Execs In The Know

THE ROI IMPERATIVE:

Building the Business Case for Exceptional CX

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INTRODUCTION

Customer experience (CX) leaders have spent years making the case that exceptional customer experiences drive measurable business outcomes. And even as organizations face increasing budget scrutiny, the conversation around CX is evolving. Improving the customer experience is no longer enough. CX leaders are increasingly expected to demonstrate how those improvements translate into value that go beyond the immediate, impacting wider business metrics like retention, revenue, loyalty, and lifetime customer value.

This research explores how organizations are approaching ROI for CX in an environment where financial justification has become a core requirement for investment. The findings reveal that ROI is now deeply embedded within CX decision-making, with 86% of respondents describing the ability to demonstrate ROI as either "Extremely Important" or "Very Important" when proposing new initiatives (page 9). At the same time, nearly half of CX leaders (48%) report that organizational focus on ROI has increased significantly over the past 12 to 24 months (page 10), signaling a growing expectation that CX investments be evaluated through a business performance lens.

The results also reveal a notable maturity gap. While most organizations consider their CX programs mature (page 6), only 4% describe their approach to ROI calculation as highly standardized (page 12). Many respondents point to fragmented data, inconsistent measurement frameworks, organizational silos, and difficulty translating CX outcomes into financial language as ongoing challenges. The findings suggest that organizations generally believe in the value of CX, but they often struggle to quantify that value in ways that withstand executive and financial scrutiny.

Looking ahead, the research points to a future heavily shaped by automation and AI. Nearly two-thirds (65%) of respondents expect AI and Automation to receive the largest share of new CX investment over the next 12 to 24 months, while 75% believe those investments will generate the strongest ROI storylines (page 19). These expectations reflect both the opportunity and pressure surrounding emerging technologies as organizations seek greater efficiency, scalability, and measurable impact.

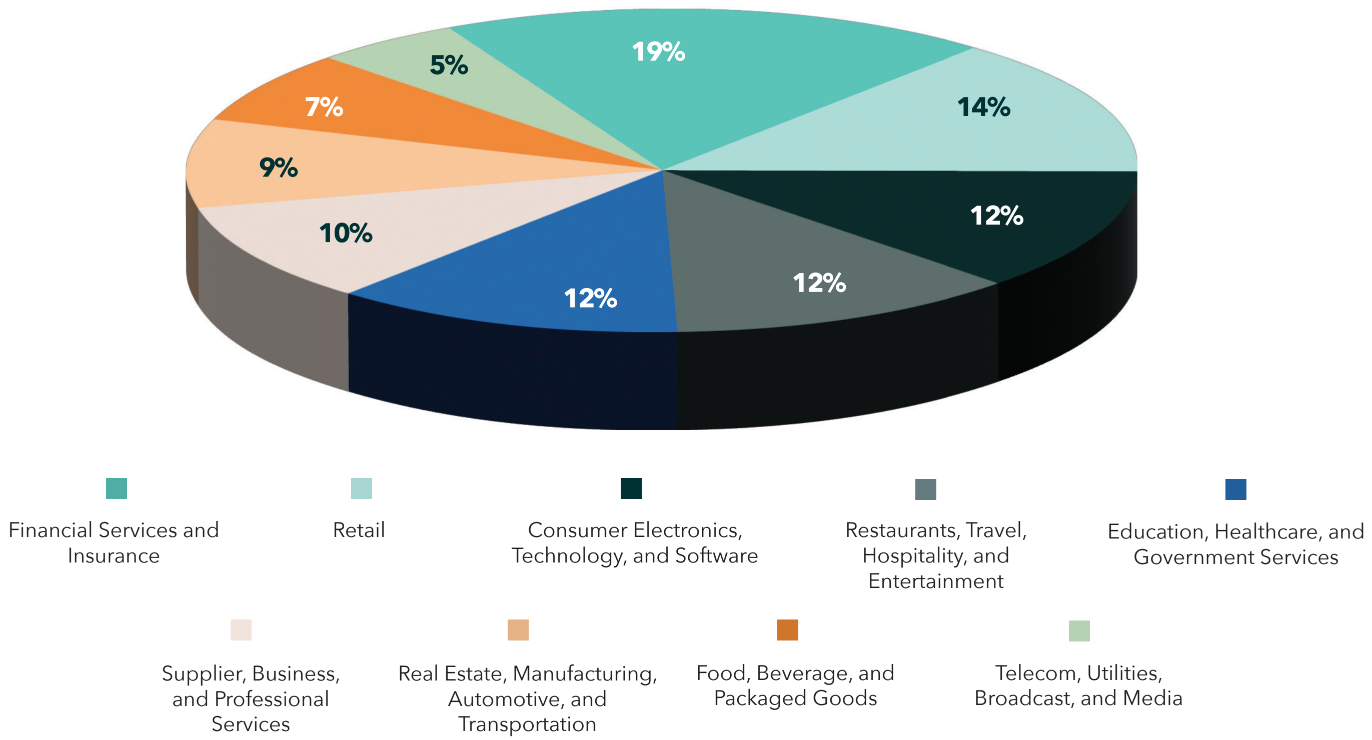
Ultimately, this report is not simply about justifying CX investment. It is also about how organizations evaluate value, prioritize resources, and make decisions in an increasingly accountable environment. By understanding how peers are measuring success, overcoming barriers, building business cases, and aligning stakeholders, CX leaders can strengthen their own ability to secure investment, prove impact, and drive meaningful business outcomes. At the end of the day, CX leaders need to hold themselves accountable for asking a very simple question, "Can I demonstrate, with credible evidence, that a specific CX investment has produced measurable business value for my company?"

Special thanks to the CX leaders who contributed their thoughts to this volume of research, including Lisa Oswald (Travelzoo) (page 9), Ebrahim Hyder (Michael Kors) (page 10), Jason Mercer-Pottinger (JMP) (Vantive) (page 12), John Sorenson (Formerly with Truist) (page 19), and John McCahan (Fellers) (page 28). Please be sure to check out their valuable insights.

ABOUT THE SURVEY'S PARTICIPANTS

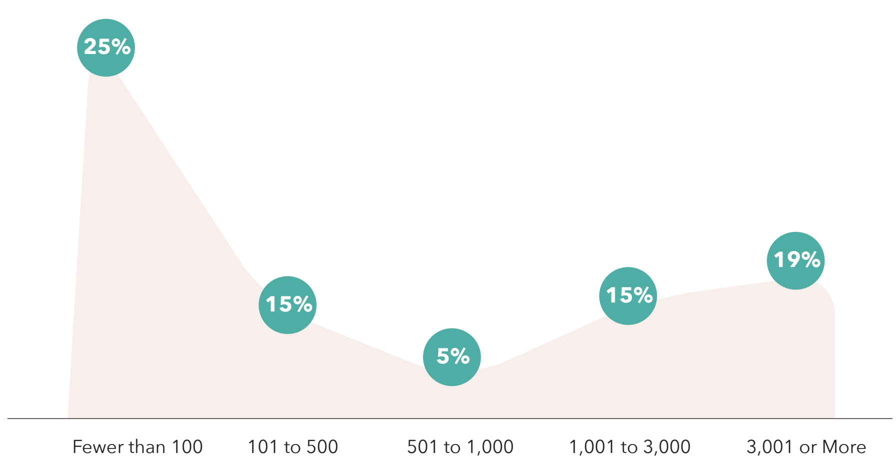
The respondent base reflects a broad cross-section of CX environments, with Financial Services and Insurance representing the largest share at 19%, followed by Retail at 14%. Restaurants, Travel, Hospitality, and Entertainment, Consumer Electronics, Technology, and Software, and Education, Healthcare, Senior, and Government Services each accounted for 12%. This mix provides a useful view into ROI expectations across highly crowded, regulated, and competitive service environments.

Which vertical does your company represent?



Survey respondents represent organizations with a wide range of CX team sizes, though nearly half (46%) operate with fewer than 100 CX employees. At the same time, 34% report teams of more than 1,000 people, including 19% with 3,000 or more. This split matters because ROI expectations often scale differently by organization size. Smaller teams may need faster, more visible proof of value, while larger programs may face more complex approval paths, greater stakeholder involvement, and more pressure to demonstrate enterprise-level financial impact.

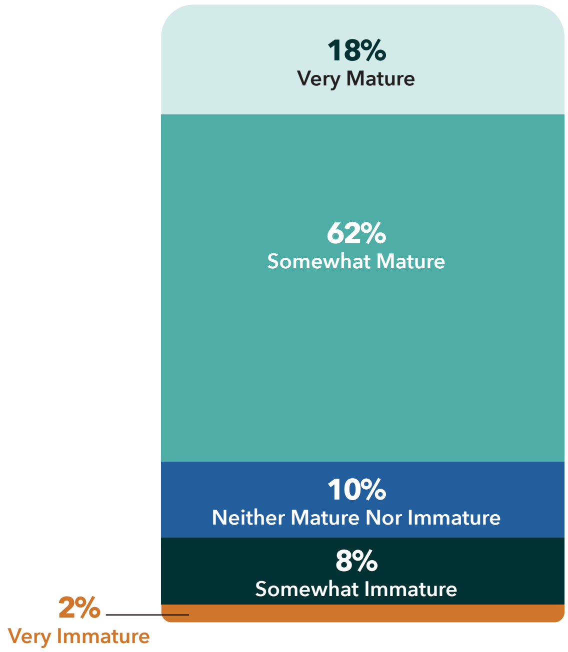
What is the approximate size of your CX team, including front line agents, support staff, and leadership.



About the Survey's Participants

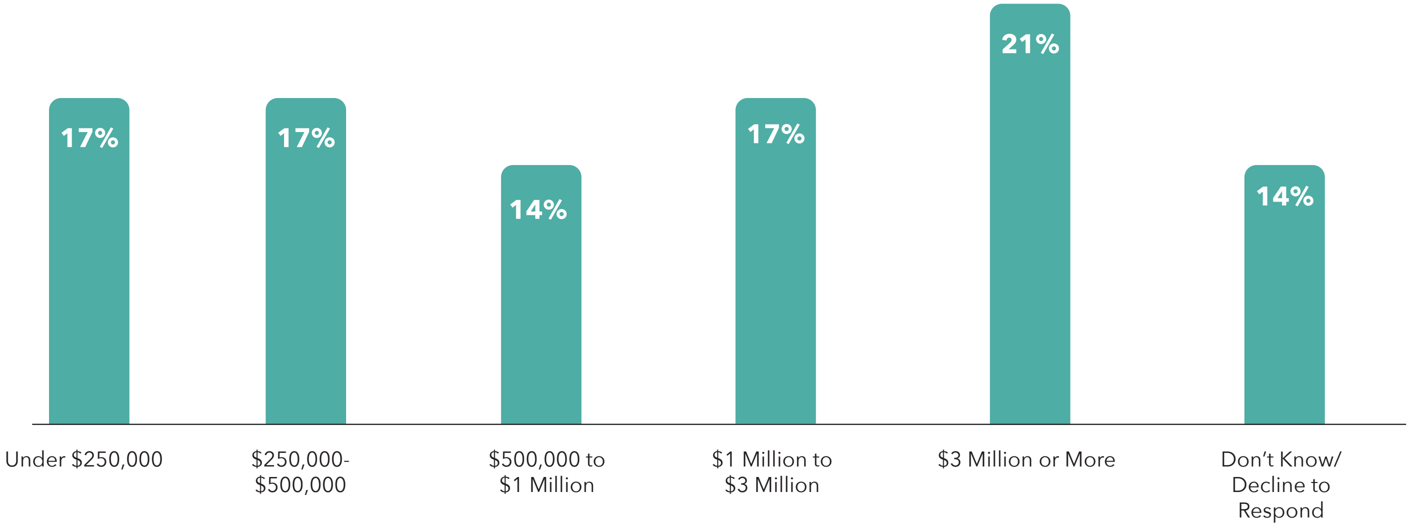
Most respondents describe their CX programs as mature to some degree, with 62% indicating "Somewhat Mature" and another 18% indicating "Very Mature." This suggests most organizations have moved beyond foundational CX practices, though many may still be refining measurement, governance, and investment discipline. The relatively small share of highly mature programs is meaningful, especially in the context of ROI where many organizations appear to have established CX operations, but not necessarily fully standardized practices (page 12) for measuring or proving out business value.

