Qualtrics
XM institute™

HOW-TO GUIDE

How to Build an EX Program Roadmap

By **XM Institute**

EXECUTIVE SUMMARY

This how-to guide will help you create an employee experience (EX) program roadmap: a one-page strategic document illustrating current and future employee listening programs in your organization. A roadmap is a critical tool to communicate your EX vision and produce a tangible set of activities. While this guide contains suggested steps and advice to help you navigate this process, you can (and should!) adjust the approach as needed to match your specific environment. This may include completing steps in a non-linear fashion, adding steps or activities where necessary, skipping steps, or bringing in outside advisors to provide additional support and guidance.

STEPS

This how-to guide on building a closed-loop program contains the following steps:

1. **Document the Current State of EX.** Establish a baseline understanding of employee listening activities happening across the organization and map your key stakeholders.

2. **Define Your EX Vision.** Develop a compelling vision for the future state of employee experience for your organization.

3. **Assess Your EX Capabilities.** Complete a diagnostic assessment of the organization's EX maturity level, identifying the competencies and skills already in place and areas of development.

4. **Identify Key Experience Gaps.** Detail which employee experiences are critical for the attainment of your business goals and draft an EX Project Evaluation Inventory to address them.

5. **Prioritize Your EX Projects.** Prioritize EX projects that address your strategic needs, ranking them in order of delivery for your roadmap.

6. **Build Your EX Program Roadmap.** Create an EX program roadmap that visualizes the path you expect to take over the next 2 to 5 years in order to realize your EX vision.

Step 1: Document the Current State of EX

Goal: Establish a baseline understanding of employee listening activities happing in across the organization and map your key stakeholders.

This first step is all about discovery. The current state of EX in your organization is the foundation on which you build a compelling future roadmap. Employee listening activities already happening across your organization may range from one-off feedback requests to ongoing programs of work. As a first step on the path to building a roadmap, deepen your understanding of the current state of the employee experience management within your organization, such as which employee

listening posts exist, the teams and individuals who use employee insights, and a map of critical stakeholders for your EX program moving forward.

Some activities you may want to carry out in this step include:

- **Identify teams or individuals who are collecting EX data.** The goal of this activity is to take stock of where in the organization employee experience data is being collected, analyzed, and actioned. This might be enablement teams running training sessions, HR teams responsible for promotion and performance management, L&D teams who provide leadership development, teams assembled to design the future of work, those who run onboarding programs, IT or tech support, managers who measure team culture, and more. They may be conducting their own listening projects or accessing ones that are centrally managed.

- **Conduct discovery sessions.** Connect with the people collecting EX data to learn more about their EX work. The goal of these discovery sessions is to uncover details of the EX projects that are in flight or planned. Areas to explore in these discovery sessions might include the technology systems they are using, how they are collecting and storing data, listening post design, the business needs to be met, and stakeholders involved.

- **Inventory existing listening posts.** Now that you have taken stock of what employee listening activities are happening across the organization, create a document that collates this information in one place. The goal of this activity is to create a single summary of the current state of EX in your organization. This will form the building blocks of your roadmap, enabling you to build on progress and optimize existing programs. To map the current state of EX, list out the projects currently underway and their details.

- **Develop an internal stakeholder map.** A well-thought-out stakeholder map provides direction for when and how to engage with stakeholders who are critical to the long-term success of your EX program. The goal of creating a stakeholder map is to provide direction on when and how to engage with the individuals or groups who are vital to the long-term success of your EX program, allowing you to craft more effective communication plans and engagement strategies that will keep these stakeholders aligned with your EX efforts over the long term. Stakeholders may be specific individuals (e.g. a senior leader or program manager) or groups of people (e.g. people managers, the communications team). Use XM Institute's Stakeholder Map to guide you.

- **Build understanding of key employee journeys.** At the end of the day, fixing individual, isolated employee touch points will only get you so far. Ultimately, to deliver great employee outcomes, you will need to consider critical employee experiences within the broader lifecycle context. These journeys map an employee persona through critical touchpoints, such as applying for a job, accepting an offer, onboarding, training, performance reviews, promotion, parental leave, internal mobility, and service interactions – right through to exit and alumni experiences. The goal here is to first identify the most important journeys employees take with your organization and then understand how employees feel along those journeys as well as how effectively your internal processes support them along the way. Journey maps are an excellent tool you can use here to not only develop this holistic

perspective but also bridge organizational silos and unite EX activities and understanding across the business.

