

Worksheet: Stakeholder Mapping

Original Resources: *How to Build a CX Program Roadmap*; *How to Build an EX Program Roadmap*

SUMMARY

Experience Management (XM) – including customer experience (CX) management and employee experience (EX) management – is everyone’s business. A single CX or EX team working alone will not be able to deliver on their program’s strategy and roadmap. To bring an XM vision to life, you need leaders and employees across the organization to be aligned. Effectively managing stakeholders and securing authentic buy-in is therefore essential to the long-term success of your program. How you engage these various groups will depend on their level of interest in your XM efforts as well as the strength of their influence over the direction of your program. Stakeholder mapping is a powerful exercise to better understand and activate the individuals and groups needed to successfully implement your XM strategy and roadmap. Use this tool to categorize key stakeholders across four segments and create a tailored engagement plan to more effectively mobilize your XM efforts.

FOUR STEPS FOR CREATING A STAKEHOLDER MAP

A well-thought-out stakeholder map provides direction for when and how to engage with the stakeholders who are critical to the long-term success of your XM program. The framework provided here categorizes stakeholders based on their levels of interest in and influence over your XM activities. To create a stakeholder map, follow these four steps:

- + **Step 1. Define your key stakeholders.** Create a list of the key stakeholders who relate to your XM program. “Stakeholders” can be specific individuals (such as a senior leader or program manager) or groups of people (such as people managers, frontline employees, or the communications team). The goal here is to list the stakeholders who influence the design and delivery of your XM program or who are ultimately affected by it. Add stakeholder names and roles into the left-hand column on page 2.
- + **Step 2. Score each stakeholder on their level of interest and influence.** Give each stakeholder a high, medium, or low rating for both their interest in and influence over your XM program. Use the guidance on page 3 to better understand what each dimension is and what these different levels of influence and interest might look like.
- + **Step 3. Assign each stakeholder to their appropriate group.** Using the interest and influence ratings for each stakeholder, group them into categories. Use the matrix on page 4 to help you conceptualize the relationship between these groups and their levels of interest and influence. For those who scored in the middle, use the descriptions on page 4 – as well as the more detailed overviews on pages 5 through 9 – to identify where they fit best.
- + **Step 4. Build engagement and communication plans.** Now that you have a better understanding of each of your stakeholders, use the information provided on pages 5 through 9 to begin building an effective strategy for engaging and communicating with people in each group.

HOW TO USE

You can use this tool in a number of different ways to better engage stakeholders across your organization:

- + **Incorporate into communications plans.** Leverage the insights for each stakeholder segment to define a comprehensive [plan for communicating](#) key XM messages to each group, including role-specific language, cadence of communications, and expected delivery channels.
- + **Align on stakeholder priorities and objectives.** Clarify stakeholder expectations of your XM program and how they believe it fits into their objectives. We recommend using our [CX Project Prioritization tool](#) or [EX Project Prioritization tool](#) to help you align the priorities of your programs’ projects.
- + **Prioritize your time.** Your time is a limited resource, and this tool can help you prioritize which individuals or groups you should invest the most (or least) time engaging.
- + **Change management.** Use this tool to help you identify which individuals or groups are most likely to be affected by upcoming changes so you can prepare these stakeholders and preemptively address their concerns.

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List out each stakeholder (individual or group) along with their interest/influence level and stakeholder segmentation. Use this list in conjunction with the guidance on pages 5 to 9 to craft your stakeholder engagement and communication plans.

Stakeholder Name and Role	Rating		Stakeholder Segmentation			
	Interest Level	Influence Level	Bystander	Challenger	Supporter	Champion
ex. Tom Smith, CMO	High	High				X

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To help you complete the worksheet on page 2, here is a breakdown of the two dimensions you will use to rate each stakeholder (individual or group) – interest and influence:

INTEREST

How much is this stakeholder affected by XM strategy and activities?

Questions to consider when rating **INTEREST** level:

- + Does the stakeholder carry out experience-related activities in their everyday role?
- + Does this stakeholder depend on XM insights in their daily work?
- + Does this stakeholder have responsibility for delivering aspects of the XM strategy?

INFLUENCE

How much does this stakeholder affect XM strategy and activities?