How would you describe your CX program's level of maturity?



Direct spend on CX-focused tools, platforms, and technology varies widely, with 21% of respondents reporting an annual spend of $3 million or more and another 17% reporting $1 million to $3 million. At the same time, 34% report spending below $500,000. This outcome underscores the need to interpret ROI expectations in context. For some organizations, CX investment decisions may involve large-scale transformation and executive scrutiny, while others may be focused on targeted improvements where speed, affordability, and practical business impact matter most. Regardless, CX leaders should focus on maximizing the effectiveness of existing investments, ensuring strong adoption, and clearly linking technology initiatives to business outcomes before pursuing additional spending. In many cases, improving utilization and execution may deliver greater returns than expanding the technology portfolio.

What is the approximate annual direct spend of your organization on CX-focused tools, platforms, and technology?

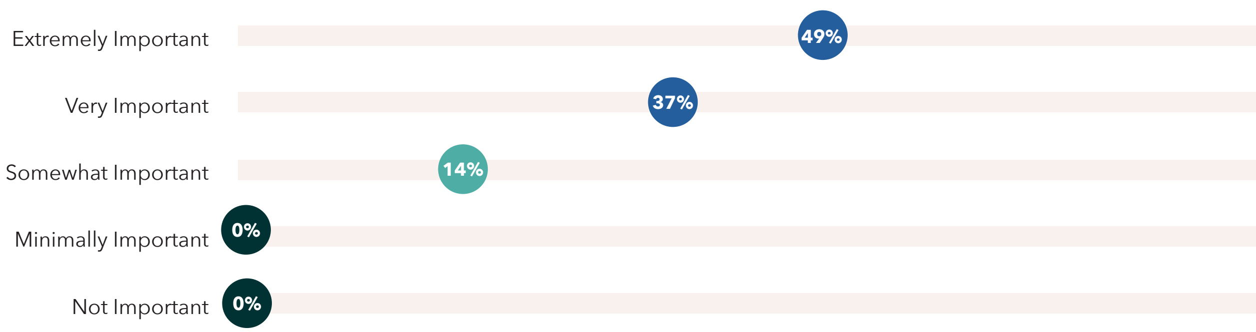


SURVEY RESULTS

THE ROI IMPERATIVE

With 86% of respondents indicating that demonstrating ROI is either "Extremely Important" or "Very Important," the findings confirm that financial accountability has become a central component of CX leadership. Organizations are increasingly evaluating customer experience initiatives through the same lens applied to other business investments. For CX leaders, this means ROI can no longer be treated as a post-implementation exercise. ROI needs to be a consideration before an initiative begins, with clearly defined objectives, measurable outcomes, and realistic assumptions. Organizations that embed ROI planning into the earliest stages of an initiative may be better positioned to secure support and demonstrate lasting value.

How important is demonstrating ROI when proposing new CX initiatives within your organization?



How can CX leaders help ensure CX business initiatives are positioned as business investments rather than customer experience projects?

> Nearly nine in ten CX leaders say demonstrating ROI is extremely or very important when proposing new initiatives. Yet most teams still walk in with satisfaction scores instead of financial outcomes.
>
> We need to translate our language around CX's value into financial terms. CSAT and NPS are leading indicators, not business cases, so let's connect them to metrics finance already tracks.
>
> Talk about revenue at risk: "This fix could save us $X,XXX,XXX a year by stopping 15% of our churn." Talk about cost avoidance: "Cutting handle time by one minute saves the equivalent of three FTEs annually." Talk about lifetime value: "Customers who have a good experience are 30% more likely to buy more from us within a year."
>
> The shift is simpler than it sounds — it's a language change. Start by picking one initiative, mapping it to a single financial metric, and reporting on it quarterly, before anyone asks.

Lisa Oswald
SVP and Global Head of Member Services | TRAVELZOO

How can CX leaders help ensure CX initiatives are positioned as business investments rather than customer experience projects?

“One of the most effective ways CX leaders can position initiatives as true business investments is by anchoring them in measurable financial outcomes rather than just customer sentiment. The research underscores the importance of clearly demonstrating ROI when advancing CX initiatives.

In our organization, we’ve brought this to life through a targeted AI use case focused on lost eCommerce orders. Historically, when a customer reported a missing order, the default resolution often leaned toward issuing a full refund — protecting the experience, but at a high cost to the business.

By embedding agent-facing AI into the workflow, we transformed both the speed and quality of decision-making. The AI can instantly analyze a customer’s order history, including prior lost-order claims, surfacing patterns such as repeat claims in seconds, rather than the manual effort it would typically require. At the same time, it can identify an exact replacement item in available inventory and automatically build a cart for reshipment, dramatically reducing handling time. This level of automation enables Style Consultants (CSRs) to resolve cases significantly faster, helping preserve strong AHT performance while improving decision consistency.

The impact was twofold. First, we reduced unnecessary refund payouts and drove measurable cost avoidance while fulfilling orders at COGS. Second, and equally important, we retained customers within the Michael Kors ecosystem. By ensuring the customer still received the product they intended to purchase, we minimized the risk of attrition to competitors and preserved long-term value.

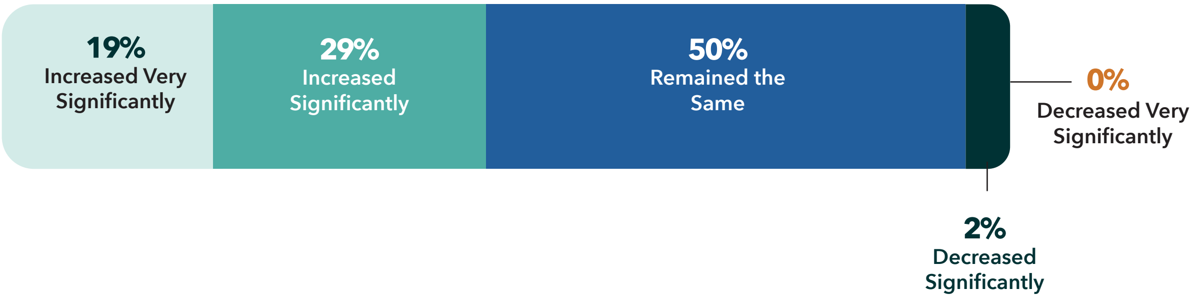
This is where CX becomes a business investment. The initiative wasn’t positioned as “improving the lost order experience.” It was framed around reducing avoidable cost, improving margin outcomes, and protecting revenue. For CX leaders, the lesson is clear: connect every experience improvement to a financial lever. When you can demonstrate both customer impact and business return, CX moves from a functional initiative to a strategic investment.”

Ebrahim Hyder
Vice President, Customer Service

MICHAEL KORS

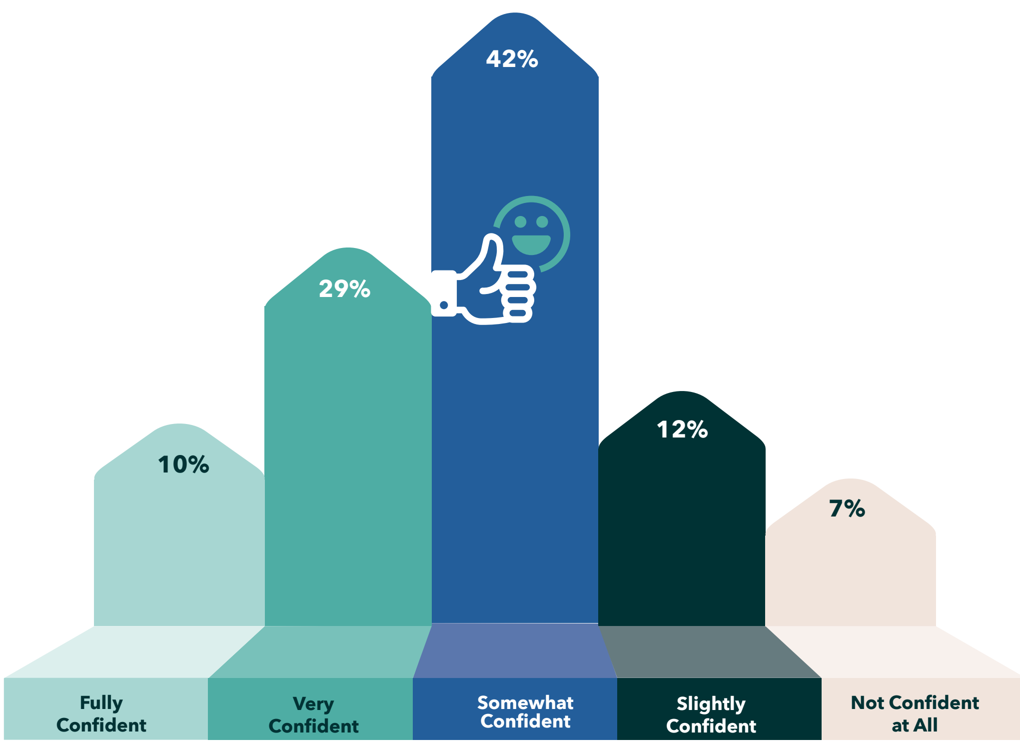
Nearly half of respondents (48%) report a significant increase in organizational focus on ROI over the past two years, with another 50% indicating focus that’s unchanged. Together, these findings suggest that organizations are entering a period where customer experience investments will face greater scrutiny and more rigorous evaluation. CX leaders should view this shift as an opportunity rather than a threat. Organizations that can clearly articulate the value of their initiatives and connect customer improvements to operational and financial outcomes may gain an advantage when competing for resources. As ROI expectations rise, proactive measurement and stronger business case development will become increasingly important differentiators.

Over the past 12-24 months, how has the focus on demonstrating ROI for CX investments changed?



Many organizations (39%) feel reasonably confident measuring new CX initiative outcomes, though relatively few (10%) express complete confidence. This gap reflects the fact that measuring activity is often easier than measuring business impact. Leaders should focus on strengthening the quality, consistency, and accessibility of data used to evaluate performance. Investments in analytics, attribution models, and cross-functional measurement practices may help organizations move from reporting what happened to understanding why it happened and what value it created. Improved confidence in measurement can lead to stronger investment decisions and more credible conversations with stakeholders.

How confident are you in your organization's ability to measure and understand the value, impact, and outcome of new CX initiatives?

