

A black and white photograph of a man with a beard and glasses, smiling and looking down at a laptop screen. He is wearing a light-colored button-down shirt. His hand is resting near his chin. The background is blurred, showing what appears to be an office or cafe setting with a cup of coffee visible in the bottom right corner.

**:ubiquity**

# 2025 GUIDE TO PROVING *CXROI*

# 3 IN 5 CX LEADERS STRUGGLE TO DEMONSTRATE ROI<sup>1</sup>



Customer experience (CX) is a key driver of business success, but demonstrating its impact and ROI to C-level executives remains a challenge for many professionals. Aligning CX strategies with broader business goals ensures that every initiative directly supports key objectives, positioning leaders to clearly showcase CX value and secure approval for improvements — even when budgets are constrained.

**"Globally, the economic environment is tightening, and we all know that the funding that gets pulled first is that from areas that are unproven in their value to business. We need to demonstrate and validate that CX is critical to business growth."**

— Yvette Mihelic, Director of CX at John Holland Group and CX Network Advisory Board member<sup>2</sup>

When CX specialists fail to connect their initiatives to measurable ROI, the risk of budget cuts increases, along with the loss of access to valuable insights that could enhance strategic spending and overall CX effectiveness. Conversely, demonstrating the impact of CX initiatives builds credibility and secures the trust needed to make investments in essential areas such as automation, data analytics, and staffing. This guide will explore best practices for tracking the ROI of CX and showcasing its success.

1. <https://www.forrester.com/report/the-state-of-voc-and-cx-measurement-practices-2023/RES180658>

2. <https://www.cxnetwork.com/cx-experience/articles/five-insights-on-the-state-of-cx-in-2024>



# 5 STEPS TO TRACK CX ROI— AND BUILD BUSINESS VALUE



CX leaders say that their top obstacles to investing in new CX tools and services are<sup>3</sup>:

- **DEMONSTRATING ROI**
- **SECURING THE NECESSARY BUDGET**
- **GETTING BUY-IN FROM INTERNAL AND EXTERNAL STAKEHOLDERS**

Tracking the right metrics and connecting them in ways that demonstrate CX ROI can help specialists prove the business benefits of CX success, solving the above challenges. Here are five steps to get there.

- 1 **TIE CX STRATEGY TO BUSINESS OBJECTIVES**
- 2 **CONNECT CX METRICS TO BOTTOM-LINE WINS**
- 3 **BUILD THE RIGHT INTERNAL ALLIANCES**
- 4 **TELL THE ROI STORY, AND BUILD A BUSINESS CASE**
- 5 **REMAIN ACCOUNTABLE, AND SHARE SUCCESSES**

3. <https://www.cxnetwork.com/cx-experience/reports/global-state-of-cx-customer-experience>

## STEP 1:

# TIE CX STRATEGY TO BUSINESS OBJECTIVES

CX specialists must look at the big picture. This includes understanding their organizations' mission and goals and related business objectives, as well as the high-level strategy for achieving them. By aligning a CX strategy with organizational goals, specialists create a clear path to proving ROI in a way that resonates with C-level leaders.

## HOW TO ALIGN CX GOALS TO BUSINESS OUTCOMES

WITH POOR/NO CX STRATEGY

WITH IMPROVED CX STRATEGY

SALES REVENUE

+7%

PROFITABILITY

+2%

SHAREHOLDER RETURNS

+10%

Companies that improve their CX have seen<sup>4</sup>:

- Sales revenues improving by up to 7%
- Profitability rising by up to 2%
- Shareholder returns rising by as much as 10%

4. <https://www.mckinsey.com/tr/our-insights/prediction-the-future-of-customer-experience>



Here are two examples of how companies can align CX initiatives with desired business outcomes.

## EXAMPLE 1

### BUSINESS OBJECTIVE

Grow revenue while reducing customer acquisition costs. The head of CX plans to support this goal by focusing on customer loyalty and account expansion.



