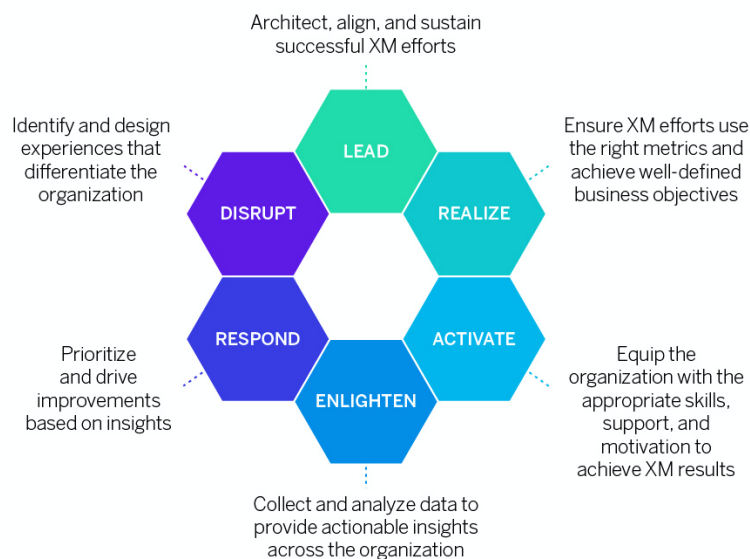# Prioritizing Improvements across EX Skills and Actions

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 EX 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

DISRUPT   **REALIZE**

RESPOND   **ACTIVATE**

ENLIGHTEN

Prioritize and drive improvements based on insights

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

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 EX 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 EX program.

2. **Group discussion.** Use the tool in a group exercise with your EX 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 EX Skills and Actions

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LEAD

Architect, align, and sustain successful XM Efforts. To effectively manage employees' experiences, an organization needs to articulate a clear EX 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 EX 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 EX program.

SUGGESTED ACTIONS TO MASTER EX SKILLS IN THE LEAD COMPETENCY	+/−
XM Strategy — Develop and maintain a clear and shared vision for XM efforts.	
A clearly defined EX strategy is aligned with business and talent objectives	
EX strategy is resourced, funded, and is visible in regular senior leadership forums	
Defines holistic 'EX Program' with measurement and action-taking processes designed to support the program's objectives and initiatives	
Develops the strategy with cross-functional input, including executive sponsors and key stakeholders	
Communicates the EX strategy broadly to ensure employees understand why it matters and how they play a role in implementing it	
Reviews and updates the EX 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 (employees, journeys, tools/routines) are the key areas of focus	
Defines targeted activity streams that will persist over several years, inside of which projects may change	
Activity streams feed into a single point of oversight which regularly reviews roadmap to ensure simplicity and alignment	
Requires all EX projects to have defined objectives, timelines, budgets, and success measures	
Assigns teams and individuals to be accountable for executing on roadmap items	
XM Governance — Establish and maintain organizational structures that provide appropriate decision-making, alignment, accountability, and conflict resolution.	
HR leader garners other C-suite executive sponsor support to advocate for the EX program and drive accountability across the organization	
C-suite leaders buy into and support the EX program (including budget/headcount) and view it as a competitive advantage	
Mobilizes a cross-functional working group to address roadmap projects and issues identified from employee insights	
Uses a strong core EX team to lead the effort, defining methodologies and managing the day-to-day activities of the EX measurement program(s)	
Gathers input from employee representatives from across the organization (e.g., advisory council) on critical EX program governance decisions/actions	
Defines discrete stakeholder groups related to the EX strategy (e.g., Center(s) of Excellence, business owners, direct influencers, etc.) and their unique needs, expectations, or involvement	

Prioritizing Improvements across EX Skills and Actions

Original Report: *Operationalizing XM*

REALIZE

Track and ensure that XM efforts achieve well-defined business objectives. For EX 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 EX efforts achieve well-defined business objectives.

Directions: Review the list of suggested actions for each of the EX 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 EX program.

