



# This bank didn't fix CX by redesigning the customer journey

They barely touched it



# The Popular Advice

When CX stalls, most leaders hear the same playbook. It's a cycle of busy work that feels productive but rarely changes outcomes.

## **Map the journey again**

Another workshop, another flowchart, same results

## **Rewrite scripts**

More words that don't address the root problem

## **Roll out training**

Generic sessions that agents forget by next week

## **Add more QA**

More checking, but still no clarity on what matters

# The Uncomfortable Truth

Customers weren't the real bottleneck. Employees were operating blind in a system that set them up to fail.

## **Performance data lived everywhere**

Scattered across systems with no single source of truth

## **Feedback was inconsistent**

Different standards, different interpretations, different outcomes

## **Coaching depended on managers**

Quality varied wildly based on who led your team

**You can't deliver great service when you don't know what "good" looks like.**



## The Counterintuitive Move

### Wrong Question

"How do we improve the customer experience?"

### Right Question

**"Why is it so hard for agents to perform consistently?"**

That single reframe changed everything about their approach.

# What They Actually Fixed

They didn't start with scripts or policies. They fixed visibility—the foundation that makes everything else possible.

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## Unified Performance Signals

All quality and performance data consolidated in one place, accessible to everyone who needs it

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## Clear Patterns

Real insights emerged from the noise, showing what actually drives outcomes

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## Shared Understanding

Replaced opinions with data, creating alignment across teams

**Agents stopped guessing. Managers stopped reacting.**

# Coaching, Reimagined

Most coaching fails because it's late and generic. This bank flipped that model completely, transforming coaching from reactive to proactive.



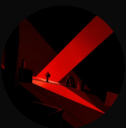
## Coaching became frequent

Regular touchpoints instead of quarterly surprises



## Feedback became specific

Tied to actual behaviors and real customer interactions



## Focus on what matters

Energy directed toward behaviors with proven impact

Managers finally knew where to spend their time.

# The Outcomes Everyone Wants

The results looked like CX wins. But the work happened nowhere near the customer journey map—it happened in the systems supporting agents.

**16%**

## **First Call Resolution**

Significant increase in resolving issues on first contact

**17%**

## **Customer Satisfaction**

Measurable improvement in CSAT scores

**153%**

## **Coaching Activity**

Dramatic rise in meaningful coaching conversations

Plus fewer repeat calls, lower costs, and agents who finally felt supported.

# The Reframe

**Customer experience is rarely a customer problem.**

It's usually a systems problem that employees absorb on behalf of customers.

Fix the system they work inside—give them visibility, consistency, and support—and CX improves as a natural side effect.

Stop treating symptoms. Address the root cause: the infrastructure your team navigates every single day.

# Where Leverage Lives

If your CX metrics aren't moving, stop asking how agents should behave.

**Start asking what you've made invisible, fragmented, or hard for them.**

That's where leverage lives. That's where transformation begins.

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**Share this with a CX leader who's tired of surface-level fixes.**