#### CX Goals

Grow revenue and reduce customer acquisition costs by:

1. Increasing spend from current customers
2. Improving customer retention



#### CX Tactics

1. Launching a proactive customer loyalty program to engage and retain current customers
2. Training and enabling agents to upsell and cross-sell when appropriate



#### Key CX Metrics

1. Customer retention
2. Customer lifetime value

### BUSINESS OUTCOMES

By increasing customer retention, the business sees reduced customer churn and a higher customer lifetime value (CLV). CLV continues to rise as agents become more effective at driving revenue by upselling and cross-selling to existing customers. These CX improvements reduce the need for constant customer acquisition, allowing for a reduced spend on attracting new customers.

## EXAMPLE 2

### BUSINESS OBJECTIVE

Reduce costs in Q1. To support this business objective, the head of CX decides to focus on reducing customer support costs — while maintaining customer satisfaction.

#### → CX Goals

Reduce customer-support costs by:

1. Reducing the number of calls to live agents
2. Increasing first-contact resolutions

#### → CX Tactics

1. Deflecting calls to live agents by improving their self-service tools
2. Adding AI-supported agent tools that help agents more efficiently assist customers, reducing average call-handling times, increasing first-contact resolutions, and improving customer satisfaction

#### → Key CX Metrics

1. First-contact resolutions
2. Number of calls to live agents
3. Average call-handling time

### BUSINESS OUTCOMES

As these metrics improve, current CX initiatives are justified by their direct alignment and impact on the organizational cost-reduction goals. Over time, these goals will also improve customer satisfaction, loyalty, and advocacy.

## STEP 2:

# CONNECT CX METRICS TO BOTTOM-LINE WINS

Many CX professionals — even CX leaders — aren't measuring the right things. Two-thirds of CXOs track customer satisfaction, but only about half of them track retention rates or engagement rates — both of which tie more directly to their company's bottom line.<sup>5</sup>

Establishing a clear connection between CX metrics and bottom-line impact is essential for demonstrating the value of CX initiatives. A well-defined measurement strategy ties CX improvements to financial outcomes, aligning CX efforts with broader business goals.

60% 

**OF CX LEADERS STRUGGLED  
TO LINK THEIR BENCHMARKS  
TO BUSINESS METRICS.<sup>6</sup>**

**“If you can't demonstrate measurable progress, you're not going to get the support and the buy-in and even the funding that you're going to need to make this a long-term success.”**

— Amelia Dunlop, CXO at Deloitte Digital<sup>7</sup>

5. <https://www.deloittedigital.com/us/en/insights/perspective/cxo-challenges.html>

6. <https://www.forrester.com/report/the-state-of-voc-and-cx-measurement-practices-2023/RES180658>

7. <https://www.customerexperiencedive.com/news/cxos-struggle-to-identify-appropriate-metrics-demonstrate-roi/707036>



# HOW TO TIE CX METRICS TO MEASURABLE BUSINESS VALUE

CX leaders must:

1. **Select the right metrics to measure as KPIs**
2. **Understand each metric's connection to the bottom line**

## 1. Select The Right Metrics To Measure As KPIs

To get the C-suite's attention and approval, CX professionals must demonstrate how their expenditures and improvements directly impact bottom-line financial metrics. Standard CX metrics may provide insight into the customer journey but fall short of conveying ROI on their own. To do that, CX professionals must link these metrics to financial indicators that drive business outcomes. Here are common CX metrics, along with examples of how these influence key financial indicators:



- **Net Promoter Score® (NPS)**  
Track the relationship of NPS improvements to positive effects on customer retention rates, average customer lifetime value (CLV), and average customer acquisition cost.
- **Customer Satisfaction (CSAT)**  
Tie CSAT improvements to positive effects over time on the number of referrals, online ratings, customer retention, and average CLV.
- **Customer Effort Score**  
Demonstrate its effect on customer retention to better connect it to the bottom line.
- **Online Ratings**  
Show a connection to ratings' effect on customer acquisition costs and total revenue over time if revenue trends up after online ratings improve.
- **Call Center Metrics (E.G. First-Call Resolution Rates, Average Call-Handling Times, Self-Service Resolution Rate)**  
Map out the full story by showing leaders call center metrics on saved costs or higher revenues.



