



**How Financial Institutions
Build CX That Drives
Loyalty & Growth**

The 5 Stages of CX Maturity

IN FINANCIAL SERVICES



Tools Alone Don't Build Trust. Strategy Does.

Many FIs have the technology in place
but not the structure to deliver meaningful
CX improvement.

What's needed: a clear, strategic journey that
aligns CX efforts with business outcomes.



Lay the Groundwork

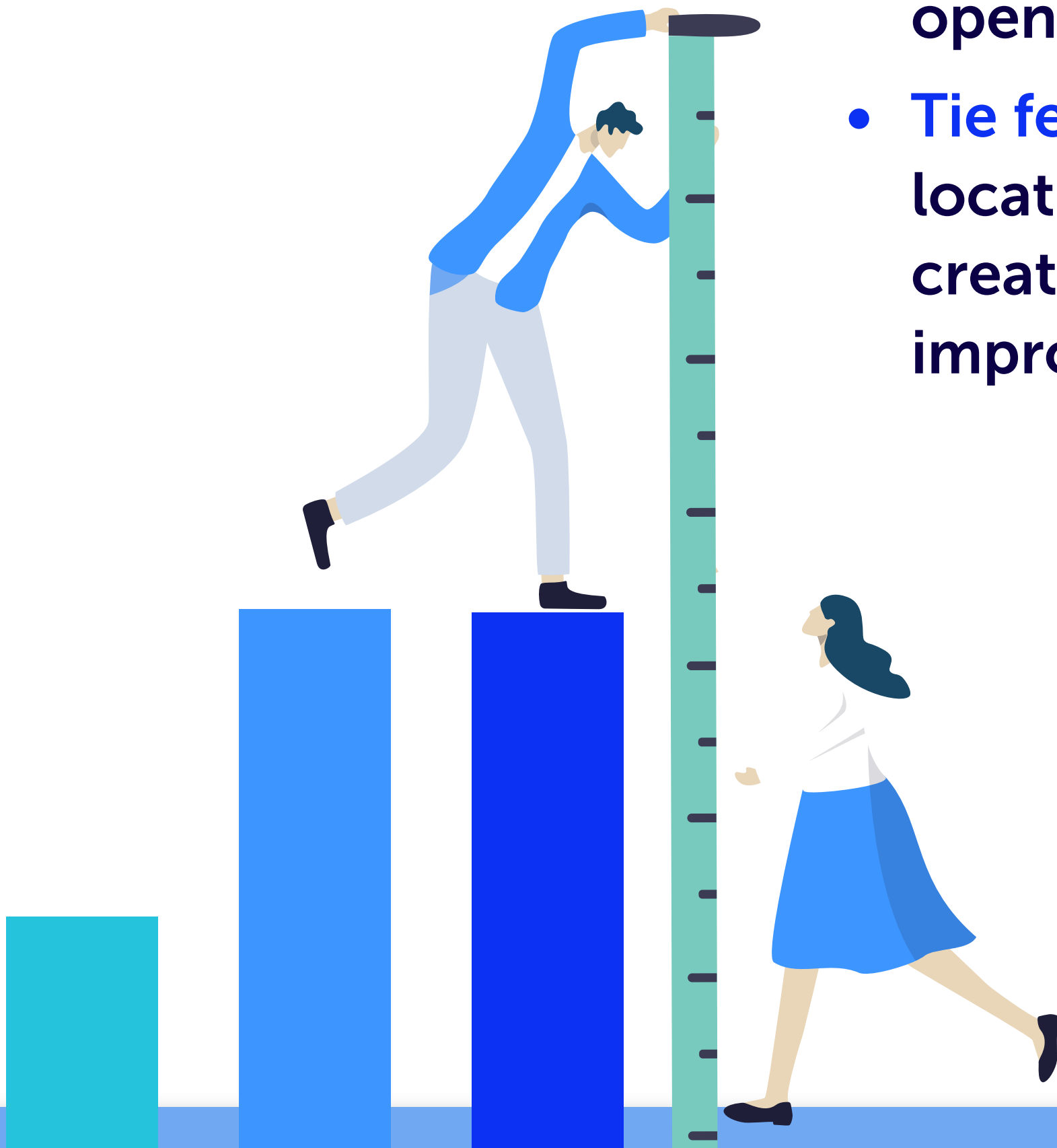
- **Align CX goals** with business outcomes (growth, retention, deposits)
- **Get leadership buy-in** and embed CX into your organizational culture
- **Build a scalable, flexible framework** using metrics like NPS, CSAT, CES



1

Measure What Matters

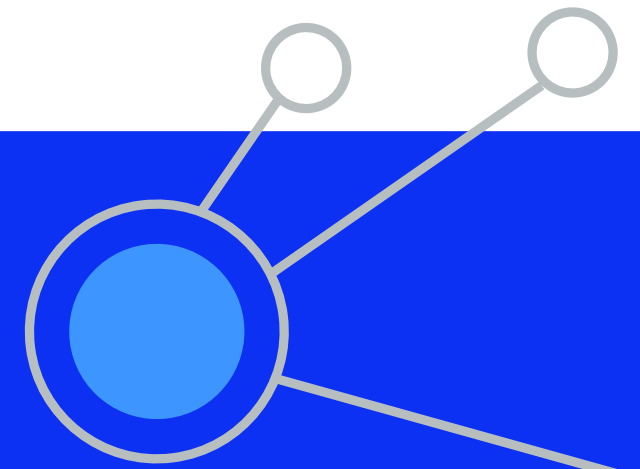
- Use the right metrics across all touchpoints
- Capture sentiment and analyze open-ended feedback
- Tie feedback to specific teams, locations, and moments and create actionable strategies for improvement



2

Identify

High-Impact Service Drivers



Not all feedback is created equal

- Use **key driver analysis** to pinpoint what matters most to customers
- **Focus improvement efforts** where they'll deliver the greatest ROI
- Use **findings** to direct and dial in training and coaching

3



4

Create a Cycle of Improvement

Build Momentum

with Quick Wins + Long-Term Strategy

- **Identify easy fixes** that show early impact
- **Develop long-term systems** for measurement and training
- **Embed CX** into your growth strategy for lasting results



5

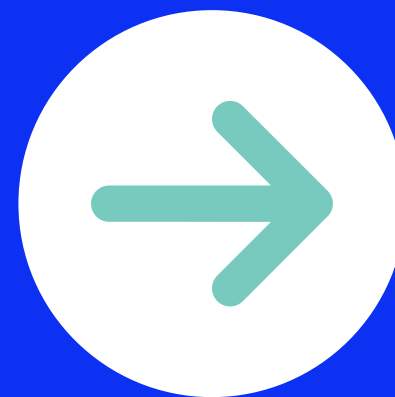


Ready to Accelerate Your CX Journey?

DOWNLOAD

Stages of the CX Journey in Financial Services

Let CSP turn feedback into stronger relationships and measurable business growth.



Contact us today!

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