Moving Up the CX Maturity Model:

Your Guide to Scaling and Optimizing CX Programs in an AI-Driven, Automated World

nextiva

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Introduction

Companies have spent decades trying to perfect the customer experience. Since the birth of multi-channel touchpoints and the mass adoption of CRM systems, they've worked to collect more and more customer data, integrate a more complex tech stack, and find ways to personalize each interaction.

Now, as companies attempt to adopt AI at scale, a new era of CX is upon us. Most companies have an omnichannel strategy, but the complexity and inefficiency of their systems can feel unsustainable. With the added economic pressure to drive more value from customers and improve profit margins through increased operational efficiency, those who want to stay competitive must make the leap to a new level of CX maturity.

Customers expect frictionless experiences where they can learn, make purchases, and get support in the way that's best for them. They already understand what's possible—either through brands and apps they already use, or through consumer-facing AI tools like ChatGPT—and will gravitate toward the companies that give them the same flexibility and excitement. But before companies can make a leap to a new level of CX maturity, they need to eliminate the biggest roadblocks to a streamlined, hyper-personalized customer journey.

What does the next level look like? It's different for each company. That's why we created the Nextiva CX Maturity Model—it's a framework you can use to understand where your company falls compared to other organizations and how prepared you are for the future of CX. As you work through the guide, use the maturity model to develop a customized, actionable plan for your company's improved CX program.

What is a **CX maturity model**?

A customer experience (CX) maturity model is a blueprint that lets you benchmark and improve each stage of the customer journey, from the first website visit to the hundredth transaction and beyond. You can use it to understand how mature your CX capabilities are in comparison with other companies, set relevant and specific goals across all CX stakeholders, and figure out what you need to prioritize to meet those goals.

A customer maturity model is only actionable if you add your own business context. As you evaluate your organization and consider what it takes to get to the next level, follow the steps in this guide to develop your own blueprint for CX success.

When finished, you'll have clear set of CX metrics around customer satisfaction, growth, and revenue that will get you closer to your vision—a seamless, unified experience that gives each customer a personalized journey and solves problems before they even occur.

The **Nextiva** CX maturity model

At Nextiva, we've developed a strong baseline for CX success, based on our experience with hundreds of top global brands. Use our CX Maturity Model (pg. 9) to evaluate your current CX efforts, find gaps, and set a course for the next level.

Assessing your CX maturity: The discovery process

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Before you can move up the levels of your maturity model, you'll need to know where you fall today. A structured discovery process can make all the difference in accurately benchmarking yourself against other companies and your own organization at different points in time.

Identify your top CX metrics and business goals

First, collect everything you know about your goals around customer satisfaction, retention, revenue, and operational efficiency across customer-facing teams. Include broader business goals your CX strategy can impact—for example, if the organization is targeting a 25% revenue increase in the coming year, your program will contribute by raising customer retention and increasing upsells.

Too often, CX programs focus on simplistic metrics like net promoter score (NPS), average handle time (AHT), or first contact resolution (FCR). While those are good to include, choose additional metrics that can tell more of the story.

Top metrics to consider as you improve your CX program

- ✓ Customer satisfaction score (CSAT)
- ✓ Customer effort score (CES)
- ✓ Customer retention rate (by account or individual)
- ✓ Purchase frequency
- ✓ Repeat purchase rate
- ✓ Customer lifetime value (CLTV)
- ✓ LTV to CAC ratio or CAC payback period
- ✓ Resolution time/MTTR
- ✓ Upsell and cross-sell rate
- ✓ Customer referral rate
- ✓ Loyalty program usage

Map out your customer journey and key touchpoints

To tailor your CX maturity model to your company, you'll need to identify each major touchpoint and path throughout the customer journey. As you write them out, consider the customer's intent behind each action and what they're hoping to achieve.

Focus on touchpoints related to conversion (a form submission, account creation, or purchase), potential points of friction or churn (putting items in a cart, submitting a support question, reading a return policy), or customer satisfaction (writing a review, completing a feedback survey, sharing a promo code with a friend).

Here's an example of some touchpoints you might list, starting with the customer's first important interaction with your brand. Don't worry if they don't always happen in exact chronological order or map to a single stage of the customer journey—the point of this exercise is to visualize the most impactful things people do as they discover, adopt, and pay for your products and services. Take note of any known roadblocks in your customer journey. For example, do customers get frustrated by your IVR and hang up before they can get support? Friction points can be a good starting point for change as you design your new CX program, since fixing them is likely to produce quick ROI.

