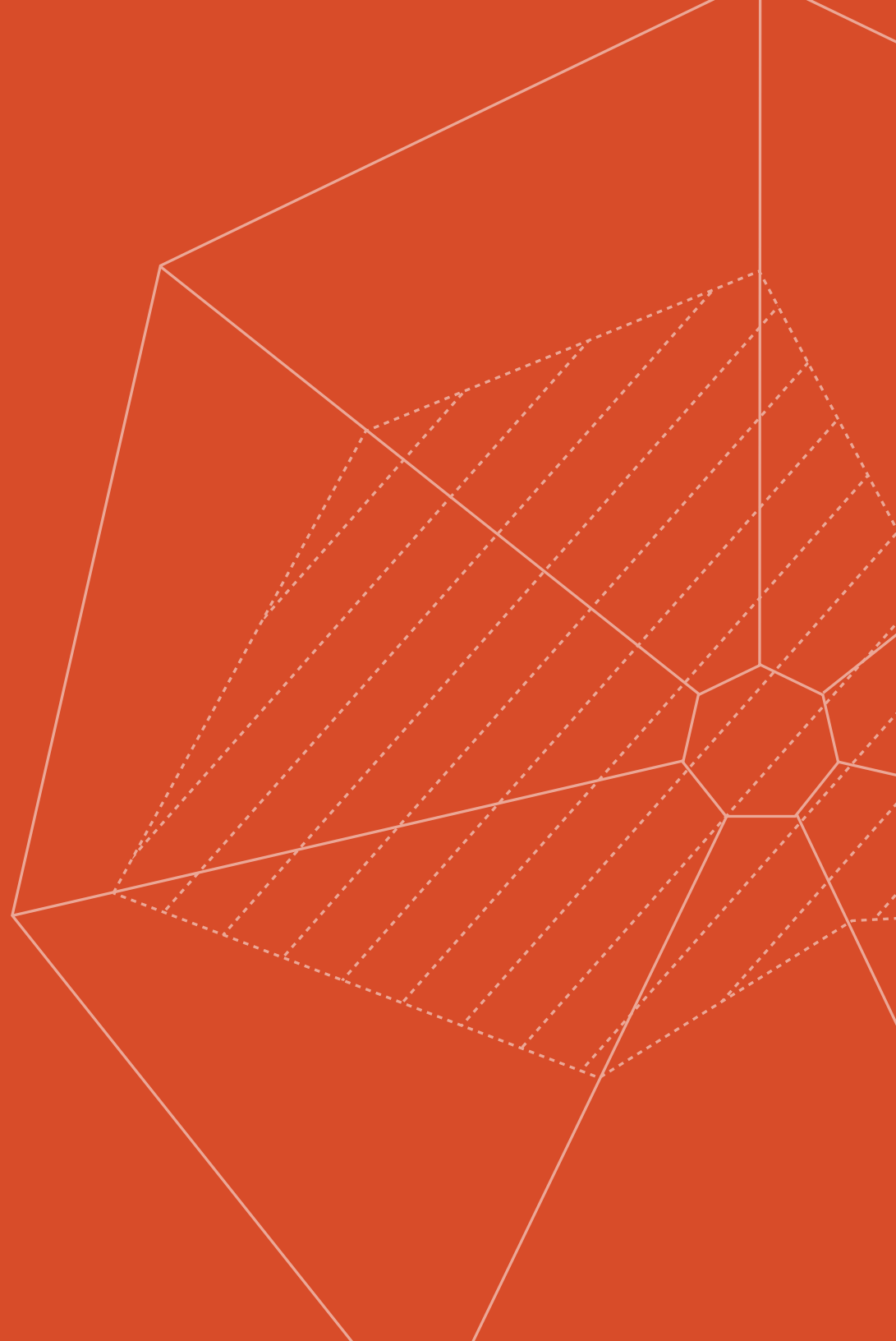


DX7 Assessment Playbook

Lightweight team alignment activity

CONNECTIVE DX



Overview

The DX7 Assessment is a diagnostic tool designed to help you understand the current state of your organization's capabilities across seven digital experience competencies. This three-part activity is a light-duty or "self-service" version of a more in-depth process we run with clients who are pursuing organizational alignment toward sustainable digital success.

