

Leading One of the Nation's Largest Banks to Drive Data-Backed CX Transformation with Insights360

westcx



WestCX' analytics and optimization platform, Insights360, delivers enterprise-level intelligence that improves IVR performance, boosts containment, and uncovers millions in potential annual savings.

Meeting the Need for Smarter IVR and Self-Service Optimization

As one of the nation's largest financial institutions, a leading national bank manages millions of customer calls each month across its mortgage, credit card, and auto loan businesses, as well as consumer and small business checking and savings transactions. Seeking to enhance self-service efficiency and reduce customer friction, the bank partnered with WestCX to gain deeper visibility into its IVR performance and uncover opportunities for new automation and improvement of existing self-service.

Through a two-year engagement, WestCX deployed its analytics and optimization platform to deliver end-to-end intelligence, capturing every interaction from the first dial to when the customer hangs up - across the bank's virtual routing systems. WestCX analytics identified key trends and inefficiencies that delivered actionable recommendations to simplify call flows, reduce agent transfers, and improve authentication success.

Turning Analytics into Enterprise-Wide Impact

The WestCX platform uncovered several friction points within the customer journey, including redundant call loops, inconsistent routing logic, and authentication gaps, that were driving customer frustration and increasing operational costs.

Over a 10-week analysis period, WestCX presented detailed insights and recommendations for each IVR line of business to the bank's leadership, demonstrating how targeted adjustments could enhance customer satisfaction and reduce support costs.

By implementing these recommendations, the customer estimates \$4–6 million in annual savings, driven by improvements such as streamlined call flows, expanded self-service options, and corrected routing errors that previously caused call transfers or abandonment.

Case Study:

Enhancing Self-Service Efficiency and Optimizing IVR Performance



Profile Organization

Type: One of the nation's largest financial institutions managing high-volume customer interactions across multiple business lines



Size:

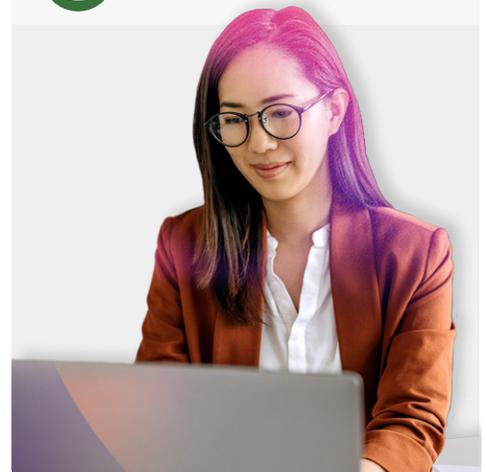
Large enterprise managing millions of customer calls monthly across mortgage, credit card, auto loan, consumer, and small business transactions



Relationship: 2 year partnership



Location: United States



Achieving ROI in Record Time

WestCX delivered a full year's ROI within the first three months and achieved the total two-year investment return by the end of the first year. The platform delivers a complete view of each interaction, tracking calls from entry to resolution. With this visibility, the WestCX Professional Service Team identified performance gaps that traditional analytics tools often miss, allowing for faster decision-making and stronger business results, including:

- ✓ **\$4–6 million in total savings** identified through optimized call flow and self-service
- ✓ **Full ROI realized** within 12 months of deployment
- ✓ **Improved authentication rates and consistent customer routing**
- ✓ **Higher containment and first-call resolution rates**
- ✓ **The ROI delivered enabled client** to renew for an additional two-year engagement to continue CX transformation

Building on Success: Empowering Continuous Improvement and Future Growth

The client is currently migrating to a new IVA platform, and WestCX' findings are directly informing the design and configuration of that system to ensure efficiency from launch. For example, insights from WestCX identified authentication gaps and redundant call loops and inefficiencies within the bank's mortgage servicing IVA—issues that are now being addressed in the new platform's call flow design to improve routing consistency and reduce customer friction nationwide.

Through the implementation of the platform's recommendations, the financial institution expects continued annual savings in the multimillion-dollar range, along with measurable gains in containment and first-call resolution and a reduction in tuning time for their new IVA environment. The bank also benefits from shared access to WestCX' analytics dashboard, which provides transparency and empowers its internal teams to participate in ongoing performance analysis.

Looking Ahead

As an early adopter of WestCX' analytics platform, the national bank continues to lead the industry in applying conversational analytics to enhance large-scale customer service operations. Together, they are building a modern engagement model focused on efficiency, consistency, and continuous improvement.

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