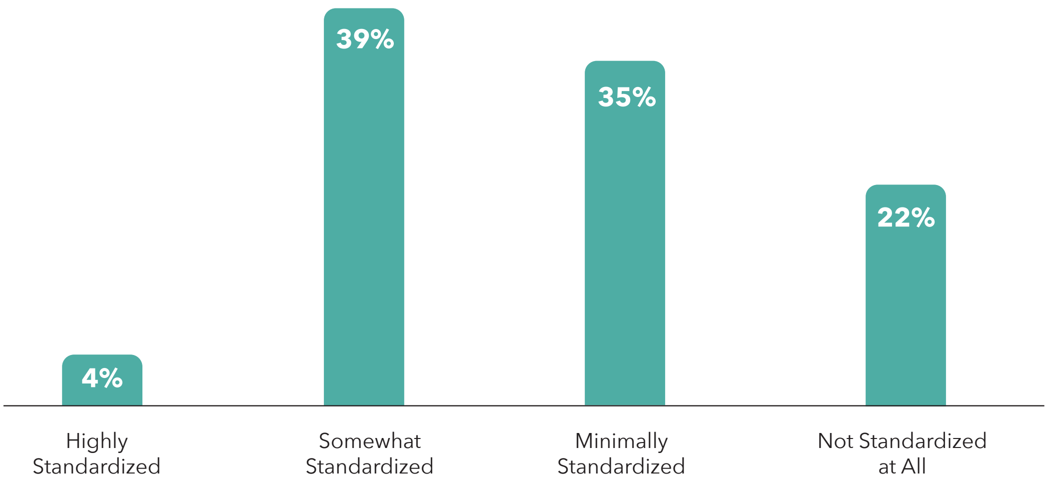


STANDARDIZING THE APPROACH

The ROI Imperative

One of the most significant opportunities revealed within this research is the lack of standardized approaches to measuring ROI. Despite widespread emphasis on demonstrating value, very few organizations have established highly consistent methodologies for calculating and reporting returns. This inconsistency can create confusion, slow decision-making, and undermine stakeholder confidence. CX leaders should consider developing repeatable frameworks that define common metrics, assumptions, and reporting practices across initiatives. Standardization not only improves comparability and accountability, but also reduces the effort required to build future business cases. Organizations that consistently guide on ROI measurement and assessment may gain a significant advantage in securing support and prioritizing new initiatives.

How standardized is the approach to calculating ROI across CX initiatives in your organization?



What does an effective ROI framework for CX look like, and what advice would you give organizations struggling to create a repeatable approach?

"An effective ROI framework for CX starts by linking experience directly to operational and financial outcomes, not just sentiment scores. The most effective models anchor on a simple chain: interaction » behavior » outcome » cost/value. In practice, that means connecting what happens in an interaction (adherence to troubleshooting, variability in decisions) to tangible outcomes like repeat contacts, device swaps (Med Tech-specific), or customer disruption and ultimately to cost avoidance and improved outcomes.

Equally important is scale and visibility. Sampling a small percentage of interactions will never produce a credible ROI narrative. Organizations need full interaction coverage and AI-driven pattern detection to surface systemic drivers and quantify impact in near real time.

However, the real unlock is operational discipline, not the technology itself. ROI is created through a closed-loop operating model: weekly driver-based coaching, monthly executive decisions, and continuous calibration. Dashboards don't drive value, behavioral change does.

For organizations struggling to make this repeatable, my advice is simple: Start narrow. Pick one high-cost friction point, define what "good" looks like, and simplify to a handful of KPIs. Validate the linkage from CX to cost, then build a repeatable coaching and governance loop before scaling.

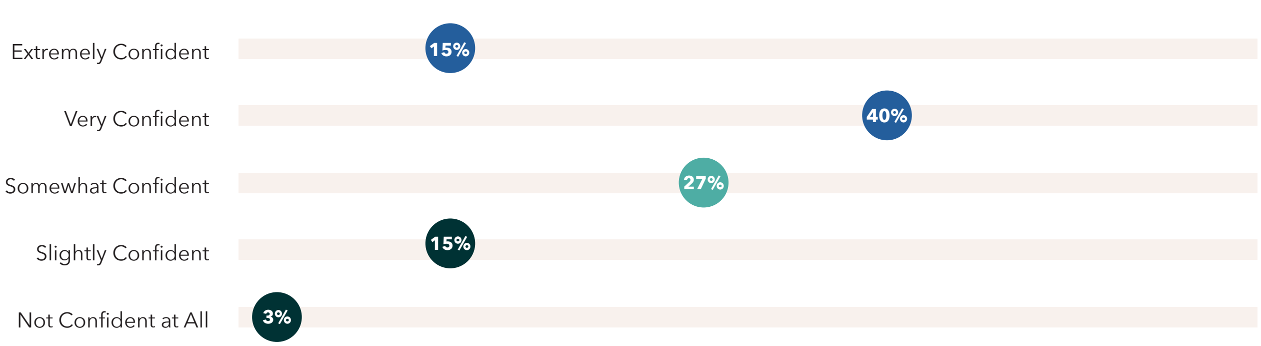
The leaders who win in CX aren't measuring more, they're operationalizing insights faster and tighter than everyone else."

Jason Mercer-Pottinger (JMP)
Senior Director of Customer Care, Americas

Vantive

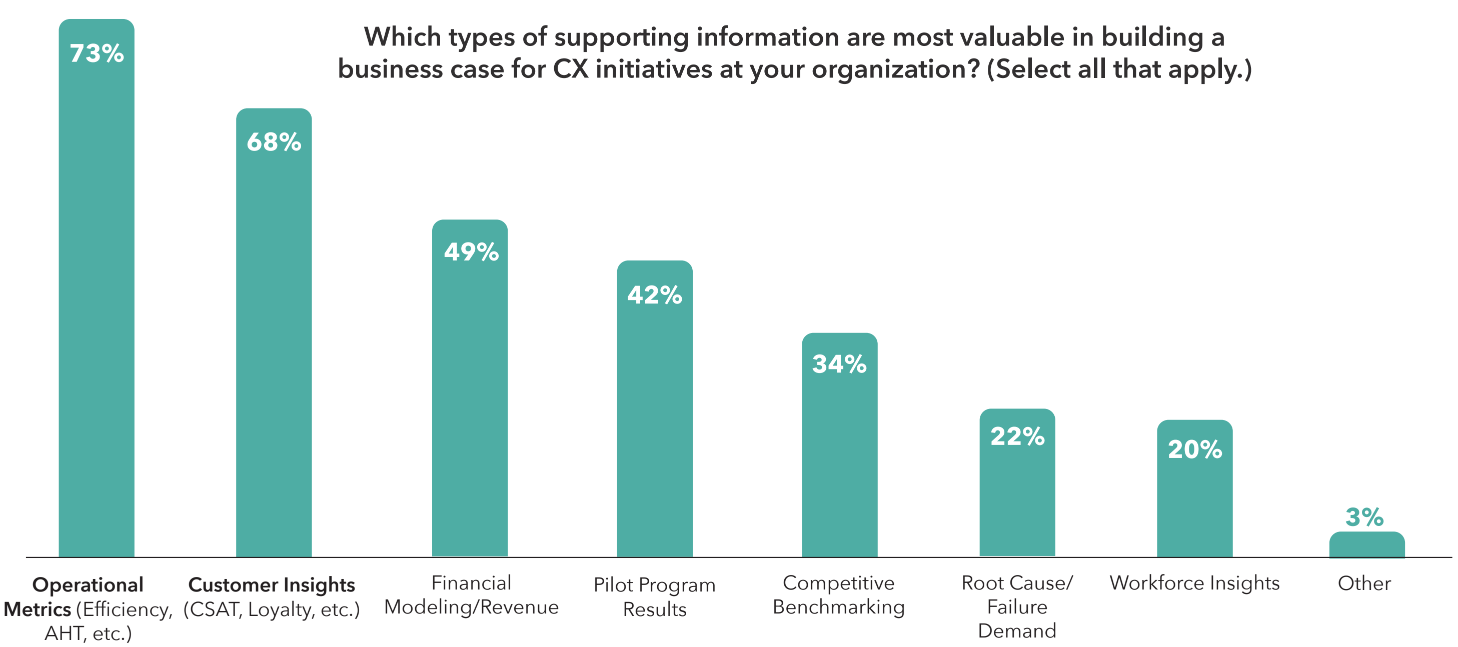
While most respondents (55%) express confidence in their ability to build ROI-driven business cases, a sizable portion remain only somewhat confident or lack confidence altogether. This suggests that many CX leaders recognize the importance of ROI but may not yet feel fully equipped to quantify and communicate value in a way that resonates with executive stakeholders. Organizations can strengthen this capability by providing access to better data, establishing common business case frameworks, and fostering closer collaboration with Finance and Operations teams. Building confidence in ROI development is not simply about improving approval rates — it is about enabling more informed investment decisions and creating greater organizational trust in CX initiatives.

How confident are you in your ability to build an ROI-led proposal when making the case for a new CX initiative or investment?



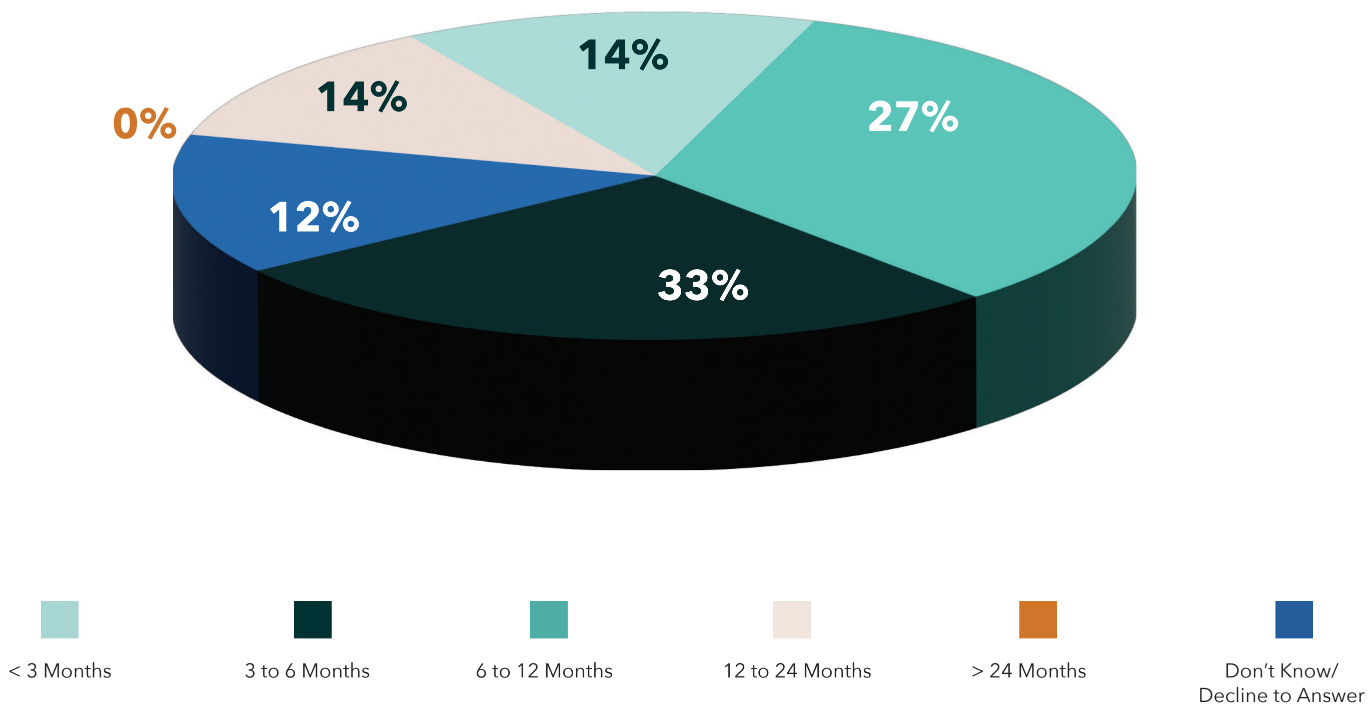
Operational metrics and customer insights emerged as the most valuable forms of evidence when building a business case, reinforcing the importance of grounding investment decisions in both performance data and customer feedback. While financial projections remain important, decision-makers appear most persuaded when proposed investments are supported by real-world evidence. CX leaders should consider combining operational performance indicators, customer insights, pilot results, and financial modeling into a unified value narrative. Business cases that incorporate multiple forms of supporting evidence often provide a more compelling and credible argument for investment than those relying on projected financial returns alone.

Which types of supporting information are most valuable in building a business case for CX initiatives at your organization? (Select all that apply.)



The length of time required to secure funding reflects the growing complexity of investment decision-making within many organizations. Approval processes often involve multiple stakeholders, competing priorities, and extensive scrutiny of projected outcomes. For CX leaders, this means business case development should begin well before funding is needed. Early stakeholder engagement, robust supporting evidence, and clear alignment with organizational priorities can help accelerate decision-making. Organizations that proactively prepare for longer approval cycles may be better positioned to capitalize on emerging opportunities when they arise.