SUGGESTED ACTIONS TO MASTER EX SKILLS IN THE REALIZE COMPETENCY	$+/-$
Value Planning Forecast the specific business value of XM efforts and define how it will be tracked.	
Defines key indicators of improved EX (e.g. increased retention, discretionary effort, decreases in turnover)	
Creates models that shows how changes in key EX metrics affect key employee outcomes	
Determines success targets for the EX program based on desired business and employer brand objectives	
Defines the best methods and tools for tracking the business impact of key EX initiatives over time	
Outlines messaging about the value and impact of EX 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 drive the desired EX business outcomes	
Measures overall value being delivered by EX efforts, and reports findings to executive sponsors	
Reviews and adjusts EX 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 changing business requirements	
Metrics Management Develop and utilize metrics using X- and O-data to drive operational priorities.	
Specifies a core set of EX metrics that are consistently used across the organization over time to prioritize and align EX activities	
Identifies the underlying key drivers (both operational and experience) that impact the core EX metrics	
Defines realistic targets for the core EX metrics and key driver metrics based on their influence on desired business outcomes	
Translates key drivers into role-specific employee behaviors that positively impact EX metrics	
Provides ongoing access to the status of the EX metrics, and regularly reports on successes and failures	

Prioritizing Improvements across EX 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 EX program must overcome people's inertia and their natural resistance to change.

Directions: Review the list of suggested actions for each of the EX 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 EX program.

SUGGESTED ACTIONS TO MASTER EX SKILLS IN THE ACTIVATE COMPETENCY		+/—
Ecosystem Communications Keep employees and partners informed about the value and progress of the XM efforts.	Develops and maintains a plan to communicate with the entire ecosystem about EX, why it is important, the key drivers of EX, and the culture required to support it	
	Proactively communicates the value and progress of EX efforts, tracking against metrics, while highlighting employees and others who have supported the efforts	
	Crafts and appropriately cascades key messages and expectations through management layers and across teams to reach all levels of the organization	
	Uses a range of messages and formats to resonate with different internal audiences, tapping as much as possible into existing communications channels	
	Uses feedback from employees groups 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 EX capabilities that the organization needs to master internally	
	Integrates key EX capabilities into organization's competency model and performance management system	
	Hires EX team members with the skills, capability and expertise to support both the EX strategy and enablement of teams	
	Partners with external organizations for training and support to build and enhance essential internal capabilities	
	Provides training and coaching to extend capabilities across the organization and beyond just the internal experts	
	Facilitates sharing of EX 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 employee insights or other employee measurement outputs	
	Has a clear change management plan to facilitate the transformation, alongside the mindset and behavior changes required to get there. For each employee group, it's known what changes will happen to them and what changed is required from them.	
	Defines how employees in different roles can change their operating routines and personal interactions to improve employee experience in an ongoing manner	
	Recognizes and celebrates employees and teams who embody desired EX-centric behaviors	
	Solicits and responds to employee feedback on how to help them sustain and enhance EX at the organization	
	Embeds desired behaviors into HR processes like hiring, performance reviews, on-boarding, and promotion processes	

Prioritizing Improvements across EX Skills and Actions

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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 EX 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 EX program.

SUGGESTED ACTIONS TO MASTER EX SKILLS IN THE ENLIGHTEN COMPETENCY		+/—
X- & O- Data Integration Combine experience data (X-data) and operational data (O-data) in order to generate more actionable insights.	Connects X-data with O-data, such as employee lifecycle stage, historical performance, and business metrics, together into one system to facilitate advanced analytics	
	Uses operational data to improve feedback efficiency by better targeting employees with specific questions at key moments	
	Builds employee segmentation that combines X-data and O-data	
	Designs interfaces to share allowable X-data within HCM/HRIS systems	
	Integrates all employee feedback into a single technology platform	
Experience Monitoring Identify and capture appropriate signals from the appropriate audiences at the appropriate times.	Applies robust and methodologically sound approaches for survey design and feedback collection	
	Has a combination of always-on listening and point-in-time surveys	
	Listening is context-aware for both employee lifecycle moments and location/format of listening post	
	Adjusts portfolio and design of listening posts based on latest findings and organizational priorities	
	Combines solicited feedback with unsolicited (e.g., internal or external social platforms) and behavioral data where possible	
	Has a comprehensive view of all employee listening to mitigate survey and inaction fatigue	
Insights Discovery Analyze X- and O-data to uncover actionable insights and prioritize the most valuable actions.	Monitors core employee-centric business metrics (e.g., attrition, recruiting cost, employee productivity) and identifies changes and longer-term trends with EX data	
	Analyzes across multiple employee listening touchpoints and uses ad hoc surveys to diagnosis findings more thoroughly	
	Uses qualitative research methods to develop a deeper understanding of key employee issues or opportunities	
	Identifies sentiment and topics within unstructured employee feedback using text analytics	
	Analyzes X-data and O-data to pinpoint operational activities that result in positive and negative employee experiences	
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.	Supports employees across the organization with training and coaching to help them understand and utilize employee insights	
	Disseminates insights at regular intervals to support decision-making and operational cadences of managers and executives	
	Broadly communicates the value of insights and the expected response by the organization alongside the actual insights	
	Provides customized insights based on role and relevant results	
	Provides EX data alongside other employee or organizational operational data	

