Worksheet: CX Project Prioritization Exercise

Original Resource: *How to Build a CX Program Roadmap*

SUMMARY

Maintaining a portfolio of customer experience (CX) improvement projects – prioritized by business and customer needs – is essential to the success of every CX program. This prioritized list of projects should act as a key input to your CX program roadmap, which visualizes what CX activities you will be doing and when. Use this worksheet to guide you through the process of prioritizing – or reprioritizing – your list of potential CX projects in a way that makes it easy for key stakeholders to participate, collaborate, and take ownership of the process.

SIX STEPS OF A CX PROJECT PRIORITIZATION EXERCISE

This CX Project Prioritization Tool provides a framework for creating and maintaining a list of CX projects that are prioritized based on business objectives and customer needs. The goal of this activity is to – in an empirical way – arrive at a list of CX projects that are well-aligned with the current business environment, easy to update as needed, and position your CX program to deliver maximum value on an ongoing basis. To use this prioritization tool:

+ **Step 1. Build a list of potential projects.** Develop a list of potential CX projects from customer insights, employee input, business strategies, and stakeholder input. Aim to include a mix of projects with a range of scopes, effort, costs, time requirements, and potential value to the business. Add a short description or an appendix describing each project so that all participants have the essential information needed to assess each option.

+ **Step 2. Identify participants to rate each potential project.** If you have a CX governance committee, you should include members of that group in the prioritization exercise and then add people as needed. For example, you'll want a representative from groups that would be responsible for planning and executing projects on the list or would benefit from their implementation. Try to include people who can speak directly to what it would take to deliver and maintain CX projects and have the collective knowledge to reliably assess each of the dimensions (see list on page 2).

+ **Step 3. Have participants rate projects across each dimension.** Share the list of proposed projects from Step 1 and ask each participant to independently assess each project based on the six dimensions using the table on page 3. Having participants complete the exercise separately and on their own time enables them to consult members of their team as needed and avoid influencing one another's scores. Edit these dimensions or their wording as needed.

+ **Step 4. Collect and average ratings to create a ranked list.** Collect the assessments and average the scores for each dimension, adding them into the table on page 4. Then add the average dimensions together to create a customer-centric, organization-centric, and overall total score. You may wish to create weightings for specific criteria if some of the dimensions are more important than others.

+ **Step 5. Meet to review and discuss ratings.** After all projects have been scored, bring participants together to discuss the results on page 4, reconcile any significant differences, and identify projects that require further research. Once you are all in agreement, fill out the table on page 5 with estimated timelines and launch dates. We recommend validating these with appropriate project collaborators before finalizing the list.

+ **Step 6. Incorporate your prioritized list of projects into your CX program roadmap.** Finally, transfer your prioritized list into your CX program roadmap and incorporate the plans for each project – developed by the project owners – into the roadmap as well. Remember, you will need to update this list regularly as projects are completed, customer expectations or business needs change, or your roadmap is due for an update.

HOW TO USE

You can use this tool to:

+ **Develop a diverse portfolio aligned to business needs**. A successful CX program will have a continuous flow of business outcomes delivered as a result of CX improvements. Use this tool to prioritize efforts that align with your organization's business objectives and create a portfolio of projects that is diverse in terms of the amount of time and resources required as well as the magnitude of outcomes.

+ **Generate buy-in and ownership.** While the core CX team identifies opportunities and leads improvement efforts, stakeholders and their teams are the ones who execute these actions and changes. To build support and commitment from the stakeholders who will ultimately lead these CX projects, have them complete this overall exercise.

+ **Continuously adapt your portfolio of projects.** Business priorities and customer expectations change over time, and efficient and effective prioritization is necessary to ensure you can adapt your CX efforts to keep them in line with these this shifting needs. Use this tool to facilitate the reprioritization of projects as needed.

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CX programs exist to improve customers' experiences and drive organizational outcomes. The prioritization dimensions below provide a way to assess the importance of each project from both a customer and an organizational perspective. Use this page for reference as you fill out page 3.