This exercise is a great starting point for you and your team to spark conversation and start the process toward better digital experiences for your customers and your teams. To get the most benefit we encourage you to assemble a team of cross-functional stakeholders, with an eye toward making the connections necessary for this collaborative process. Step one encourages individuals to think about certain questions and evaluate the situation honestly on their own. Steps two and three engage a team to gather to share ideas, connect, and begin to bridge across disciplines in order to make rapid progress.

The method



Create copies of the DX7 Competencies Worksheet and mastery description pages and distribute them to team members at least one day in advance of the group meeting. The individual activity can be done the night before your team gathers. Allow two hours for the group and collaborative activities.

Note that there is a sequential nature to this process, as each competency supports successive ones along the map. Let this sequence guide your discussions to identify the gaps and gain consensus on opportunities to enhance your organization's competencies—and improve your customer's digital experiences.

Step One

Individual consideration

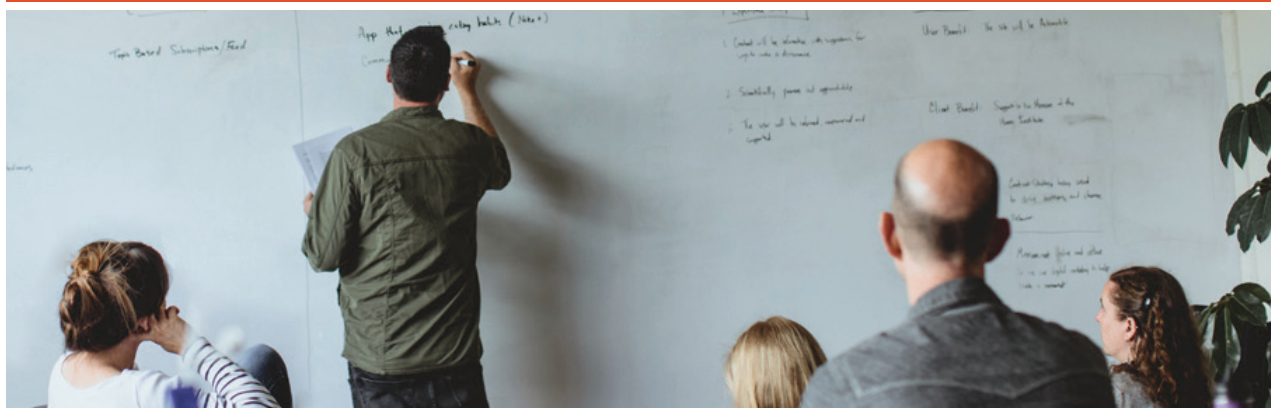


Before the group collaboration begins, have team members consider the DX7 competencies and mastery characteristics of each.

- For each of the competencies listed, have each person indicate the level of mastery (or evolution) they believe your organization has achieved in each by marking the appropriate points on the diagram, outward from the center, with 1 being the least and 5 being the greatest level of mastery.
- For each competency, team members should think about why they placed the mark where it is. What observations can they make about each? How much is perception vs. measurable?
- They should also think about what could be helping or hindering groups to be more successful. What is working well? What needs improvement?
- Team members should write these observations down on the provided pages and come prepared to talk about them with the group.

Step Two

Group activity



Gather the team in a workspace and create three columns on a whiteboard marked: Gaps, Barriers and Resources.

- Allow each person to present their individual diagrams, with an emphasis on answering why they rated each competency as they did. If the group agrees on the relative scores for each competency, what does that mean to the organization? If there is a low degree of alignment, what does that indicate?
- Allow the team to compare their diagrams as a group. Were there any surprises or outliers? Is there anything that indicates a trend or direction to address?
- Considering the results as a group, have a conversation about any significant gaps or issues and note them in the columns on the whiteboard. Do the same for any barriers to achieving these goals and any resources that can be allocated to fill the gaps and improve your organization's digital experience competencies.

