# XPLANE®

ESSENTIAL WORKSHEET TOOLKIT:
15 of Our Most Loved Worksheets

Empathy Map

Everyone in your organization is driven by different things. The Empathy Map gives you a deep-dive into the underlying motivations of your people to uncover why they are functioning the way they are. The principle is to start with your people and design with their needs in mind. Empathy mapping for organizational (rather than consumer) insights, follows all the same principles, just putting employees or stakeholders at the center.

1 WHO are we empathizing with?

- Who is the person we want to understand?
- What is the situation they are in?
- What is their role in the situation?

2 What do we want them to DO?

- What do they need to do differently?
- What job(s) do they want or need to get done?
- What decision(s) do they need to make?
- How will we know they were successful?

3 What do they SEE?

- What do they see in the marketplace?
- What do they see in their immediate environment?
- What do they see others saying?
- What do they see others doing?
- What are they watching and reading?

4 What are they SAYING?

- What have we heard them say?
- What can we imagine them saying?

5 What do they DO?

- What do they do today?
- What behavior have we observed?
- What can we imagine them doing?

6 What do they HEAR?

- What are they hearing others say?
- What are they hearing from friends?
- What are they hearing from colleagues?
- What are they hearing second-hand?

7 What do they THINK & FEEL?

PAINS

What are their fears, frustrations, and anxieties?

GAINS

What are their wants, needs, hopes and dreams?

1. WHO are we empathizing with?   GOAL   2. What do we want them to DO?

6. What do they HEAR?

3. What do they SEE?

7. What do they THINK & FEEL?

PAINS   GAINS

4. What do they SAY?

What other thoughts & feelings might motivate their behavior?

5. What do they DO?
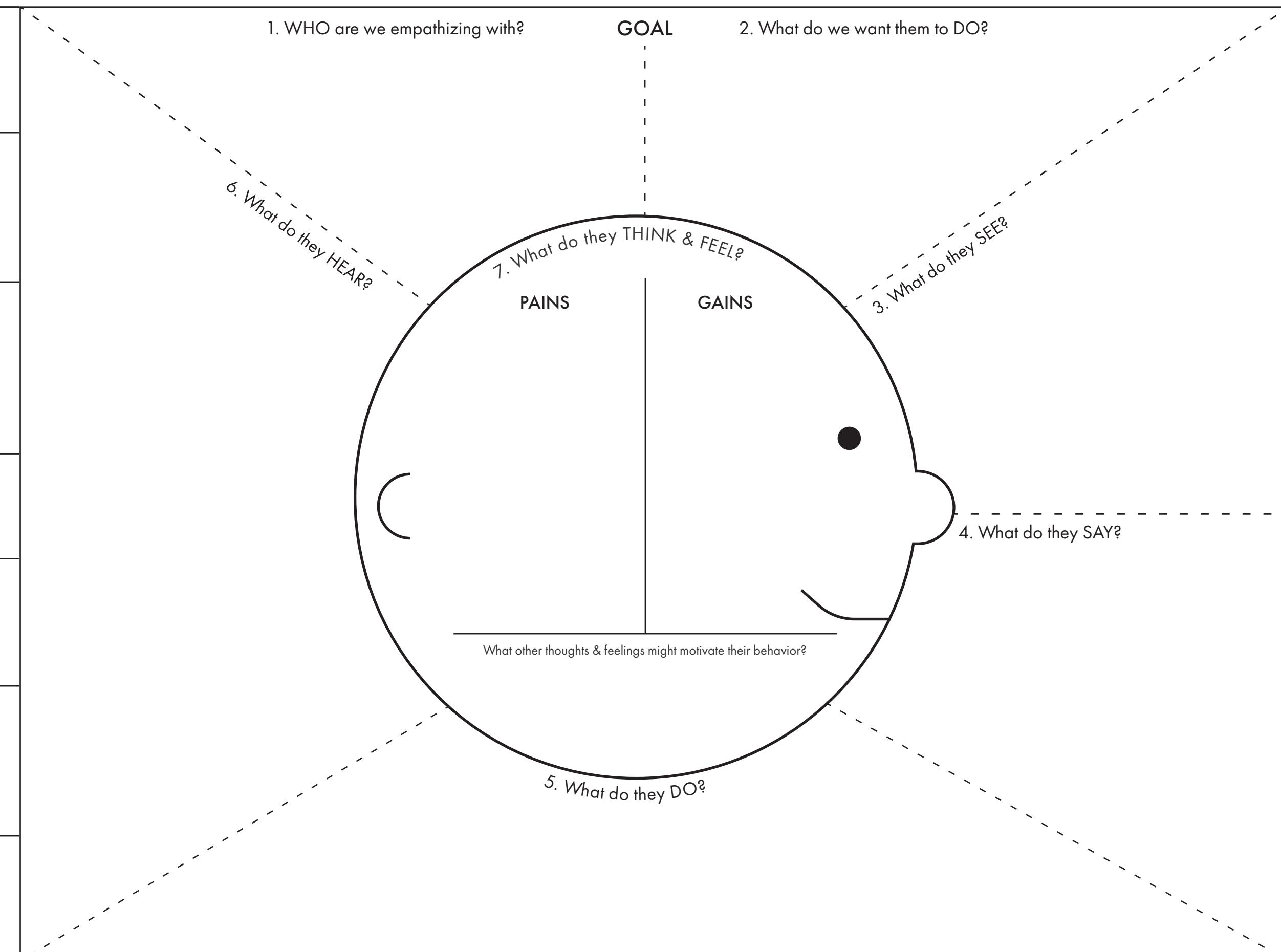
Design Ops

This canvas helps you think through how design will scale in your organization. If a current Design Ops function exists, use the canvas to visually map it. If it does not yet exist, use the canvas to design it. Set the stage for conversations in your organization, think through your needs, plans, and goals, and ask the right questions. Then, use this canvas to capture your ideas and insights in one place.

