

XM Masters

Student Handbook



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Welcome to the student handbook for the XM Masters program! This handbook has been created to provide you with important information about the program and the policies and procedures that you need to follow. Please take the time to read this handbook carefully so that you can have a successful and fulfilling experience in XM Masters.

About Qualtrics XM Institute

[Qualtrics XM Institute](#) is the world's leading experience management think tank. Its faculty of experience management (XM) experts combine deep industry expertise with proven executive training skills. Our mission is to create a thriving global community of XM professionals who are empowered and inspired to improve human experiences. We do this through:

- Thought Leadership - powerful insights from leading XM experts on building and maturing XM programs
- Community - XM Pros, the premier global community for XM professionals to connect with their peers
- Training & Certification - content for building XM mastery and establishing credentials
- Speaking - speeches, presentations, and workshops on XM trends, best practices, and frameworks

About the XM Masters Program

XM Masters is a premier professional development training for experience management professionals. The XM Masters program is designed to provide students with advanced knowledge and skills in experience management, and accelerate their careers as an XM Professional.

Across twelve weeks, practitioners will progress through six learning modules that integrate experience management (XM) theory and practice. The program runs for twelve consecutive weeks and consists of a combination of in-person and online learning activities. The XM Masters program provides a strong, broad understanding of XM, as well as applied practitioner skills to deepen expertise in either customer or employee experience.

Learners are required to register for either the customer experience or employee experience track for focused skill development in modules three through five.

Enrollment Qualifications

XM Masters is open to anyone with qualified experience. Both Qualtrics customers and non-customers may enroll. This program is best suited to mid-to-senior level professionals who are developing executive leadership skills and competencies in experience management. For example:

- Customer experience and employee experience professionals who lead programs and seek to advance their expertise
- Strategic consultants expanding their XM skills and toolkits
- Executives who are transforming experience-centric organizations
- Tenured professionals, such as those in HR or market research, who are building XM specialization

Those enrolled in XM Masters will receive professional development that advances practical, real-world experience of managing one or more core experiences of business: customer, employee, product, or brand. To ensure that students meet the minimum criteria necessary to gain the most value from the XM Masters curriculum, there are two prerequisites for enrollment.

Prerequisite 1: Professional Experience

Five or more years of Experience Management experience (as a practitioner or consultant) in one or more core experience areas (customer, employee, brand, or product), with primary responsibilities that include delivery or management of XM programs. For example:

- Leading a transformation effort to architect and sustain an experience management program
- Tracking and ensuring XM efforts achieve well-defined business objectives using a clear set of metrics
- Activating an organization's employees for change to achieve desired results
- Collecting appropriate experience and operational data and provide actionable insights across the organization
- Establishing mechanisms for an organization to prioritize and drive improvements based on insights
- Identifying and creating experiences that differentiate an organization

Prerequisite 2: Access to an XM Program

Access to current or past experience management programs, to be used in each of the applied practitioner skills modules. In these modules, students will apply the XM tools and practices with real organization use cases provided by students. To complete the projects and get the most value from the XM Masters program, each participant should be working with XM programs on which these practitioner skills can be applied. If you do not have access to an XM program use case, please contact the XM Institute program manager to explore options.

At enrollment, it is the responsibility of each student to:

1. Ensure that you have met all prerequisites to enroll
2. Obtain all of the necessary permissions from your employer, partners, and affiliates, as applicable, to fully participate in the XM Masters program

3. Ensure your participation in the XM Masters program is not in conflict with existing employer, partner, or affiliate agreements
4. Your enrollment will not cause an event of default
5. That all information provided in your enrollment application is complete, true, and accurate

Attendance

To receive the XM Masters professional certificate, students must attend a minimum of 80% of required coursework and complete the final project. The total time commitment will differ for each student, averaging between 6 to 8 hours per week. Across the twelve weeks, this is a combination of the following:

Total coursework

- 2 x two-day in-person workshops in a single location
- 10 hours of live, online learning activities
- 6 hours of self-guided, online learning activities
- Up to 25 hours of personal study and project completion
- 15+ hours of optional virtual group study, collaboration, or office hours with XM Institute faculty

Learning Methods

Across the XM Masters program, students will engage with the coursework through both in-person and live, online learning activities.