Step Three

Collaboration exercise

Finally, considering the set of ideal competencies (included) as a group, attempt to answer which initiatives would help build value for customers and the business by connecting teams and advancing core capabilities.

- Have deliberate conversations among individual stakeholders in pairs, with an eye toward establishing collaborative relationships. Try to prompt collaboration among stakeholders across disciplines. It's possible these people have never spoken in service of the entire organization before. The goal is to encourage conversations along new frontiers, and to challenge long-held beliefs and the status quo.
- Pay attention to unexpected or unique reactions and findings, especially ones that involve new partnerships that haven't been seen before within the company. For example, in order for other groups to respond, management may need to fund technology in new ways or may need to articulate vision clearly. Or, for team to create new habits to improve performance or execute with more efficiency, your organization may need to communicate goals and objectives more clearly or widely or with additional detail.
- Log these findings and use them as a guide moving forward. Agree upon specific and achievable goals that help continuously improve the organization's competencies (think SMART goals). Encourage further collaboration on an ongoing basis and, as programs evolve, continue to assess the organization's ability to deliver sustainable digital success.

DX 7

Competencies Worksheet



Insight

A real and present understanding of the customer, their journey, goals, motivations, and business context across key touch points

Vision

Alignment between digital experience strategy, business strategy, and customer needs, with an agreed upon “North Star” to align goals and to prioritize and map initiatives

Culture

High-performing, connected and informed teams empowered to transcend silos, own all aspects of the digital experience, and build collaborative relationships, with freedom to experiment at low risk

Content

A cohesive and complete content strategy to inform the creation, publication and governance of the content necessary to build and measure impact

Technology

Technology platforms, marketing ecosystems, mobile, and social channels and communities that are coordinated and integrated to support consistent, intentional experience

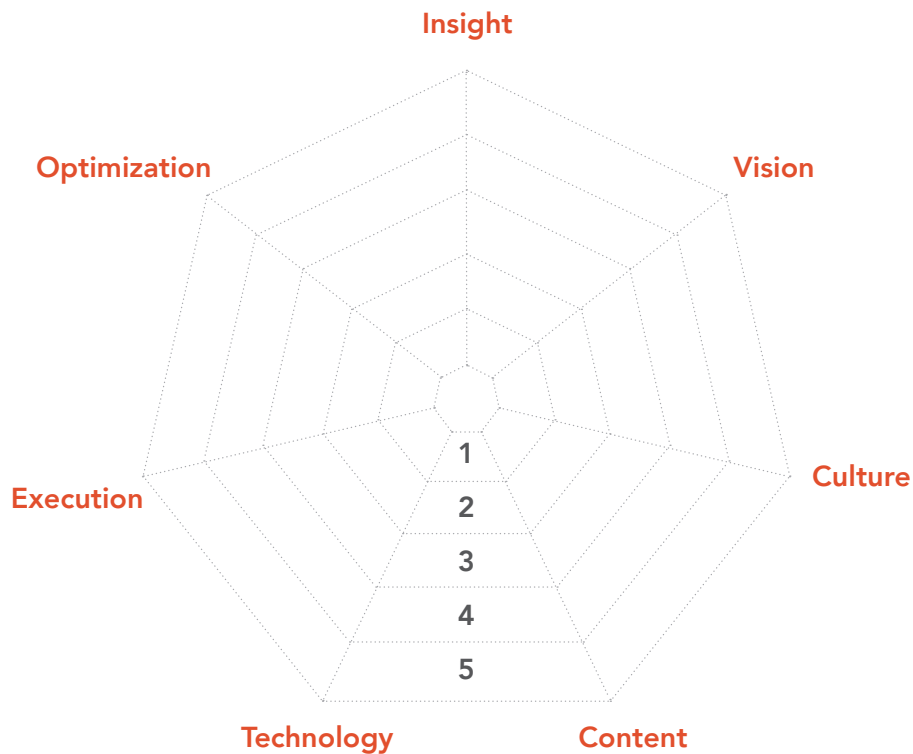
Execution

The right people, with the right skills, who can manage digital experience delivery from an operational perspective

Optimization

A data-driven approach to measuring, testing, improving, and humanizing the digital channel and customer experience

DX 7 competencies



Consider the descriptions of each competency on the following pages as you individually mark on the diagram.