	DIMENSION	CONSIDERATIONS	SCALE
CUSTOMER-CENTRIC	**Importance** How much does this experience matter to the most valuable customers?	+ Does this project relate to a key journey or a moment that matters to customers? + How essential is this experience to customers' success with the organization (e.g., check-out for retail customers)? + Which customer segments will see the most positive impact from this project?	**1** = Not at all important **2** = Slightly important **3** = Moderately important **4** = Important **5** = Extremely important
	Severity How acute are the pain points customers currently experience?	+ How intense are the negative emotions this experience evokes in customers? + What are customers' current perceptions of and attitudes towards this experience (captured through surveys, unstructured feedback, etc.)?	**1** = Very low severity **2** = Low severity **3** = Moderate severity **4** = High severity **5** = Very high severity
	Frequency How often do customers encounter this experience?	+ What percentage of customers go through this experience? + How many times does a single customer have to go through this experience?	**1** = Very low frequency **2** = Low frequency **3** = Moderate frequency **4** = High frequency **5** = Very high frequency
ORGANIZATION-CENTRIC	**Business Value** How much financial value will this project generate for the organization?	+ What are the expected economic consequences of this project? + How easy is it to link this initiative with key financial and strategic measurements? + How long will it take to begin to see return on investments?	**1** = Very low value **2** = Low value **3** = Moderate value **4** = High value **5** = Very high value
	Ease of Implementation How easy will it be to deliver and maintain this project?	+ What resources (budget, people, time, and tools) are required to complete this project and ensure its ongoing success? + Are the capabilities in place to take effective action? + Will the project require changes to current technology? If so, how complex are these changes? + How difficult will this project be to scale?	**1** = Very difficult **2** = Difficult **3** = Moderate **4** = Easy **5** = Very easy
	Strategic Alignment How well does this project align with other organizational objectives?	+ To what extent will the opportunities or challenges addressed by this project support other organizational goals? + Are there other high-priority initiatives that may be depleting resources or attention? + How much stakeholder buy-in and executive commitment does this project have?	**1** = Not at all aligned **2** = Slightly aligned **3** = Moderately aligned **4** = Mostly aligned **5** = Entirely aligned

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Ask each participant in the prioritization exercise to rate the proposed projects across the six criteria (more details on page 2). Collect all the completed assessments and calculate the average score for each project across the six dimensions. See page 6 for an example completed template.

Stakeholder #1	Importance	Severity	Frequency	Business Value	Ease of Implementation	Strategic Alignment
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						

Rating Scale for Each Dimension
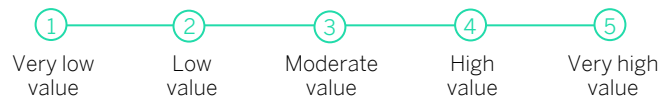
Importance

1 — Not at all important
2 — Slightly important
3 — Moderately important
4 — Important
5 — Extremely important

Severity

1 — Very low severity
2 — Low severity
3 — Moderate severity
4 — High severity
5 — Very high severity

Frequency

1 — Very low frequency
2 — Low frequency
3 — Moderate frequency
4 — High frequency
5 — Very high frequency

Business Value

1 — Very low value
2 — Low value
3 — Moderate value
4 — High value
5 — Very high value

Ease of Implementation

1 — Very difficult
2 — Difficult
3 — Moderate
4 — Easy
5 — Very easy

Strategic Alignment

1 — Not at all aligned
2 — Slightly aligned
3 — Moderately aligned
4 — Mostly aligned
5 — Entirely aligned
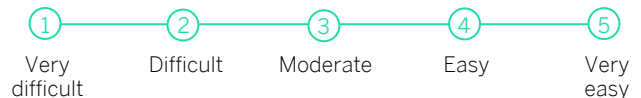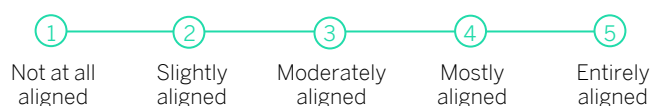
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Once you have calculated the average scores for each project, add them into the table below. Then add up the three customer-facing criteria and the three organization-facing criteria to generate a "customer-centric total" and an "organization-centric total." Add these two totals together to create an "overall total" score for each project (see example on page 7). Share this table back with participants and set up a meeting to discuss the results as a group. Structure the meeting agenda to allow time for people to a) nominate projects for discussion they think were scored incorrectly, b) discuss each of those, c) decide whether scores should be changed, d) identify (and table) projects that require further research, e) select project owners for the top 10-15 projects on the list.

	Importance	Severity	Frequency	Customer-centric Total	Business Value	Ease of Implementation	Strategic Alignment	Organization-centric Total	OVERALL TOTAL
	AVERAGE	AVERAGE	AVERAGE	TOTAL	AVERAGE	AVERAGE	AVERAGE	TOTAL	TOTAL
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									

Projects requiring further research:

PROJECT NAME	NOTES ON NEXT STEPS
Project	
Project	
Project	
Project	
Project	

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Now that you have customer-centric, organization-centric, and overall total scores, list the projects in the table below. We recommend listing them in descending order based on their overall total scores, with the highest scoring projects at the top and the lowest on the bottom. Then put an 'X' in the box that best reflects how long you expect that project to take to deliver end-to-end. Finally, add a potential launch date for the project. Keep in mind that you may not always implement the highest scoring project first. You may instead over-index on customer-centric or organization-centric dimensions. Ideally, you want projects with a mix of different implementation lifts. We suggest meeting with stakeholders and project owners to review and validate your project plans.