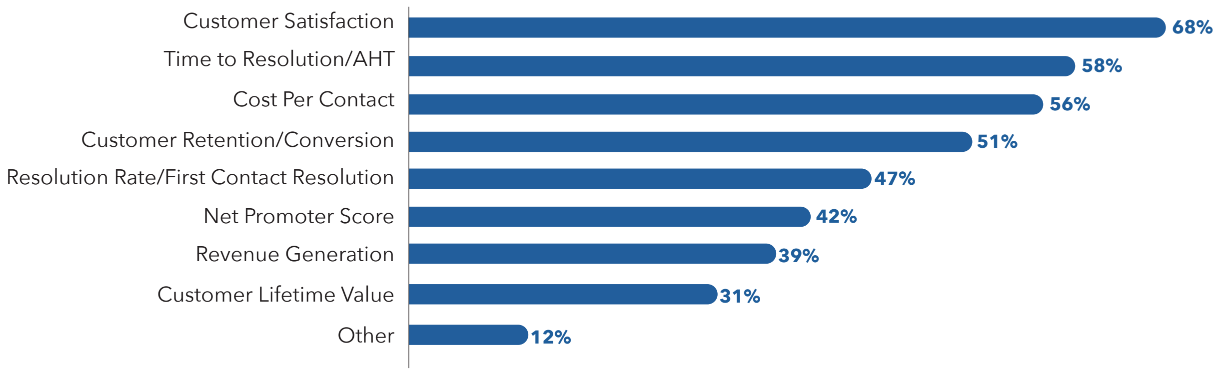
How long does it typically take to secure funding for new CX initiatives at your organization?



MEASURING WHAT MATTERS, OUTCOMES, AND FUTURE EXPECTATIONS

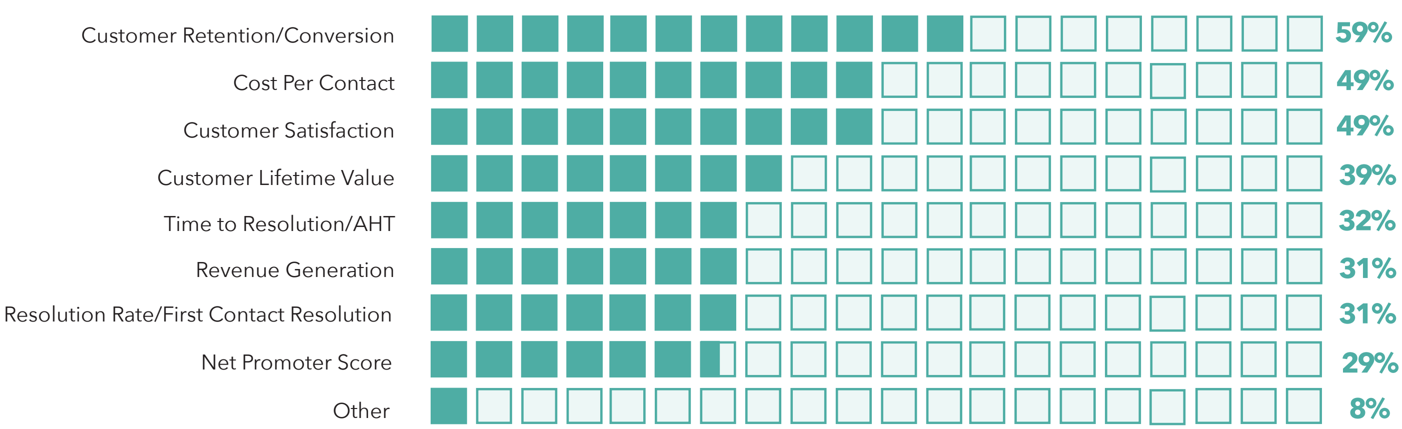
Organizations rely heavily on customer satisfaction, operational efficiency, and cost-focused metrics when evaluating CX investments. While these measures provide important visibility into customer perceptions and operational performance, they don't necessarily reflect broader business impact. For CX leaders, this presents an opportunity to evolve measurement practices beyond traditional CX scorecards. Organizations that connect customer experience metrics to outcomes such as retention, customer lifetime value, revenue growth, and profitability may be better positioned to demonstrate strategic value and strengthen executive confidence in future investments. The goal isn't to replace traditional metrics, but to supplement them with measures that clearly illustrate business impact.

Which KPIs are typically most in focus when evaluating the success of a CX-related investment? (Select all that apply.)



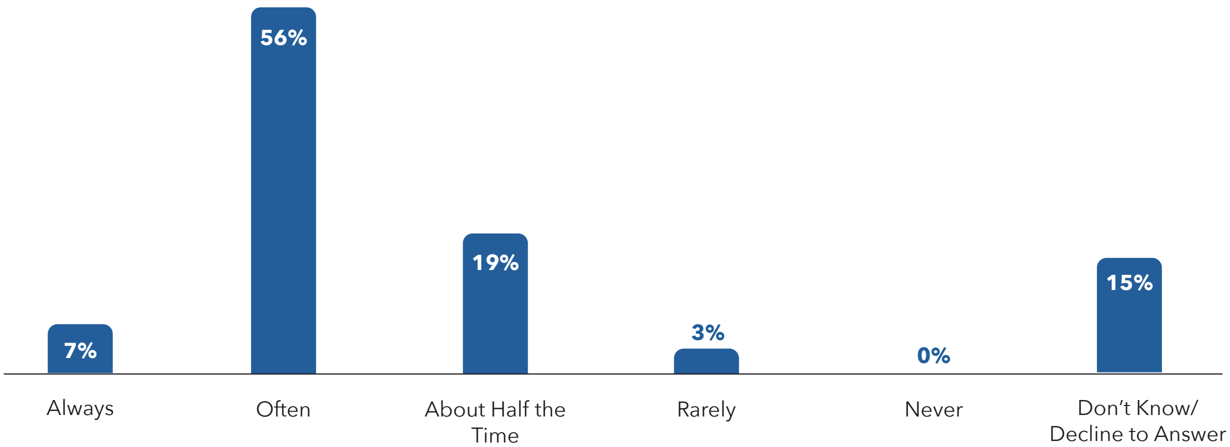
Customer Retention and Conversion emerged as the most desired area for KPI improvement, signaling a growing recognition that CX should contribute directly to customer growth and loyalty. Interestingly, many organizations continue to measure success primarily through operational and satisfaction metrics, creating a disconnect between what leaders hope to achieve, and what they actively monitor. CX leaders should ensure their measurement frameworks reflect their strategic objectives. Doing so can improve both decision-making and value demonstration.

Which KPIs is your organization most interested in improving with your CX-related investments? (Select all that apply.)



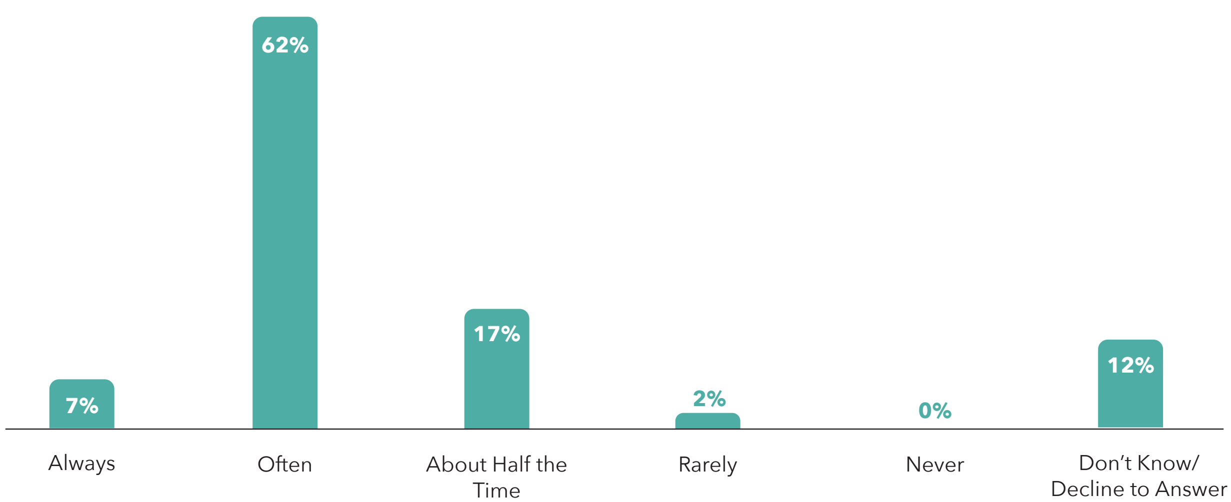
Most respondents (63%) report that CX initiatives "Always" or "Often" achieve their intended financial objectives, yet the results also suggest there is considerable room for improvement. This finding highlights the importance of validating projected benefits (especially financial) after implementation rather than relying solely on assumptions made during the approval process. CX leaders should establish regular post-investment reviews that assess whether expected savings, efficiencies, retention improvements, or revenue gains have occurred. Organizations that systematically evaluate outcomes can strengthen future business cases, improve forecasting accuracy, and create a culture of accountability.

How often do your organization's CX investments meet FINANCIAL objectives and expectations?



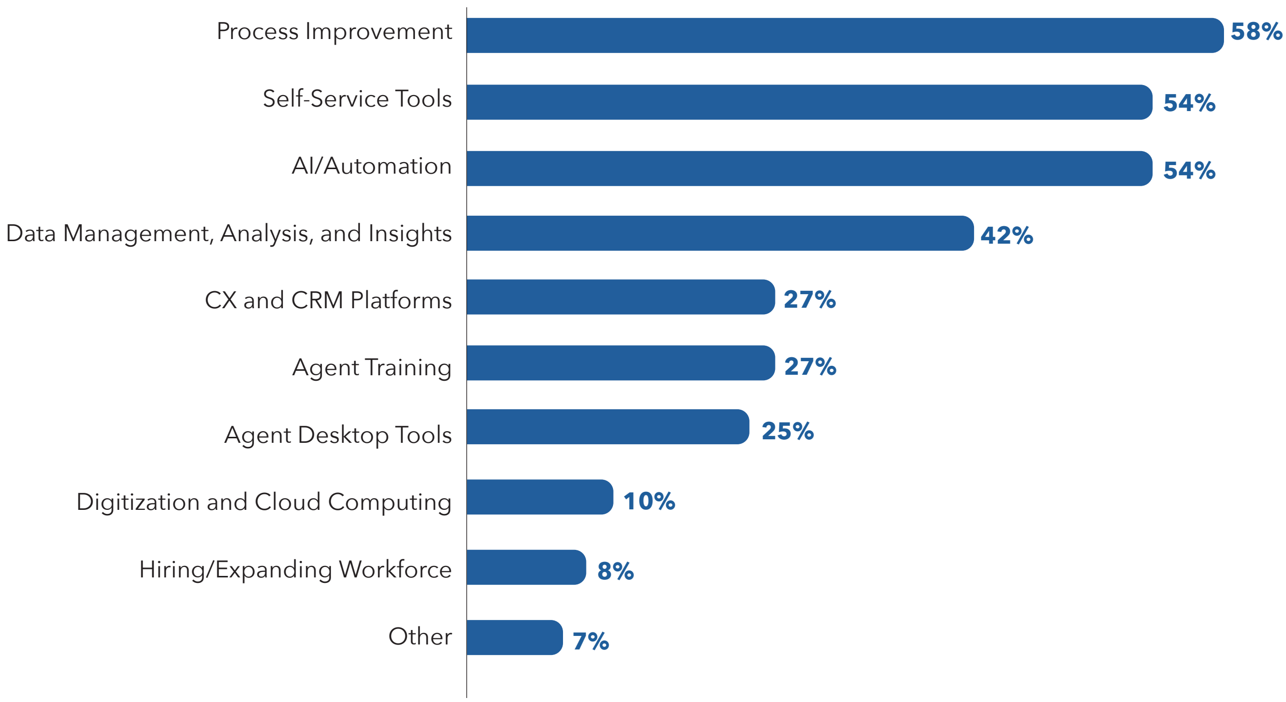
Organizations are as likely to achieve program objectives as financial objectives, suggesting a potential connection between improving operational performance, customer satisfaction, and process efficiency and generating measurable business outcomes. CX leaders should focus on strengthening this connection, ensuring that success metrics reflect both program execution and business impact. Organizations that can clearly demonstrate how improvements in customer experience contribute to financial performance may find it easier to justify investments and secure ongoing support from executive stakeholders.

