



The CX success framework: Why preparation is your competitive edge



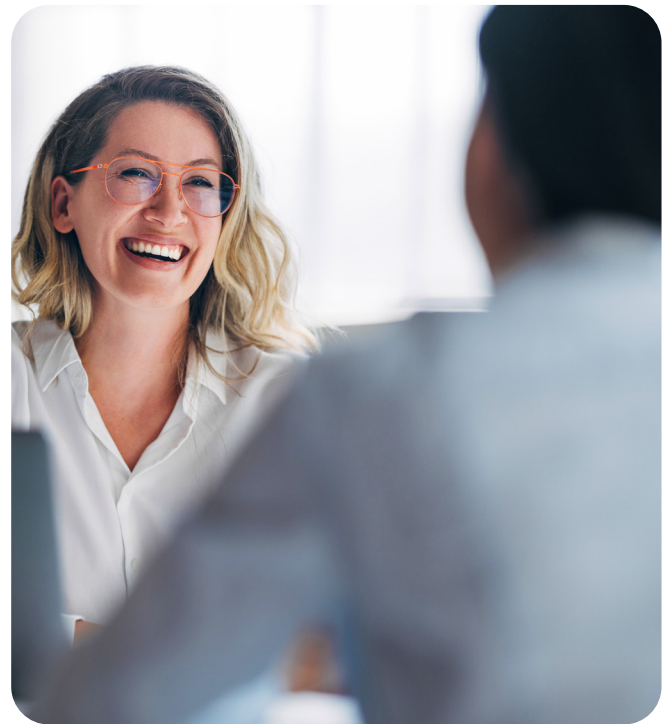
Great customer experiences don't just start with software — they begin with a truly customer-centric strategy.

While leading customer experience (CX) technology platforms can enable change, real transformation happens when people, processes, goals and data come together with purpose. It's this alignment that turns customer-centric ambition into measurable customer and business outcomes.

Effective CX also calls for ongoing engagement, iteration and intent. Evolving customer engagement requires a cultural shift approaches customer experiences at every step and level. At the core is the concept of Next Best Action — a strategic approach to meeting customer needs in the moment. It's about staying in step with your customers, adapting quickly, and creating experiences that feel personal, relevant, and responsive.

In this eBook we'll explore some of the common roadblocks that stall CX transformation — and the practical steps organisations can take to move past them. We also examine the common 'set and forget' mindset that too-often flaws CX transformation efforts.

You'll get a clear picture of what good CX looks like, grounded in real-world results. And we'll share a success story that shows just how powerful the right strategy can be when it's backed by the right vision and mindset.



In this eBook:

- 7 common customer experience roadblocks and how to overcome them
- What good CX looks like
- Success story: How a major financial services organisation transformed its CX
- Getting started





7 common roadblocks to excellent customer experience and cultural transformation and how to address them.

Organisations can face significant challenges when implementing customer experience solutions — undermining even the most advanced platforms, particularly if foundational elements like strategy, data, governance, and culture are misaligned.

Here are some typical ‘roadblocks’ to success, and our guidance and top tips on how they can be overcome.

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Challenge **Unclear vision and mission**

Many organisations approach CX transformation iteratively and without a well-defined vision or clear set of objectives.

This can lead to fragmented efforts and inconsistent outcomes, despite being built on a highly sophisticated piece of CX technology. Even with a clear mission and vision, organisations can fail through having ill-defined or even zero accountability for delivery.

Solution

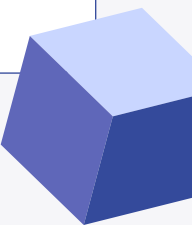
Set well-defined goals and objectives

Successful CX transformation requires more than incremental change; it demands a roadmap based on a strategic vision and foundational enablers — such as data, people, and processes — before or alongside any technology rollout. A well-designed CX roadmap starts with a clear vision statement that serves as the organisation’s ‘north star’, allowing stakeholders to rally around a common goal and fostering a shared understanding of the desired outcomes.

