

The AI Advantage for Finance



Many financial institutions launch AI pilots with high expectations—but face challenges scaling solutions, securing executive buy-in, and realizing measurable ROI.

This guide helps you validate your AI readiness and map how the right tools can help you become more efficient, compliant, and customer-centric.

- To capture value and remain competitive, organizations must begin their AI journey with a structured approach.
- Organizations with advanced AI maturity outperform in cost savings, revenue growth, and customer experience.
- Early-stage efforts without a roadmap lead to fragmented impact.

**Start by assessing where you are
— and where you want to go.**



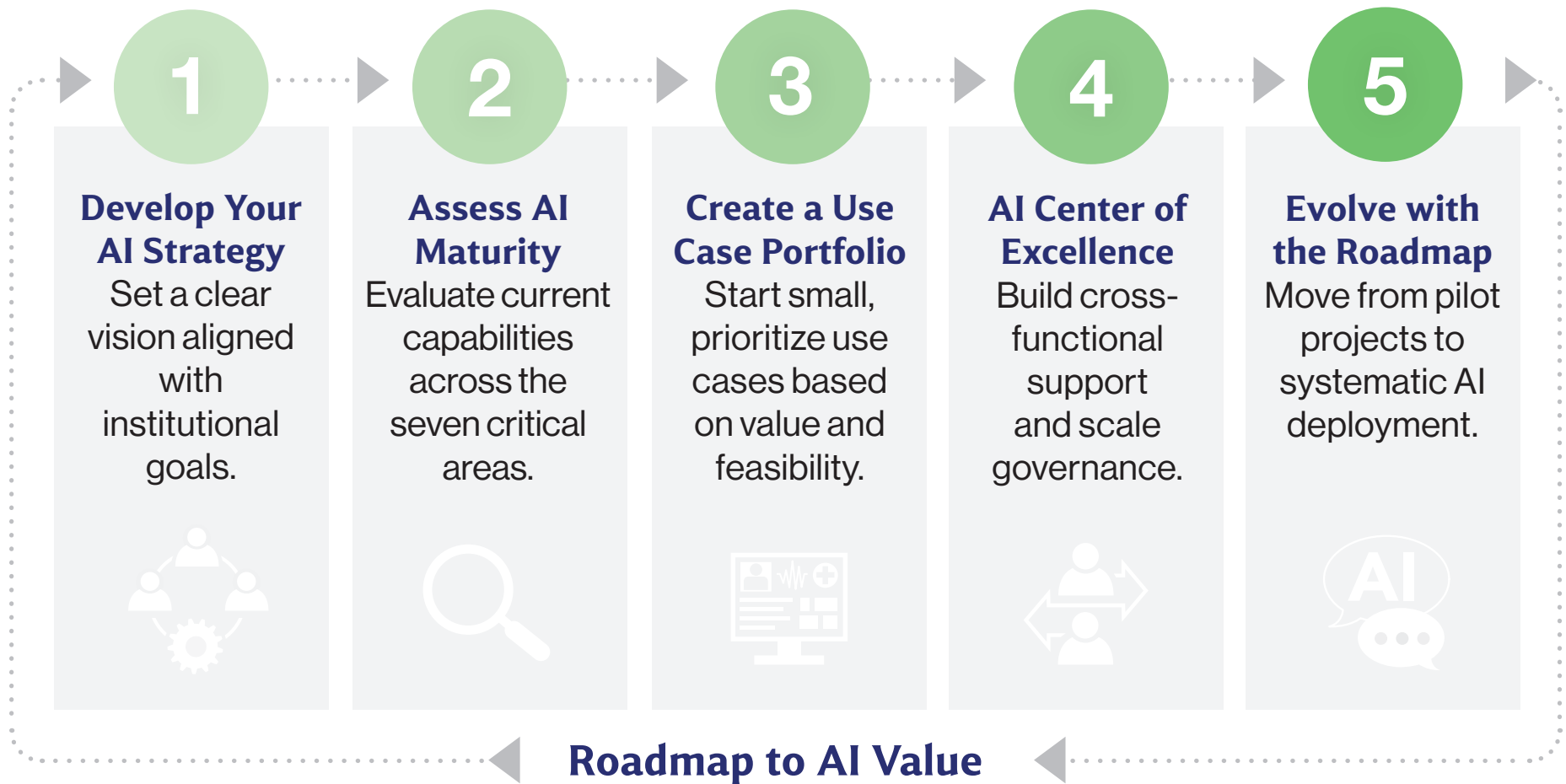
How to Get Started—Where Are You Today?

This AI Maturity Model measures your Financial Institutions progress across seven critical areas.

Click the circle that best suits where I think the o is a zero in these.

● Current Maturity		Strategize	Test	Optimize	Scale	Elevate
AI Strategy	Is AI aligned with business goals?	----- ----- ----- ----- ----->				
AI Value	Are AI initiatives delivering ROI?	----- ----- ----- ----- ----->				
AI Model	Is there an operating model for AI success?	----- ----- ----- ----- ----->				
AI Adoption	Is AI literacy growing across the org?	----- ----- ----- ----- ----->				
AI Ethics	Are responsible AI practices in place?	----- ----- ----- ----- ----->				
AI Readiness	Is data optimized and governed for AI use?	----- ----- ----- ----- ----->				
AI Insights	Are AI solutions scalable and repeatable?	----- ----- ----- ----- ----->				

How to Get Started—AI Roadmap Essentials.



