

ATB Financial

Moving the dial on CX with real time insight.

How a Canadian financial institution rebuilt customer feedback around its Genesys Cloud migration.



Implementing CX Index as our Voice of the Customer solution has meant real time insight for real time action. We have been able to analyse both our highest and lowest rated interactions and find trends, which led us to make valuable changes to improve the customer experience.

Michael Rogers

Director of Insights, ATB Financial

01 The challenge

ATB Financial was going through a major contact centre transformation, migrating to Genesys Cloud. As part of that shift they needed a customer feedback solution that could integrate across voice, chat and email, deliver contextual insight from every interaction, reduce the manual reporting workload, and meet stringent data security standards.

02 Why CX Index

CX Index was the only platform offering native integration across all the Genesys channels ATB needed, voice IVR, chat and email, while meeting their security requirements with ISO 27001 certification.

Automated and real time

Surveys fire automatically rather than through a manual batch process.

Tied to interaction metadata

Every response carries the context that explains it.

Simpler for everyone

A cleaner experience for customers and for the internal teams acting on it.

03

What they asked customers

With a focus on impact and simplicity, the survey design came down to three questions.

Quality of service “The person I chatted with provided high quality service.”	Request fulfilment “The person I chatted with was able to fulfil my request.”	Ease of interaction “The person I chatted with made the interaction easy for me.”
---	---	---

Open text feedback provided the emotional context behind the scores, and ideas for customer led improvement.

04

How they captured it

ATB rolled out chat and IVR surveys using the CX Index Genesys integration to automate delivery and collect the metadata that makes a score readable.

- Reason for contact
- Team and agent involved
- Wait time
- Department
- Prior experience

05

Bringing insight to life

CX Index opened up data access across the organisation. Agents could see their own performance in real time, managers had team level dashboards, and executives had a top down view across departments. All of it inside the Genesys interface, with no platform switching, which drove higher adoption and faster action.

06

Results

500%Increase in survey
response rates**1m**IVR responses
captured**24%**Improvement in
ease of interaction**27%**Improvement in
request fulfilled**24%**Improvement in
service quality

07

Better insight, better outcomes

CX Index helped ATB Financial close the loop between experience and action, so they could keep improving service quality, drive customer satisfaction and involve frontline teams in the work rather than reporting at them.

Running a Genesys migration?

Onboarding runs alongside the build, so real customer feedback is landing by the time anyone asks how the programme is going. cxindex.com