It’s also important to articulate anticipated changes in customer experience that will emerge as the vision is realised. Outlining how the transformation will enhance customer outcomes will help teams maintain focus and motivation throughout implementation.

Organisations should conduct a thorough assessment of their current systems and capabilities to identify skill gaps and highlight what’s missing. Clarity on these aspects enables prioritisation of initiatives, ensuring resources are allocated effectively.

A quality CX transformation will also consider the skillsets of the people involved, organisational structure, and the envisioned future state. Understanding team dynamics, required skills, and potential role evolution is crucial for sustaining effective CX initiatives, ensuring both transformation delivery and ongoing maintenance are well-supported.



Summary

Top tips for setting a strong CX foundation

- Define your CX vision early — make it your north star
- Set clear goals and link them to customer outcomes
- Align people, processes and tech from the start
- Identify capability gaps early
- Build accountability into every step

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Challenge

Lack of robust data management

Disconnected, inconsistent, or poor-quality data is often a major challenge in CX transformation. When data is scattered across the organisation or locked in disparate legacy systems, achieving a comprehensive view of an individual customer becomes nearly impossible. This can result in 'data paralysis', whereby an organisation's pursuit of 'perfect' data delays subsequent phases of CX transformation until every data point is flawless.

Solution

Establish strong data foundations

Data is the fuel that powers exceptional customer experiences. Success in customer experience transformation starts with ensuring data is accurate, consistent, and integrated across systems. To strengthen data foundations, organisations may need to engage in data cleansing, re-architecting data models, and investing in improved data governance and stewardship.

Awaiting flawless customer data can prolong transformation efforts indefinitely. Instead, organisations can implement agile tactics that facilitate transformation while allowing long-term data programs to integrate into the ecosystem with minimal disruption. A key learning from working with various organisations in the region is the importance of adopting a 'progress over perfection' mindset.

Summary

Top tips for getting your data CX-ready

- Don't wait for perfect data — treat data management as a continuous journey
- Clean, connect and unify your data as early as possible
- Prioritise accuracy, consistency and governance
- Build for agility — let long-term fixes run in parallel

Challenge

Outdated success metrics

Despite rhetoric around customer-centricity, many organisations still measure success using outdated metrics tied to short-term outcomes — such as sales volumes or service resolution times — rather than long-term customer value.

This issue is often compounded by marketing attribution models that focus on individual performance over collective impact. Without the right key performance indicators (KPIs) in place, teams may prioritise outputs over outcomes, missing opportunities to build deeper, more valuable customer relationships.

Solution

Redefine success with customer-centric KPIs

To drive meaningful CX transformation, organisations must move beyond output-based metrics like units sold or emails sent. These don't reflect customer impact or satisfaction.

Customer-centricity demands new KPIs that capture long-term value — such as churn rate, Net Promoter Score (NPS), and Customer Lifetime Value (CLV). CLV is especially valuable, helping teams prioritise investment and service strategies based on a customer's potential future contribution.

Shared KPIs break down silos and ensure everyone is working toward the same customer-focused goals.

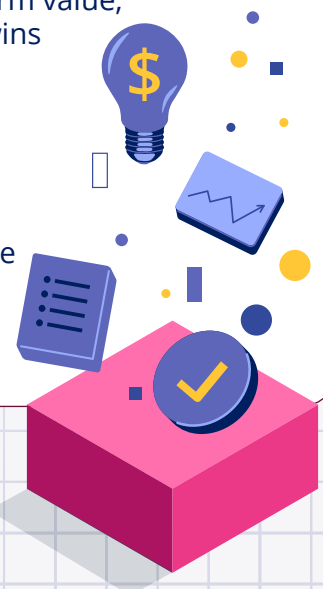
Organisations should also shift from quantity to quality. Success isn't how many messages you send — it's how customers respond. Engagement metrics like click-through rates offer a clearer view of relevance and impact, guiding more targeted and effective communication.