1 What do we do?

- What is the value we provide?
- What does "good" look like?
- What is our process and/or operating rhythm?
- What methods and tools do we use?
- What are our inputs and outputs?
- How do we work together?

2 Who are we?

TEAMMATES
- Who are we looking for?
- How do we recruit people?
- How do we develop our people?
- How do we retain people?

STAKEHOLDERS
- Who are our most valuable partners?
- What makes them successful?
- What obstacles stand in their way?
- How do we work with them?

SUPPORT
- What support and resources do we need?

3 How do we communicate?

- How do we communicate internally, within our teams?
- How do we communicate externally, with other stakeholders?
- How do we educate and evangelize?
- How do we give and get feedback?
- How do we share our knowledge and new learnings?

4 What constrains us?

- What regulatory, security, or other realities constrain what is possible?
- How do we manage conflicts and tradeoffs?
- How do we manage risk?

5 How are we structured?

BALANCE
- How do we balance autonomy and the common good?

MANAGEMENT
- What is our mission?
- How do we set goals?
- How do we track and measure success?
- How are we structured?
- Who is responsible for what?

6 What else?

- What else should we be thinking about?

What do we do?

Who are we?

TEAMMATES | STAKEHOLDERS

SUPPORT
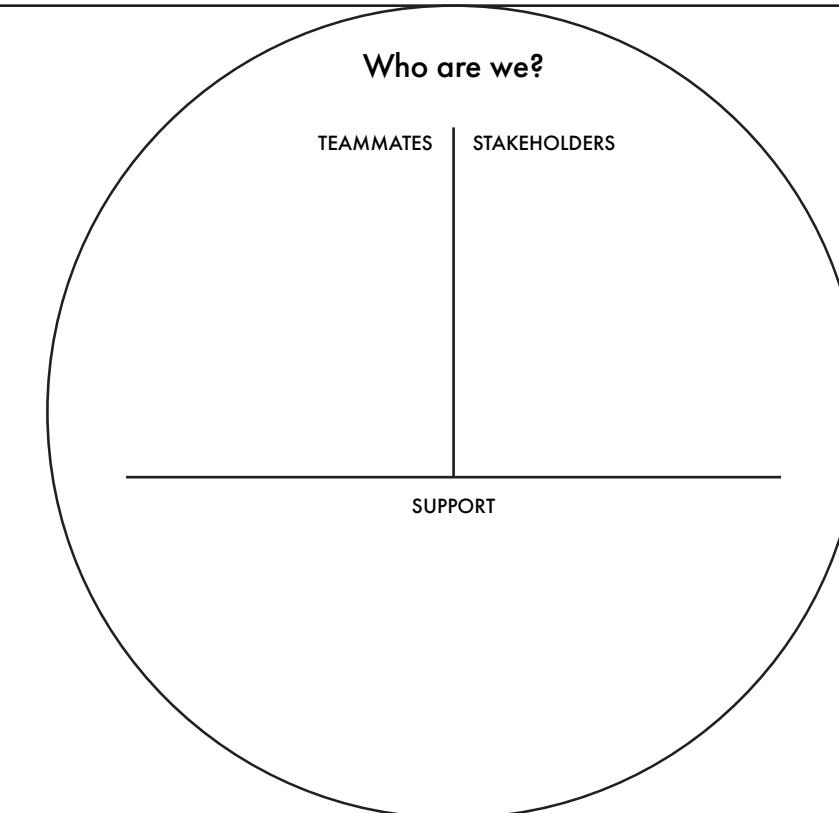
How do we communicate?

What constrains us?

How are we structured?

BALANCE

MANAGEMENT

AUTONOMY
The freedom and independence we need to do great work.

COMMON GOOD
The things we need to do consistently in order to work well together.

BALANCE
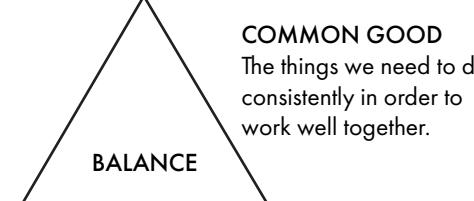
What else?

Culture Madlibs

Use this worksheet to get specific about the nuances that make your current culture unique.

Find a partner or small team and fill out the "Madlibs" style story in the worksheet. You may find it's easier to read the story in context rather than blindly choosing adjectives and nouns like in the real Madlibs game—although that approach certainly makes things humorous!

