discuss areas of agreement and disagreement between your evaluations.

COMPETENCIES	SKILLS	+	—
LEAD Architect, align, and sustain successful XM Efforts.	XM Strategy		
	XM Program Roadmap		
	XM Governance		
REALIZE Track and ensure that XM efforts achieve well-defined business objectives.	Value Planning		
	Value Delivery		
	Metrics Management		
ACTIVATE Ensure the organization has the appropriate skills, support, and motivation to achieve desired XM results.	Ecosystems Communication		
	Expertise Building		
	Role-Based Enablement		
ENLIGHTEN Provide actionable insights across an organization.	X- & O-Data Integration		
	Experience Monitoring		
	Insights Discovery		
	Insights Distribution		
RESPOND Prioritize and drive improvements based on insights.	Immediate Response		
	Continuous Improvement		
	Strategic Decision-Making		
	Process Integration		
DISRUPT Identify and create experiences that differentiate the organization.	Experience Visioning		
	Experience Design		
	Experience Integration		

Prioritizing Improvements across CX Skills and Actions

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Action Planning Directions: Use this worksheet to prioritize your focus for optimizing your performance of the 20 XM skills in your CX program across four categories:

+ **Start Doing** – begin working on demonstrating these actions
+ **Stop Doing** – remove or replace these less effective actions
+ **Accelerate** – do more of these actions across your CX program
+ **Learn More** – identify skills or actions you need to better understand

LIST YOUR ACTION ITEMS FOR EACH PRIORITIZATION CATEGORY

Start Doing	
Stop Doing	
Accelerate	
Learn More	