

# How to Use the EX in 9 Canvas

## About the EX in 9 Canvas

A well-crafted Employee Experience (EX) matters, full stop. It enhances innovation, belonging, efficiency, customer experience, and overall business outcomes. It is defined by team, individual, and organizational abilities to deliver compelling results.

But "well-crafted" is the key term.

EX is not the stuff of foosball tables and free food. It's not measured in hindsight via an annual, anonymous survey. A meaningful EX does not require million-dollar programs or culture overhauls. Nor is it designed "at the top" and cascaded through corporate communications.

Meaningful EX is evolved through a series of conversations between leaders and their teams. It is driven by listening, by experimenting, by thinking locally, by starting with small wins and celebrating them. Over and over. It is the cumulative conditions that enable teams to deliver, develop, connect, and thrive.

The EX in 9 Canvas is a simple one-page template designed to help you facilitate dialog, hone your hunt, and capture and implement meaningful outcomes that will fuel your team or organization's EX, in turn fueling outcomes and success!

## Who It's Designed For

The EX in 9 Canvas is designed to be used by an HR leader or a business team leader in order to facilitate a collaborative, action-oriented EX planning dialog with a team ready to craft their own EX.

## How to Use

- Identify the team or entity to craft its EX
- Set the tone for an empowering and collaborative conversation
- Invite the team to imagine the possibility
- Schedule the first (of several) conversation - approximately 90 minutes is a good beginning
- Manage logistics (have supplies, group breakouts, etc.)
- Capture answers, insights, and plans in the designated boxes...and watch your EX thrive

NOTE: The top half of the canvas is blue, and the bottom red. This is to delineate before and after. Before (blue) represents the boxes to be completed in service of planning. After (red) captures all that happens once implementation begins.

## Guiding Principles for Success

In order to maximize engagement, impact, and overall success of your EX, we recommend keeping the following principles top of mind.

- 1. Think Local.** EX need not start in an executive suite. Wherever you are is where it begins
- 2. Think micro.** Begin with small changes. Let wins build momentum build trust in this process
- 3. Think collaboration.** Every voice counts. Encourage everyone to weigh in
- 4. Think iteration.** An idea that doesn't succeed need not be a failure. Learn and tweak as you go
- 5. Think outcomes.** For each ideas you plot out, ask yourselves "in service of what?"
- 6. Think dialog.** An EX evolves over time. It is not a "one and done" activity. Keep a conversation open

## What Makes This Tool Unique

Quite Simply, it is our Four Quads Framework. Just behind the Canvas you'll find the Four Quads - the key pillars that drive a meaningful EX. You'll find the what and why of each, along with a few sample questions you can use (or customize your own!) to get you started on your journey of exploration.

# EX in 9 Canvas

1. Our Value		2. Our Potential	
3. Our Opportunities			
<b>DELIVER</b>	<b>DEVELOP</b>	<b>CONNECT</b>	<b>THRIVE</b>
4. Our Priorities		5. Our Indicators	
6, Our Commitments			

7. Our Cadence	8. Our Learnings	9. Our Wins
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# EX in 9 Canvas - Thought Starters

