Template: EX Project Evaluation Inventory

Qualtrics XM institute™

Original Resource: *How to Build an EX Program Roadmap*

SUMMARY

In each organization, there is a plethora of potential employee experience (EX) projects that could be implemented. Without a systematic way of documenting and assessing these possible activities, teams are likely to take a haphazard, myopic approach to employee experience improvements that are unlikely to lead to wider, systemic change. An EX Program Evaluation Inventory is a standardized template that organizations can use to capture a high-level overview of potential EX projects, along with some light details around how each project would be implemented. This can be used to make decisions about which EX activities to focus on and when. Use this worksheet to build out an EX Program Evaluation Inventory using the template provided. We've included tips for each step and an example completed Inventory to help guide you.

NINE STEPS TO BUILD AN EX PROJECT EVALUATION INVENTORY

From applying for a role through to exiting, there are critical moments in the employee journey that enhance or deplete employee engagement. The purpose of this activity is to identify which of these moments are most important in your organization. The goal here is to lightly detail *potential* EX projects, not identify ones you will absolutely undertake. This will allow you to prioritize, plan, socialize, and validate your organization's EX efforts. To complete this Project Inventory:

+ **Step 1. Pinpoint EX challenges and opportunities**. Identify where there are existing talent challenges and opportunities that your EX program could address (see page 4).
+ **Step 2. Brainstorm EX projects to address challenges and opportunities**. Write down ideas for EX projects that could address the challenges and opportunities you identified. These should be high-level workstreams rather than narrow tasks (see page 4).
+ **Step 3. Define expected outcomes**. For each project, articulate the benefit(s) that employees and the organization could expect if it's successfully delivered. These may be framed as operational or experience metrics (see page 5).
+ **Step 4. Establish key metrics for actionable insights**. In each project, there are key metrics that will be measured and tracked. Consider both lagging indicators (experience KPIs such as employee engagement and operational metrics such as attrition) as well as lead indicators that are drivers of these outcomes (see page 5).
+ **Step 5. Identify new or existing listening posts**. Outline which listening posts you would need to have in place to capture your key metrics, including some details around methods of collecting the feedback (see page 6).
+ **Step 6. Describe the employees who would provide these insights**. Not every employee has to always answer every question. Be specific about who provides the feedback, as targeted employee listening feels customized to their experiences and ensures the EX data is an accurate reflection of the experiences you wish to improve (see page 6).
+ **Step 7. Define the trigger event for making a feedback request**. Describe the conditions under which this listening post would be enacted, such as a date in the calendar or going through a particular experience (see page 7).
+ **Step 8. Identify project owners and collaborators**. Define which teams or individuals would likely own each project as well as which groups would need to be included in the design and implementation of that project (see page 7).
+ **Step 9. Estimate timelines, length of project, and resource requirements**. The goal here is not perfect accuracy (that should come later if and when you choose to implement the project) but to give you a rough estimate you can use when making prioritization and planning decisions (see page 7).

HOW TO USE

You can use this tool to:

+ **Identify inputs to your EX program roadmap.** Use the EX projects you capture here as an input into [your EX program roadmap] and strategy. We recommend running a [prioritization exercise] on the list of projects to rank them in order of importance.
+ **Conduct a EX strategy workshop.** Complete this exercise as part of an EX strategy workshop, where participants work together to build out the EX Program Evaluation Inventory as a foundational step in your EX strategy development.
+ **Create transparent communications.** Leverage this Inventory to illustrate the link between EX and business outcomes and communicate your plans and priorities to key stakeholders.
+ **Build organizational agility.** When business strategy and priorities shift, having a considered and comprehensive EX Program Evaluation Inventory you can draw ideas and inspiration from will help you quickly adapt.

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Use this template to fill in your EX Project Evaluation Inventory. You made need multiple copies of this page to capture them all. Use tips on pages 4 through 8 for guidance.

	PROJECT #1	PROJECT #2	PROJECT #3	PROJECT #4
OPPORTUNITY OR CHALLENGE				
EX PROJECT TYPE				
EXPECTED OUTCOMES				
KEY METRICS				
LISTENING POST METHOD				
EMPLOYEE RESPONDENTS				
REQUEST TRIGGER				
PROJECT OWNERS				
PROJECT COLLABORATORS				
TIMELINE				
RESOURCES				

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EXAMPLE: Completed EX Project Evaluation Inventory:

	PROJECT #1	PROJECT #2	PROJECT #3	PROJECT #4
OPPORTUNITY OR CHALLENGE	Creating a great onboarding experience for hybrid employees	High rates of regretted attrition	Increasing rates of burnout	Slow progress towards workforce diversity goals
EX PROJECT TYPE	**Onboarding program to match our future of work plans**	**Survey to understand why people are leaving and their experiences**	**Research employee wellbeing to inform our employee programs**	**Deep dive into our culture of inclusion to understand the experiences of diverse employees**
EXPECTED OUTCOMES	Shorter ramp-time for new employees; positive onboarding experience & high engagement	Uncover themes and patterns as to why people leave, seek to address them and reduce turnover	Lower burnout; high impact investment into drivers of wellbeing; employee led solutions for greater wellbeing	A more diverse, equitable and inclusive work environment for all employees
KEY METRICS	Onboarding KPIs (Experience vs. Expectations & engagement) and drivers	Reasons for leaving; final perception of the company; aspects of their experience	Employee wellbeing at work; burnout risk; drivers of wellbeing	Demographic representation; inclusion; inclusive culture drivers
LISTENING POST METHOD	Lifecycle survey (existing - needs revamp). Email only.	Exit survey (new). Email & SMS.	Employee Research Survey (new). Email, QR Code.	Employee research survey (new). Email, QR code, Kiosk.
EMPLOYEE RESPONDENTS	Cohort: New starters	Cohort: voluntary termination	Representative Sample (~30%)	All employees
REQUEST TRIGGER	Event: day 10/30/90	Event: Notice of resignation	Date: Annual	Date: Diversity Month
PROJECT OWNERS	EX Team & Enablement Team	EX Team & HR Program Managers	EX Team & Wellbeing Program Manager	EX Team & Chief Diversity Officer
PROJECT COLLABORATORS	Heads of business, People Analytics & HR Business Partners	HR Business Partners, Heads of Business	CHRO, Benefits team, EAP Vendors, Wellbeing champions group	CHRO, CEO, Employee Resource Groups, Comms teams
TIMELINE	6 months, with 2 week sprints	2-3 months	1-3 months	3 - 6 months
RESOURCES	Onboarding / enablement specialist, technical implementation, project manager	HRIS integration technical support, Project Manager, HR expert	Implementation manager, I/O psych design, communications	Deep DEI expertise, implementation manager, communications

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To help you fill out the EX Project Evaluation Inventory template on page 2, we have provided some tips to guide you through the process:

STEP 1

Pinpoint EX challenges and opportunities

TIPS

+ Ideally, the EX opportunities and challenges you identify should flow from your EX vision. This vision, in turn, should link to your organization's business strategy and act as a north star for your EX program.
+ Don't overlook EX opportunities and challenges arising from your organization's external environment that may be shifting employee expectations or the competitive landscape (e.g., flexible working, social impact, market disruption, technological opportunities, etc.).

Potential sources: employee survey results and open text, journey maps, maturity assessments, stakeholder interviews, scenario reviews, external research insights, social media posts

STEP 2

Brainstorm EX projects to address challenges and opportunities

TIPS

+ You can identify multiple EX projects to address the same challenge or opportunity or one EX project to address multiple challenges or opportunities.
+ It's okay to get creative or aspirational. The goal of this tool is to document many different EX projects, so don't get too hung up on only including the efforts most likely to get implemented. You can prioritize which projects to take up – and in what order – at a later date.
+ We recommend keeping these projects at a high-level. You will need to break them down into smaller tasks if and when you choose to put them into action, but for now, the goal is to create an easily scannable and shareable overview of potential projects.
+ If your organization has a people & culture strategy, employee value propositions or existing commitments, be sure to incorporate these into the Inventory

Potential sources: any source from Step 1, XM Institute's [Prioritizing Improvements Across EX Skills and Actions] worksheet, the EX Actions in each stage of the [EX Maturity Assessment]

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STEP 3

Define expected outcomes

TIPS

+ These are the expected employee outcomes that have a material impact on the organization and employees. What does success of this project look like?
+ These outcomes may include operational metrics, such as attrition / retention rates, diversity of leadership teams, tenure, performance ratings, sales or productivity rates, onboarding ramp-time, safety metrics, and more
+ Where possible, we recommend using the same language to describe employee outcomes as the rest of your organization uses in order to clearly align your EX efforts with your organization's top-level priorities and initiatives.

Potential sources: stated organizational priorities, executive interviews, minutes from company meetings, quarterly or annual company reports

STEP 4

Establish key metrics for actionable insights

TIPS

+ In each project, there are key metrics that will be measured and tracked. Consider the following:
    - **Operational Metrics**: Observable Employee data, such as attrition/retention, diversity demographics, performance ratings, and other metrics often found in HR systems.
    - **EX Outcomes (or KPIs)**: These are the indicators that an organization tracks to ensure they are providing great employee experiences. These metrics are the key indicators of a healthy culture, such as Engagement, Inclusion, Wellbeing, or Intent to stay. While they do track organizational performance trends, they alone do not provide insights that are actionable.
    - **EX drivers**: These leading indicators are the critical experiences that influence the EX outcomes. Driver metrics provide actionable insights that signal the focus areas for improving employee experience.
+ These metrics should track your progress towards the expected outcome. For example, if your business outcome is "reduce attrition rates in first 90 days," operational data would be reduced attrition rate for employees under 90 days. Experience outcomes would be overall onboarding experience, belonging, engagement, and intent to stay. Drivers of the experience outcomes may be clarity of role, connection with colleagues, manager support, having the right training, and access to resources.