**“When CX specialists make an effort to see the bigger picture, they can correlate their own metrics with others to tell the full story of how their efforts ultimately drive revenue.”**

— Meg Porter, EVP of APAC at Ubiquity

## 2. Understand Each Metric's Connection To The Bottom Line

Successfully linking the above CX metrics to bottom-line business indicators shows that CX efforts can:

- a) Reduce costs
- b) Retain at-risk revenue
- c) Increase revenue

Key financial metrics can be linked to CX performance indicators, enabling CX professionals to demonstrate ROI from their initiatives:

- **Customer Lifetime Value (CLV)**  
Higher CLV can increase revenue and profitability.
- **Customer Retention (Or Customer Churn)**  
When average customer tenure rises, money can be saved by spending less on customer acquisition.
- **Cost To Serve**  
When this is reduced, money is saved.
- **Cross-Selling Rates**  
When agents can spend more time cross-selling, revenue increases.
- **Renewal Rates**  
When more customers renew their service contracts or return to buy more, revenue per customer is maintained, and overall revenue can grow more rapidly.
- **Average Order Values**  
When more customers renew their service contracts or return to buy more, revenue per customer is maintained, and overall revenue can grow more rapidly.
- **Customer Acquisition Cost**  
When this is reduced, money is saved, which can boost profitability.

While connecting CX metrics to bottom-line outcomes demonstrates reliable ROI, achieving this success demands coordinated efforts with other internal departments to measure metrics and track progress.



## STEP 3:

# BUILD THE RIGHT INTERNAL ALLIANCES

**TWO IN FIVE CX LEADERS SAID THAT ONE OF THEIR MAIN CHALLENGES IS COLLABORATING AND GETTING BUY-IN FROM OTHER DEPARTMENTS.<sup>8</sup>**



Establishing a robust data metrics plan and monitoring it across teams and platforms requires a cross-functional approach. After determining the key metrics, CX professionals often must collaborate with internal colleagues to accurately track the data that help them prove CX ROI. Common skills needed include data mapping, analytics, and IT. Often, specialists can only gain access to these skills and related systems by partnering with other departments, such as:

- IT
- Marketing
- Sales
- Finance

8. <https://www.forrester.com/report/the-state-of-voc-and-cx-measurement-practices-2023/RES180658>

# HOW TO CREATE THE RIGHT INTERNAL ALLIANCES

## To Establish Effective Partnerships With These Teams, Specialists Should Start By:

1. Understanding each department's purpose, goals, and priorities, to find common ground
2. Fostering trust by identifying shared objectives
3. Co-building a compelling case for tracking and demonstrating ROI

## The Key Is To Frame CX Objectives In Ways That Matter To Each Department. For Instance, Focus On:

1. Cost-saving metrics when working with finance
2. Conversion and customer retention metrics with marketing and sales
3. Operational efficiency with IT



## STEP 4:

# TELL THE CX ROI STORY, AND BUILD A BUSINESS CASE.

A well-structured data measurement plan maps CX metrics in a way that tells the full ROI story, illustrating how CX improvements drive better business outcomes.

## HOW TO CREATE A COMPELLING BUSINESS CASE

While building and presenting a business case for CX initiatives, leaders must speak the language of the C-suite. This can include:

- Addressing common executive concerns, such as cost reduction and risk management
- Highlighting short-term and long-term gains, including financial benefits, such as increased revenue, customer loyalty, and productivity

Specialists can also share real-world examples of CX improvements that provide a more immediate financial impact, alongside longer-term strategies that yield significant results:

- Short-term ROI example – Agent training programs improve CSAT, reducing churn rates within three months and yielding retained revenue.
- Long-term ROI example – Improving NPS yields lower customer acquisition costs and higher CLV over two years.