<p>Our Value - <i>What unique outcome do you create, for whom, in service of what purpose?</i></p> <p><i>We develop cutting-edge collateral for our Sales Organization so that they may achieve or exceed revenue targets with their customers</i></p>	<p>2. Our Potential - <i>What could an enhanced EX allow you to be or unleash?</i></p> <ul style="list-style-type: none"> <li><i>We strive to be more efficient in delivering outputs</i></li> <li><i>We strive to be more collaborative with sales, co-creating with them</i></li> <li><i>We strive to increase the average tenure of members of our team</i></li> <li><i>We strive to hear more voices in meetings</i></li> <li><i>We strive to deliver 3 new products in the next fiscal year</i></li> </ul>		
<p>3. Our Opportunities - <i>Within the Four Quads below, what actions could move us closer to our potential?</i></p>			
<p><b>DELIVER</b></p> <ul style="list-style-type: none"> <li><i>Review campaign approval process - too many bottlenecks</i></li> <li><i>Only 1 (not 3!) from our team attend weekly sales mtg</i></li> <li><i>Test having monthly mtg w/ sales to review customer feedback (to help us tailor our materials better)</i></li> </ul>	<p><b>DEVELOP</b></p> <ul style="list-style-type: none"> <li><i>Kick off peer coaching circle</i></li> <li><i>Host monthly business book club</i></li> <li><i>Monthly career development conversations and lunch + learn sessions</i></li> </ul>	<p><b>CONNECT</b></p> <ul style="list-style-type: none"> <li><i>Jane (our boss) shares weekly updates from CEO</i></li> <li><i>Monthly invitation to a sales leader to join our team meeting, keeping us connected to their work</i></li> <li><i>Inclusion webinar!!!</i></li> </ul>	<p><b>THRIVE</b></p> <ul style="list-style-type: none"> <li><i>Experiment with 8-3 workday on Fridays</i></li> <li><i>Institute "Gratitude program"</i></li> <li><i>Monthly "Stop, Start, Continue" exercise as a team to keep our workload aligned and in check</i></li> </ul>
<p>4. Our Priorities - <i>What will we tackle first?</i></p> <ul style="list-style-type: none"> <li><i>Peer coaching - let's learn from each other!</i></li> <li><i>Bring sales to our team meetings to practice better collaboration</i></li> <li><i>Monthly book club</i></li> <li><i>STOP having everyone attend all sales meetings - make better use of our time!</i></li> </ul>		<p>5. Our Indicators - <i>What measures (qualitative or quantitative) will you watch for?</i></p> <ul style="list-style-type: none"> <li><i>Fewer revisions and ad hoc requests from sales</i></li> <li><i>More ideas being discussed and implemented based on ideas coming from great books</i></li> <li><i>Higher productivity as fewer of us attend the same meetings</i></li> <li><i>Greater sense of team connectivity as we coach and support each other</i></li> </ul>	
<p>6, Our Commitments - <i>How (specifically) will you turn priorities into actions to be executed with accountability?</i></p> <ul style="list-style-type: none"> <li><i>Rashid will speak with 3 experts on launching peer coaching circles and bring recommendations to our team meeting on July 17th</i></li> <li><i>Avery will invite Jay (Sales Leader) to our August 3rd team meeting. Avery will produce the agenda</i></li> <li><i>Cleo will solicit topics from the team and select the book for our inaugural book club meeting on September 5th</i></li> </ul>			
<p>7. Our Cadence - <i>How will you keep this dialog ongoing?</i></p> <ul style="list-style-type: none"> <li><i>We will conduct a monthly hour-long EX check in to discuss progress and further ideas</i></li> <li><i>John will conduct monthly 1-1's with each of us to gather feedback on his leadership of this work</i></li> <li><i>Shea will set up and monitor an email box designed solely for EX feedback and suggestions</i></li> </ul>	<p>8. Our Learnings - <i>What are you learning (good or bad!) as you go?</i></p> <ul style="list-style-type: none"> <li><i>Book club is great...but quarterly is plenty!</i></li> <li><i>Peer coaching is challenging. We will continue with a smaller cohort of those really invested in keeping it going</i></li> <li><i>Having sales in our meetings has taken us off track. We will set up a separate monthly check-in to ensure our collaboration continues</i></li> </ul>	<p>9. Our Wins - <i>What will you celebrate?</i></p> <ul style="list-style-type: none"> <li><i>We applied the strategy discussed in last month's book club and customer feedback has been fabulous!</i></li> <li><i>Two of the three promotions have been won by women!</i></li> <li><i>We've noticed sales is coming to us earlier in the process, helping us adjust before the product is too "baked" - more collaborative and efficient</i></li> </ul>	

# EX in 9 Canvas - Four Quads Framework

These are – in our research and experience – the Four areas with the most direct and powerful impact on the Employee Experience.

The questions within each are designed to be a starting place. Feel free to make them your own.