I'm _____ and I'm so _____
[most common first name at company]   [emotion experienced by new employees]

to join _____. This morning I walked into the
[company name]

_____ and the first thing I saw was
[what you call an office]

_____. Everyone says it's classic
[something you might only see at your company]

_____ because _____.
[company name]   [why]

My manager has been showing me the ropes. She says the people who

get ahead here are _____, _____,
[adjective]   [adjective]

and _____, but watch out for the _____
[adjective]   [adjective]

people — they're career trouble. She said you can tell a real

_____ by the way they run a meeting.
[what you call someone who works at your company]

Those meetings are run like a _____
[metaphor for what your meetings are like]

_____
[metaphor for what your meetings are like]

_____.
[explanation of metaphor]

Yesterday I got lost trying to find the bathroom. Embarrassing! The

CEO walked by and _____.
[what your CEO would do if they saw someone wandering in the hall]

When _____ happened, I thought
[something your company is known for doing differently]

it was a little strange, but people tell me it's very typical here. At

_____ we all got togehter to _____.
[time when you might gather for a social activity]   [social activity people might do at your company]

You know you're at a _____ gathering when
[company name]

_____. I think if I stay
[story of a legendary thing that really happened]

here it will be because of the _____.
[best thing about working for company]

but if I would go it's because _____.
[most common reason people leave company]

I hope it works out! It's like the guy I sit next to said: the first rule is

_____,
[thing everyone talks about being important]

but if you really want to succeed here, remember

_____
[unspoken rule that everyone seems to live by]

Anthropologist's Game

What clues can you gather by viewing your organization as an outsider? Imagine you are an anthropologist, encountering your organization for the first time. Viewing it with fresh eyes, what seems to be important to those who work within the organization? Write or draw in the spaces below to capture your findings.

Imagine you are an anthropologist encountering your organization for the first time. Use this worksheet to document what seems to be valued by those within the organization. Who appears to be their heroes and legends? What sayings do you hear? What customs and rituals do you observe? What artifacts do they hold as having great importance?

This worksheet is best used to get past stated values, toward what may be so deeply ingrained in the culture that it's become hard to see. It can be completed individually or as a group.

This game is adapted from work by Geert Hofstede.

Heroes & Legends

Sayings & Language

Customs

Values & Beliefs

Artifacts

Ways of Working

Use this worksheet to facilitate a conversation with your team around how you want to work and what you expect from one another. Fill it out together using words and images, or print large scale and populate with sticky notes. As you complete each section be sure to synthesize your results into a key statement or bulleted list you agree on.

1 | What do we value?

What qualities and behaviors are important to us as individuals? Which ones are shared among us?

2 | How will we behave based on these values? Explore these categories:

COMMUNICATE:
When, how, and with what channels?

COLLABORATE:
When will we show one another our work? How will we work together on ideas? What tools will we use?

MEASURE OUR WORK:
What does success look like? How will we know we've reached it?

PROVIDE FEEDBACK:
How do we expect performance feedback will be delivered and managed?

MAKE DECISIONS:
Is it through consensus or is there a designated decision-maker? How do we know who the decision-maker is? How will decisions be communicated?

RECOGNIZE ONE ANOTHER:
How do we individually like to be rewarded? Do we have specific goals or milestones we'll celebrate together?

HANDLE CONFLICT:
What does healthy conflict look like for us? What would unhealthy conflict look like?

PRIORITIZE WORK:
How will we resolve conflicting priorities?

WHAT IS YOUR TEAM ARCHETYPE?:
What is our superhero, or historical representative?

3 | What commitments can we make to one another based on this?

How will we each show up differently as individuals and team members? What behavior change can we hold one another accountable to?

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1. What do we value?

3. What commitments can we make to one another based on this?

2. How will we behave based on these values? Explore the categories below.

COMMUNICATE	COLLABORATE	MEASURE OUR WORK
PROVIDE FEEDBACK	MAKE DECISIONS	RECOGNIZE ONE ANOTHER
HANDLE CONFLICT	PRIORITIZE WORK	WHAT IS YOUR TEAM ARCHETYPE?

Culture Crush

Use this worksheet to identify the elements of an organization you admire and aspire to cultivate in your own organization. Look at the desirable as well as the less desirable organizations for inspiration. Remember the mantra: contrast create definition!

Best as a group activity. Ask your team, "On what organizations do we have a culture crush?" Think about companies that people often talk about emulating. List them in the hearts on the worksheet. Then note the reasons why you have a crush on them. Next, think about what organizations are the antitheses of the culture you want. Fill in the drops on the worksheet and note why for each.

Company Name: _____
Why?

Company Name: _____
Why?

Company Name: _____
Why?

Company Name: _____
Why?

Company Name: _____
Why?