1
- Visit the website
- Find content
- Follow on social media
- Fill out a form
- Message with a chatbot
- Download a mobile app

2
- Search for products
- Create an account
- Get onboarding info
- Watch a training video
- Explore the app
- Save favorite products

3
- Get push reminder
- Use a discount code
- Add products to a cart
- Make a purchase
- Return a purchase
- Make repeat purchase

4
- Invite/refer a friend
- Visit a physical store
- Request support
- Write a review
- Post on social media
- Join a Discord server

5
- Purchase a membership
- Call customer support
- Update information
- Upgrade plan
- Submit feedback
- Redeem rewards points

6
- Log into portal
- Attend a sales call
- Go to a VIP event
- Renew a yearly plan

Benchmark against the Nextiva CX maturity model

The Nextiva CX Maturity Model gives you a clearcut way to measure your organization's CX program against other large, high-volume enterprise CX functions. The following section describes each level to help you identify where you fall today.

Level I: Fragmented and reactive

In this stage, CX priorities are not aligned with business goals and often change unexpectedly. Data is scarce and hard to act on, CX roles are ambiguous, and little visibility exists into the customer journey. Most CX efforts are manual and focus on traditional channels for selling and support.

Education stage: Prospects and customers engage in a manual discovery process, learning from one-size-fits-all content and campaigns. Acquisition channels are siloed, minimal CX data is available, and each stakeholder team works on CX projects with their own departmental goals in mind. Communication with prospects happens mostly over traditional channels like email and phone support, and CX technology is limited to basic implementations of must-have tools like a CRM or marketing automation platform.

Deal stage: Marketing, ecommerce, sales, and partnership teams execute their initiatives in silos. A lack of detailed data makes it hard to target content and campaigns or offer personalized deals, and funnel optimization efforts don't roll up to any greater business goals. Contact center reps have little context as they assist potential customers, and little visibility exists into why would-be buyers abandon transactions or leave without converting.

Onboard stage: Prospects often feel friction as they convert to paying customers. Simple automated onboarding flows may exist, but communication can be poorly timed and lacks personalization. Because data isn't integrated across channels and funnel stages, customers often receive incongruent marketing campaigns or receive too many emails. Reps must often step in manually to resolve payment issues, technical support, or provide answers to questions that should have been easy for the customer to find.

Sustain stage: Support is typically via phone or email only, with static IVR and little data informing each interaction. Agents do not have a single place to triage support tickets and communicate with customers, leading to long resolution times and frustrating, repetitive conversations.

Upsell stage: Lack of historical data or sophisticated analytics makes personalized recommendations and upselling virtually impossible. Without meaningful automation or AI, many opportunities to increase CLTV or individual transaction values are missed. Customers are often lost unnecessarily due to missed churn indicators.

- Analytics
- UCaaS
- Engagement
- Data/Spreadsheet
- CRM
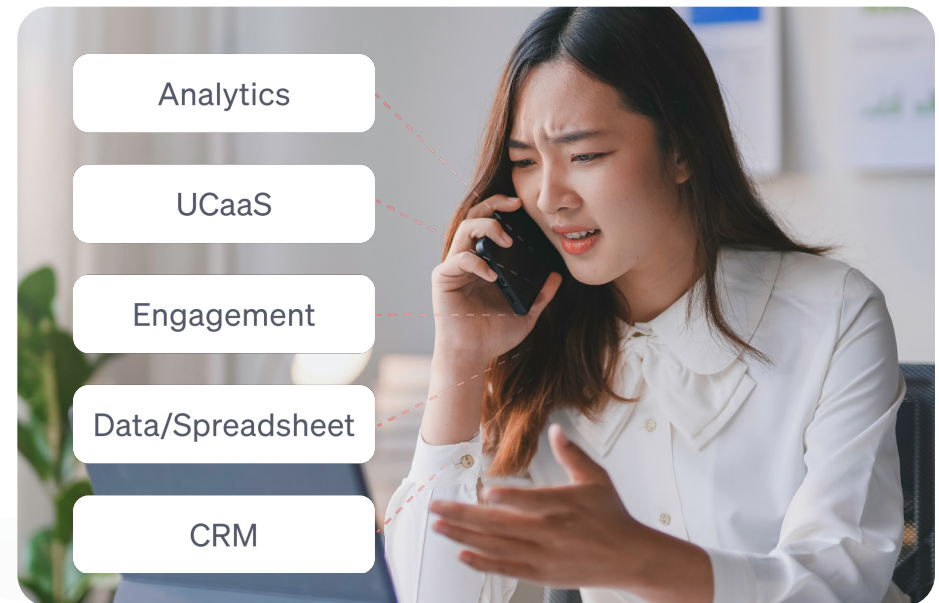
Level II: Structured but siloed