How often do your organization's CX investments meet PROGRAM PERFORMANCE objectives and expectations?



Interestingly, Process Improvement slightly outperformed Self-Service Tools and AI/Automation as a proven source of ROI. While emerging technologies continue to generate excitement, the results suggest that simplifying workflows, reducing friction, and improving operational efficiency remain among the most reliable paths to value creation. CX leaders should view technology as an enabler rather than a substitute for strong processes. Before pursuing new tools, organizations may benefit from evaluating whether existing workflows can be streamlined or redesigned. In many cases, process optimization can deliver meaningful returns quickly while also increasing the effectiveness of future technology investments.

Which types of CX investments have typically delivered the strongest ROI for your organization? (Select all that apply.)

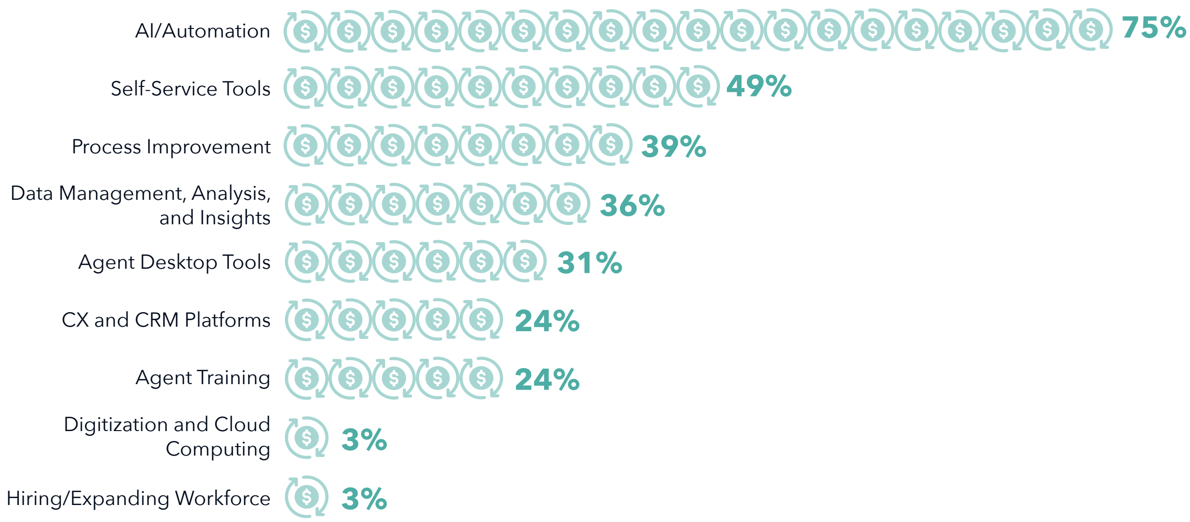


WHICH INVESTMENTS WILL DELIVER STRONGEST ROI

Measuring What Matters, Outcomes, and Future Expectations

AI/Automation is expected to generate the strongest future ROI by a significant margin, indicating substantial optimism about the role these technologies will play in shaping the future customer experience. While the potential benefits are considerable, organizations should recognize that anticipated ROI is not guaranteed. Successful outcomes often depend on factors such as organizational readiness, employee adoption, integration quality, and ongoing performance management. CX leaders should focus on identifying specific use cases where AI can address measurable business challenges rather than pursuing implementation for its own sake. Organizations that maintain a clear link between technology investments and business objectives are more likely to achieve meaningful returns.

Which types of CX investments do you think will provide the strongest ROI for your organization in the coming 12-24 months? (Select all that apply.)



What can organizations do to ensure AI investments deliver the expected business value based on measurable outcomes for customers?

"With 75% of organizations expecting AI and automation to deliver their strongest CX ROI over the next 12-24 months, the pressure to show results is real and so is the risk of getting it wrong.

The organizations I see converting AI investment into measurable outcomes share one trait: they built the governance model before they scaled the technology. That means defining, upfront, who owns the cross-functional outcomes AI is supposed to drive — not just who owns the tool or the platform.

In contact center environments, AI value compounds across touchpoints. A routing improvement connects to handle time, which connects to agent performance, which connects to customer satisfaction. But when each function measures its own piece in isolation, the compounded outcome never gets claimed or protected.

The discipline that separates high-ROI AI adopters is the ability to measure and manage the ecosystem, not just the initiative. Before deployment, that means establishing shared metrics and shared accountability above functional ownership. Without that structure, AI performance stays theoretical — and the next budget cycle becomes a hard conversation."

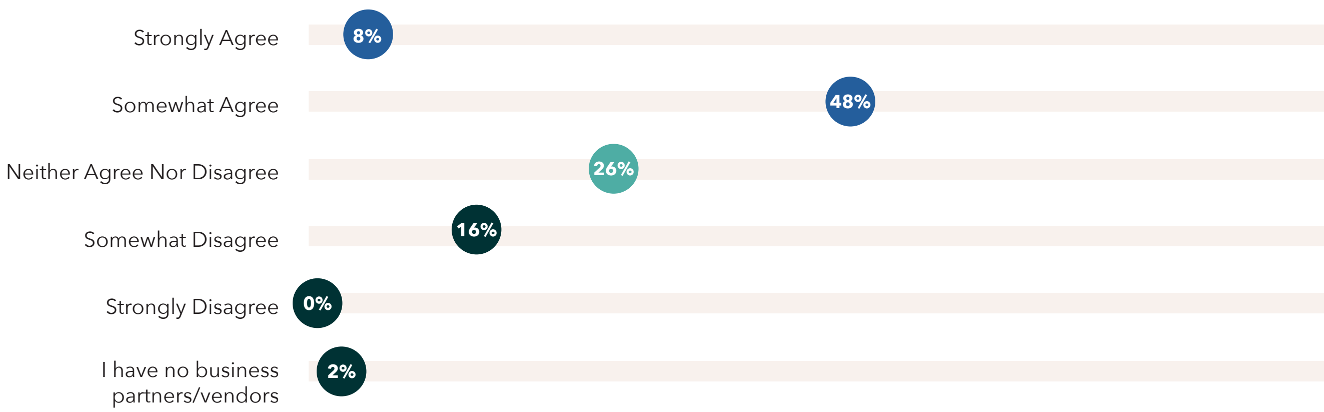
John Sorenson
SVP, Director of Customer Success &
Contact Center Operations
Retired from Truist

OUTCOMES MATCHING PROMISES AND EXPECTATIONS

Measuring What Matters, Outcomes, and Future Expectations

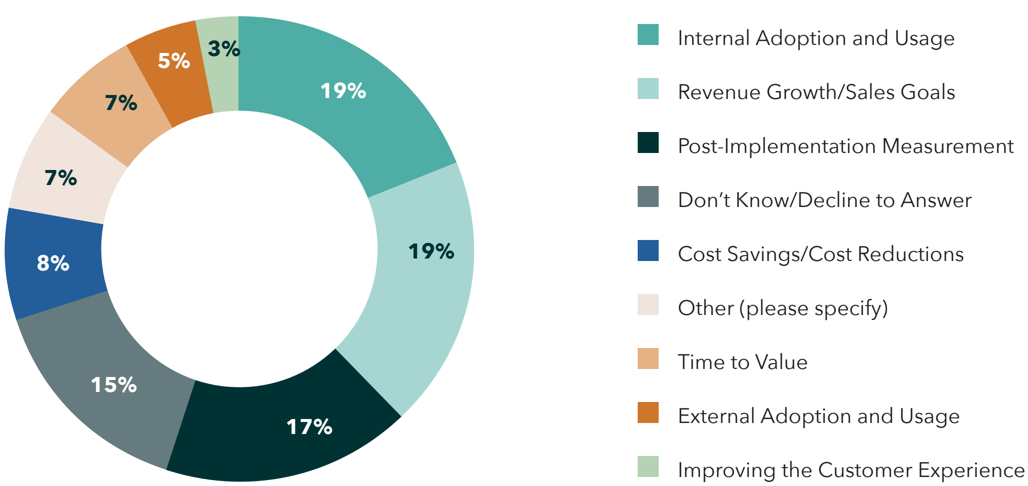
While most respondents (56%) believe vendors generally deliver on promised outcomes, the results also reveal a meaningful gap between expectations and realized value. This finding reinforces the importance of establishing realistic expectations during the evaluation and purchasing process. CX leaders should work with vendors to define clear success metrics, implementation milestones, adoption goals, and measurement plans before contracts are finalized. Organizations that actively monitor outcomes throughout implementation are often better positioned to identify risks early, improve adoption, and maximize the value ultimately generated by the investment.

How much do you agree or disagree with the following statement: The outcome of CX initiatives and investments closely match what was promised by my business partners/vendors.



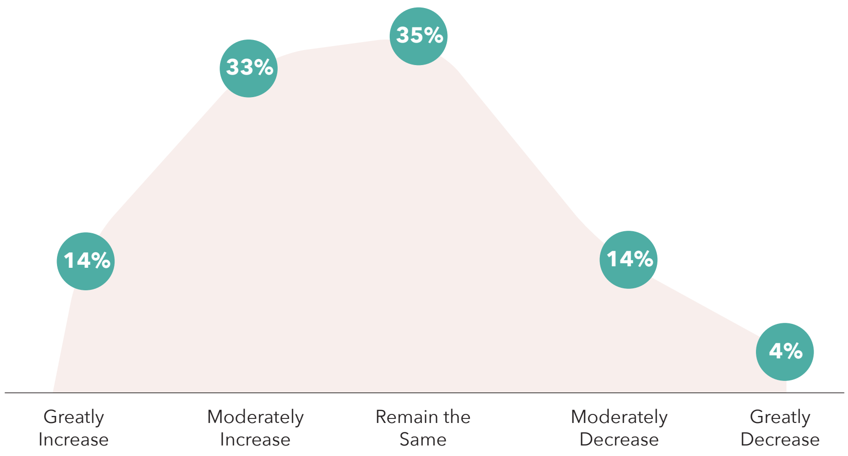
CX initiatives are most likely to fall short in Internal Adoption and Usage and Revenue Growth/Sales Goals, each selected by 19% of respondents. Post-Implementation Measurement followed closely at 17%. These results reinforce three recurring challenges: 1) proving commercial impact; 2) ensuring people use new capabilities; and 3) measuring outcomes after deployment. The findings also suggest that weak ROI is not always caused by poor strategy or technology. In many cases, value may be lost during implementation, adoption, or measurement, where projected benefits fail to translate into real outcomes.

Historically speaking, where have your CX initiatives and investments been most likely to fall short of expectations?