In-person Workshops

Each student will select a location to attend in-person workshops at a Qualtrics location. These workshops are four days in total: 2 consecutive days in week one and 2 consecutive days in week twelve. These workshops will not be repeated or recorded. Students are expected to attend all four days in person.

Workshops will be held at Qualtrics offices. Please refer to the syllabus for your cohort to see which locations are available for your cohort.

2023 Locations

- Dublin, Ireland
- Seattle, US
- Sydney, Australia

Students will be provided with lunch and beverage service - please share any dietary restrictions upon registration or reach out to the XM Masters program manager. Recommended attire is

business casual. Students are responsible for securing and funding their own travel and accommodation.

Online Learning Activities

Weeks two through eleven will be conducted through virtual learning. These online sessions combine self-guided, online Lessons and live, online Learning Labs. All live online Learning Labs will be offered at three optional times, with timing dependent on the locations included in the cohort. Lessons in Modules 2, 3, 4, and 5 will be recorded and available for students to complete in their own time prior to their selected Learning Lab. Students are required to attend one Learning Lab per module in order to meet attendance requirements. At the end of each module, students will be required to complete and present an applied learning project.

Students can collaborate with peers and XM Institute faculty in optional Peer Meet-Ups and Office Hours.

There are five types of online learning activities:

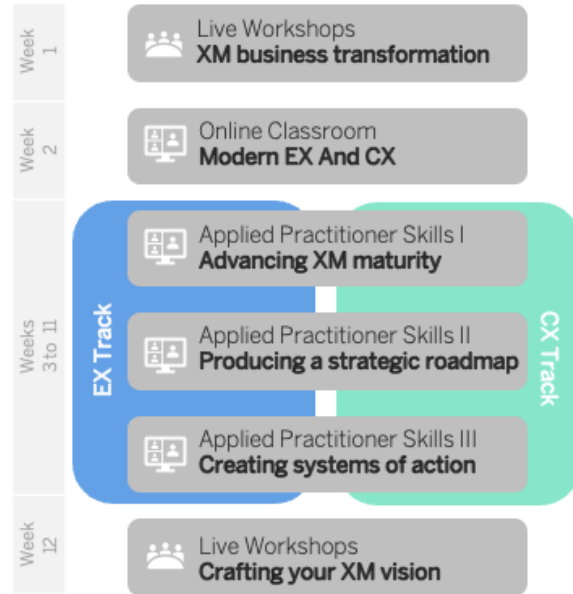
Type of Learning	Description	Length	Frequency	Scheduling	Required
Lesson <i>Led by XM Institute Faculty</i>	Pre-recorded lectures from XM Institute faculty, to be completed before Learning Labs.	45 min - 1 hour	Weeks: 2/3/6/9 <i>Six total</i>	N/A	Required
Learning Labs <i>Led by XM Institute Faculty</i>	Live, interactive training XM Institute faculty, diving into topics from the foundational lecture.	1 hour	Weeks: 2/3/6/9 <i>Six total</i>	Two to three time options for each track and module	Required
Project Presentations	15-minute slots to share your project findings and recommendations to peers and faculty and receive feedback.	1.5 hours	Weeks: 5/8/11 <i>Three total, one for each Module 3-5</i>	Two to three time options for each module	Required
Peer Meet-ups	Student-led collaboration and working groups	1 hour	Weeks: 4-10	One time option each week (rotating times) for each track	Optional
Office Hours <i>XM Institute Faculty</i>	Get advice and feedback from XM Institute Faculty	15-30 min	Weeks : 3/4/6/7/9/10	Three to six slots each week	Optional

Program of Study

Across twelve consecutive weeks, students will progress through six modules of learning.

Modules:

1. XM Business Transformation
2. Modern EX and CX
3. Applied Practitioner Skills I: Advancing XM Maturity
4. Applied Practitioner Skills II: Producing a Strategic XM Roadmap
5. Applied Practitioner Skills III: Creating Systems of Action
6. Crafting your XM Vision



The progression of each module is documented below.