In this stage, CX projects are starting to map to business goals, with stakeholders aligned on major priorities and roles. Basic integrations and automations are in place, and data drives major CX decisions but may be unreliable. The customer journey is mapped, but teams lack a unified view into efforts and metrics across each touchpoint and channel.

Education stage: The website, content, and campaigns are now targeted toward customer segments, but not personalized on a one-to-one basis. Prospects can use dynamic signup flows or questionnaires to move through the conversion funnel, and are starting to communicate over newer channels like social media or text. Data integration is starting to reduce friction during discovery.

Deal stage: Marketing, ecommerce, sales, and partnership teams share data, but a lack of real-time visibility and clear shared priorities results in repetition and wasted effort. Contact center reps have some access to historical data as they assist potential customers, but often lose sales due to friction in the sales and support process.

Onboard stage: Better visibility into customer data helps personalize onboarding to some extent, but communication still comes mostly in the form of emails and manual outreach. In-app onboarding is usually a basic product walkthrough. Reps may have better tools for dealing with payment issues or support inquiries from new customers.

Sustain stage: Support is more personalized and flexible, and reps may be able to triage support issues in a centralized ticketing or helpdesk solution. IVR and other contact center technology is more dynamic and contributes to deflection, but speech recognition and routing is still not up to par. Before agents provide support they can review historical customer data, but lack a 360° view or real-time guidance.

Upsell stage: Marketing, ecommerce, and sales have more data to inform their efforts, but still lack the data to facilitate highly personalized upselling and often miss churn indicators. CX stakeholders need more visibility into what drives customer retention.

Level III: Data-driven and automated

In this stage, CX is more of a company-wide effort and well-aligned with business goals. Stakeholders and partners are regularly updated on the value and progress of CX projects and encouraged to develop customer-centric skills and initiatives. Trusted CX data is connected across key touchpoints and channels in the customer journey, though often via a sprawling set of tools and integrations. The customer experience is personalized, and automation helps CX stakeholder scale efforts across a high volume of interactions, but AI adoption is in early stages and many inefficiencies still exist.

Education stage: Website and app users get data-driven content and offers, but recommendations are not always relevant. Prospects can discover and interact with the brand on any channel, and often answer their own questions using chatbots or GenAI-powered search, but can become frustrated with self-service tools that don't actually improve their experience.

Deal stage: Marketing, ecommerce, sales, and partnership teams have a unified view into CX data and orchestrate their efforts to meet shared goals. The buying experience is more personalized and dynamic thanks to investments in automation and AI, but complexity is often an obstacle to scale. Contact center reps and other CX stakeholders have access to a great deal of data without a way to quickly parse priorities, key insights, and which actions will drive revenue.

Onboard stage: Onboarding is fairly smooth and automated, but can feel disjointed due to so many CX tools in the stack—for each transaction, customers may receive messages from payments, logistics, and survey vendors. Self-service onboarding and support workflows take some of the burden and cost out of CX, but deflection rates are often low due to subpar personalization or limited AI capabilities.

Sustain stage: Support is personalized with several automated resolution paths. Contact centers are mostly efficient with modern IVR that contributes to deflection. However, agents still struggle if they're required to go off-script or need to make data-driven decisions during a live conversation. AI assistants and chatbots are in place, but need fine-tuning and better configuration before they can consistently resolve issues.

Upsell stage: Data-driven upselling and cross-selling recommendations drive additional revenue, but have yet to fully incorporate or maximize the value of AI. Churn indicators are integrated into CX dashboards and help boost CLTV.