Questions to consider when rating **INFLUENCE** level:

- + How much power does this stakeholder have to set the direction of the XM program or strategy?
- + Is this stakeholder able to influence change across the organization?
- + Does this stakeholder have the capability to help unlock resources to advance the XM strategy?

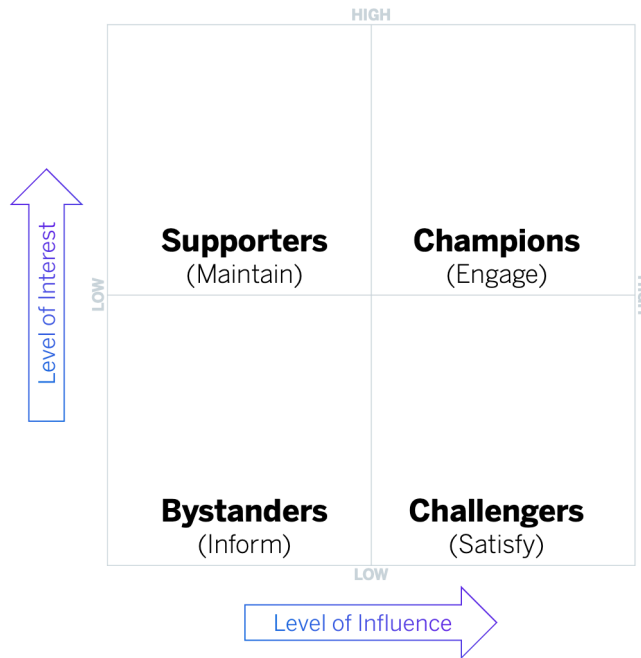
Rating Criteria

	LOW	MEDIUM	HIGH
INTEREST	<ul style="list-style-type: none"> + Accesses XM data only when pushed + Unaware of any XM strategy + Mildly curious about XM + Changes to the XM program will impact them slightly 	<ul style="list-style-type: none"> + Accesses XM data regularly + Some awareness of the XM strategy or roadmap + Interested in XM + Changes to XM programs will impact them significantly 	<ul style="list-style-type: none"> + Pays close attention to details and has informed opinions about the XM program + Depends on XM data in their daily work + Has responsibility for delivering aspects of the XM strategy + Places high value on XM + Changes to XM programs will have a big impact on them (e.g., their success is defined by XM targets or goals)
INFLUENCE	<ul style="list-style-type: none"> + Is a recipient or consumer of XM insights + Take action at the local level only 	<ul style="list-style-type: none"> + Can affect the direction of XM strategy or programs + Contributes to the success of the XM program + Uses XM insights to align their objectives 	<ul style="list-style-type: none"> + Has the power to direct XM strategy, such as senior executives or leaders of key business units that are closely aligned with your XM efforts + Includes critical partners required to deliver the program

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To help you conceptualize the four segments you are bucketing stakeholders into on page 2, here is a visual representation of the four quadrants of the interest/influence matrix, along with with a short description of the individuals or groups within each segment:



STAKEHOLDER SEGMENTATION	DESCRIPTION
Bystanders (Inform)	<ul style="list-style-type: none"> + These stakeholders have low levels of interest in the XM strategy and low levels of influence across the organization (see page 7). + These tend to be individuals or groups who have limited understanding of how XM programs are run, are passive recipients of XM insights, and/or have a limited amount of bandwidth to get involved. + Keeping this group informed of the vision, strategy, and direction of XM programs is a key part of organization change efforts.
Challengers (Satisfy)	<ul style="list-style-type: none"> + These stakeholders have low levels of interest in the strategy but high levels of influence across the organization (see page 8). + These tend to be individuals or groups who have not previously been engaged in XM efforts or are resistant in some way to the XM strategy as it stands. + While they are potential “challengers” to your strategy now, if you take the time to engage them, they can become Champions.
Supporters (Maintain)	<ul style="list-style-type: none"> + These stakeholders have a high level of interest in your strategy but low levels of influence across the organization (see page 9). + These tend to be individuals or groups who are important evangelists for your XM strategy + The advocacy and support of this group is critical for building positive sentiment towards your program as well as an XM-centric culture overall.
Champions (Engage)	<ul style="list-style-type: none"> + These stakeholders have high levels of interest in your XM strategy and high levels of influence across the organization (see page 10). + These are the ultimate proponents of your strategy as they both embrace the value of XM and have the power to drive your program forward by advocating for it across the organization.