Potential sources: Existing employee experience data, exit interviews, and expert advice from the industry

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STEP 5

Identify new or existing listening posts

TIPS

+ A "listening post" refers to *a single listening event*, such as a survey.
+ Decide on the best method to collect the data. In EX, there are many methods of collecting feedback, each with its own design and implementation considerations.
    - **Always-on**: on-demand tool for employees to provide feedback, insights, and raise issues
    - **Employee Research**: single moment-in-time employee feedback that are framed around a specific topic
    - **Pulse**: regular, structured measure of employee attitudes that are effective for predictive modeling and longitudinal tracking
    - **Lifecycle**: event-based, standardized measures of the employee experience at critical points in the employee lifecycle
    - **Multi-rater (360)**: individual, employee-focused assessments that can range from pure self-development to formal performance appraisal
    - **Census**: traditional, standardized measure of employee experience and the organizational practices delivered to all employees
+ Consider including some details around the best ways to requesting feedback (e.g., email, SMS, website/in-app, telephone, kiosk, QR-code) and whether the listening post would be new, revamped, or existing.

Potential sources: Current employee voice or EX programs, HRIS reporting, stakeholder interviews with teams who own that element of the employee journey

STEP 6

Describe the employees who would provide these insights

TIPS

+ When it comes to employee subject groups, consider these three broad categories:
    - **All Employees**: every employee in the organization
    - **Cohort**: employees who are grouped together based on a similar experience (e.g., new starters this month), or descriptor (location, role type, demographic, etc.)
    - **Sample**: a smaller group of employees that are representative of the whole
+ Remember that providing feedback is itself an employee experience. Take this opportunity to get more targeted and specific about who you ask and why their feedback would be most relevant.

Potential sources: Organizational charts, HRIS

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STEP 7
Define the trigger for making a feedback request

TIPS

+ There are three common ways that employees connect with feedback requests
    - **Date-based**: feedback requests are sent on a specific date. These projects often have a response window where the feedback opportunity opens and closes (e.g., Annual Engagement)
    - **Event-based**: feedback requests are triggered by an event or experience. These EX projects collect continuous feedback triggered by a particular employee experience occurring (e.g., starting at the company/onboarding, resigning/exit, feedback request/360, contacting the IT helpdesk, or candidates applying for a role)
    - **Always-on**: employees can provide feedback at anytime they wish. Requests for feedback may be passive (such a form or inbox they can use when they have feedback) or active (such as a site-intercept pop up when they access an internal site).

Potential sources: Existing EX program designs, HRIS integration options, interviews with stakeholders

STEP 8
Identify project owners and collaborators

TIPS

+ To be successful, an EX project will need a specific team or individual who is responsible for managing and coordinating the effort and is ultimately accountable for its success.
+ EX projects can be owned by a core EX team, People Operations, or leaders within the relevant line of business.
+ It is unlikely that a single team or individual would own the end-to-end process of a given project, so it's important to also identify "project collaborators" – individuals or teams who will need to be involved in the creation and design of the project (e.g., People Analytics, Project Managers, Communications teams, HR, IT, etc.).
+ We recommend sharing the overview of a particular EX Project with its likely collaborators and asking them for input. It's particularly useful to get their insights into things like their bandwidth, necessary resources, potential competing priorities, etc.

Potential sources: org charts, stakeholder interviews with teams who own that element of the employee journey, stakeholder maps

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STEP 9

Estimate likely timelines, length of project and resource requirements

TIPS

+ Remember, these are only for potential EX projects, so don't spend too much time trying to define the most accurate timeline or resource requirements – general estimates are okay here.
+ Take these estimates to relevant project owners and collaborators to validate that this matches their availability, budget, and timing constraints.
+ Keep in mind that depending on factors such as changing business priorities, market shifts, personnel changes, competing priorities, etc., timelines can vary dramatically, so you'll likely need to revisit this step regularly.

Potential sources: stakeholder interviews with project collaborators, EX program's executive sponsor, EX program annual budget

GENERAL TIPS FOR FILLING OUT THIS TEMPLATE:

+ To ensure it is easy to scan and share the completed template, only include necessary information. However, you may want to keep more detailed supporting documentation for each potential EX project handy so that if it does get implemented, you are starting from a strong foundation.
+ Use this inventory is a starting point for a project prioritization exercise and/or a EX program roadmap.
+ You can fill in this template yourself, with a small team, or as part of a workshop where you develop ideas with a wider group of stakeholders.
+ Plan to revisit this list on a regular basis (quarterly, bi-annually, etc.) to ensure it continues to reflect the most pressing EX challenges and opportunities facing your organization.

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