Level IV: AI-powered and hyper-personalized

In this stage, CX is ingrained in company culture and driven by teams across every go-to-market function. A unified CX platform integrates data from every channel and tool, stakeholders are aligned on goals and priorities, and advanced analytics drive a set of shared CX metrics. Automation and AI is widely deployed to scale each team's impact and personalize the customer journey, but opportunities always exist for improvement as the CX landscape evolves.

Education stage: Personalized content is served dynamically across the website, app, knowledge base, and community forums. Well-configured and fine-tuned chatbots and GenAI search products help users get answers faster without having to find content manually.

Deal stage: Marketing, ecommerce, sales, and partnership teams all share a unified, real-time view into CX data with AI insights into what matters the most or needs action. The sales process is largely self-service and integrated across every channel. Users receive AI-driven offers, tips, and recommendations at the exact right time, based on their actual preferences and intent.

Onboard stage: Onboarding is highly personalized and feels seamless. Intelligent alerts and omnichannel communication keep customers updated without overwhelming them. Users can explore app features, products, and services using dynamic onboarding checklists, self-service portals, and tailored recommendations.

Sustain stage: Support is dynamic, personalized, and largely self-service. Calls are quickly resolved and friction-free, with well-coached and empowered agents helping customers as efficiently as possible. IVR is AI-driven and deflects the majority of calls. Advanced AI and business logic automatically resolves standard issues around returns, refunds, or product questions.

Upsell stage: AI-powered recommendation engines and highly orchestrated campaigns drive upselling, expansion, and referral business. Upselling happens throughout the customer journey, from product exploration to checkout to campaigns that foster ongoing engagement.

Identify gaps in data and capabilities

Collect data and institutional knowledge from your CX stakeholder teams to understand what's missing and gauge which improvements will be most impactful later on. Speak with CX stakeholders across the organization and gather data from various systems so you can be confident you have all the information you need to design a successful program.

In addition to finding information gaps, talk with each team about how productive and empowered they feel around CX activities.

Many customer experiences suffer due to disorganization, poor agent enablement, and lack of coaching and training—you may discover a need for technology investments in areas like agent analysis and performance benchmarking, live contact center coaching, or workforce scheduling.

Here are some ideas to help you tap into wealth of resources you already have:

- Meet with each go-to-market team to get their feedback on what they think customers need.
- Ask marketing, sales, product, and CS teams about manual workflows that should be automated, data they're missing, and technology they need but don't yet have.
- Collect qualitative data from sales call recordings, transcripts, and notes.
- Collect behavioral data from your website or apps that can uncover points of friction and churn in your user experience.
- Gather qualitative customer support data from tickets, calls, and chats via your helpdesk or AI chatbots.
- Gather quantitative CS data from your CX platform, CRM, or helpdesk to understand resolution times, top issues, and other key support metrics.
- Pull data from online communities that can help you understand sentiment and critical customer topics.
- Review any customer surveys, NPS scores, or other indicators of satisfaction.
- Explore transaction data for patterns and trends by customer segment, product, payment method, and more.
- Talk to reps and contact center agents about what they need to do their best work, then ask the same questions of their managers.

Designing your improved CX program: Prioritize and deep dive

Once armed with all of the data you need, it's time to make a detailed plan. You'll accomplish several things in this section:

- Select 3-5 top-priority CX improvements based on your discovery process and customer touchpoints.
- Set actionable, measurable goals for each desired improvement.
- Develop a tactical plan for each improvement.
- Specify the resources and support you'll need to be successful.
- Map out your desired future state at each higher level on the maturity model.

