

# How a Leading Bank Transformed Customer Experience with WestCX

westcx



WestCX delivers AI-powered automation and analytics that streamline banking services, boost employee retention, and create more personalized experiences for customers.

## Meeting Rising Expectations with Automation

Since 2022, WestCX has partnered with a leading U.S. financial institution to modernize customer support and drive ongoing innovation. Over nearly four years, WestCX has become a trusted partner, helping leadership transition from legacy systems to advanced AI-driven outcomes.

As customers increasingly turned to digital banking channels, the institution recognized the urgent need to modernize its customer support strategy. For decades, the bank had relied on its live agent call center to manage a wide range of customer questions, including balance inquiries, transfers, bill payments, and branch searches. While this model was effective in the past, it was becoming increasingly difficult to scale as customer expectations shifted toward instant, digital-first engagement.

The organization set out to simplify routine interactions, free staff for high-value conversations, and gain visibility into customer behavior to refine operations.

## Conversational AI

To achieve these goals, the bank turned to WestCX' conversational AI offering, Engage, to automate routine requests like account balance checks, transfers, and branch location searches. Customers can call to receive immediate, secure responses, supported intelligent automation that adapts to customer intent in real time, creating natural, human-like conversations.

Redirecting thousands of repetitive calls freed agents to focus on more complex and sensitive member requests, reducing wait times, improving staff and member experiences, and delivering faster, more consistent service.

## Case Study:

Modernizes Customer Experience with AI Automation



### Profile Organization Type:

Leading U.S. Bank /Financial Institution



**Size:** Large enterprise; serves millions of banking customers across multiple channels



**Relationship:** Since 2022



**Location:** United States



## Analytics and Optimization

Building on this trusted foundation, the organization adopted WestCX' analytics and optimization offering, a real-time insights platform that integrates with the conversational AI to capture every interaction end to end. This milestone was the natural evolution of the partnership. The proven impact of conversational AI paved the way for the institution to confidently expand into analytics for deeper transformation.

Through the platform, dashboards highlighted friction points such as long holds, repeated transfers, and confusing prompts, and surfaced sentiment and call patterns for deeper visibility. With these insights, the team refined scripts, reduced drop-offs, improved resolution rates, and tracked key metrics like self-service containment and average call handle time.

Together, WestCX' conversational AI and analytics created a closed-loop system that improved service speed and accuracy for customers while giving the bank the intelligence to drive ongoing improvements.

## Results: Elevated Customer and Employee Experience

The bank saw measurable improvements across both contact center and branch operations:

- ✓ **Higher customer satisfaction:** Post-interaction survey scores consistently exceeded 4 out of 5.
- ✓ **Greater self-service adoption:** Containment improved 4% year over year, reducing agent demand and freeing staff for high-value interactions.
- ✓ **Time savings:** Routine requests were resolved more quickly, saving thousands of staff hours across the organization.
- ✓ **Operational consistency:** Automated processes created more uniform experiences across branches.
- ✓ **Employee experience and retention:** Staff satisfaction improved from being able to shift away from repetitive tasks to more meaningful customer needs requiring judgment, empathy, and expertise.
- ✓ **Clear growth path:** The bank launched a 20-month automation roadmap to scale efficiency gains, customer satisfaction, and revenue growth.

*WestCX is the parent company of Televox and Mosaicx, bringing all solutions together under a single, unified brand.*

## Looking Ahead: Scaling Innovation

Building on the success of its initial rollout, the bank is expanding WestCX across additional business units. With AI-driven self-service voice and analytics embedded in daily workflows, the institution is positioned to anticipate customer needs, uncover process improvements, and deliver more proactive service. Plans include predictive intent capabilities, more personalized prompts, and streamlined backend operations to extend efficiency gains and sustain momentum.

As customer expectations continue to rise, the bank views WestCX as a strategic driver of growth and service innovation. With automation and analytics at the core of operations, the institution is shaping the future of digital banking and strengthening its reputation as a forward-thinking leader.

