

# CX Evolution: From Opportunities and Challenges to Sustainable Business Success

A study on the status quo and future of CX management



# The customer is at the heart of our corporate philosophy

Dear Readers,

Under the motto "Customer Everything", we at Deloitte integrate customer experience (CX) into all our services. Our understanding of CX goes far beyond optimizing customer journeys, channels, and touchpoints. For us, a holistic CX strategy is much more an expression of a customer-centric orientation of the entire company.

CX is therefore the starting point and anchor for all our services. Whether brand, growth & loyalty strategies, omnichannel orchestration, marketing & sales transformation, Customer 360 platforms, service excellence or innovation through AI – we offer these services in an integrated manner and with globally leading capabilities.

In doing so, we always pursue the goal of creating maximum added value for business and end customers. Find out in our study how customer experience can drive your business forward. Enjoy!



The best possible customer experience is critically important for most companies. At the same time, there remains a clear need for action and investment to secure customer loyalty and growth.

**HOLGER WEUSTE**  
Customer Offering Portfolio Lead



# CX is the key to long-term business success

Especially in economically challenging times, targeted, conscious investments are important. They are essential for sustainable corporate success and competitiveness. We believe that investments that have both a direct and indirect impact on the customer experience pay off in the long run. **Indirect investments** are, for example, the establishment of a CX organization, the design of CX management and organizational principles or the rollout of a "Voice of the Customer" (VoC) program.

**Immediate investments** directly improve the customer experience. This can be done through innovative technologies at touchpoints, the introduction of a loyalty program or product improvements based on customer feedback. **Both approaches** are indispensable for driving CX improvements, measuring and clearly demonstrating their success.

In view of this, the central research question of this study

arises: **What is the current state of CX management in companies in Germany and what opportunities and challenges arise from this?**

Based on the results of a quantitative survey and qualitative expert interviews, this study provides a comprehensive overview of how CX management is lived in practice. It shows the priority of CX in large companies, how customer centricity is achieved through internal workflows and processes, and how success can be measured by linking classic CX metrics and financial metrics. In doing so, we always highlight current challenges and untapped potential. Finally, the study provides an outlook on the willingness to invest as well as concrete recommendations for improvement.

## What is Customer Experience (CX)?

Customer experience refers to the totality of all conscious and unconscious impressions that a customer collects at every stage of interaction with an organization – across all channels, touchpoints and experiences. CX is created in the area of tension between the customer's expectations and the reality experienced and is characterized by seven central elements: value alignment, product promise, content quality, physical and digital spaces, product performance, customer service and additional services.

# Key results of the Customer Experience Study 2025

## **CX is a clear priority in companies**

Of the study participants surveyed, 92 percent confirm that CX is a high priority in their company. However, the perception of this priority varies between different hierarchical levels.

## **CX accountability is predominantly in dedicated teams**

Dedicated CX teams are primarily responsible for the customer experience, according to 54 percent of respondents. These focus especially on the quantitative measurement of customer satisfaction.

## **There are many reasons for a lack of CX improvements**

The study participants consider rigid internal processes, a lack of willingness to invest, and a lack of customer data and knowledge to be particularly inhibiting. However, these factors are prerequisites for improved CX.

## **Measuring the success of CX remains challenging**

Linking CX metrics to financial metrics is seen by 94 percent of respondents as critical to the strategic underpinning of CX. However, only 20 percent of those surveyed have succeeded in making such a link so far.

## **High investment volume expected in CX in the future**

At 83 percent, the majority of companies expect growth in investments in the CX area over the next three years. The focus is on customer-centric processes, training & enablement, shaping the strategy and vision of CX.

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# 01 | Study Overview

# The methodology of the study includes quantitative and qualitative surveys

For a comprehensive presentation of the status quo and the future prospects of customer experience management in companies in Germany, customer experience experts were interviewed in addition to a quantitative online survey. The expert interviews provided valuable insights into the practice of customer experience management and highlighted currently relevant topics and challenges. Based on these findings, practical recommendations can be derived for companies to further improve their customer experience and make it successful in the long term.

*Please note: The survey and interviews were conducted originally in German and were subsequently translated.*

## **CUSTOMER EXPERIENCE STUDY**

### **ONLINE SURVEY**

In April 2025, 150 CX experts with decision-making authority (predominantly middle and upper management up to board level) were surveyed about CX management in their company. The survey was conducted by an independent research institute and commissioned by Deloitte.