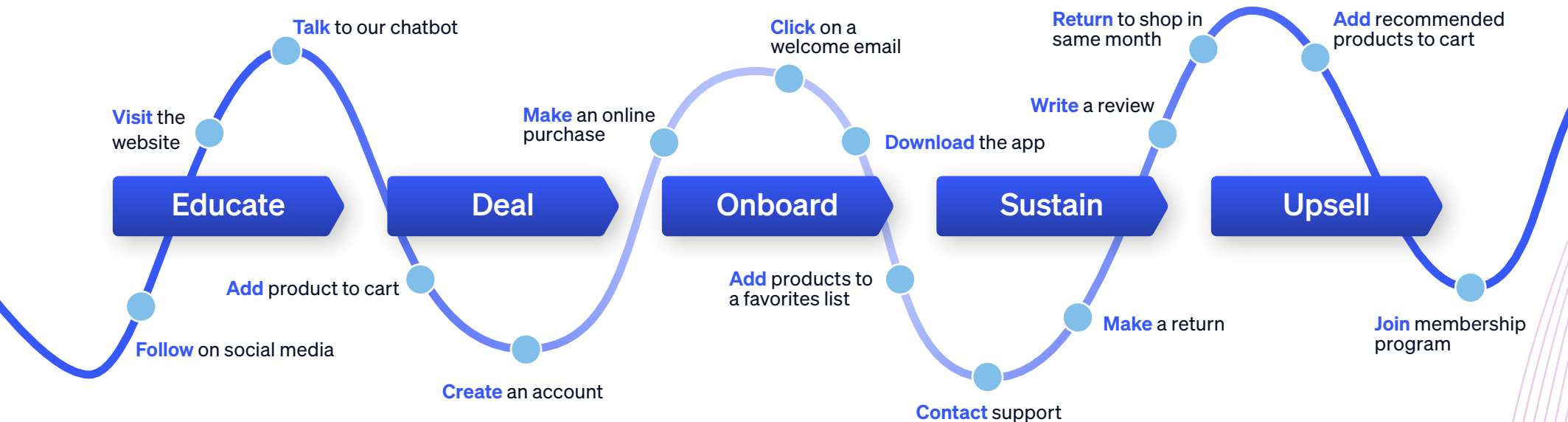# Prioritize CX improvements based on your customer journey

You can't fix everything at once. That's why it's so important to choose the most impactful improvements first and decide how you'll make it happen via technology or process changes.

There are several reasons you might want to prioritize one CX improvement over another. One is to gain a quick win—boost this quarter's numbers, cut short-term costs, or improve team morale. Another may be around upcoming critical milestones. Consider whether a particular improvement will support a product launch, campaign, or expansion into new markets.

Finally, consider which improvements will have the most impact on company-wide KPIs like growth, revenue, and profit. The most ambitious ones may feel out of reach at first, but combined with low-hanging fruit and simpler initiatives, they can be achieved without sacrificing near-term goals.

Example customer journey for a consumer brand

Let's take a look at an example of a customer journey for a consumer brand, mapped to each stage in the Nextiva CX model. Though the customer may have other interactions, these key touchpoints are ones that best indicate interest, buying intent, engagement, and loyalty.

Talk to our chatbot

Visit the website

Make an online purchase

Click on a welcome email

Return to shop in same month

Add recommended products to cart

Write a review

Download the app

| Educate | Deal | Onboard | Sustain | Upsell |

Add product to cart

Add products to a favorites list

Make a return

Follow on social media

Join membership program

Create an account

Contact support

Depending on your budget and resources, you can choose to make improvements to each touchpoint or just select a few to focus on first. For each one you select, write down why change is needed, a concrete plan of action, and the potential dollar impact.

Create you top CX action items

1. Follow on social media

Challenge:
We don't have a consistent way to monitor and act on social media activity like mentions, follows, and comments. We often miss opportunities to engage fans and customers or resolve complaints on social platforms.

Recommendation:
Invest in a platform that automates social media engagement helps us track important activity and sentiment using AI. Consolidate social media communication in the same place agents respond to email or SMS support requests.

Succes metrics:
- Increase revenue on purchases attributed to social media
- Increase engagement across every social channel
- Reduce time to resolution for support requests on social

2. Talk to our chatbot

Challenge:
Our current chatbot doesn't personalize responses or answer complex questions well, forcing users to call or email us to get what they need. We can see from chat transcripts that this frustrates customers and deters prospects.

Recommendation:
Invest in a better AI chatbot that can answer questions based on our unique content and knowledge base and put people on the right path to resolution or conversion.

Succes metrics:
- Reduce resolution time
- Increase deflection rates
- Lower CAC and support costs

3. Contact support

Challenge:
Today, our online support does not have a strong resolution rate. Customers often need to call, but get frustrated with our IVR and by having to repeat themselves to multiple agents. Agents do not have a clear view into customer history while working to resolve issues.

Recommendation:
Invest in a solution that streamlines support across channels and allows reps to triage issues in one place. Implement a more modern IVR system for smarter call routing. Adopt an AI tool that can summarize calls and update the customer record so the next interaction starts where they left off.

Succes metrics:
- Increase CLTV and CSAT scores
- Reduce CAC
- Reduce support costs

After you've done this for every major touchpoint you want to prioritize at this phase, you have an actionable CX plan to implement.