Module 1: XM Business Transformation		
Week 1	Workshop 1: Transforming experience-centric organizations <ul style="list-style-type: none"> • Full day, in-person • Attendance required 	Workshop 2: XM vision & strategic value <ul style="list-style-type: none"> • Full day, in-person • Attendance required

Module 2: Modern EX and CX programs			
Week 2	Lesson: Experience Journeys <ul style="list-style-type: none"> • Self-guided, online learning • 45 min • Required Learning Lab: Experience Journeys <ul style="list-style-type: none"> • Live, online discussion • 30 min • Two or three live options / not recorded • Attendance required 	Lesson: EX Fundamentals <ul style="list-style-type: none"> • Self-guided, online learning • 45 min • Required Learning Lab: EX Fundamentals <ul style="list-style-type: none"> • Live, online discussion • 30 min • Two or three live options / not recorded • Attendance required 	Lesson: CX Fundamentals <ul style="list-style-type: none"> • Self-guided, online learning • 45 min • Required Learning Lab: CX Fundamentals <ul style="list-style-type: none"> • Live, online discussion • 30 min • Two or three live options / not recorded • Attendance required

Module 3: Applied Practitioner Skills I		
	EX Track	CX Track
Week 3	<p>Lesson: Advancing EXM Maturity</p> <ul style="list-style-type: none"> Self-guided, online learning 1 hour <i>Required</i> <p>Learning Lab: Advancing EXM Maturity</p> <ul style="list-style-type: none"> Live, online discussion 1 hour Two or three live options <i>Attendance required</i> <p>XM Institute faculty office hours</p> <ul style="list-style-type: none"> <i>Optional</i> 	<p>Lesson: Advancing CXM Maturity</p> <ul style="list-style-type: none"> Self-guided, online learning 1 hour <i>Required</i> <p>Learning Lab: Advancing CXM Maturity</p> <ul style="list-style-type: none"> Live, online discussion 1 hour Two or three live options <i>Attendance required</i> <p>XM Institute faculty office hours</p> <ul style="list-style-type: none"> <i>Optional</i>
Week 4	<p>Applied Learning: Advancing EXM Maturity</p> <ul style="list-style-type: none"> Individual project work <p>XM Institute faculty office hours</p> <ul style="list-style-type: none"> <i>Optional</i> <p>Virtual peer meetup</p> <ul style="list-style-type: none"> <i>Optional</i> 	<p>Applied Learning: Advancing CXM Maturity</p> <ul style="list-style-type: none"> Individual project work <p>XM Institute faculty office hours</p> <ul style="list-style-type: none"> <i>Optional</i> <p>Virtual peer meetup</p> <ul style="list-style-type: none"> <i>Optional</i>
Week 5	<p>Applied Learning: EXM Maturity Presentation & Feedback</p> <ul style="list-style-type: none"> 1.5 hours (15 minutes presenting, 75 minutes providing peer feedback) Three live options, not recorded <i>Attendance required</i> <p>Virtual peer meetup</p> <ul style="list-style-type: none"> <i>Optional</i> 	<p>Applied Learning: CXM Maturity Presentation & Feedback</p> <ul style="list-style-type: none"> 1.5 hours (15 minutes presenting, 75 minutes providing peer feedback) Three live options, not recorded <i>Attendance required</i> <p>Virtual peer meetup</p> <ul style="list-style-type: none"> <i>Optional</i>

Module 4: Applied Practitioner Skills II		
	EX Track	CX Track
Week 6	<p>Lesson: Producing a Strategic EX Roadmap</p> <ul style="list-style-type: none"> Self-guided, online learning 1 hour <i>Required</i> <p>Learning Lab: Producing a Strategic EX Roadmap</p> <ul style="list-style-type: none"> Live, online discussion 1 hour Two or three live options, not recorded <i>Attendance required</i> <p>XM Institute faculty office hours</p> <ul style="list-style-type: none"> <i>Optional</i> <p>Virtual peer meetup</p> <ul style="list-style-type: none"> <i>Optional</i> 	<p>Lesson: Producing a Strategic CX Roadmap</p> <ul style="list-style-type: none"> Self-guided, online learning 1 hour <i>Required</i> <p>Learning Lab: Producing a Strategic CX Roadmap</p> <ul style="list-style-type: none"> Live, online discussion 1 hour Two or three live options, not recorded <i>Attendance required</i> <p>XM Institute faculty office hours</p> <ul style="list-style-type: none"> <i>Optional</i> <p>Virtual peer meetup</p> <ul style="list-style-type: none"> <i>Optional</i>

