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							
DELIVER	DEVELOP	CONNECT	THRIVE				
4. Our Priorities		5. Our Indicators					
6, Our Commitments							

7. Our Cadence	8. Our Learnings	9. Our Wins

EX in 9 Canvas - Thought Starters

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Our Value - What unique outcome do you create, for whom, in service of what purpose? We develop cutting-edge collateral for our Sales Organization so that they may achieve or exceed revenue targets with their customers		 2. Our Potential - What could an enhanced EX allow you to be or unleash? We strive to be more efficient in delivering outputs We strive to be more collaborative with sales, co-creating with them We strive to increase the average tenure of members of our team We strive to hear more voices in meetings We strive to deliver 3 new products in the next fiscal year 			
3. Our Opportunities - Within the Four Qua	ads below, what actions cou	Id move us closer	to our potential?		
 DELIVER Review campaign approval process - too many bottlenecks Only 1 (not 3!) from our team attend weekly sales mtg Test having monthly mtg w/ sales to review customer feedback (to help us tailor our materials better) 	DEVELO • Kick off peer coaching • Host monthly business • Monthly career develo conversations and lunc • learn sessions	circle book club pment	CONNECT • Jane (our boss) shares weekly up from CEO • Monthly invitation to a sales lead join our team meeting, keeping connected to their work • Inclusion webinar!!!	• Insti ler to • Mon	THRIVE eriment with 8-3 workday on Fridays tute "Gratitude program" othly "Stop, Start, Continue" exercise as a on to keep our workload aligned and in check
 4. Our Priorities - What will we tackle first? Peer coaching - let's learn from each other! Bring sales to our team meetings to practice better collaboration Monthly book club STOP having everyone attend all sales meetings - make better use of our time! 		 5. Our Indicators - What measures (qualitative or quantitative) will you watch for? Fewer revisions and ad hoc requests from sales More ideas being discussed and implemented based on ideas coming from great books Higher productivity as fewer of us attend the same meetings Greater sense of team connectivity as we coach and support each other 			
 6, Our Commitments - How (specifically) w Rashid will speak with 3 experts on laune Avery will invite Jay (Sales Leader) to our Cleo will solicit topics from the team and 	ching peer coaching circles r August 3rd team meeting. ,	and bring recomm Avery will produce	pendations to our team meeting on Ju the agenda	ly 17th	
 7. Our Cadence - How will you keep this dialog ongoing? We will conduct a monthly hour-long EX check in to discuss progress and further ideas John will conduct monthly 1-1's with each of us to gather feedback on his leadership of this work Shea will set up and monitor an email box designed solely for EX feedback and suggestions 		 8. Our Learnings - What are you learning (good or bad!) as you go? Book club is greatbut quarterly is plenty! Peer coaching is challenging. We will continue with a smaller cohort of those really invested in keeping it going Having sales in our meetings has taken us off track. We will set up a separate monthly check-in to ensure our collaboration continues 		 9. Our Wins - What will you celebrate? We applied the strategy discussed in last month's book club and customer feedback has been fabulous! Two of the three promotions have been won by women! 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 	
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EX in 9 Canvas - Four Quads Framework

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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.



Everyone you've hired has a job to do. You need their best work, and they want the freedom to do their best work. Quad 1 is all about enablers of - and distractors from great work.

- Are they empowered to make decisions
- Are there broken processes not being fixed?
- Are there bottlenecks in the system?
- Can they try something new when stakes are low?
- Does everything require permission or approval?
- Do they have the tools and resources they need to do the job?

DEVELOP

Delivering allows them to demonstrate their current skills and capabilities. But honing those and developing news ones are essential to their EX as well. This can be done with or without a development budget.

- Do they receive meaningful, actionable feedback?
- Are they being coached on what matters?
- Do they see a future career path?
- Are they being given opportunities to be challenged?
- Do they have (or make) time to learn and grow through formal programs or accessible resources (books, TED talks, webinars)?
- Are they seeking on-the-job learning opportunities?

CONNECT

Connecting is all about belonging and meaning-making. Do they feel safe and connected to each other, to purpose, to organizational happenings? Do they have the information they need to make their own connections?

- Do they feel informed in a transparent way?
- Do they feel comfortable speaking up in meetings?
- Do they know the right people in other parts of the organization?
- Can they define their individual role in delivering company purpose and outcomes?
- Will they raise the essential questions, poke holes, and state risks they anticipate?
- Do they experience collaboration?

THRIVE

Thriving reflects the degree to which work fits into their lives - not the other way around. It's about the feeling - the sentiment they hold around team, job, and company.

- Do they feel respected as a contributor?
- Do they feel recognized for talents, efforts, and great work?
- Do they feel a sense of control over boundaries?
- Do they understand how to spot and manage burnout?
- Does wellness feel like a priority?

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