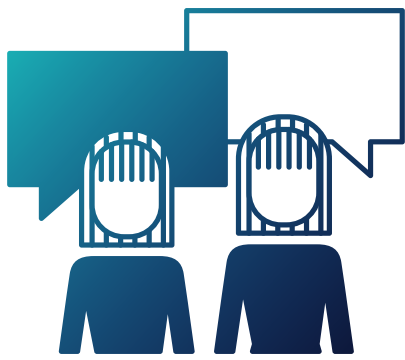


# CXMB Industry Insights: FINANCIAL SERVICES SURVEY RESULTS

This information is from *CXMB Industry Insights: Financial Services 2018*, a research report produced in partnership between COPC Inc. and Execs In The Know, with sponsorship support from VXI Global.

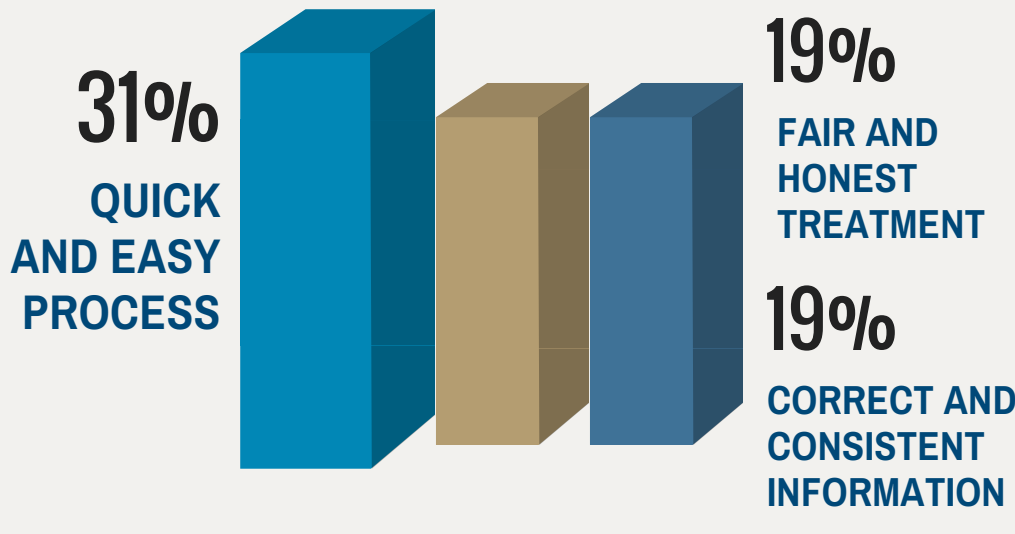
The research confirmed that customer expectations are rapidly changing and that financial institutions need to focus not just on technology solutions but rethink the entire customer interaction—from the customer’s perspective.

**Live assistance is most important 38%**

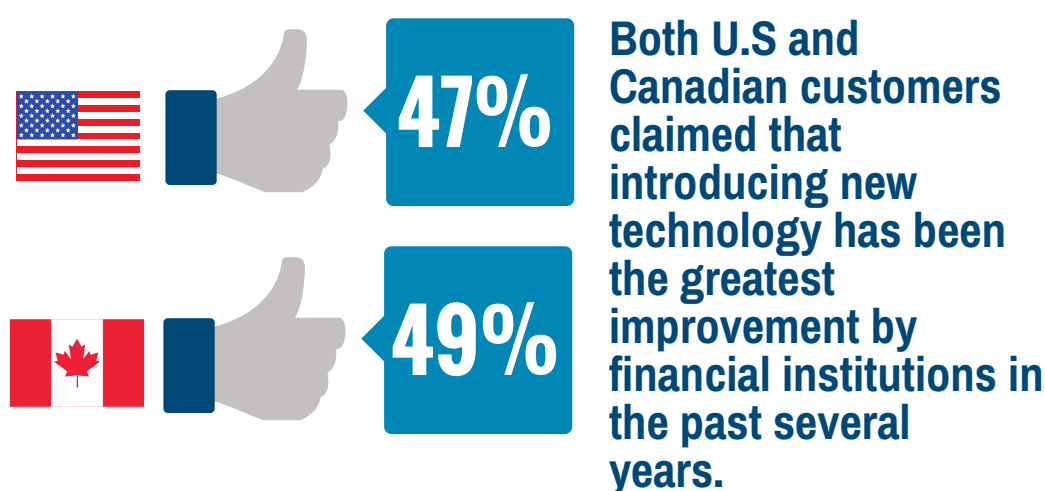


of customers stated that live assistance is the most important factor in choosing a communication channel. This was more important than convenience, speed, reliability or familiarity.

## KEY DRIVERS OF CUSTOMER SATISFACTION

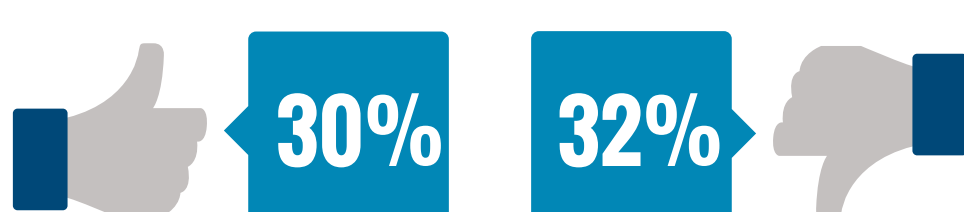


## WHAT HAS IMPROVED: TECHNOLOGY



## WHAT NEEDS WORK: ISSUE RESOLUTION

**57%** of customers reported having moved some or all of their business as a result of a poor customer care experience.



Only 30% of customers believe resolving issues has become easier over recent years, while 32% believe it has become more difficult.

## SELF SELECTION REMAINS IMPORTANT

When consumers self-select a journey that includes multiple channels -- as opposed to being forced into one -- consumers were far more likely to use words like “easy,” “quick,” and “pleasant” to describe that experience.