Week 7	Applied Learning: Producing a Strategic EX Roadmap <ul style="list-style-type: none"> Individual project work XM Institute faculty office hours <ul style="list-style-type: none"> <i>Optional</i> Virtual peer meetup <ul style="list-style-type: none"> <i>Optional</i> 	Applied Learning: Producing a Strategic CX Roadmap <ul style="list-style-type: none"> Individual project work XM Institute faculty office hours <ul style="list-style-type: none"> <i>Optional</i> Virtual peer meetup <ul style="list-style-type: none"> <i>Optional</i>
Week 8	Applied Learning: EX Roadmap Presentation & Feedback <ul style="list-style-type: none"> 1.5 hours (15 minutes presenting, 75 minutes providing peer feedback) Three live options, not recorded <i>Attendance required</i> Virtual peer meetup <ul style="list-style-type: none"> <i>Optional</i> 	Applied Learning: CX Roadmap Presentation & Feedback <ul style="list-style-type: none"> 1.5 hours (15 minutes presenting, 75 minutes providing peer feedback) Three live options, not recorded <i>Attendance required</i> Virtual peer meetup <ul style="list-style-type: none"> <i>Optional</i>

Module 5: Applied Practitioner Skills III		
	EX Track	CX Track
Week 9	Lesson: Creating an EX System of Action <ul style="list-style-type: none"> Self-guided, online learning 1 hour <i>Required</i> Learning Lab: Creating a System of Action <ul style="list-style-type: none"> Live, online discussion 1 hour Two or three live options <i>Attendance required</i> XM Institute faculty office hours <ul style="list-style-type: none"> <i>Optional</i> Virtual peer meetup <ul style="list-style-type: none"> <i>Optional</i> 	Lesson: Creating a CX System of Action <ul style="list-style-type: none"> Self-guided, online learning 1 hour <i>Required</i> Learning Lab: Creating a System of Action <ul style="list-style-type: none"> Live, online discussion 1 hour Two or three live options <i>Attendance required</i> XM Institute faculty office hours <ul style="list-style-type: none"> <i>Optional</i> Virtual peer meetup <ul style="list-style-type: none"> <i>Optional</i>
Week 10	Applied Learning: Creating an EX System of Action <ul style="list-style-type: none"> Individual project work XM Institute faculty office hours <ul style="list-style-type: none"> <i>Optional</i> Virtual peer meetup <ul style="list-style-type: none"> <i>Optional</i> 	Applied Learning: Creating a CX System of Action <ul style="list-style-type: none"> Individual project work XM Institute faculty office hours <ul style="list-style-type: none"> <i>Optional</i> Virtual peer meetup <ul style="list-style-type: none"> <i>Optional</i>
Week 11	Applied Learning: System of Action Presentation & Feedback <ul style="list-style-type: none"> 1.5 hours (15 minutes presenting, 75 minutes providing peer feedback) Three live options, not recorded <i>Attendance required</i> Virtual peer meetup <ul style="list-style-type: none"> <i>Optional</i> 	Applied Learning: System of Action Presentation & Feedback <ul style="list-style-type: none"> 1.5 hours (15 minutes presenting, 75 minutes providing peer feedback) Three live options, not recorded <i>Attendance required</i> Virtual peer meetup <ul style="list-style-type: none"> <i>Optional</i>

	Applied Practitioner Skills Close-Out <ul style="list-style-type: none"> • 1 hour • Three live options, not recorded • <i>Required</i> 	Applied Practitioner Skills Close-Out <ul style="list-style-type: none"> • 1 hour • Three live options, not recorded • <i>Required</i>
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Module 6: Crafting your XM Vision		
Week 12	Workshop 1: Accelerating towards modern XM <ul style="list-style-type: none"> • Full day, in-person • <i>Attendance required</i> 	Workshop 2: Mastering your role as change agent <ul style="list-style-type: none"> • Full day, in-person • <i>Attendance required</i>

Exemptions

Because the XM Masters program requires cohorts to move through each module together, no exemptions are available for required coursework.