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Here is some guidance you may find valuable as you craft your engagement and communication strategies for stakeholders in this segment:

Bystanders (Inform)

Overview	<p>These stakeholders have low levels of interest in XM strategy and activities and low levels of influence on how the XM program is run. Often these are individuals who have never been exposed to the XM strategy before, and while they may use XM insights in some of their work, they have limited or no understanding of how these insights are generated. Stakeholders in this group also tend to lack the bandwidth to become more involved in XM efforts. While these stakeholders might be passive actors in your XM strategy right now, they are a critical segment in any change management effort. Plus, in the future, they may gain increased levels of interest or influence, so it is important not to ignore this segment.</p>
Example members	<p>Partner or vendor operators, analysts, individual contributors, frontline managers or employees using XM insights</p>
Why this segment is important	<p>The people who you care about most (senior leaders and influencers of XM program strategy) care about these stakeholders. So while this segment may not currently have direct influence or interest, if the XM program is not delivered or communicated well – if it does not effectively enable frontline staff or if it actively disrupts their workflows – these issues will escalate quickly. Additionally, members of this segment may shift into other segments as their role changes or as they become more interested in XM strategy and activities.</p>
What they care about	<p>They care most about how XM insights reflect on them as individuals and affect their ability to perform their everyday work (either positively or negatively).</p>
Tips for engaging and communicating	<ul style="list-style-type: none">+ Don't overlook this segment! Factor these stakeholders into your change management and communications plans.+ Although little to no direct communication with this group is required while you're early in the process of building out your program roadmap, once you begin rolling out XM activities, you will need to proactively keep this group informed about the value and progress of these efforts.+ Tailor organization-wide updates to connect with these stakeholders, clarifying what XM changes mean for their individual work, what mindset or behavioral changes may be required of them, and what specific role they play in creating an XM-centric culture.
Resources	<ul style="list-style-type: none">+ Report: Best Practices Across the Activate Competency+ Tool: Effective XM Communication Plans: Strengths and Gaps+ Blog: How Do You Engage Employees? Adopt the Five I's+ Blog: Drive Change Top-Down and Bottom-Up... with Middle Managers!

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Challengers (Satisfy)

Overview	<p>These stakeholders have low levels of interest in XM strategy and activities but high levels of influence on how the XM program is run. They can be potential detractors from your efforts. Often these are individuals who have never been actively included or made aware of the XM strategy before. They may also feel that XM program encroaches upon their area of work in some way or requires them to make changes they don't agree with or are unwilling to prioritize. Because their opposition can create major obstacles – and their buy-in could boost momentum – these are the influencers and decision-makers you really want to win over with a strong engagement strategy.</p>
Example members	<p>(Same as Champions) Chief Experience/Marketing Officer, Chief Financial Officer, Senior Business Leaders, Chief Operating Officer or their designees, XM program managers, Chief Human Resources Officer & People Operations leaders, Technology Leaders</p>
Why this segment is important	<p>Because of their position of high influence, this group can substantially affect whether your XM activities and strategies are widely adopted or fail to thrive. While it may not always be obvious at first, there are often incredible opportunities for collaboration and mutual benefit with members of this group.</p>
What they care about	<p>They care most about their own objectives, and it is likely they do not yet understand how their organization or priorities fit into your proposed XM roadmap. Why should they care about increasing their level of interest in the program? How does the XM program help or hinder their efforts to achieve their group's broader business objectives?</p>
Tips for engaging and communicating	<ul style="list-style-type: none">+ Meet with each individual in this segment 1:1 to personally communicate the XM vision and roadmap. During this meeting, explicitly connect XM with the business outcomes they care about, share success stories, and work to identify opportunities for potential collaboration.+ Establish a cadence of monthly or quarterly 1:1 meetings to share value-driven insights and updates .+ Activate healthy competition amongst leaders by highlighting the business success of the Champions who are more highly engaged with your XM program.
Resources	<ul style="list-style-type: none">+ Blog: How Do You Explain Experience Management to Senior Executives?+ Tool: Executives' Commitment to XM: Assessment+ Report: Activating Executive Commitment