Company Name: _____
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Company Name:
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Why?
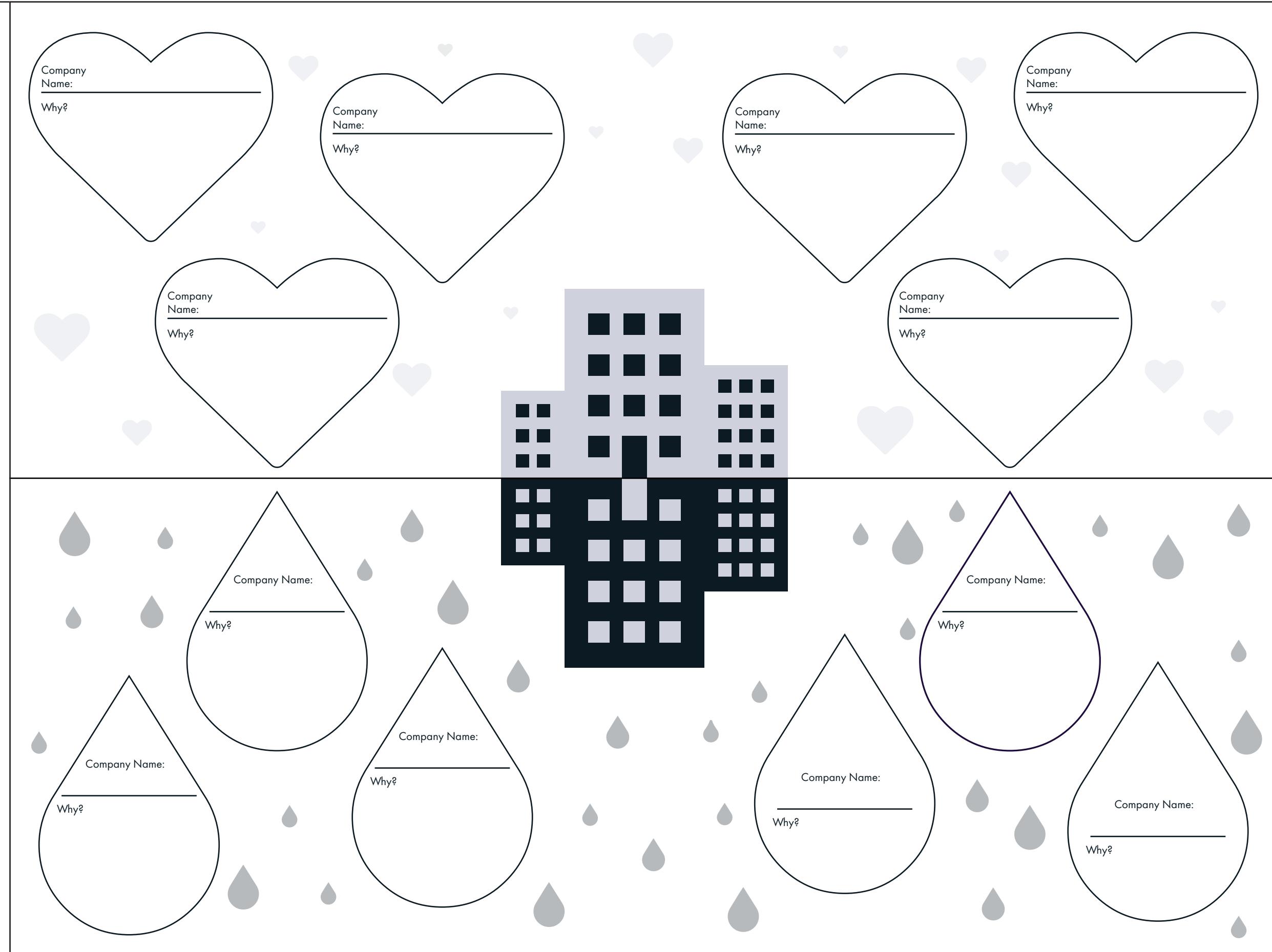
5 P's Planning

Purpose, prep, people, process, and product. Use this tool to design and structure a productive meeting in a fixed period of time.

1	**PURPOSE**

What is the purpose of our time together? What do we hope to achieve?

2	**PREP**

What preparation needs to be done by the facilitator to get ready for the meeting? Is there any preparation that needs to be done by the participants?

3	**PEOPLE**

Who needs to attend the meeting? What are their roles?

4	**PROCESS**

Plan out the agenda for the meeting along the timeline. What is the sequence of events / exercises / discussions that will take us from Point A to Point B?

5	**PRODUCT**

What is the outcome of our meeting? It could be a specific product, a plan / prototype, or a concrete set of next steps and actions.

PURPOSE:

1

PREP:

1

2

3

PEOPLE:

PROCESS:
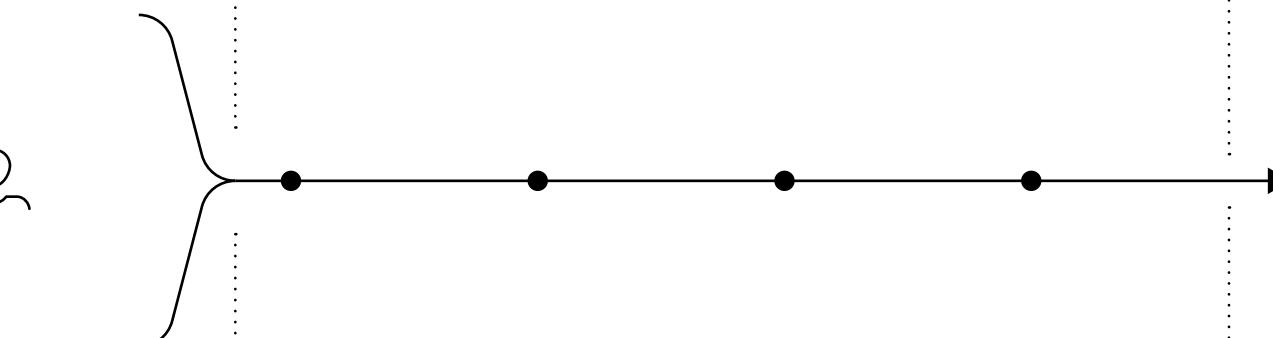
PRODUCT:

Employee Experience Journey Map

A diagnostic tool that will help you visualize an employee's current experience in your organization, the Employee Experience Journey Map includes "touchpoints" at which you can assess whether an employee's experience meets their expectations.

Discovery
The perception of the organization and the Hiring Process.

Onboarding
The integration into the organization.

Training
The acquisition of knowledge or skills.

Work
The achievement of the task and the way one connects to others and to teams.