Professional Certificate Requirements

XM Masters is not a graded certification. Students will receive professional certification based on the following

1. Attendance rate $\geq 80\%$ in required lessons, learning labs, and workshops
2. Satisfactory completion of the final project (Professional Development Plan) in Week 12.

Physical XM Masters professional certificates will be distributed in the final workshop, and digital certificates soon thereafter.

Leave of Absence

Given the 12-week duration and cohort-based learning, leave of absence from XM Masters cannot exceed one week. Any absence greater than one week will require reapplication for future cohorts. Contact the XM Masters program manager to arrange for re-enrollment and fee options.

Course Registration

Registrations for XM Masters will be accepted up until seven calendar days before the first workshop. Students are responsible for registering for XM Masters and for any changes to their schedules. Program registration will close once the maximum number of students has been reached. The remaining students can register for a waitlist, in case of cancellations.

Tuition Payment

All tuition rates are subject to change and are due seven calendar days before the XM Masters cohort start date. A student's enrollment is secured only when full tuition has been paid.

Payment of tuition can be completed through direct payment or invoicing.

Direct Payment

Visit basecamp.qualtrics.com to make a digital payment

Invoicing

Please contact the XM Masters program manager if you wish to generate an invoice or raise a purchase order

Refunds

All tuition payments are final and non-refundable. Students are eligible to transfer enrollment dates up to seven calendar days before the start of their course.

Tuition Adjustments

Some students may be eligible for tuition fee adjustments.

Discount code

If you have a discount code, this will be deducted from your fees payable on Basecamp, or quote the code to the XM Masters program manager to have this applied to an invoice.

Diversity

Qualtrics XM Institute is committed to consciously creating an XM Industry that is diverse, equitable, and inclusive. We acknowledge the important role we play an important role in ensuring this happens. We offer tuition fee incentives to students who identify with an EEOC category for race, color, religion, sex (including sexual orientation, gender identity, or pregnancy), national origin, age, disability, or medical history. For more information, contact the XM Masters program manager.

Student Support

Academic coaching and feedback

Students will benefit from coaching and feedback from both XM Institute faculty and peers. During weeks 3, 4, 6, 7, 9, and 10, students can schedule 1:1 sessions with XM Institute.

Career support

Students will receive certification for use in their professional profile, and may opt into being on the XM Masters list for internal distribution and referrals at Qualtrics.

Disability services

XM Institute wants to ensure every student has a great experience during XM Masters. If there is an accommodation you need, please reach out to the XM Masters program manager.

Technical assistance

If students require technical assistance, please reach out to the XM Master program manager to troubleshoot and/or escalate support.

Code of Conduct for XM Masters Students

The Code of Conduct for XM Masters is a set of rules and guidelines that are meant to maintain a safe, inclusive, and positive learning environment for all students. As an XM Masters student, it is your responsibility to familiarize yourself with the Code of Conduct and abide by its rules and guidelines. Failure to do so may result in disciplinary action, including expulsion from the program.

Academic Integrity

Students are expected to maintain academic integrity at all times. This means that you should not cheat, plagiarize or engage in any other form of academic misconduct. You should also take responsibility for your own learning, and not participate in any behavior that might compromise the integrity of the student cohort, Qualtrics, or the XM Institute team.

Respect for others

Students are expected to treat all members of the XM Masters community with respect and inclusion. This includes fellow students, faculty, staff, and administrators. Students should always use respectful language and refrain from engaging in offensive, discriminatory, or harassing behavior toward others. Respect the opinions of others and avoid personal attacks or insults. Students should be responsible digital citizens and contribute to a positive online community. This includes reporting any inappropriate behavior or content and avoiding engaging in online activities that may be harmful or offensive to others.