Tips & Tricks

1. Don't rush through this step! It lays the foundation for the rest of the activities in this roadmap guide.

2. A good place to start looking for existing EX activities is across the people operations functions, such as recruiting, enablement teams, HR, and others.

3. Keep the end of the process in mind – collect the information in a way that makes it easy to access, add to, and revise as needed.

4. You will inevitably need to update and refine this information as you move through future steps or discover more, so don't spend too much time making everything perfect.

5. These activities do not need to happen in a fixed order. You might start with the stakeholder map and go from there.

Resources to support you:

TOOL	MULTIMEDIA	LAUNCHPAD
Worksheet: Stakeholder Mapping	**What is Journey Mapping?**	**Fundamentals of Employee Experience**

Step 2: Define Your EX Vision

Goal: Develop a compelling vision for the future state of employee experience for your organization.

Now that you have a good understanding of where you are, it's time to articulate where you want to go. Your EX vision is an inspirational statement on how your organization aspires to best serve employees. It is a standard that everyone can strive for and look to when making decisions that impact employee experiences. This EX vision will act as your north star, aligning behaviors and activities as you work to enact experience-centric changes over multiple years and projects. To be effective, this vision must be grounded in your organizational mission and purpose.

Activities you may want to carry out in this step include:

- **Describe how employee experience accelerates your organization's mission and purpose.** The goal of this activity is to set the foundations of how your EX roadmap underpins the organization's overall success. Begin with your organization's mission and purpose: How do employee experiences accelerate you toward this? Which business needs will be met by the EX program?

- **Express the desired outcomes of your EX program.** Now it's time to cast your mind forward in time. The goal of this activity is to describe what future success looks like. Skip forward 5 to 10 years and imagine that your organization has far exceeded all of the strategic goals, thanks in part to the incredible success of your EX program. What happened? What changed for employees?

- **Write your EX Vision Statement.** This is the 2 to 3 sentence statement on how your organization aspires to serve employees. The goal of this activity is to create an EX vision statement that is simple and clear, connects to your organizational strategy, describes an aspirational future state, sparks emotion and inspiration, is unique to your organization, and describes what success looks like.

- **Align your key stakeholders.** Regardless of how ambitious or achievable your EX ambitions end up being, it is essential that you secure the commitment needed to help you reach them. This will help align investments and activities across the organization and ensure that all the people responsible for executing on your roadmap are incentivized to do so. While there is no "right" way to attain this buy-in, one method is to hold a workshop with key stakeholders who will need to play a significant role in bringing your roadmap to life. The goal of this effort is to develop a unified perspective on the direction and objectives of your EX program and then secure the commitment necessary to achieve those aspirations.

Tips & Tricks

1. Inputs to your EX vision come from a variety of sources, including company strategy and values, senior leader interviews, survey of stakeholders, journey mapping exercises, and more.

2. These activities could be conducted as a working group or as part of a workshop. Including key stakeholders in this step to ensure buy-in and resonance across the organization.

3. A vision statement illustrates the future state of employee experience at your organization. How you will deliver on this vision becomes the purpose and mission of the EX program or team.

4. Keep it simple. You ultimately want everyone to be able to remember and reference this vision.

Resources to support you:

BLOG
XM Competency: Leading a Multi-Year Transformation

TOOL
Executives' Commitment to XM: Assessment

BLOG
Effective Communication: A Critical Skill to Propel XM Success

Step 3: Assess Your EX Capabilities

Goal: Complete a diagnostic assessment of the organization's EX maturity level, identifying the competencies and skills already in place and areas of development.

Organizations don't achieve their EX vision overnight. It can take years to build this culture and for people across the organization to grow their capabilities. Now you know where your EX program is starting from and where it's headed, the next step is to assess your organization's ability to execute your EX vision and roadmap into the future. This includes understanding what EX competencies and skills are already in place across the business and where you will need to invest in development.

Activities you may want to carry out in this step include:

- **Complete an EX maturity assessment.** The XM Operating Framework provides a blueprint for building your organization's Employee XM capabilities. As you master the framework's six XM Competencies, you will progress through five stages of maturity. Use the EX Maturity Assessment to evaluate how you are currently performing in each of these Competencies and Skills and determine where your EX program maturity currently falls across the five stages. The goal here is to identify your existing EX strengths and weaknesses, helping you surface gaps between your baseline capabilities and where you ultimately need to be to reach your EX vision. This assessment will also help you uncover where there are already strengths and skill sets that you could capitalize on to accelerate your roadmap to completion.