Rewards
Everything related to compensation, benefits, and how to obtain them.

Mobility
Professional changes relevant to the employee.

Breaks
Moments when you aren't working but you maintain a work relationship.

Exit
The way in which a person disassociates themselves from the organization.

Stages	Discovery	Onboarding	Training	Work	Rewards	Mobility	Breaks	Exit
Touchpoints								
Emotional Curve								
Needs								
Insights								
Opportunities								

Vision Map

Use this exercise to explore possible new futures. A quick documentation of the Current State allows reflection on what might need to change, and a deeper envisioning of the Future State allows dreaming without constraints. The Bridge then begins to anchor the dream with possible actions to realize it.

1

Divide the page or whiteboard into three sections. Label the top of the sections with Current State, Bridge, and Future State. If there are multiple participants, begin by having each one complete the exercise individually on their own page.

2

Invite participants to describe or sketch their Current State — what does their world or scenario look like today?

3

Then invite the participants to describe or sketch their desired Future State — what do they want their world or scenario to look like in the future?

4

With both states clearly envisioned, ask the participants to complete the Bridge section by identifying specific actions that could be taken or things that would need to change in order for the Future State to be realized.

5

If there are multiple participants, have each share their vision with the group, and then discuss similarities and differences, and identify common themes. These themes become "common ground" for further exploration.

CURRENT STATE
What does our world look like today?

BRIDGE
What steps do we need to take to get there?

① → ② → ③ → ④ → ⑤

① ② ③ ④ ⑤

FUTURE STATE
What do we want our world to look like tomorrow?
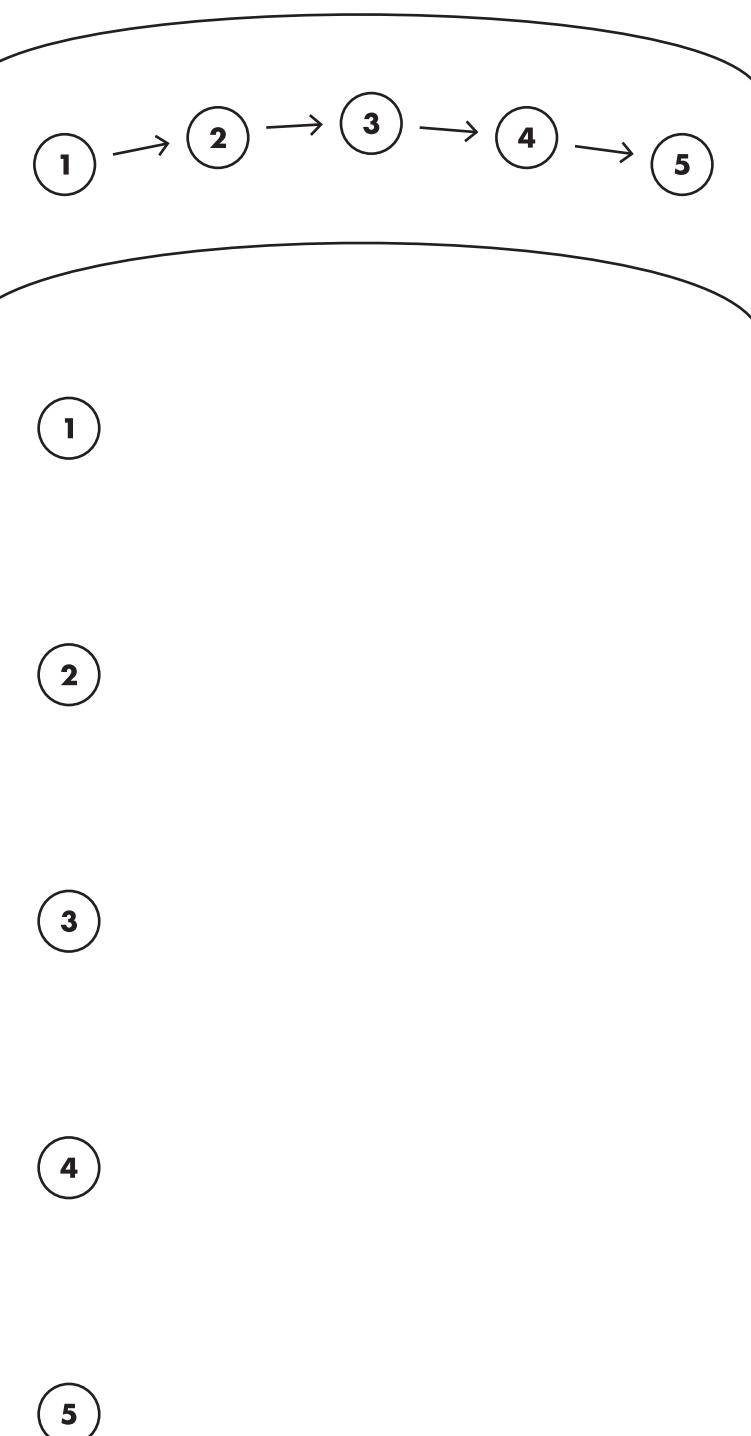
Who/Do

The Who/Do is a useful framing device to define an audience (the who) and what you want them to do (or do differently). Make success tangible and measurable by clearly determining a target audience and frame how they should behave differently in the future. Prioritize action and clarify what a final communication plan should solve for.

1

Under WHO, record a list of target audience(s). Who's involved in making this happen? Who needs to be informed? Who is the decision-maker?

