Worksheet: EX Project Prioritization Exercise

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

SUMMARY

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

SIX STEPS OF A EX PROJECT PRIORITIZATION EXERCISE

This EX Project Prioritization Tool provides a framework for creating and maintaining a list of EX projects that are prioritized based on standardized employee and organizational dimensions. The goal of this activity is to – in an empirical way – arrive at a list of prioritized EX projects that are well-aligned with the organizational context, easy to update as needed, and position your EX 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 EX projects derived from employee insights, people and culture 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 organization. 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.** People operations teams, executive leaders, and employee committees are a good place to find participants to include in the prioritization exercise. Ideally, you'll want representatives 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 EX 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 teams 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 an employee-centric, organization-centric, and overall total score. You may wish to create weighting 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 the appropriate project collaborators before finalizing the list.

+ **Step 6. Incorporate your prioritized list of projects into your EX program roadmap.** Finally, transfer your prioritized list into your EX 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, employee expectations or business needs change, or your strategic roadmap is due for an update.

HOW TO USE

You can use this tool to:

+ **Build an EX Strategy or Roadmap**. Use this prioritization tool with predefined and standardized ranking criteria to ensure that the EX projects you are choosing to include in your strategy and roadmap have an empirical foundation that have fairly considered all options.

+ **Generate buy-in and ownership.** While the core EX 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 EX projects, have them complete this overall exercise.

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

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

	DIMENSION	CONSIDERATIONS	SCALE
EMPLOYEE-CENTRIC	**Impact on Employees** How much does this experience matter to employees?	+ Which employee segments will see the most positive impact as a result of this project? + How essential is this experience to employees' success in the organization (e.g., retention, performance, etc.)? + What long-term effect will this project have on employees, both personally and professionally?	**1** = Very low impact **2** = Low impact **3** = Moderate impact **4** = High impact **5** = Very high impact
	Severity How acute are the pain points or frustrations employees currently experience?	+ How do employees currently feel about the experience this project would address? + What are employees' 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
	Scope of the Issue How many employees will this project impact?	+ What percentage of employees encounter this experience? + How frequently do employees encounter this experience? + Which employee provide this feedback? + Who accesses and uses the insights?	**1** = Very few employees **2** = Some employees **3** = About half of employees **4** = Many employees **5** = All employees
ORGANIZATION-CENTRIC	**Strategic Alignment** How well does this project align with other organizational objectives?	+ To what extent will the opportunities or challenges that are addressed by this project support other organizational goals? + How critical are these insights for leaders to deliver on organizational goals?	**1** = Not at all aligned **2** = Slightly aligned **3** = Moderately aligned **4** = Mostly aligned **5** = Entirely aligned
	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? + How much stakeholder buy-in and executive commitment does this project have? + Are the capabilities in place to take effective action? + Will the project require changes to current technology? If so, how complex are they?	**1** = Very difficult **2** = Difficult **3** = Moderate **4** = Easy **5** = Very easy
	Improvement Ownership How clear are the lines of responsibility or accountability for this project?	+ Who will take responsibility to improve this experience and act on the data collected? + Are there established systems in place are ready to take action?	**1** = Very unclear **2** = Unclear **3** = Neither clear nor unclear **4** = Clear **5** = Very clear

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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.

Participant Name & Title	Impact on Employees	Severity	Scope of the Issue	Strategic Alignment	Ease of Implementation	Improvement Ownership
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						
Project						

Rating Scale for Each Dimension

Impact on Employees
1 — Very low impact
2 — Low impact
3 — Moderate impact
4 — High impact
5 — Very high impact

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

Scope of the Issue
1 — Few employees
2 — Some employees
3 — About half of employees
4 — Many employees
5 — All employees

Strategic Alignment
1 — Not at all aligned
2 — Slightly aligned
3 — Moderately aligned
4 — Mostly aligned
5 — Entirely aligned

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

Improvement Ownership
1 — Very unclear
2 — Unclear
3 — Neither clear nor unclear
4 — Clear
5 — Very clear

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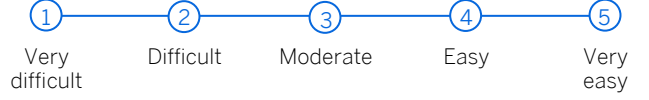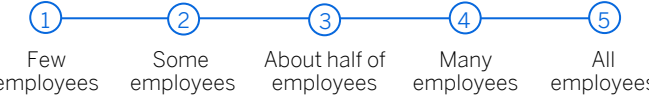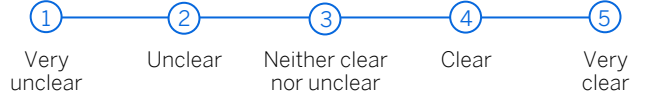
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Once you have collected all the responses, complete the table below. First note down the number of participants who provided their data. Then add up the three employee-facing criteria and the three organization-facing criteria to generate an "employee-centric 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 results back with each participant and discuss as a group. Structure the meeting agenda to allow time for people to a) nominate projects for discussion that they think were scored inaccurately, b) discuss each one, c) decide on any score weightings or adjustments, d) identify projects that require further research, and e) select project owners for the top 5-10 projects on the list.

NUMBER OF PARTICIPANTS:	Impact on Employees	Severity	Scope of the Issue	Employee-centric total	Strategic Alignment	Ease of Implementation	Improvement Ownership	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 employee-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 employee-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.