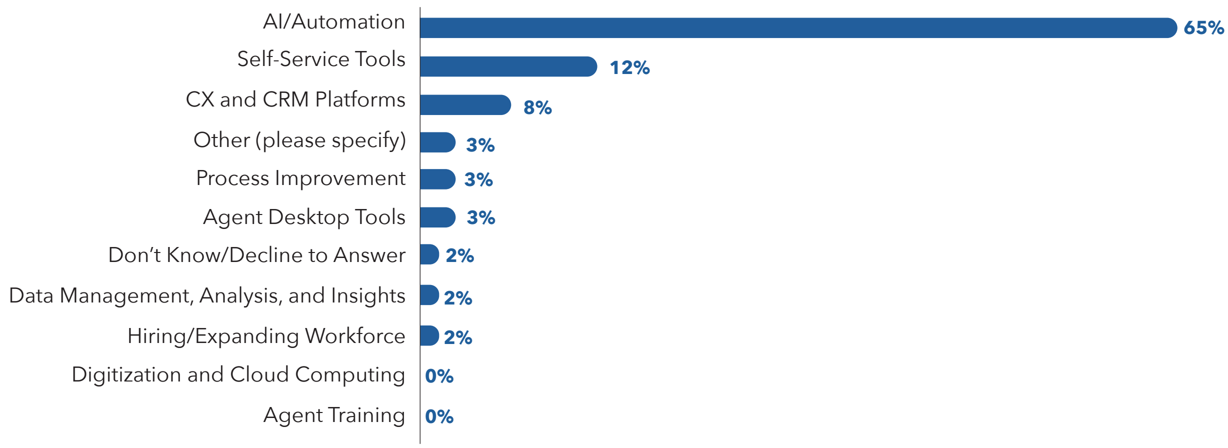
The generally positive outlook for future CX funding suggests organizations continue to recognize customer experience as an important strategic priority. However, available funding alone does not guarantee investment success. As competition for resources remains intense, CX leaders should focus on developing well-supported business cases, prioritizing initiatives with measurable, customer-benefitting outcomes while demonstrating accountability for results. CX organizations that consistently prove value may find themselves better positioned to capture future investment opportunities. In fact, moving forward, the ability to communicate impact may become just as important as the impact itself.

Over the next 12-24 months, what do you expect to happen to funds dedicated to new CX investments?



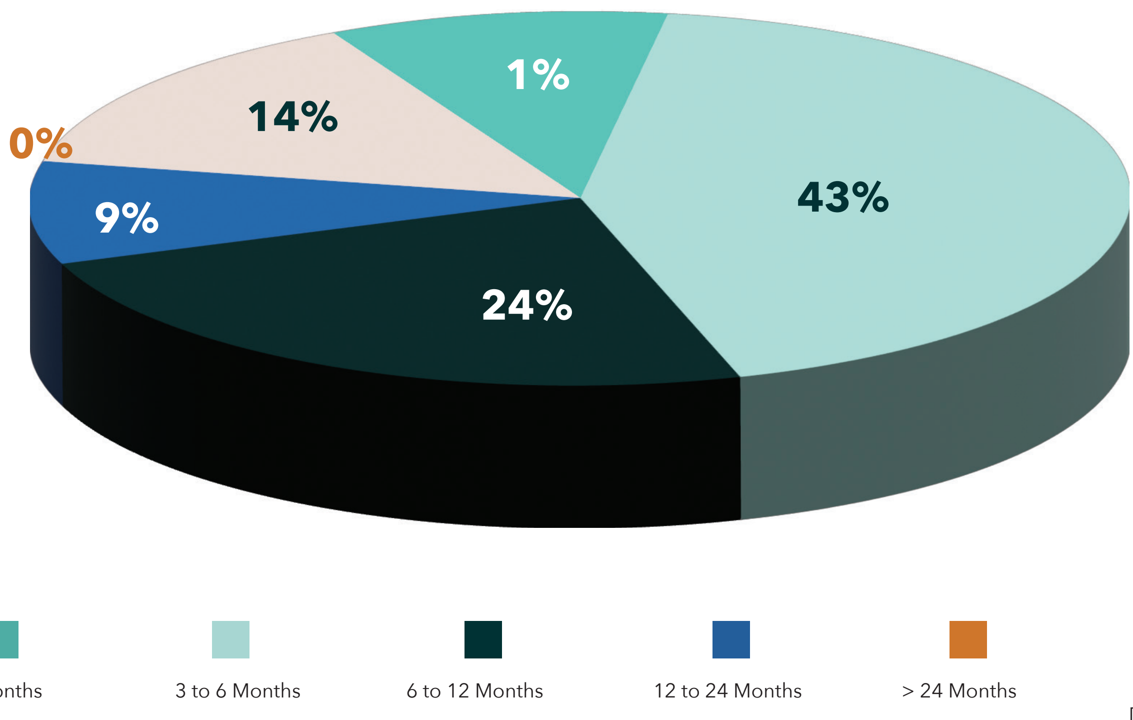
A strong focus on AI/Automation reflects where organizations believe future competitive advantages and efficiency gains will emerge. However, high investment expectations can also create heightened scrutiny and pressure to deliver measurable outcomes. This reinforces the importance of approaching AI initiatives with clear objectives, realistic expectations, and defined success metrics. Organizations that establish strong governance, adoption plans, and measurement frameworks before implementation may be better positioned to realize value and avoid the disappointment of overhyped technologies that underdeliver.

Which single area of CX investment do you expect to receive the lion's share of new investment in the coming 12-24 months?



Most organizations (53%) begin evaluating success within the first six months following implementation, reflecting a desire for quickly proving value. While early indicators can be useful, CX leaders should be cautious about relying solely on short-term results. Many customer experience investments, particularly those focused on loyalty, retention, or behavioral change, may require more time before meaningful business outcomes become apparent. Organizations should establish both leading indicators and long-term success measures to ensure initiatives are evaluated fairly and comprehensively. Balancing short-term accountability with long-term value creation can improve decision quality and reduce the risk of prematurely abandoning promising investments.

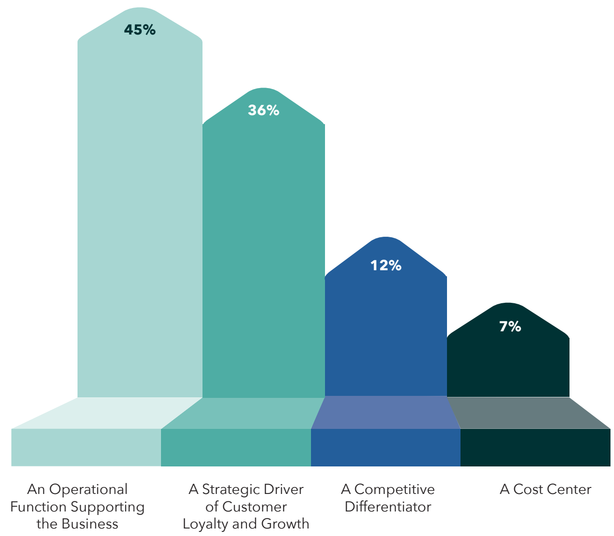
How long does your organization typically allow a CX initiative to run operationally before evaluating its success?



ALIGNING THE ORGANIZATION AND OVERCOMING CHALLENGES

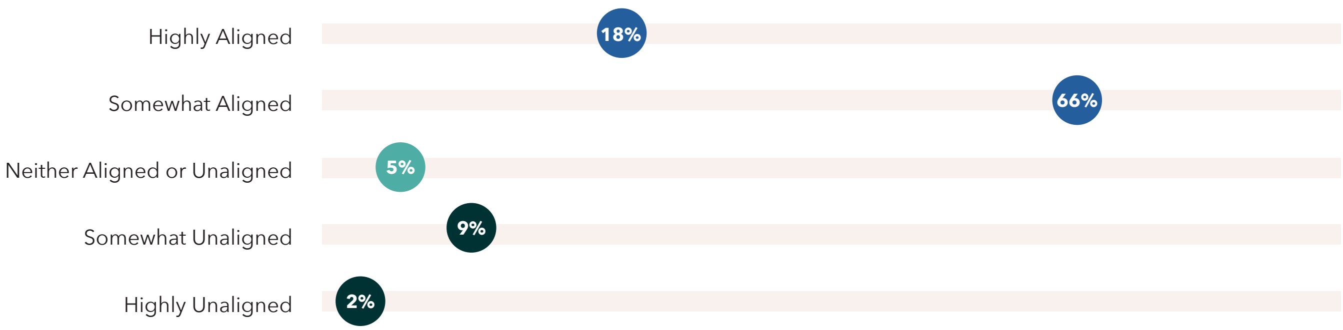
Although many organizations now view CX as more than a traditional support function, results suggest that customer experience has not yet fully achieved a position as a strategic driver across most organizations. Leaders who want greater influence should focus on showing how CX contributes to broader business objectives such as growth, profitability, retention, operational efficiency, and competitive differentiation. The more consistently CX can be linked to enterprise outcomes, the more likely it is to be viewed as a strategic investment rather than an operational necessity.

In your opinion, how is CX most commonly perceived within your organization?



Although most respondents describe their organizations as "Somewhat Aligned" around CX investment decisions, relatively few (18%) report being "Highly Aligned" across stakeholders. This suggests that many organizations continue to experience differing priorities, expectations, and definitions of success among departments. For CX leaders, alignment should be viewed as an ongoing process rather than a one-time achievement. Establishing common goals, shared success metrics with high visibility, and clear accountability structures can help reduce friction. Organizations with stronger alignment are often better equipped to move quickly, allocate resources more effectively, and maintain focus on outcomes that matter across stakeholders.

How would you describe the level of alignment among stakeholders when making CX investment decisions?

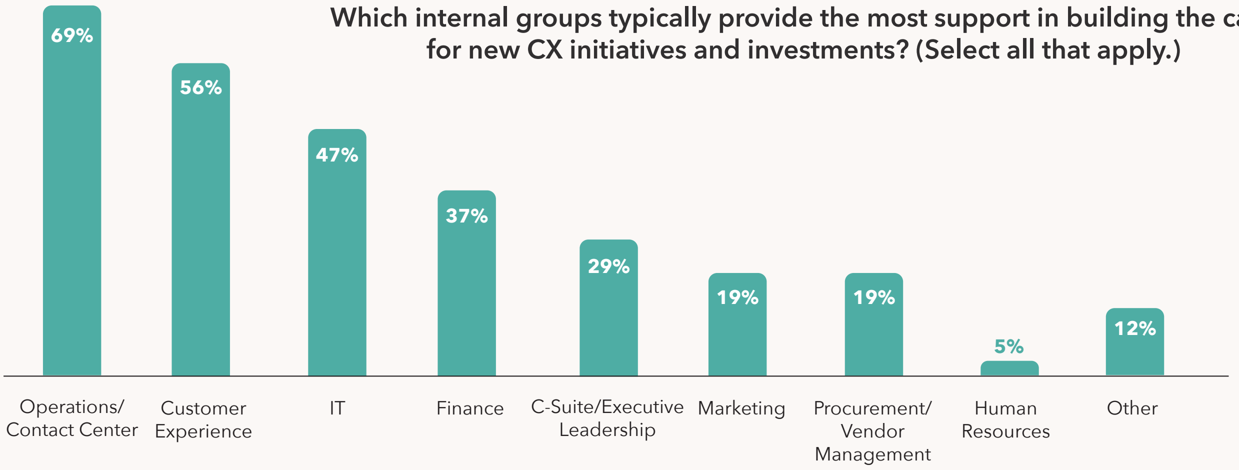


INTERNAL SUPPORT AND FINANCIAL INVOLVEMENT

Aligning the Organization and Overcoming Challenges

Operations and CX teams remain the primary developers of CX proposals, with notable support from IT and Finance. Although a strong mix, gaining support from a broader group of stakeholders is likely to boost the odds of funding, while also improving the likelihood of the initiative's success. CX leaders should consider expanding involvement to executive sponsors, especially early on in the process given their heavy influence on investment decisions (both now and in the future) (page 26). Broader participation often improves assumptions, strengthens financial credibility, and helps identify potential implementation challenges. Undoubtedly, organizations that build cross-functional ownership improve outcomes.