Personal responsibility

Students are responsible for their own actions and should take steps to ensure that their behavior does not negatively impact others. This includes being accountable for your own safety and well-being and refraining from engaging in behavior that might put yourself or others at risk.

Professionalism

As an XM Masters student, you are expected to act in a professional manner at all times. This means arriving on time to scheduled learning and participating in discussions in a respectful and constructive manner.

Privacy

Students should not share personal information, such as phone numbers, addresses, or sensitive financial information, online or with people they don't know or trust. Students should also be cautious when sharing personal details or photos on social media platforms and ensure that their accounts are secure and protected.

Compliance with Laws and Policies

Students should comply with all laws, policies, and regulations related to digital communication, privacy, and security. Violations of any laws related to digital communication may result in disciplinary action.

Individuals who violate any of the Terms and Conditions or who provide false, misleading, or incorrect information in connection with their application or certification may lose all certifications and associated payments related to the XM Masters certification.

XM Masters Certified Professional Standards

XM Masters certification and use of the Qualtrics XM Institute intellectual property is given to students under the two following assumptions. If Qualtrics XM Institute discovers you have violated these standards or provided false, misleading, or incomplete information in connection with your application: (1) you may lose all certifications and associated fees paid related to the XM Masters Program, and (2) we, in our sole discretion, may choose to terminate your participation in the XM Masters Program.

Representing your XM Masters certification

Your use of the XM Masters certification designation (XMM) and logo is only for the personal use of the individual person who received the certification, and cannot be used to represent that a company, organization, or school is certified. That is, a company, organization, or school may not represent itself as certified—only those individual persons who have received the certification may represent themselves as certified. At all times when you are holding yourself out as the recipient of a Qualtrics XM Institute certification, you will conduct your activities in a professional and competent manner; comply with all applicable laws, regulations, and orders of any governmental or regulatory authority; not make any representations, warranties, or guarantees to third parties with respect to Qualtrics; not misrepresent or embellish your relationship with Qualtrics; and comply with all applicable terms and conditions of any agreement governing your participation in the Program; and not engage in any illegal, false, or deceptive acts or practices.

Use of Qualtrics XM Institute materials

As part of XM Masters, you will gain access to the XM Institute consulting toolkits and be trained in their use and application. All students are encouraged to leverage these assets in their ongoing professional practice. All references must attribute Qualtrics XM Institute as the author.

The use of XM Institute intellectual property is subject to copyright laws in the United States and cannot be reproduced publicly without express permission. The use, access, and distribution of Qualtrics XM Institute copyrighted materials is the responsibility of the individual who participates in the XM Masters program. See the indemnification terms for more details.

Use of XM Masters certification

You will not misrepresent or embellish the relationship between us and you (including by expressing or implying that we support, sponsor, endorse, or contribute to you or your business endeavors), or announce or imply the existence of any relationship or affiliation between us and you or any other person or entity except as permitted by the Agreement. Subject to your continued compliance with these terms, we grant each student the limited right to use the name of the specific XM Masters certification that you have received and any trademarks, service marks, service or trade names, logos, and other designations of us and our affiliates that we make available to you for so long as such Qualtrics certification is valid or until revoked or terminated as set forth in these terms. We may revoke any license granted to you to use any XM Masters Mark associated with the Qualtrics certification at any time by giving you notice of such revocation.

Collection and use of Personal Data

We are collecting personal information primarily to process your participation in the XM Masters Program and to contact you if necessary. By participating in this Program, non-U.S. resident entrants are authorizing the transfer of personal data to the United States for these purposes. By participating in the Program, you agree that we may share your information, at our sole discretion, with third parties that have a need to know the information (such as those we retain to assist in administering the Program). The data controller is Qualtrics, LLC. By enrolling in the Program, you also agree to all terms listed in our Privacy Statement available at <http://www.qualtrics.com/privacy-statement/>.

We hope that this handbook has provided you with the information you need to have a successful and fulfilling experience in the XM Masters program. If you have any questions, please do not hesitate to contact the XM Masters program manager. Best of luck in your studies!

If you have additional questions about the program that are not addressed within this handbook or the information provided in XM Basecamp, please contact info@xminstitute.com.