2

Jump to the third column. Under Do, think about each audience—when they understand the big picture, what do we want them to DO? (Or stop doing, or do differently?)

3

Go back to the middle column. Once the target audience (WHO) and the actions (DO) have been determined, ask yourself what do they need to understand to move toward the desired actions?

4

Given all of the possible audiences and actions, what is the most important? Who comes first?

TIP

Bias yourself toward action. When brainstorming "DOs," there is a tendency to slip into the easier mode of "we just want them to understand." Most often when you want people to understand something, it's because you want them to change something, or learn something that they can then "DO." Don't shortchange what you are really looking for—action.

It is beneficial to conduct a communication timeline prior to finalizing the WHO/DO matrix. The timeline's temporal perspective can help straighten out a long and difficult list.

WHO IS YOUR TARGET AUDIENCE?	WHAT DO THEY NEED TO UNDERSTAND?	WHAT DO YOU WANT THEM TO DO?
TARGET 1		
TARGET 2		
TARGET 3		
TARGET 4		
TARGET 5		

Activation Curve

Different stakeholders in your organization are at different levels of understanding. This is the natural result of how human beings process information. We call the progression from the first contact to embedded in the day-to-day functions the Activation Curve.

Organizations are in a constant state of change. Change is inevitable, but it is also at odds with the basic human instinct to be cautious and skeptical of the unfamiliar. The activation curve is XPLANE's method of determining where change is needed and how it is activated throughout an organization.

Who needs to do what to make your culture change a success? Develop an engagement and communication program for your people, segmented by your different audiences. Each group needs a unique path to take to get to the culture you envisioned. To move people from the bottom of the curve to the top, you must start with where they are today. Plot out exactly where each of your stakeholder groups sits on the curve today and where you would like them to be in the future. This is a fast way to break through the clutter of who needs to be involved in a change process and get clarity on where to start, where you need them to be, and by when.

DEGREE OF SUPPORT

Look Into the Future

New Business as Usual

Integrating

LIVE IT.
Embedded Experience

Internalizing

Applying

Acquiring

BELIEVE IT.
Learning

Accepting

Understanding

Awareness

HEAR IT.
Communicating

TIME
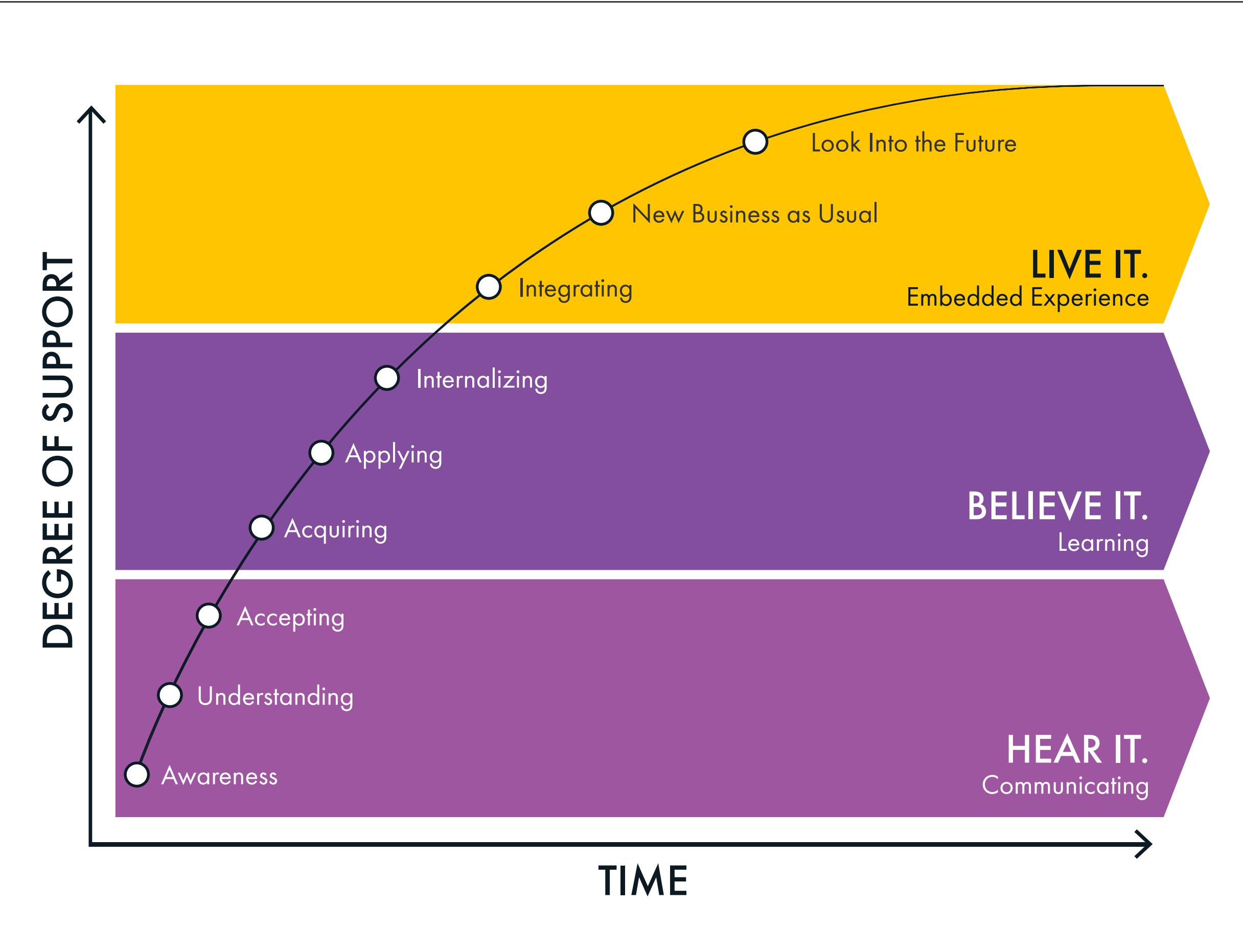
Mascot Game

Use this worksheet to get clear about the culture your organization aspires to without relying on vague, cliche words.