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Supporters (Maintain)

Overview	<p>These stakeholders have high levels of interest in XM strategy and activities but low levels of influence on how the XM program is run. They are critical to the success of your XM program as their ongoing advocacy and support is what creates an XM centric-culture and builds positive sentiment towards your XM program. While these stakeholders may not have significant input into the direction of your program roadmap right now, they are valuable promoters and evangelizers of your XM efforts amongst their peers and can be powerful allies over time as their roles change and they take on more leadership positions.</p>
Example members	<p>Department or location managers, analysts, frontline team members, people managers, People Operations team members</p>
Why this segment is important	<p>This segment is likely the population taking the greatest amount of action to improve employee and customer experiences. They are often the ones closing the loop and implementing improvements based on direction given to them by stakeholders in the Champions segment.</p>
What they care about	<p>They care most about departmental business performance and KPIs, insights that are relevant to their roles, action planning guidance, and their personal employee experiences.</p>
Tips for engaging and communicating	<ul style="list-style-type: none">+ Because these stakeholders are often the ones delivering XM activities or using XM insights, actively solicit their input through channels such as a formal voice of the employee program, journey mapping sessions, employee-driven process improvement or innovation projects, frontline feedback, and informal listening sessions.+ Keep this group well-informed about any XM-related changes that are likely to affect them, delivering these key messages through multiple channels on a regular basis and specifying what these changes mean for them personally.+ Recognize and reward supporters who exhibit the desired XM mindsets and behaviors. This might be through formal awards and incentives programs or through informal gestures of appreciation.+ Establish an XM Ambassador program to capitalize on these stakeholders' grassroots support and empower them to amplify and contribute to your XM vision and strategy.
Resources	<ul style="list-style-type: none">+ Launchpad: Activating Employees Around Experience Management+ Report: Best Practices Across the Activate Competency+ Blog: How Do You Engage Employees? Adopt the Five I's+ Blog: Five Elements of Successful XM Ambassador Programs

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Here is some guidance you may find valuable as you craft your engagement and communication strategies for stakeholders in this segment:

<h2 style="margin: 0;">Champions</h2> <p style="margin: 0;">(Engage)</p>	
Overview	<p>These stakeholders have high levels of interest in how the XM program roadmap and strategy are delivered as well as high levels of influence over how it gets done. These are the key sponsors of your program who will represent you at the highest levels of the organization, raising awareness of and support for your XM efforts and helping to shape and approve the direction of your program. Because of their belief in the XM vision and ability to advocate amongst their peers, keeping this group actively engaged is absolutely essential for the long-term success of your program.</p>
Example members	<p>(Same as Champions) Chief Experience/Marketing Officer, Chief Financial Officer, Senior Business Leaders, Chief Operating Officer or their designees, XM program managers, Chief Human Resources Officer & PeopleOps leaders, Technology Leaders</p>
Why this segment is important	<p>This segment has the ability to direct organizational resources and attention to accelerate your XM program as well as drive change within their individual departments.</p>
What they care about	<p>They care most about how the XM strategy propels the organization towards high-priority business objectives and organizational outcomes, which means it is crucial to ensure these stakeholders continue to see the value of your XM program and clearly understand how it connects to revenue growth, profitability, risk, and cost reduction. They are invested in the success of your XM program.</p>
Tips for engaging and communicating	<ul style="list-style-type: none"> + Invite members of this group to join your steering or executive advisory committee, which provides the highest level of oversight in shaping and approving your XM strategy and roadmap. + Invest time in building relationships with stakeholders in this group, learning who they are as individuals, what motivates them, what their primary business goals are, and which projects or initiatives they care about most. + Create opportunities for this group to actively support your XM efforts, such as participating in the organization's CX Day celebrations, participating in EX workshops or listening programs, or contributing to XM-centric internal communications. + Where possible, ensure they build accountability and responsibility for XM into their own team's operations (e.g., including a representative from their team on your XM working group).
Resources	<ul style="list-style-type: none"> + Blog: The Five Essential Elements of CX Program Governance + Report: Activating Executive Commitment