Validate your action plan with **stakeholders**

Congratulations, you've built yourself a powerful business case for investing in new technology and making strategic improvements to your CX program. With your action plan, you should be able to justify your budget and be confident that you'll have the impact you want.

Share your planned program improvements with relevant CX stakeholders and leadership team members. Getting buy-in now will help you implement changes faster and remove roadblocks as you scale.
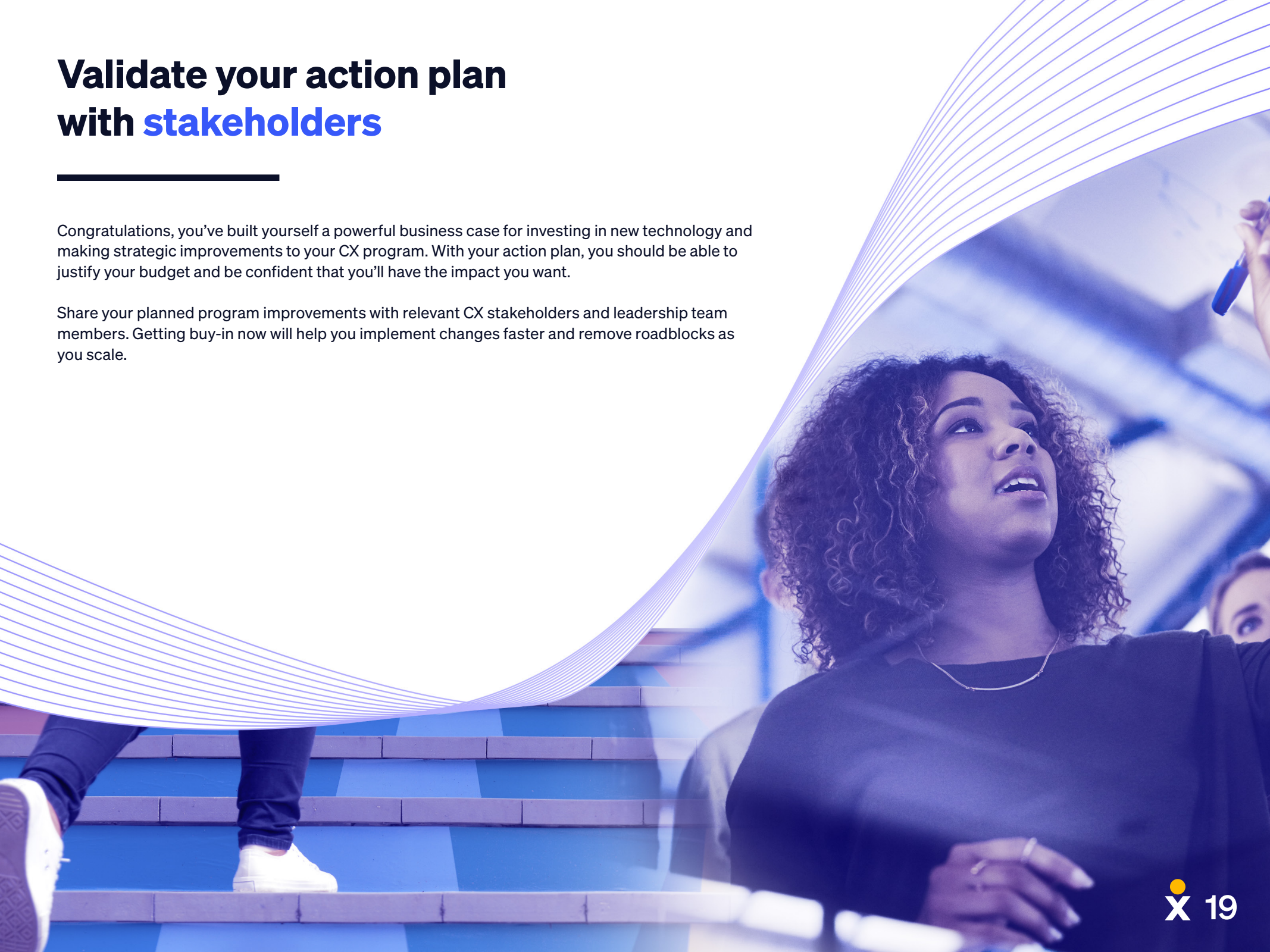
Create a project **task force**

With a path laid out ahead, it's time to assemble a cross-functional team of CX stakeholders to implement your plan. You should also take a close look at whether your current tech stack and team skills are up to the task of supporting your improved CX strategy. The customer journey is a team effort, with many players. Here's what your team might look like:

Executive sponsor

VP or C-level team member who can sponsor the program, help keep everyone aligned, and sign off on critical decisions.