A helpful analogy when defining metrics: in a football game, each player may only touch the ball for a few minutes — but their impact depends on what they do with the ball. Likewise, CX success isn't just about direct interactions, but everything an organisation does behind the scenes to support, anticipate and improve the customer journey.

Summary

Top tips for redefining success criteria

- Stop measuring output — start measuring impact
- Prioritise long-term value, not short-term wins
- Make CLV your guiding metric
- Align KPIs across all departments
- Shift from volume to engagement



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Challenge

Siloed systems

Disconnected and siloed systems also pose barriers to exceptional customer service. Business units often operate independently, with product-centric goals overshadowing customer needs.

This results in inconsistent experiences and missed opportunities. By fostering cross-functional collaboration and shared accountability, organisations can break down silos and create a cohesive CX strategy that centres on the customer.

Solution

Centralise goals, systems and data

Delivering a seamless customer experience means every team — from marketing and sales to service and operations — must pull in the same direction. This requires more than cooperation; it demands shared goals, joint accountability, and a unified CX vision.

It also calls for a tighter integration of technologies. Systems need to talk to each other, and duplication must be eliminated. That might mean rethinking the role of certain platforms, streamlining the tech stack, and repurposing tools to serve the bigger picture.

When teams and technologies are aligned, customer journeys become more connected — and far more impactful.

Summary

Top tips for breaking down silos

- Unite teams around a shared CX vision
- Align goals and accountability across functions
- Break tech silos — integrate systems and data
- Eliminate redundancy in your tech stack
- Collaborate to deliver connected experiences

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Challenge

Skills mismatch

Even with the right technology, CX initiatives can stumble if teams lack the skills to use the tools effectively. Inadequate training in data interpretation or decision-making logic can lead to underutilisation of features, while the complexity of the logic required for some rules-based solutions can introduce risk when operated by non-technical business users.

Cultivating a culture of continuous learning ensures teams are equipped to leverage new technologies for optimal customer outcomes.



Solution

Upskilling teams to unlock CX value

Technology alone doesn't deliver transformation — people do. To get the most out of CX platforms, teams need more than just technical training. They need to understand how their work impacts the customer journey and how to use data and insights to make smarter decisions.

That means embedding upskilling into your change programs — not as a one-off, but as a continuous effort. From frontline staff to senior stakeholders, everyone should be supported to adopt a customer-first mindset and empowered to use new tools confidently and effectively.

Summary

Top tips for redefining success criteria

- Make upskilling continuous
- Build a customer-first mindset
- Align roles with customer outcomes
- Embed training in ongoing change
- Empower all levels of the organisation



Challenge

Outdated processes and workflows

Legacy processes often prioritise internal efficiencies over customer outcomes, creating friction and frustration. When processes are not designed with the customer in mind, even the best customer engagement can falter.

For example, a personalised offer may be appealing, but if the follow-up process is broken — like an activation journey that hits roadblocks — customers quickly lose trust.

Legacy systems, inconsistent data, and complex workflows can turn a seamless experience into a frustrating one, leaving customers disengaged and dissatisfied.

Solution

Redesigning processes with the customer in mind

To create a world-class customer experience, organisations must re-engineer legacy processes to speed up value delivery.

This includes mapping decision paths, automating tasks, and aligning processes with customer goals to remove friction and build trust.

A strong customer engagement strategy can fail if the fulfillment process is flawed, as even personalised offers are irrelevant if customers face activation obstacles.

Tools like Pega's GenAI Blueprint help streamline workflows, facilitate collaboration, and fine-tune execution, reducing time spent on business requirements. By prioritising customer experience in process design and improving cross-system integration, organisations can boost satisfaction, loyalty, and trust while minimising the risk of churn.