	Customer-centric Total	Organization-centric Total	Overall Total	0 – 3 months	4 – 6 months	7 – 12 months	12+ months	Launch Date
Project								
Project								
Project								
Project								
Project								
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EXAMPLE: Completed Step 3

Omar Fowler (Head of Analytics and Insights)	Importance	Severity	Frequency	Business Value	Ease of Implementation	Strategic Alignment
Self pay/order tablets at restaurants Gain buy-in from food & beverage stakeholders & implement	3	3	3	3	3	3
SMS/pulse survey post check-in Work with IT to identify operational data opportunities & real-time deployment capabilities	5	5	5	5	2	5
Housekeeping training for identifying mold Develop & launch training for housekeeping to proactively identify potential mold in bathrooms	5	5	5	5	4	5
SMS/in-app call for car for valet Partner with digital team & valet team to develop new channel for requesting cars	3	4	2	3	3	2
Improve room request collection at booking Partner with digital, revenue, & hotel ops to improve ability to collect room preferences at booking & act on at check-in	4	3	5	4	3	3
Automate bell service orders at room check-in Partner with digital team & bell services team to develop automated workflow to assign delivery ticket after check-in	2	3	2	2	4	2
Diagnose low room cleanliness scores Explore the highest impact reasons for continued decrease in room cleanliness scores	5	4	5	5	3	5
Customer service training for frontline employees Annual service refresh training	5	2	5	5	4	5
Reduce number of steps in online booking process Work with digital and revenue management to streamline booking process	4	4	4	4	3	4

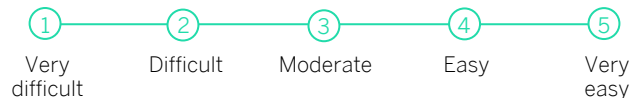## Rating Scale for Each Dimension

Importance
1 — Not at all important
2 — Slightly important
3 — Moderately important
4 — Important
5 — Extremely important

Business Value
1 — Very low value
2 — Low value
3 — Moderate value
4 — High value
5 — Very high value

Severity
1 — Very low severity
2 — Low severity
3 — Moderate severity
4 — High severity
5 — Very high severity

Ease of Implementation
1 — Very difficult
2 — Difficult
3 — Moderate
4 — Easy
5 — Very easy

Frequency
1 — Very low frequency
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Strategic Alignment
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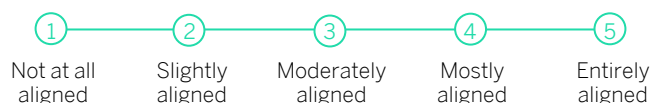
EXAMPLE: Completed Steps 4 and 5

	Importance	Severity	Frequency	Customer-centric Total	Business Value	Ease of Implementation	Strategic Alignment	Organization-centric Total	OVERALL TOTAL
	AVERAGE	AVERAGE	AVERAGE	TOTAL	AVERAGE	AVERAGE	AVERAGE	TOTAL	TOTAL
Self pay/order tablets at restaurants	2.9	3.4	3.1	9.4	2.8	2.9	3.0	8.7	18.1
SMS/pulse survey post check-in	4.8	4.7	4.9	14.4	5.0	2.4	4.8	12.2	26.6
Housekeeping training for identifying mold	5.0	4.6	4.8	14.4	4.9	4.2	5.0	14.1	28.5
SMS/in-app call for car for valet	2.8	4.4	2.3	9.5	2.9	3.0	2.2	8.1	17.6
Improve room request collection at booking	4.4	3.5	5.0	12.9	4.3	3.3	3.7	11.3	24.2
Automate bell service orders at room check-in	1.7	3.3	2.0	7.0	2.4	4.5	2.1	9.0	16.0
Diagnose low room cleanliness scores	5.0	4.4	4.8	14.2	4.7	3.6	4.9	13.2	27.4
Customer service training for frontline employees	4.6	2.5	4.8	11.9	4.9	4.3	4.7	13.9	25.8
Reduce number of steps in online booking process	3.6	4.0	3.4	11.0	4.0	3.1	3.9	11.0	22.0

Projects requiring further research:

PROJECT NAME	NOTES ON NEXT STEPS
Operational Data Options	Work with IT to determine additional operational data points to integrate
Real-time survey capability	Determine capability internally to deploy holistic real-time feedback strategy
CX for Design Teams	Explore data sets that can be leveraged by the internal design teams
Reservation Center Satisfaction	Combine property CX metrics with remote contact center metrics
Dashboards for Facilities	Understand data points available and relevant for a facilities dashboard

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EXAMPLE: Completed Step 6

	Customer-centric Total	Organization-centric Total	Overall Total	0 – 3 months	4 – 6 months	7 – 12 months	12+ months	Launch Date
Housekeeping training for identifying mold	14.4	14.1	**28.5**			X		Q3 2022
Diagnose low room cleanliness scores	14.2	13.2	**27.4**			X		Q3 2022
SMS/pulse survey post check-in	14.4	12.2	**26.6**				X	Q4 2022
Customer service training for frontline employees	11.9	13.9	**25.8**			X		Q2 2023
Improve room request collection at booking	12.9	11.3	**24.2**		X			Q4 2022
Reduce number of steps in online booking process	11.0	11.0	**22.0**		X			Q1 2023
Self pay/order tablets at restaurants	9.4	8.7	**18.1**	X				Q1 2023
SMS/in-app call for car for valet	9.5	8.1	**17.6**	X				Q4 2022
Automate bell service orders at room check-in	7.0	9.0	**16.0**			X		Q1 2023

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