- For each of the competencies listed, indicate the level of mastery you believe your organization has achieved in each by marking the appropriate points on the diagram, outward from the center, with 1 being the least and 5 being the greatest.
- Not all of these characteristics may be applicable to your organization. However, they do represent how aligned your organization is on priorities, which capabilities are important, and where performance is measured.
- Think about why you placed the mark where it is. What observations can you make about each category? How much is perception vs. measurable? Also think about what could be helping or hindering groups to be more successful. What is working well? What needs improvement?
- In fact, you may identify other characteristics not captured here that are more important to continued growth and improvement. Write these observations down on the provided pages and come prepared to talk about them with the group.

1. Insight

A real and present understanding of the customer, their journey, goals, motivations, and business context across key touch points

Mastery characteristics of insight

- Our analytics take into account how customers behave, react and think.
- Our design decisions are informed through customer data and insights.
- We have a healthy process to gather, analyze and process data to build customer insights from across the organization.
- Our stakeholders understand how journey maps, personas and customer insights are utilized.
- Our whole organization has access to analytics and customer insight tools.
- Our organization has a shared understanding of emerging trends and digitally enabled businesses.
- We have connected our customer data and insights as a resource across our organizational silos.
- Our senior executives are helping foster a culture of customer-centricity and design-thinking.

4. Content

A cohesive and complete content strategy to inform the creation, publication and governance of the content necessary to build and measure impact

Mastery characteristics of content

- We respect and utilize content as a valuable asset throughout our organization.
- Any content we create directly follows guidelines established in a customer persona and journey.
- Our content authors have access to measurement and insight tools that they readily use these to improve content.
- All relevant parties understand our content model, and their role in creating and sustaining it.
- We follow an established content strategy and editorial calendar.
- We can scale our content development from a central to a distributed model when necessary.
- We have established a community for content that acts as a center of excellence.
- We distribute and reuse content appropriately to our advantage.
- Our content is produced in the appropriate tone and voice that matches customer needs.

5. Technology

Technology platforms, marketing ecosystems, mobile, and social channels and communities that are coordinated and integrated to support consistent, intentional experience

Mastery characteristics of technology

- Our choice of technology platforms makes sense in light of our digital and business requirements.
- Our technology investments are designed to serve the needs of content authors to drive flexibility and efficiency.
- Our technologies are connected across the organization to support seamless customer experiences.
- The programs on our technology roadmap are prioritized to meet the needs of building and growing customer relationships and experiences
- Our IT and Business groups partner to support technology that furthers the capabilities and performance of our Marketing and Customer Service teams.
- Our organization follows established and rigorous design, build, release and QA processes.
- We collaborate, making us agile enough to adopt new technologies quickly.

7. Optimization

A data-driven approach to measuring, testing, improving, and humanizing the digital channel and customer experience

Mastery characteristics of optimization

- We measure the right customer experience and business performance metrics to build value and improve outcomes.
- Our optimization programs create actionable insights that teams use to inform ongoing customer experience design and development.
- We measure success for each customer persona based on clear objectives for each step in the customer journey.
- We test the experience across all channels with actual customers, and ensure that all stakeholders utilize the results.
- We gather regularly to collaborate on big picture opportunities.
- We have invested in the capabilities to deliver personalized content across digital channels.
- We have dedicated analyst(s) to support content and business line owners.
- We use data and customer insight to prioritize digital initiatives.

We help organizations embrace the power of digital, align around the customer, and take control of their digital future.

CONNECTIVE DX

www.connectivedx.com

v2.1