Summary

Top tips for re-engineering processes for customer-centricity:

- Map decision paths to align with customer goals
- Automate tasks to accelerate value delivery
- Use collaboration tools like Pega's GenAI Blueprint to streamline workflows
- Integrate systems for a seamless, frictionless experience

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Challenge

Weak governance

A lack of clear governance can derail even the most well-intentioned CX programs. Without strong oversight and leadership buy-in, initiatives risk losing focus and momentum. Weak governance can lead to fragmented efforts, misaligned strategies, and missed opportunities.

Effective governance is essential for maintaining a customer-centric culture, ensuring compliance, and keeping teams on track. Without it, organisations can struggle to make lasting improvements, leaving customers and stakeholders dissatisfied.

Solution

Centralise goals, systems and data

Strong governance is crucial for keeping CX initiatives aligned with strategic goals and on track for long-term success. It ensures clear ownership, well-defined escalation paths, regular reviews, and a culture of accountability.

Governance provides the structure to support decision-making and maintain focus on customer-centric outcomes, without becoming a barrier to agility.

Equally important is having guardrails in place to mitigate risk. These ensure that while teams have the flexibility to innovate and move quickly, they do so within defined boundaries that protect against missteps and ensure compliance.



The best governance frameworks foster collaboration, encouraging cross-functional teams to assess the value of initiatives and prioritise projects based on their potential impact on the customer experience, loyalty, and brand equity.

Summary

Top tips for achieving optimal governance

- Ensure clear ownership and accountability
- Establish defined escalation paths for issues
- Prioritise regular reviews and progress checks
- Maintain alignment with strategic goals
- Foster a culture of collaboration and customer-centric decision-making

What good CX looks like



Personalised, relevant interactions delivered at the right time, through the customer's preferred channel.



Consistent experiences across touchpoints, regardless of which team, product or platform the customer engages with.



Proactive engagement, where issues are anticipated and addressed before they escalate.



Fast, frictionless service, enabled by streamlined processes and empowered frontline teams.



Customer needs at the centre of decisions, not just internal goals or product targets.



Data-driven decision-making that evolves based on real-time insights and feedback.



Ongoing learning and optimisation, supported by agile teams and strong governance.



Aligned internal teams working together toward shared customer outcomes.



Success story: Transformation in global financial services

A global financial services organisation undertook a transformative journey to enhance customer experience across five key channels: mobile app, internet banking, email, SMS, and push notifications. By implementing the recommended strategies, they achieved seamless integration of critical data entities, including customer profiles, accounts, transactions, insights, digital behaviour, and complaints, in both batch and real-time processing.

Within just nine months from the program kick-off, the organisation launched over 50 Next Best Actions. To evaluate the impact of 1:1 targeting, they reused existing content from their mobile app — initially managed by a legacy system — to isolate the effects of Pega's arbitration and scoring engine. The results were impressive, featuring a 17-fold increase in click-through rates, with some actions experiencing up to a 50-fold uplift in conversion rates. This transformation significantly improved customer engagement and product uptake.



Pega has already helped
multiple global customers achieve:

50%

increase in
conversion rates
in mortgage lending

3x

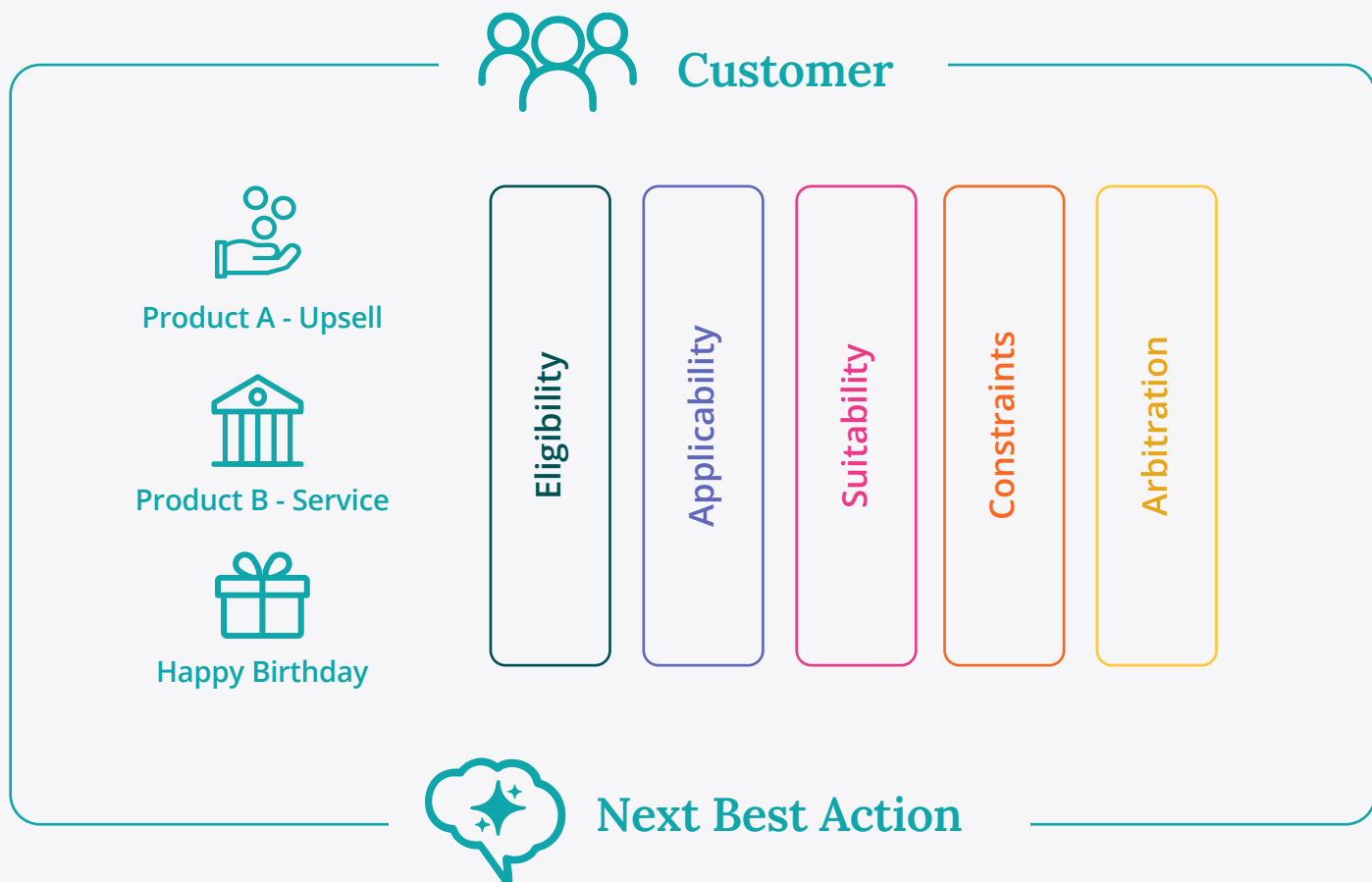
more sales opportunities
through improved targeting
and timely lead delivery

5%

increase in Customer
Lifetime Value (CLV)

Customer Centric Engagement

Our 1:1 approach means we start by understanding the customer, their needs, and the context, preferably in real time



Getting *started*

Becoming truly customer-centric is not merely about the technology you purchase; it's about the transformative changes you implement within your organisation.

Whether you're at the beginning of your transformation journey or looking to refine your current approach, partnering with a knowledgeable resource is essential for successful execution.

At Pega, we go beyond delivering technology; we collaborate with you to rethink the way your organisation operates around the customer.

If you're interested in discovering how others are successfully navigating this journey with us, we invite you to join our community discussions or reach out for a no-pressure consultation.

Find out more about what Pega can do for you [here](#).