- **Socialize the Maturity Model and results with key stakeholders**. A maturity assessment not only provides a structured approach for identifying and quantifying your organization's existing EX strengths and weaknesses, but it is also a valuable communication tool. It will help you create internal alignment around common employee experience terminology and the essential capabilities required to derive value from your EX efforts as well as convey the range of activities required to do EX well. The goal here is to use the maturity model as a means of setting and aligning expectations with key stakeholders across the business, so everyone understands what is required in order to achieve your stated EX vision.

- **Identify cultural headwinds and tailwinds.** An organization's culture shapes how people think, believe, and act. Achieving your EX vision will almost certainly require a number of individuals and groups across your organization to adjust how they perform their everyday roles. How supportive or unsupportive your culture is of these changes will therefore significantly impact the speed and success of your roadmap's implementation. The goal here is to identify existing cultural tailwinds you could tap into to accelerate your EX projects as well as potential headwinds you are likely to encounter so you can proactively plan for overcoming these challenges.

- **Uncover key technology gaps.** Technology is an essential component of any successful EX program as it enables the organization to collect, understand, and take action on employee experience and operational data. The goal here is to identify technology investments your organization will need to make to bring its EX vision to life. This could include Human Resources Information Systems (HRIS), data analytics platforms, learning management systems (LMS), or a more comprehensive experience management platform. To uncover these technology gaps, we recommend partnering with your IT department and the groups you spoke to in Step 1 who are already collecting EX data in some form.

  Tips & Tricks

1. Revisit the results and retake the assessment again in 12 to 18 months to track your progress towards greater XM Maturity.

2. You do not need to aim for the highest levels of EX maturity if that isn't right for you. This assessment is meant to provide guidance on next steps as you advance your organization's maturity.

3. Involve key stakeholders in these assessments. Bringing them into the process early will help secure their commitment and buy-in.

4. Be honest with yourself in the process. Completing these assessments are intended to help you, so answering with complete honestly only helps set you up for the greatest success.

Resources to support you:

TOOL	BLOG	LAUNCHPAD	LAUNCHPAD
Employee Experience Maturity: Assessment	**Five Tips for Using Our XM Maturity Assessments**	**Maturing Your XM Program**	**The XM Operating Framework**

LAUNCHPAD
Nurturing an XM-Centric Culture

Step 4: Identify Key Experience Gaps

Goal: Detail which employee experiences are critical for the attainment of your business goals and draft an EX Project Evaluation Inventory to address them.

Measuring and acting on every employee experience is not feasible or necessary. In this step, identify moments in the employee journey that your organization needs to get right and draft a program framework to address them. Begin by identifying the business-critical talent challenges that are present as well as EX areas of opportunity that might be your competitive advantage. Following this, create an overview of the EX projects that align with these priorities and some light details on how they would be delivered. At the end of this step, you will have a long list of potential EX projects, but don't worry too much about resource constraints right now – it is not expected that you would deliver all of these projects as prioritization will happen in the next step.

Activities you may want to carry out in this step include:

- **Identify the business-critical talent challenges.** One way to identify experience gaps is to start with the most acute business challenges your organization is facing. These challenges are either existing or potential roadblocks that may impede your organization from advancing toward strategic goals. For example, is there high attrition in some parts of the business? Are there increasing levels of burnout that threaten employee sustainability? Has there been insufficient progress on diversity? The goal here is to surface challenges that are disproportionately affecting employee engagement and your organization's operations. There are a number of different

sources you can tap into to find these critical issues, including your listening post inventory from Step 1, areas of weakness on your maturity assessment in Step 3, moments of truth on existing journey maps, or even just conversations with influential business owners across the organization.

- **Identify areas of opportunity in EX that could be your competitive advantage.** In this activity, identify where there are untapped opportunities to deliver standout experiences that will set you apart from your competitors. The goal of this activity is to identify employee experiences that enable your organization to attract, retain, and develop great talent. For instance, you could create a world-class future or work model to incorporate hybrid working. You might invest in leadership development to foster a culture of belonging or invest in employee benefits that meet the diverse needs of your employees. The goal here is to pinpoint a few specific areas where meaningful improvements will set you apart from the rest of the market.