NUMBER OF PARTICIPANTS:	Employee-centric total	Organization-centric total	Overall Total	0 – 3 months	4 – 6 months	7 – 12 months	12+ months	Continuous	Launch Date
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									
Project									

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EXAMPLE: Completed Step 3

Keeshia Doyle (Head of People Analytics)	Impact on Employees	Severity	Scope of the Issue	Strategic Alignment	Ease of Implementation	Improvement Ownership
Onboarding Experience Survey new starters at day 10/30/90 + Hiring Manager	5	2	3	3	1	4
Leadership 360 Developmental feedback on leadership competencies	4	3	5	5	2	3
Engagement Pulse Annual census + shorter quarterly pulses	4	1	3	2	3	1
Return From Parental Leave Experience during & after return from extended leave	5	2	4	4	5	2
Candidate Experience Critical touchpoint insights from application to offer	3	5	2	5	2	4
Exit Survey Survey regretted resignation to collate themes	4	2	5	3	3	4
Internal Mobility Experience Ease of role change and mobility process effectiveness	3	4	3	2	4	5
Employee Wellbeing Research Deep dive into wellbeing, burnout, & resilience + drivers	2	1	3	5	4	4
Diversity, Equity & Inclusion Deep Dive Self-identity demographics, inclusion, and cultural drivers	5	3	2	4	2	1

Rating Scale for Each Dimension

Impact on Employees
1 — Very low impact
2 — Low impact
3 — Moderate impact
4 — High impact
5 — Very high impact

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

Scope of the Issue
1 — Few employees
2 — Some employees
3 — About half of employees
4 — Many employees
5 — All employees

Strategic Alignment
1 — Not at all aligned
2 — Slightly aligned
3 — Moderately aligned
4 — Mostly aligned
5 — Entirely aligned

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

Improvement Ownership
1 — Very unclear
2 — Unclear
3 — Neither clear nor unclear
4 — Clear
5 — Very clear

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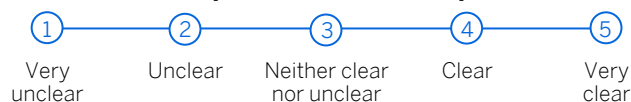
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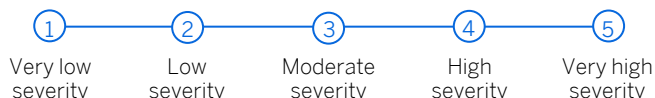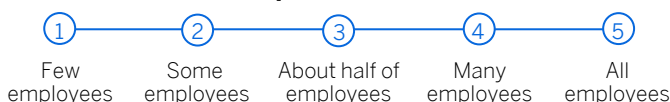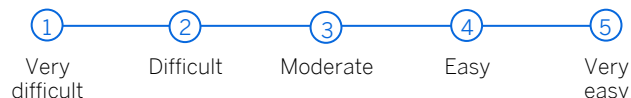
EXAMPLE: Completed Steps 4 and 5

NUMBER OF PARTICIPANTS: 15	Impact on Employees	Severity	Scope of the Issue	Employee-centric total	Strategic Alignment	Ease of Implementation	Improvement Ownership	Organization-centric total	OVERALL TOTAL
	AVERAGE	AVERAGE	AVERAGE	TOTAL	AVERAGE	AVERAGE	AVERAGE	TOTAL	TOTAL
Onboarding Experience	4.1	2.0	3.5	**9.6**	2	1.5	4.1	**7.6**	**17.2**
Leadership 360	3.8	3.5	1.5	**8.8**	3.6	2.1	3.0	**8.7**	**17.5**
Engagement Pulse	4.8	3.6	5.0	**13.2**	4.7	4.0	4.4	**13.1**	**26.3**
Return From Parental Leave	4.8	2.0	1.2	**8.0**	2.1	2.8	1.5	**6.4**	**14.4**
Candidate Experience	4.2	4.6	3.9	**12.7**	4.2	2.8	3.9	**10.9**	**23.6**
Exit Survey	2.2	3.0	1.5	**6.7**	3.0	3.7	1.2	**7.9**	**14.6**
Internal Mobility Experience	3.9	4.5	2.0	**10.4**	2.0	2.8	4.8	**9.6**	**20.0**
Employee Wellbeing Research	3.2	3.1	4.4	**10.7**	3.5	3.1	3.0	**9.6**	**20.3**
Diversity, Equity & Inclusion Deep Dive	4.6	4.0	4.3	**12.9**	4.2	2.7	3.9	**10.8**	**23.7**

Projects requiring further research:

PROJECT NAME	NOTES ON NEXT STEPS
Technology Experience	Speak with CTO regarding hybrid working experience
Learning Experience	Look into possible connection with L&D programs
IT Service Desk Effectiveness	Investigate employee journey when interacting with IT helpdesk
Facilities Experience	Workplace redesign for future of work
HR Helpdesk Satisfaction	Explore appetite to put in place an experience level agreement

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EXAMPLE: Completed Step 6

NUMBER OF PARTICIPANTS: 15

	Employee-centric Total	Organization-centric Total	Overall Total	0 – 3 months	4 – 6 months	7 – 12 months	12+ months	Continuous	Launch Date
Engagement Pulse	13.2	13.1	**26.3**					X	Q3 2022
Diversity, Equity & Inclusion Deep Dive	12.9	10.8	**23.7**			X			Q4 2022
Candidate Experience	12.7	10.9	**23.6**					X	Q1 2023
Employee Wellbeing Research	10.7	9.8	**20.5**		X				Q1 2023
Internal Mobility Experience	10.4	9.6	**20.0**		X				Q2 2023
Leadership 360	8.8	8.7	**17.5**					X	Q4 2023
Onboarding Experience	9.6	7.6	**17.2**					X	Q1 2024
Exit Survey	6.7	7.9	**14.6**					X	Q4 2023
Return From Parental Leave	8.0	6.4	**14.4**					X	Q2 2024

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