Progression is iterative — focus on sustainable growth, not perfection.

WestCX Takes the Calls, So Your Staff Can Focus On Service.

We empower financial institutions with our AI-native platform that unifies inbound, outbound, and analytics into one orchestrated customer journey.

From onboarding and payments to fraud alerts and loan servicing, WestCX automating routine inquiries, streamlining operations, and building trust at every digital and voice touchpoint.

Proven Results that Drive Growth:

40% reduction in routine calls through self-service automation

Double-digit lift in campaign conversion and cross-sell rates

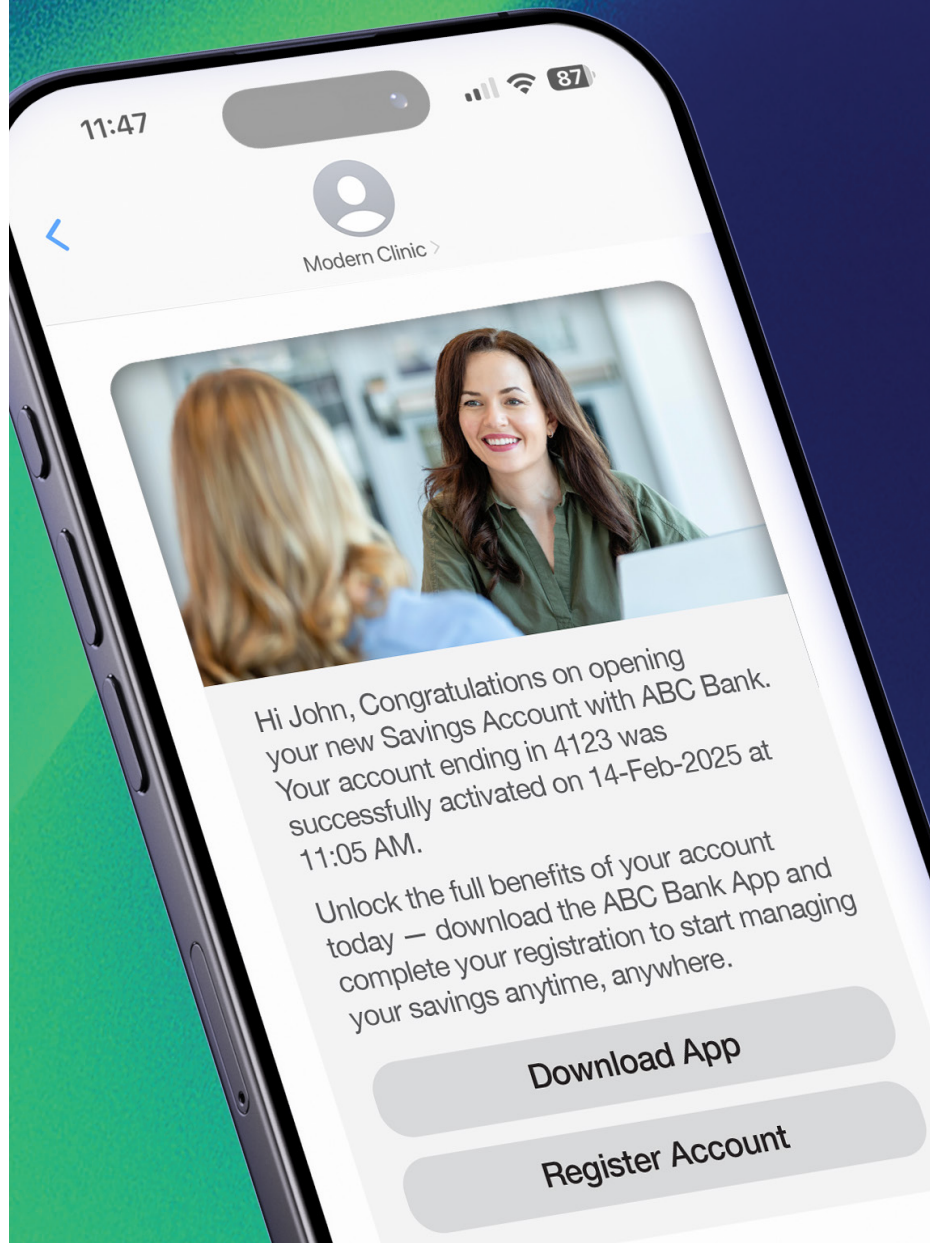
2B+ secure interactions annually, **120M+** lives reached with WestCX

30+ years of expertise supporting regulated industries

11-24X ROI across financial services clients



How We Deliver Results



Onboarding & Account Opening

Streamlined, personalized onboarding keeps customers engaged, reduces drop-offs, and accelerates account activation.

Fraud & Risk Management

Real-time alerts and automated confirmations protect your business, reduce losses, and minimize financial risk.

Loan & Credit Servicing

Proactive reminders and AI-driven outreach improve collections, lower delinquency, and enhance customer satisfaction.

Proactive Campaigns

Targeted cross-sell, upsell, and renewal campaigns drive measurable revenue growth and strengthen loyalty.

Continuous Optimization

Analytics-driven insights refine engagement, boost self-service adoption, reduce call volume, and improve overall satisfaction.

WestCX AI Native Engagement Platform, enables financial institutions to reduce costs, prevent fraud, and drive sustainable growth — turning every financial interaction into a personalized, compliant, and outcomes-driven journey.



www.westcx.com