CX leaders

A cross-functional program manager who acts as the day-to-day driver of the project. Probably on the customer success/support team.

Customer success / support reps

CS team members who will be responsible for adopting new technology and workflows day-to-day.

Marketing

Marketing team members with influence on touchpoints primarily in the Educate, Onboard, and Sustain stages of the customer journey.

Sales

Sales managers and reps with influence on touchpoints primarily in the Deal and Upsell stages of the customer journey.

Product and engineering

Technical stakeholders who can help you select and deploy technology to drive your CX program.

LOB Stakeholders

These team members across finance, HR, and other key business functions help you gather data and validate your goals.

Subject matter expoerts (SMEs)

Additional team members or outside consultants that fill gaps in expertise and add valuable insight to your program.

Review your plan and decide whether you'll need to bring on contractors or add headcount to complete the project. You may find that training and empowering your existing team is enough—in this case, consider how new processes and technology might improve the employee experience/agent engagement.

Update policies and governance

To support your new CX program, remember to update the CX policies and business rules that guide how each interaction should be handled. These rules ensure consistency across all touchpoints, providing a framework for your team to deliver a seamless customer experience. Part of your CX improvements will likely be investing in a unified CX platform that can streamline all of your new workflows. Make sure the solution you choose has built-in controls and flexible configurations that will make it easier to manage policies across the organization.

Consider the following:

- Tone, process, and response times for online interactions
- Guidelines for customer interactions at each in-person or phone touchpoint
- Autonomy of agents to go off script or adapt to live coaching
- Complaint management and support workflows
- Transitioning from automated, AI-driven interactions to a human
- Business logic that lives in existing systems and integrations
- Data management and privacy policies
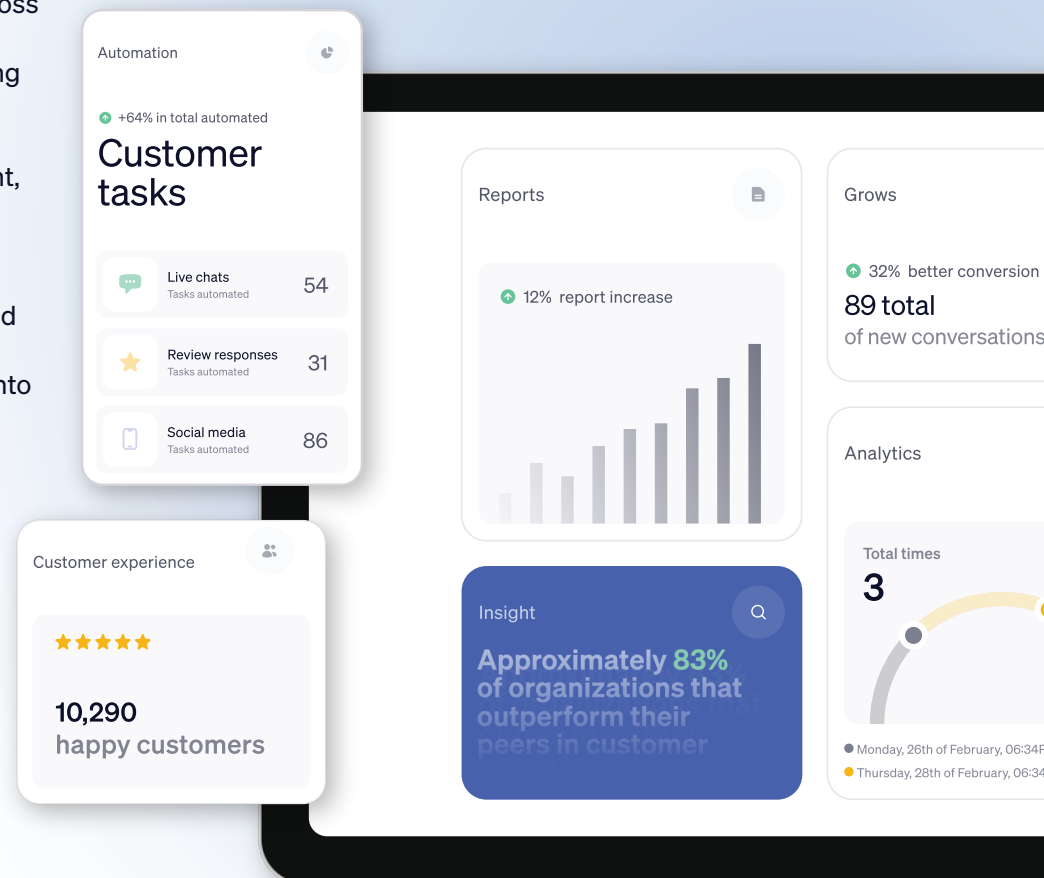
Plan for scale