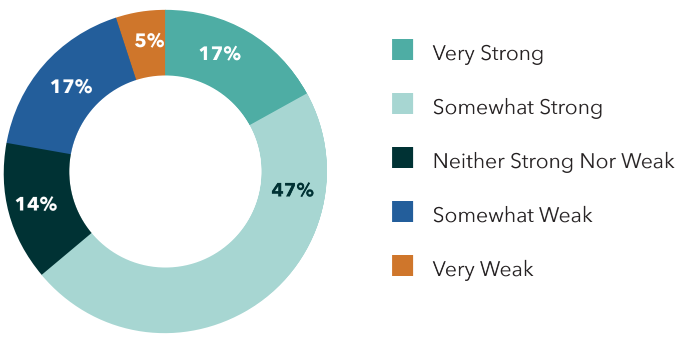
Which internal groups typically provide the most support in building the case for new CX initiatives and investments? (Select all that apply.)



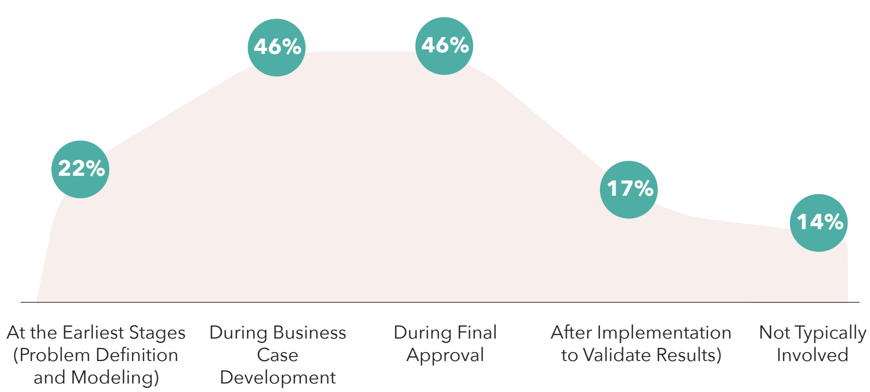
Most CX leaders receive moderate support from internal stakeholders, but truly strong organizational support remains less common. Rather than treating stakeholder engagement as an approval exercise, organizations should involve key departments throughout planning, implementation, and measurement.

Finance, specifically, remains underutilized during the earliest stages of investment planning and decision-making. Organizations can benefit by involving financial stakeholders when assumptions, projections, and success measures are initially developed. Strong Finance partnerships can improve forecasting accuracy, strengthen ROI calculations, and increase executive confidence in proposed initiatives

How would you describe the support you receive from other internal departments (like IT, finance or procurement) in building an ROI story for CX initiatives?

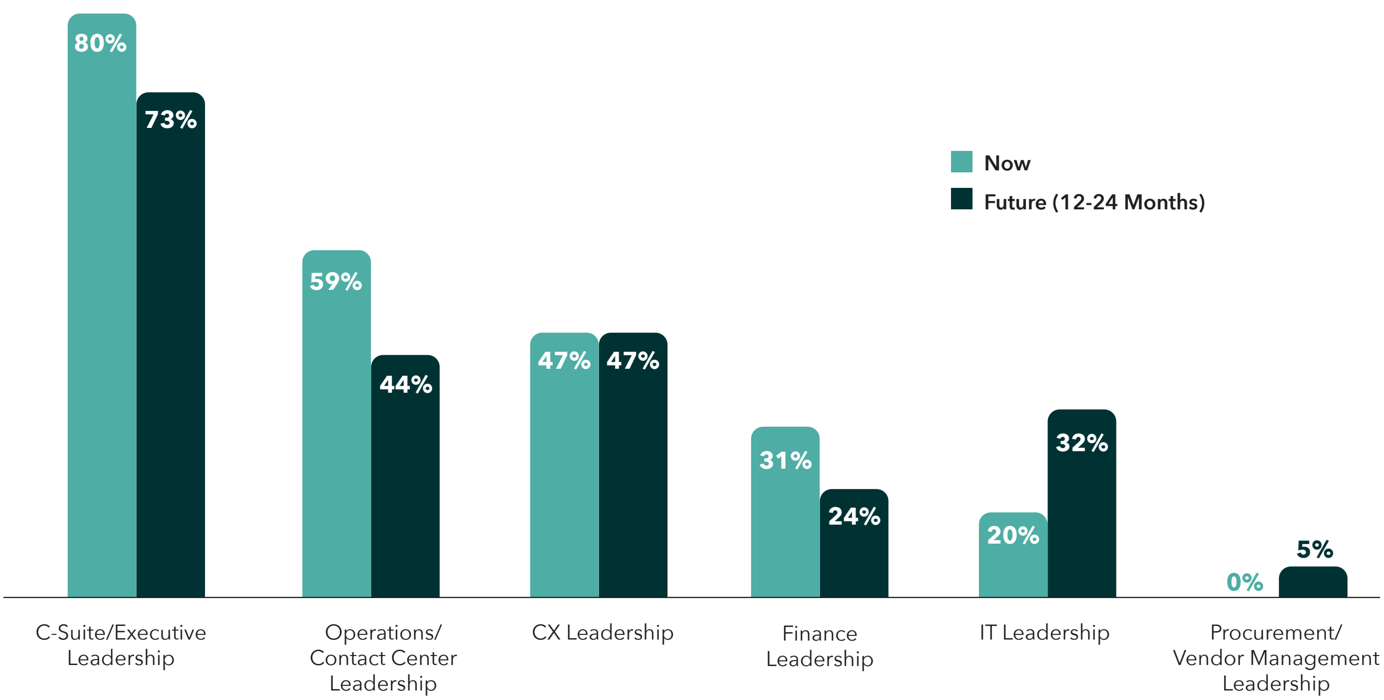


At what stages is your Finance team typically involved in CX investment decisions? (Select all that apply.)



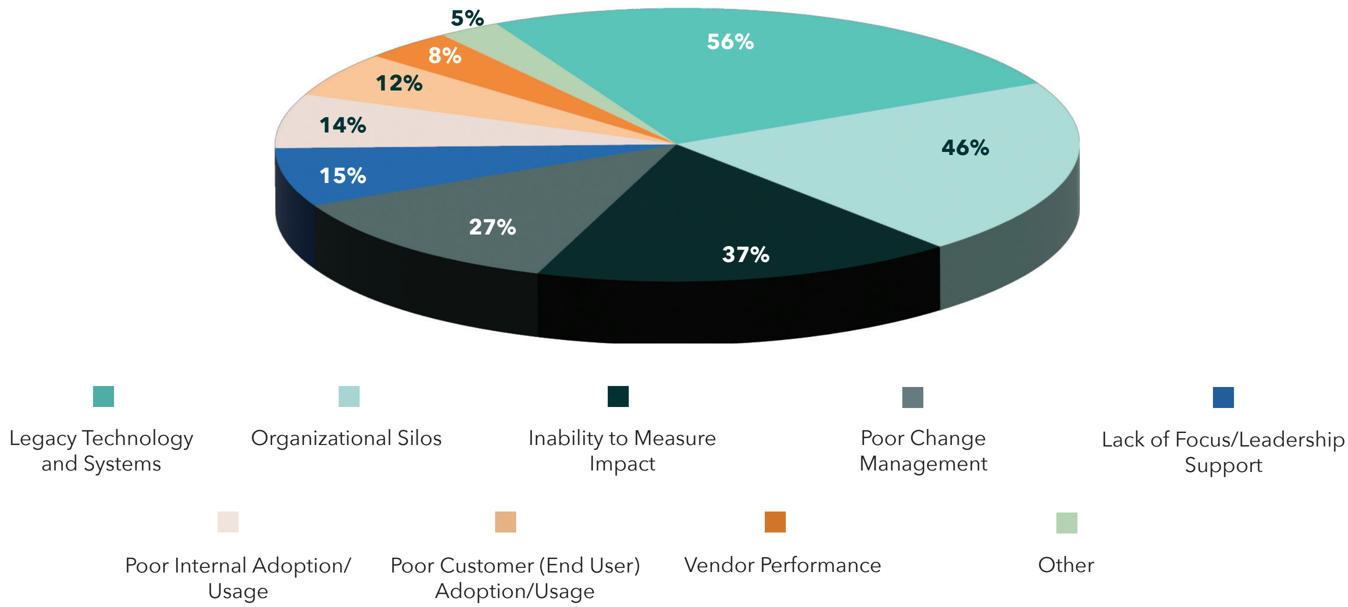
When looking at organizational influence on investment decisions, executive leadership will continue to play a dominant role. Worth noting is the growing involvement of IT, reflecting the expanded role of technology, AI, and enterprise-wide transformation in shaping customer experience strategies. For CX leaders, this evolution underscores the need to build business cases that resonate with multiple stakeholders. Success will increasingly depend on demonstrating not only customer and operational benefits, but also how proposed investments support technology modernization, organizational priorities, and business outcomes. Organizations that foster early alignment across executive leadership, CX, IT, Finance, and Operations may be better positioned to secure investment, accelerate implementation, and maximize long-term value.

Which groups historically have the greatest influence over CX investment decisions within your organization, now and in the future (12-24 months)?



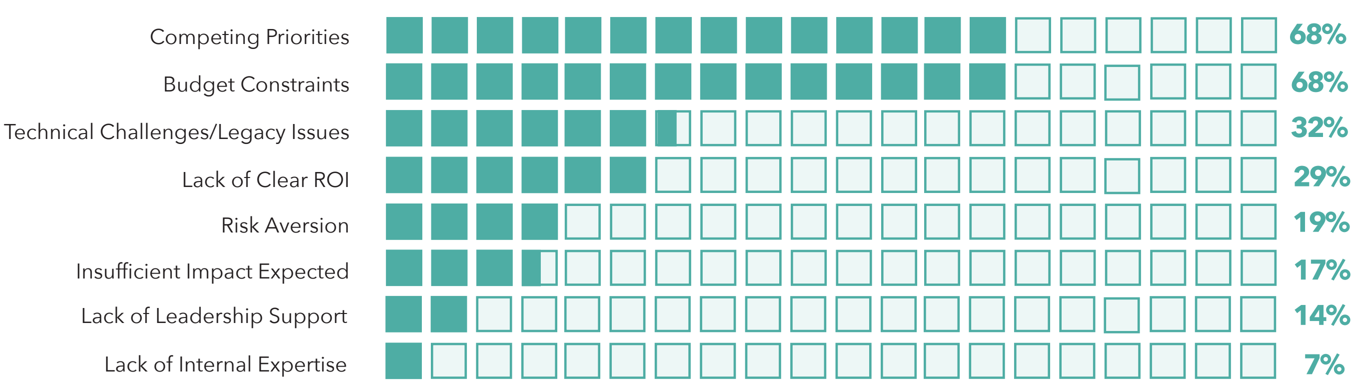
Legacy technology, organizational silos, and difficulty measuring impact emerged as the most significant obstacles preventing organizations from realizing stronger returns on CX investments. Notably, these challenges are largely structural, suggesting that many organizations may already know what experiences they want to create, but they struggle to create and support them. These findings reinforce the strategy of addressing foundational cracks before pursuing new investments. Improving data integration, strengthening cross-functional collaboration, and establishing more consistent measurement practices may unlock more value than adding new tools or technologies alone.

What are some of the biggest barriers to preventing your organization from realizing stronger ROI from CX initiatives? (Select all that apply.)