Best as a group activity. Ask your team, "What celebrity or notable person would be our organization's "culture mascot"—a spokesperson for our cultural values"? Then ask "Why?" What trait makes them emblematic of our culture? Sketch the celebrity in the center and fill out the diagram with the top six characteristics.
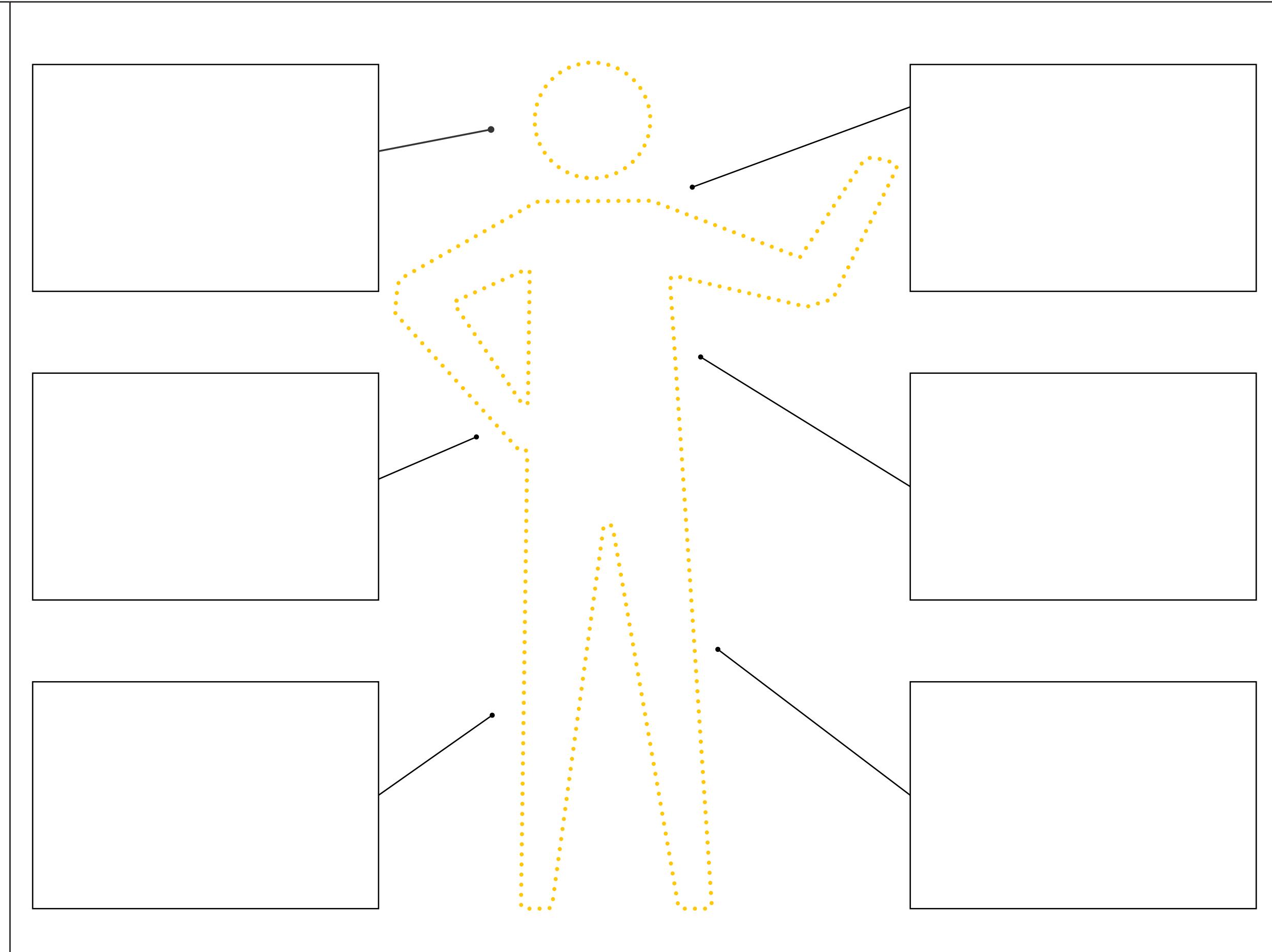
30 60 90

Use this worksheet to help you identify and sort priorities in the order in which you'll execute activities and projects over the course of 30, 60, or 90 days.

You can refine this road map by asking three questions:

| 1 | Are the due dates realistic? |

| 2 | What dependencies exist between each of these elements and how might that adjust the scheduling? |

| 3 | What is missing? |

| TEAM	NEXT 30 DAYS	NEXT 60 DAYS	NEXT 90 DAYS	BEYOND

Elevation

Shift from a content-focus to an audience-focus; draw out meaningful requirements for your communication.