As discussed in Step 2, CX professionals will be more successful in making a business case when CX-focused measurements, such as NPS and CSAT, are linked to broader business outcomes like customer retention, cross-selling rates, CLV, and subscription renewals. Because demonstrating these trends takes time, it's critical to invest in early collaboration with necessary internal stakeholders.



## STEP 5:

# REMAIN ACCOUNTABLE, AND SHARE SUCCESSSES.

A well-structured data measurement plan maps CX metrics in a way that tells the full ROI story, illustrating how CX improvements drive better business outcomes.

## HOW TO DELIVER MEASURABLE RESULTS

Once the CX budget is secured, it's essential to focus on delivering measurable results by achieving CX goals and directly linking them to improved business outcomes. Here's how to do it:

### **1. Strengthen internal partnerships.**

Communicate with departmental partners to reiterate plans and regroup on tracking and sharing of essential data, including the frequency and the delivery method for reporting updates.

### **2. Identify available resources — and potential gaps.**

Assess what can be managed internally and where external vendors may be needed to provide additional expertise or capacity. The first step is to evaluate internal skills and ensure there is sufficient bandwidth to meet CX goals. If necessary, educate the C-suite to align expectations with the available resources and capabilities.

### **3. Prioritize CX initiatives with ROI timelines in mind.**

Start with low-hanging fruit that delivers immediate impact. These short-term successes build momentum and strengthen relationships between teams and leadership. Once initial improvements are in place, focus can shift to long-term goals that require more time to achieve ROI, along with developing a compelling ROI narrative for these larger initiatives.

# HOW TO CREATE REGULAR AVENUES TO COMMUNICATE UPDATES

After making strategic investments in CX improvements, it's important to maintain leadership approval and internal support. This can be achieved by regularly sharing updates with key stakeholders. Here are effective ways to communicate program progress and share CX success:

## 1. Regular Check-Ins

Establish a cadence of update emails and regular check-in meetings for key internal players and outside vendors. Set clear expectations of who will be responsible for providing each type of update, and use these channels to:

- **Communicate progress updates**
- **Solve problems as needed**
- **Celebrate small wins along the way**

## 2. CX ROI Dashboard

Gather all metrics, both CX-focused KPIs and related business outcome metrics, in a C-suite-level dashboard to provide real-time updates and enable on-demand check-ins.

## 3. Quarterly and Annual CX Reports

Prepare for a regular reporting cadence. These reports should be more comprehensive, incorporating not only data but also related trends and insights that demonstrate measurable ROI. In these reports, CX leaders should:

- **Use quantitative metrics** to tell a compelling story, clearly illustrating how their efforts have improved business outcomes, whether through cost savings or revenue generation.
- **Highlight qualitative ROI** — both internally and externally — by showcasing individual moments of customer satisfaction and including anecdotes that illustrate positive impacts on employees.

In every type of update, CX leaders should recognize the individuals and teams that helped with each initiative, including how those teams measure CX effects. These partners are critical to CX success. Recognizing them can strengthen collaboration and encourage future buy-in.

# NEXT STEPS TO PROVE CX ROI

CX improvements directly affect the bottom line, and CX professionals can prove it. This e-book has outlined strategies for aligning CX efforts with business goals. Start today by:

1. Identifying key CX metrics
2. Considering how these CX stats affect bottom-line business metrics
3. Determining which internal teams would make useful partners

With these first steps, CX professionals can begin making the strategic partnerships that help build their business case and ultimately prove the ROI of good CX. CX leaders who prioritize data-driven strategies and cross-functional partnerships will improve their CX results and position their organizations for sustained success.

**58% OF U.S. CUSTOMERS ARE READY TO PAY MORE TO A BRAND IF IT CAN PROVIDE A BETTER CUSTOMER EXPERIENCE.<sup>9</sup>**



58%

9. <https://www.forbes.com/sites/shephyken/2022/04/24/fifty-eight-percent-of-customers-will-pay-more-for-better-customer-service/>