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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 EX 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 EX program.

SUGGESTED ACTIONS TO MASTER EX SKILLS IN THE RESPOND COMPETENCY	+/—
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.	
Gives managers and teams the tools to analyze, understand, and discuss the results in a meaningful way	
Connects insights with recommended actions and directly to resources where available	
Empowers all employees to act and take ownership of their day-to-day experience	
Provides prompts for desired behaviors that support key drivers of employee experience (e.g., manager should have 1:1s regularly with direct reports)	
Integrates follow-up into daily work routine and measures impact of actions	
Puts systems in place to create accountability and action for closed loop feedback (e.g., ticket systems for HR in 'always on' feedback portals)	
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 employee insights	
Uses a well-defined process for prioritizing potential areas of improvement based on EX 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 changes to confirm improvements to people programs, solutions, etc.	
Maintains a balance of problem and opportunity focus - both closing gaps and continuous growth towards excellent experiences for all employees	
Strategic Decision-Making Make strategic decisions based on X- and O-data insights.	
Reviews EX insights and metrics as an explicit part of criteria when making large-scale strategic decisions and determining how they are communicated	
Cascades enterprise-wide EX goals and objectives from the executive team throughout the rest of the organization	
Requires explicit review of EX impact as part of planning and budgetary cycles	
Has leaders who continually ask how decisions will impact EX and the organization's ability to live up to its cultural values	
Consistently asks for employee input from multiple roles/levels when evaluating big strategic changes	
Lists EX objectives 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 employee feedback to be a valuable input in existing processes	
Includes the use of employee insights as explicit steps throughout the development and roll-out of HR processes	
Leverages employee X- and O-data to design and refine curriculum planning and training design (from new hire to leadership)	
Infuses available employee insights into enterprise transformation efforts (such as organization redesign, M&A integration, etc.)	
Uses employee profiles based on X- and O-data when improving processes for specific employee segments	

Prioritizing Improvements across EX Skills and Actions

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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 EX 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 EX program.

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

	Action	+/−
Experience Visioning Uncover opportunities for disruptive new experiences.	Uses employee personas, based on both X- and O-data to understand and share information about important segments	
	Creates journey maps to understand employee needs and perceptions over time and across different phases of the employee lifecycle to uncover opportunities for improvement	
	Looks for inspiration for new EX practices from different industries and different domains (e.g., CX)	
	Disproportionally examines insights from employee segments who represent future success for the company	
	Identifies key trends that will shift employee needs and expectations and enable new types of work models into the future	
Experience Design Apply human-centric approaches to the creation or improvement of experiences.	Deeply involves diverse employees in the design of experience improvements across EX, CX, PX, and BX	
	Follows a defined user-centered design process when creating or improving experiences	
	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	
	Educates leaders, managers, and employees on the fundamental influences on how people perceive experiences, including impact of emotions and the most common biases and heuristics	
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. running pilots, identifying teams to be involved, etc.)	
	Actively manages portfolio of new experience introductions to minimize employee confusion	
	Assembles cross-functional teams to roll-out and enable new experiences	
	Ensures all relevant employees are prepared to support new or redesigned employee-targeted 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 employee perceptions	

Prioritizing Improvements across EX 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		

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Prioritizing Improvements across EX 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 EX 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 EX 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	