Elevation is a way to align on the level of detail to focus. Discovering the right elevation for a session or for any visual is crucial.

High elevation is 30,000 feet. This is where airplanes fly and where we focus on top-line messages, a high-level view of a process, and organizational change or overall vision.

The lowest elevation is the weeds. People working in an organization often get off course because they are overwhelmed by the details.

The elevations in between represent all the different levels of detail.

30,000 Ft

20,000 Ft

10,000 Ft

5,000 Ft

Weeds

What is your initiative, and how should the details/messages/action items be arrayed from high-level to ground-level?

30,000 Ft Issues

20,000 Ft Issues

10,000 Ft Issues

5,000 Ft Issues

Weeds Issues
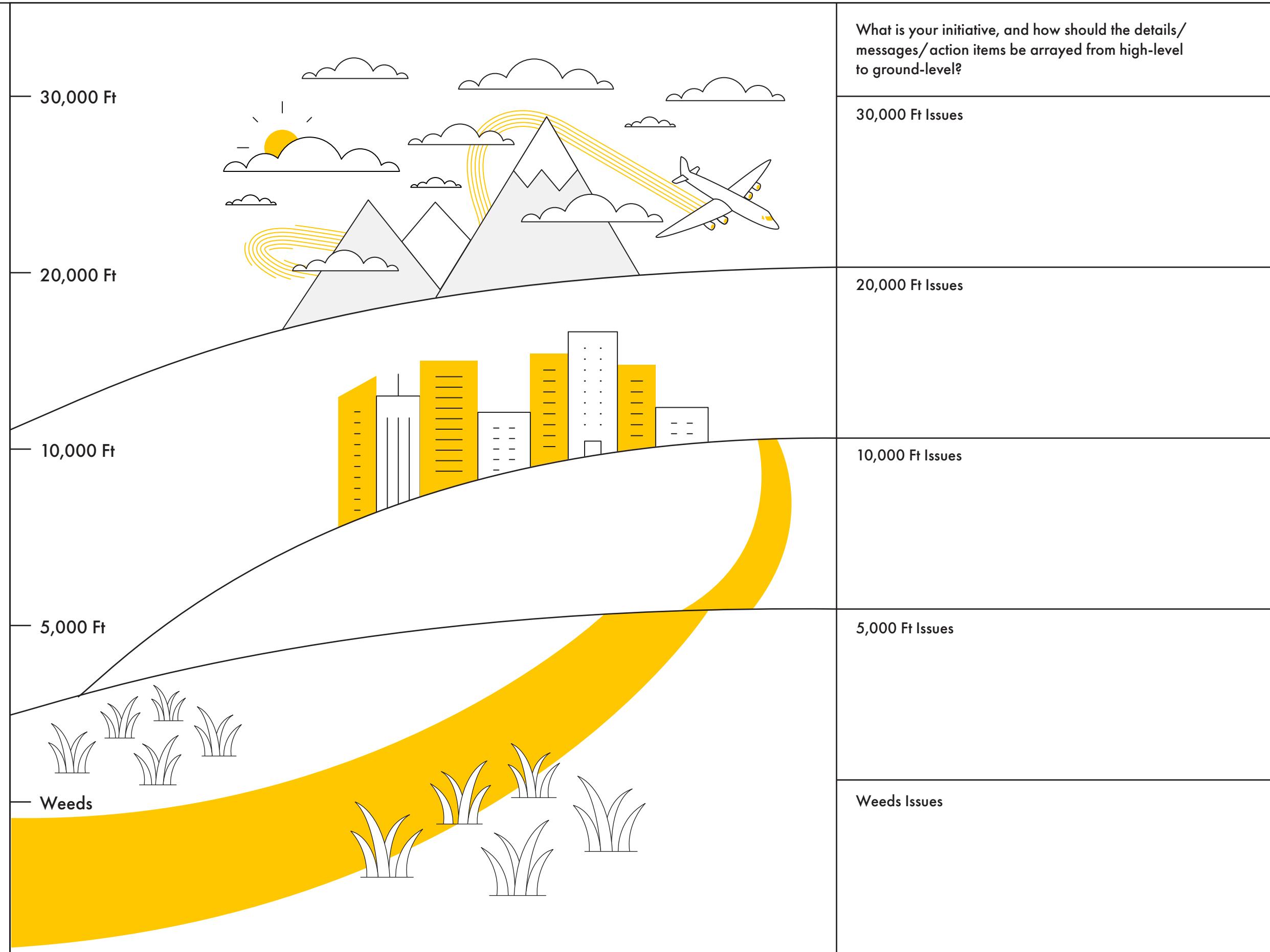
Star Employee Game

Use this worksheet to get out of the abstract and into real examples of employee behaviors. Identify the types of behaviors that are working in your current culture.

Individual or group activity. Ask yourself, "Who are the culture stars of our organization?" Ask around—if you could nominate one person to represent the company culture, who would it be? Pick your biggest culture star and use the worksheet to diagram the behaviors they exhibit.

STAR EMPLOYEE

Name:

Role:

Behaviors that fit in: What do they do that helps them fit right into the organizational groove?

Outside Experiences: What do they bring from past jobs or outside experiences that shapes how they show up?

Behaviors that stand out: What they do that is different and exceptional?

Outcome: How does their influence show up in the organization?

One big achievement that makes them our Star Employee

One small detail that makes them our Star Employee

Find more resources like these at
xplane.com