- **Analyze key drivers of employee outcomes.** If your organization already has some employee experience and operational metrics in place, you can use driver analysis to identify which potential moments or variables most impact employee attitudes and behaviors. The goal here is to determine, in a quantitative way, which factors disproportionately affect key employee and business outcomes so you know where to focus your improvement efforts. For example, if your annual engagement survey indicates the top driver of employee intent to stay and engagement is psychological safety, it makes sense to prioritize improving this.

- **Create an inventory of potential EX Projects.** Document the potential EX projects that your organization could deliver to address the identified challenges and opportunities. The goal of this activity is to produce an EX Project Evaluation Inventory that captures a high-level overview of potential employee experience projects, along with some light details on how each project would be implemented. The asset created is a fairly substantial inventory of potential EX projects, which you should then run through a prioritization exercise and use to fill in your eventual roadmap. Use the XM Institute's EX Project Evaluation Inventory Worksheet to guide you through the completion of this document.

  Tips & Tricks

  1. It can be easier to identify urgent challenges than untapped opportunities. Consciously consider the positive aspects of your culture that you could amplify or opportunities that are unique to you.

  2. Your EX Project Evaluation Inventory begins with organizational strategic objectives. Prioritize a maximum of 10 opportunities and challenges as too many will impede your progress.

  3. When determining if a moment is a key driver, be sure to look at longer trended data points (ideally over at least 3 periods) rather than at a single point in time.

  4. To help identify experience gaps, examine or enhance employee journey maps that were a recommended activity in Step 1.

  5. Take a look at your industry peers and competitors to find inspiration and see where you may have competitive advantages and opportunities to create great employee experiences.

Resources to support you:

TOOL
Template: EX Project Evaluation Inventory

RESEARCH
Best Practices Across the Disrupt Competency

BLOG
Driving Action From Journey Maps

BLOG
Three Analytical Tools That Every XM Leader Should Understand

BLOG
The Five Questions of Journey-Centric Thinking

BLOG
Create More Actionable Insights With Employee Journey Analytics

Step 5: Prioritize Your EX Projects

Goal: Prioritize EX projects that address your strategic needs, ranking them in order of delivery for your roadmap.

Equipped with a long list of potential projects in your EX program framework, it's time to determine what will get done and when. In this step, use a prioritization matrix to rate each project and identify the highest priorities. Based on your own unique context, you may choose unique prioritization criteria or use weighting the scoring method.

Activities you may want to carry out in this step include:

- **Use a prioritization matrix to rank potential projects.** One common and effective way to prioritize EX projects is to use a matrix that ranks each potential EX project using pre-defined criteria. This tool will help you compare and rank your list of projects according to factors that are important to your organization. The goal of this exercise is to – in an empirical way – order your list of potential EX projects from those that are most critical to achieving your EX and business objectives to those that are least critical. We recommend using XM Institute's EX Project Prioritization Exercise tool to guide you here. This exercise is particularly valuable when used in conjunction with the EX Project Evaluation Inventory suggested in Step 4.

- **Socialize and validate priorities.** Once you have ordered each of the proposed EX projects based on their priority rating, socialize this list across the organization. Seek input from executives and key business owners who will be involved in executing your EX roadmap. The goal here is to secure organizational buy-in and to ensure that the projects you are prioritizing are aligned to the broader company and line-of-business objectives.

- **Revisit the EX project plans and update them as necessary.** Having evaluated each EX project, you may have some edits to make to your EX project plans. The EX Project Evaluation Inventory suggested in Step 4 is an example of such a plan. The prioritization matrix and project evaluation inventory documents are not set in stone, so it is likely that they will need to be updated as new information becomes available or business needs change. The goal here is to ensure that the suite of strategic assets you are creating all work in tandem with each other, staying updated as new information and decisions emerge.

Tips & Tricks

1. To get more robust data in your prioritization ratings, you may choose to survey multiple people who have insight into EX programs at your organization.

2. Invite stakeholders to give ratings on prioritization factors. You may weight some ratings differently, but including a variety of perspectives will help you secure buy-in for the final roadmap.

3. Each stakeholder is likely to consider their project(s) most important. Use data to help you make the case empirically for why you are prioritizing one activity over another.

4. Communicate the methodology and outcome of the prioritization process with stakeholders as needed. This transparency can provide assurance that decisions were made in an empirical manner.

5. Update the Project Inventory and Prioritization Matrix at a regular cadence (6, 9, or 12 months), after you've completed a number of the projects, or after a major business or strategy shift.