As your business grows, make sure your CX program can grow with it, staying effective and impactful. You can plan for scale by selecting technology that's fit for higher volumes and more complex CX data than you currently have.

Remember, scaling is an ongoing process. Regularly assess the performance of your CX initiatives to identify what's working and where improvements can be made. Use data-driven insights to fine-tune your strategies, optimize processes, and ensure that your efforts continue to drive meaningful business outcomes. This continuous refinement helps maintain the effectiveness of your CX program as it grows.

Track and measure **success**

You've already identified your CX success metrics. Now ask your data team or CX technical lead to make sure they're incorporated into self-service dashboards and reporting so each of your program stakeholders can track progress from the same source of truth. Here are some ways you should be able to leverage your data:

- **CX performance dashboards:** Customized dashboards with all of the metrics you've identified as top-priority for your program.

- **Contact center dashboards:** Dashboards that provide a live, dynamic look into your team's performance as they interact with customers and resolve issues across online and phone-based channels. Data is organized into clear categories, like users, queues, and campaigns, and simplifies the task of identifying and resolving issues promptly.

- **Automated reporting:** Real-time, accurate custom reports broken down by agent, team, or campaign. These reports should be easy for agents to parse and alert leadership of only the most important patterns and performance trends.

- **CX data integration with BI tools:** You should be able to work in the UI you're used to. Make sure the CX solutions you invest in can be fully integrated into existing data lakes or warehouses so data can be analyzed in a number of ways and fed into advanced predictive models or third-party systems.

- **Widgets and modules that coach agents live:** Embedded analytics that can be viewed in existing agent workflows to provide them with essential SLA and KPI information, suggestions for quick resolution, and greater customer context.

- **Executive reporting and KPIs:** A dashboard or high-level report that keeps leadership updated on your CX program performance and proves ROI.

- **GenAI and predictive modeling:** Data should be well-governed and prepared for use in AI-powered analytics solutions and LLMs.

Automation

↑ +64% in total automated

Customer tasks

💬 Live chats Tasks automated		54
⭐ Review responses Tasks automated		31
📱 Social media Tasks automated		86

Reports
↑ 12% report increase

Grows
↑ 32% better conversion

89 total
of new conversations

Analytics

Total times
3

● Monday, 26th of February, 06:34P
● Thursday, 28th of February, 06:34

Customer experience

★★★★★

10,290
happy customers

Insight
Approximately **83%** of organizations that outperform their peers in customer

Modern CX: An **ongoing journey** of improvement and innovation

As you implement new processes and invest in new technology to improve the customer journey, you'll start to see your efforts pay off. You may even make it to Level IV—then what?

Once you've reached the highest level of your model, you'll notice that CX becomes a company-wide effort. Use the systems you've built to dig deep into your data and find ways to innovate further, from investing in new AI solutions and fine-tuning your models to building fun, interactive experiences for your customers. You can also examine your tech stack to reduce vendor sprawl, optimize costs, and ensure your CX platform is flexible and agile enough to adapt to your evolving needs.

CX is an ongoing adventure. Just as your industry, customers, and products are always changing, your CX strategy should too. In fact, greater success often means faster evolution. As you level up your data and AI capabilities and use them to personalize every customer interaction, you'll find it easier than ever to stay ahead of the curve.

Ready to bring your new CX program to life? Transform the customer experience on Nextiva, a unified customer experience management platform designed to help you acquire, retain, and grow your customers at any scale.

Book a Demo

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