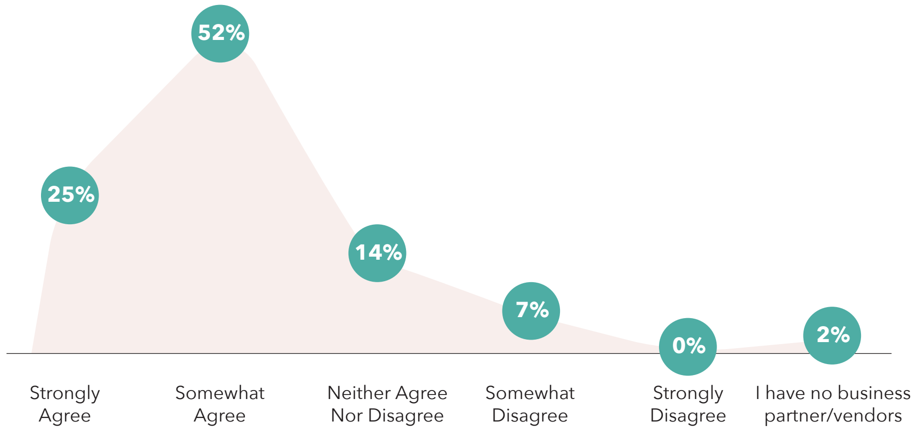
"Competing Priorities" and "Budget Constraints" emerged as the primary reasons CX investments fail to advance. This finding suggests that even strong initiatives may struggle if leaders cannot clearly articulate why an investment deserves attention and resources relative to other business opportunities. CX leaders should focus on demonstrating strategic relevance, measurable impact, and alignment with enterprise-wide objectives. Organizations that effectively position customer experience as a contributor to broader business goals may improve their ability to compete for scarce resources and executive attention.

What are some of the most common reasons why CX investment proposals are delayed of denied? (Select all that apply.)



Most respondents (77%) indicate that vendors play a valuable role in helping build and support CX business cases. As investment scrutiny increases, vendors may find themselves more often being asked to help validate assumptions, quantify expected outcomes, and provide evidence that proposed solutions can deliver measurable value. For CX leaders, this presents an opportunity to leverage vendor expertise more strategically. Organizations should seek partners willing to engage in meaningful discussions around outcomes, success metrics, and value realization rather than focusing exclusively on features, functionality, and cost.

How much do you agree or disagree with the following statement: My business partners/vendors provide valuable support in helping me build the case for new CX initiatives and investments.



What can business partners/vendors do differently to better support your ability to make the case when it comes to new CX initiatives?

“At Fellers, we are leveraging technology to drive better customer experience. I believe, the most effective business partner support for CX investments goes beyond product features and focuses on helping build a clear, outcome-driven business case.

1. **Get to know us -** Vendors can better support us by providing relevant, data-backed insights tailored to our business — such as expected improvements in first contact resolution, handle time, and cost per interaction in a B2B distribution environment. Generic ROI models are less impactful than scenarios aligned to our operational realities.
2. **Help us get there -** It is also critical that vendors offer practical implementation guidance, including phased roadmaps for adopting cloud contact center and AI capabilities. This helps communicate timeline, risk, and organizational impact to internal stakeholders. Additionally, real-world use cases and proof points from similar companies help build confidence and reduce perceived risk.
3. **Orchestrate across the entire business -** Just as important, at Fellers, we work in lockstep across Customer Service, Sales, Operations, Product, IT, and Marketing, with a deliberate focus on customer centricity. Partners who align to this cross-functional approach and help connect CX outcomes to enterprise priorities make it significantly easier to build consensus and accelerate transformation.

Ultimately, the most valuable partners act as strategic advisors, translating technology into measurable customer and employee experience improvements — such as faster response times, a unified customer view, and more empowered agents.”

John McCahan
Chief Customer Experience Officer
FELLERS

The responses received to the open-ended question below suggest that CX leaders increasingly expect business partners to serve as strategic advisors rather than merely as a solution-provider. Increasingly, vendors are expected to help close deals by delivering customer-specific business cases, credible ROI models, realistic benchmarks, and evidence from real-world implementations. Respondents also emphasized the value of pilots, peer references, post-implementation value tracking, and partners who take the time to understand their organization's unique goals and challenges. Ultimately, the vendors that earn the greatest trust are those that help clients build executive confidence, validate business outcomes, and remain engaged in demonstrating measurable value long after implementation. Essentially, the vendors that have the clearest competitive advantage are those that become an extension of the CX team.

WHAT CAN YOUR BUSINESS PARTNERS/VENDORS DO TO BETTER SUPPORT YOUR SUCCESS IN SECURING FUNDING AND SUPPORT FOR NEW CX INITIATIVES?

"The single most impactful thing business partners and vendors can do is come to the table with a co-developed, organization-specific business case rather than generic ROI calculators or industry benchmarks that don't reflect the realities of my operating environment."

"Vendors need to move past 'soft' metrics like customer happiness and provide hard, quantifiable business case models."

"Provide pilot opportunities."

"Provide realistic outcomes that other companies have had using the said technology."

"The best partners come with the business case pre-built, benchmark data, FTE savings models, and a ready-to-show ROI."

"Use our own data to make the ROI calculations 'real' and not hypothetical."

"Provide more transparent, outcome-based ROI models tied to real operational metrics, along with credible benchmarks and post-implementation proof points."

"The vendors who act as strategic partners in the funding conversation — not just solution-providers — are the ones who earn long-term relationships."

In asking CX leaders an open-ended question about the challenges of building an ROI case, the trick is not demonstrating that improving the customer experience creates value — it is proving that value in ways that are credible and actionable. Respondents repeatedly cited difficulties connecting customer experience improvements to measurable financial outcomes, measuring success across complex customer journeys, and accessing the integrated data needed to support their assumptions. Data fragmentation, inconsistent measurement frameworks, cross-functional silos, and differing definitions of value further complicate efforts to build business cases that withstand executive scrutiny. Several respondents also noted that AI investments introduce additional uncertainty, as organizations often lack historical benchmarks or reliable adoption data to confidently forecast outcomes.

WHAT IS THE MOST CHALLENGING ASPECT OF BUILDING A CX ROI BUSINESS CASE WITHIN YOUR ORGANIZATION?

"The most challenging aspect is translating the value of customer experience improvements into the financial language that resonates with CFOs and executive leadership."

"Our biggest hurdle is data fragmentation ... operational data, financial data, and marketing insights live in separate, siloed systems."

"The hardest part is translating scattered qualitative data like CSAT, resolution time, deflection rate into language Finance trusts."

"Attributing financial outcomes to CX improvements across multi-touch journeys, while aligning on consistent assumptions and proving causality — not just correlation — to Finance and executive stakeholders."

"The unknown unknowns. A lot of our projects are AI-focused and we just don't know or have a reference point to determine the actual adoption, impact, and outcome."

"Finding champions within Finance and IT to contribute to the business case and help build out the value propositions."

"Too many assumptions without evidence, and many other teams/departments claiming the benefits for CX-led initiatives."

"Compiling realistic data that doesn't come from the software/tech seller."

When asked what they need most to build a compelling ROI story, responses from CX leaders suggest they aren't looking for ROI calculators and off-the-shelf thinking. Instead, they are looking for bolstering their organizational capabilities in ways that make a strong ROI easier to demonstrate. Across responses, four themes emerged consistently: 1) access to integrated, high-quality data; 2) standardized frameworks that connect CX metrics to financial outcomes; 3) credible benchmarks and real-world success stories; and 4) stronger collaboration with Finance and executive stakeholders early in the investment process. Rather than spend too much time gathering data, defending assumptions, or translating customer metrics into financial language, CX leaders would rather be building a compelling value narrative. Ultimately, the most compelling ROI stories are built on credible evidence, shared definitions of success, and strong cross-functional alignment.

WHAT DO YOU NEED MOST TO BE BETTER SUPPORTED IN BUILDING A COMPELLING ROI STORY FOR YOUR NEW CX INITIATIVES AND INVESTMENTS?

"What I need most is a combination of robust data infrastructure and organizational alignment that allows me to connect customer experience metrics to financial outcomes in a credible, repeatable way."

"We need a comprehensive, cross-functional baseline of our current cost-to-serve and operational friction points."

"What I need most is cleaner data infrastructure that connects my tools into a single ROI narrative and industry benchmarks that give my assumptions credibility."

"Stronger, standardized frameworks for linking CX improvements to financial outcomes supported by integrated data across customer, operational, and financial systems."

"A dedicated Finance partner who would contribute during the initial phases."

"Using our 'real' data or a pilot using our own data. Case studies from other companies ... especially unrelated verticals, are not helpful at all."

"A way to measure the impact of cumulative friction ('death by a thousand cuts') in terms of churn or revenue."

"Business buy-in from siloed parts of the organization. Business cases are driven by areas that are customer-facing; our CX team lives in Marketing."

KEY TAKEAWAYS AND CONSIDERATIONS

The findings from this research highlight a critical reality for modern CX organizations: belief in customer experience is no longer the challenge. Proving its value is.

Across nearly every area of the study, respondents demonstrated strong conviction that customer experience contributes to organizational success. Yet the ability to consistently measure, communicate, and validate that value remains uneven. While 86% of respondents say demonstrating ROI is highly important and nearly half report increasing organizational emphasis on ROI, only 4% describe their ROI methodologies as highly standardized. This gap between expectation and capability may be one of the defining challenges facing CX leaders today.

The research also reveals that many barriers to ROI exist outside the CX function itself. Legacy technology and systems (56%), organizational silos (46%), and inability to measure impact (37%) emerged as the most significant obstacles to stronger returns (page 27). These findings suggest that ROI challenges are often less about customer experience strategy and more about the organizational environment surrounding it. Even the most promising initiatives can struggle when data remains fragmented, teams operate independently, or measurement frameworks lack consistency.

Encouragingly, the outlook for CX investment remains positive. Nearly half of respondents expect funding levels to increase over the next 12 to 24 months (page 21), and many organizations report that CX initiatives frequently achieve both program and financial objectives (page 17). The opportunity moving forward is not simply to continue investing in CX, but to invest with greater precision, stronger accountability, and clearer measurement.

Ultimately, the next phase of CX maturity will not be defined by whether organizations value customer experience. It will be defined by how effectively they translate customer outcomes into business outcomes. The organizations that successfully build that connection will be best positioned to secure investment, influence strategy, and create lasting competitive advantage.

Research Highlights:

- 86% of CX leaders say demonstrating ROI is extremely or very important when proposing new initiatives. (page 9)
- 48% say organizational focus on ROI has increased significantly over the past 12–24 months. (page 10)
- Only 4% describe their organization's methodology for tracking ROI as highly standardized. (page 12)
- 65% expect AI and Automation to receive the largest share of future CX investment (page 21), and 75% expect the same to deliver the strongest ROI over the next 12–24 months. (page 19)
- Process Improvement (58%) remains the most proven historical source of ROI. (page 18)

METHODOLOGY

This report was developed based on results derived from a custom 39-question survey delivered via the SurveyMonkey online platform.

Surveying occurred from April 15 through June 1, 2026. Private invitations to partake in the survey were delivered by email to the Execs In The Know community and via promotion within Execs In The Know's private online community, Know It All (KIA). Invitations targeted individuals responsible for managing the customer experience and customer care programs of large Business-to-Consumer (B2C), Business-to-Business (B2B), and B2C/B2B organizations located primarily in the United States and Canada.

The survey benefited from the participation of 59 CX leaders. See pages five and six for a detailed breakdown of the survey's participants, including details about vertical, spend, and team size.

ABOUT
EXECS IN THE KNOW

Execs In The Know brings together customer experience (CX) leaders from across industries in an effort to advance the conversation and set a new agenda for delivering amazing experiences for consumers. As a global community of the brightest minds in CX, Execs In The Know provides opportunities to learn, share, network, and engage to innovate. Operating under the motto, “Leaders Learning From Leaders,” Execs In The Know facilitates many opportunities for community engagement, such as its bi-annual national Customer Response Summit and private, online community, Know It All “KIA.” There are also exclusive, laser-focused engagements like industry briefings and executive roundtables. Execs In The Know also guides and informs the industry with a rich tapestry of CX-related content that includes *CX Insight* magazine, industry research, webinars, blogs, and much more.

To learn more about Execs In The Know, visit www.execsintheknow.com.

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