Resources to support you:

TOOL
Worksheet: EX Project Prioritization Exercise

TOOL
5 I's of Employee Engagement: Strengths and Gaps

Step 6: Build Your EX Program Roadmap

Goal: Create an EX program roadmap that visualizes the path you expect to take over the next 2 to 5 years in order to realize your EX vision.

You have arrived at the final step to map out the EX Program roadmap! By the time you arrive here, you should have an EX vision statement, a completed EX Maturity Assessment with your overall maturity and competency levels, and a list of high-priority EX projects. In this step, you are sequencing your list of EX projects in a roadmap template, to create a visual representation of the blueprint you expect to follow over the next two to five years to achieve your EX vision. Keep in mind this roadmap will change and evolve as initiatives are completed and new priorities surface, so you will need to be prepared to revisit and adapt your roadmap on an ongoing basis.

Activities you may want to carry out in this step include:

- **Choose a timeframe for your roadmap.** The stretch of time your roadmap covers will depend on a number of different factors, including your business cadence, how ambitious your EX vision is, where you're starting from, your level of organizational commitment, plus broader industry and environmental factors. We recommend that your roadmap scopes out somewhere between two to five years of EX projects. You

can choose to put in place time markers at annual, bi-annual, or quarterly time periods. The goal here is to choose a timeframe that is long-term enough to provide you with a clear view of what's to come but not so long-term that the far-future projects become meaningless.

- **Select a roadmap design**. Pick a roadmap documentation format. While roadmap templates abound, the goal here is to choose a design that is appealing, consumable, and on-brand for your organization. We recommend connecting with other XM program teams – including customer, product, and brand experience groups – to collaborate on a consistent visual design, format, and language for the roadmap. We also advise keeping your roadmap to a single page (or creating a one-page version of the document), so you can use it as a communication tool to share plans for your EX program with the rest of your organization.

- **Add EX projects and programs into the roadmap template.** Take your list of prioritized EX projects and map them into your roadmap template. Ensure you should differentiate between projects that run for a set period of time versus those that are 'always on.' If you completed an EX Project Evaluation Inventory in Step 4, you likely already have many of these key details for each activity. The goal here is to create a visual representation of your tactical plan for completing each EX project, which – when added all together – should result in your company delivering your EX vision.

- **Secure stakeholder commitment and resources.** Once you have a draft roadmap, take it back to your key stakeholders and the groups who will be responsible for executing specific EX tasks to secure their support of the project plan. Check with them that there is sufficient time, tools, technology, headcount, and budget to accomplish the stated business objectives in the given timelines. For near-term projects, set up a regular meeting cadence to make sure you are on track to hit the milestones you've laid out. The goal here is to ensure that everyone who is responsible for bringing your roadmap to life is aligned with the plan and understands what's expected of them and when.

Tips & Tricks

1. Roadmap timelines are broad estimates, contingent on many factors, so give yourself some buffers. These are living documents that adapt to change and crystalize as information becomes available.

2. Early on in the roadmap, include some projects that are likely to result in quick wins to help you build momentum and buy-in for your CX efforts.

3. Be realistic with goals, delivery times, and expectations of impact. Setting goals that are too aggressive can negatively impact your buy-in and support in the long run.

4. Keep your EX Project Evaluation Inventory hand as this will provide the detail needed to go deeper on each project, such as expected business outcomes and impact.

5. Don't overlook technology management. Data, administrative, and integration elements all have an important place in a well-defined program roadmap.

Resources to support you:

WHAT COMES NEXT

Now that you have your EX Roadmap, here are some next steps to consider:

- **Assemble your team.** Your EX roadmap will require both funding and staffing, so make sure that these are in place before you jump into the projects. Don't fall into the trap of trying to accomplish all that you've defined without any of the required resources. Start by identifying your core team.

- **Establish a governance structure.** You need to set up the organizational structures that will provide the appropriate decision-making, alignment, accountability, and conflict resolution. This typically includes an executive sponsor, executive steering committee, cross-functional working group, and EX ambassadors.

- **Detail your near-term project plans.** These are the fine details relating to the projects that will be delivered over the next 9 to 12 months. It should include expected outcomes, timelines, and resource allocations. Ensure there is sufficient time, tools, technology, headcount, and budget to enable success.

- **Start communicating successes.** Look for opportunities to get small wins and make sure you share those success stories and highlight the employees who were involved. This will help to create momentum and support for the roadmap from across the organization. Developing a well-defined communication plan can help you keep employees and other stakeholders informed about the value and progress of EX activities.