



XM Business Case + Value Planning Framework

A FOUR-STEP PRACTICAL GUIDE TO PRIORITIZING, DELIVERING + PROVING BUSINESS VALUE

{ 01 } Find the problem		OUTPUT: PROBLEM STATEMENT AND KPI BASELINE
	What is the core business problem or opportunity? Clearly describe it, noting affected segments, products, journeys.	
	Why does it matter? Consider impacts on customers, employees, and the business (BUs, functions, teams).	
	How is this measured today? Identify current (BOX) KPIs across Enterprise → BU → Function → Team.	
	What does success look like? Describe expected KPI movement & dollar impact. Note differences by audience.	
{ 02 } Understand the economics		OUTPUT: VALUE AT STAKE ESTIMATE
	What is the current cost of the problem? Quantify where possible (financial, operational, experiential).	
	What is the cost of doing nothing? What worsens if nothing changes (including downstream data, decision quality).	
	What is the potential upside? Estimate value from incremental improvement (e.g., 1%, 5%).	
{ 03 } Explore solutions		OUTPUT: PRIORITIZED USE CASE + PILOT PLAN
	List potential use cases: Include who it serves (internal/external), where/how it will be used, the insights delivered.	
	Define actions and expected outcomes: Describe intended micro/macro actions, KPIs impacted, expected timing.	
	Prioritize use cases: based on impact, feasibility, customer value, and alignment with existing initiatives.	
	Define the pilot: Identify the smallest viable solution that proves real value before scaling.	
{ 04 } Measure + track value over time		OUTPUT: VALUE ROADMAP & GOVERNANCE CADENCE
Define Value Milestones—the path to value + business Impact		
	First 90 days: Early behavioral or capability indicators (e.g., adoption, engagement, participation).	
	6-month outcomes: Observable behavior and process changes; benefits from closed-loop actions.	
	12-month outcomes: Early KPI movement across experience, operations, and financial metrics.	
	1–3-year targets: Fully quantified ROI (revenue growth, cost reduction, risk mitigation).	
Accountability + Tracking		
	Ownership: Who is responsible for each value driver and milestone?	
	Measurement: What metric confirms value delivery?	
	Governance: How often will value be reviewed, by whom, and in what system?	
	Communication: How will progress be shared internally and externally?	