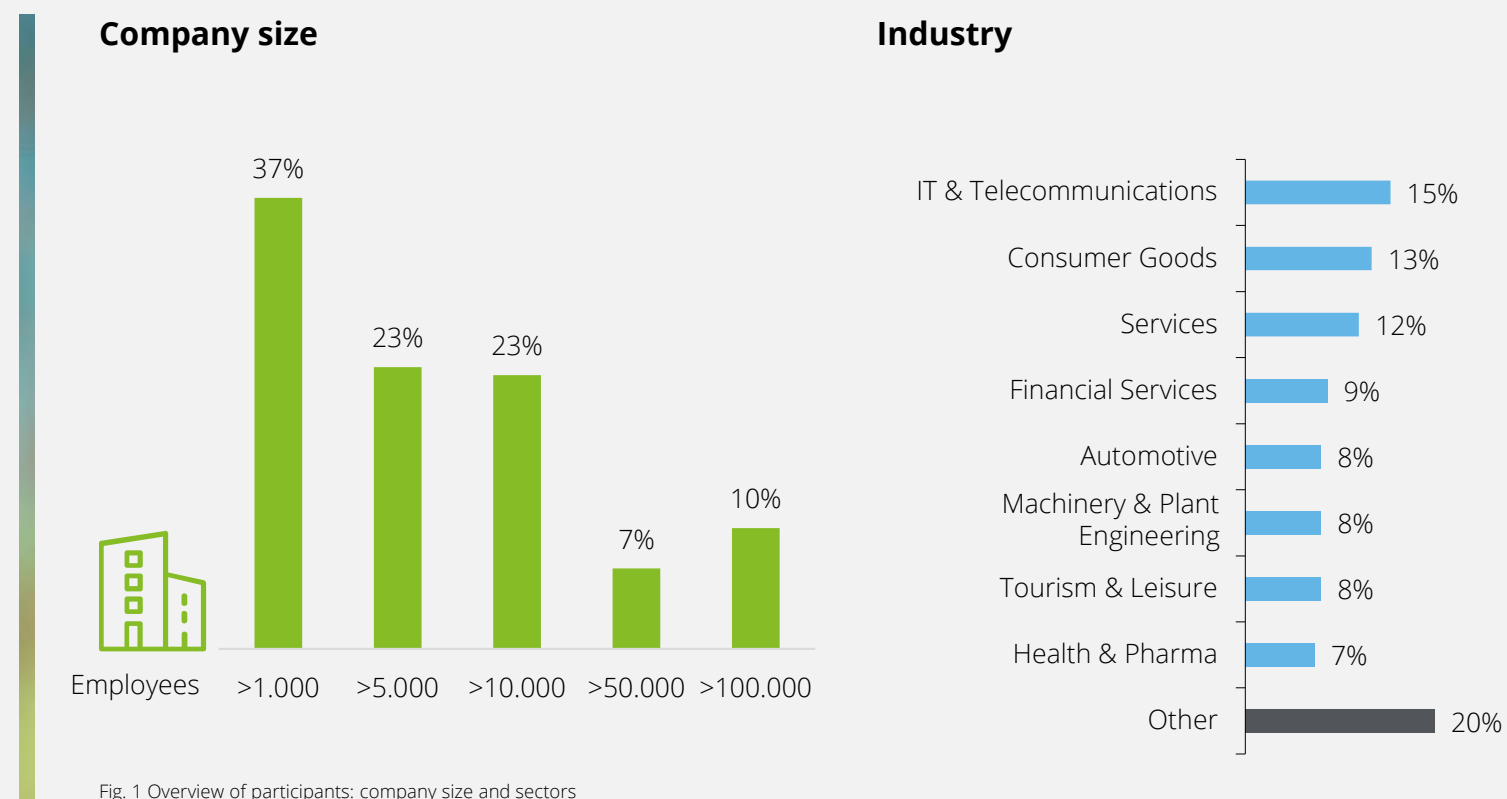
### **EXPERT INTERVIEWS**

To deepen and enrich the results from the online survey, qualitative interviews (approx. 60 min) were conducted with CX experts with decision-making authority in their company from May to August 2025.

# The participants are from large companies in various industries

As part of the online survey, 150 participants who have a professional background in the field of customer experience were asked 18 questions about CX management and the measurement of CX success. Employees of large companies in Germany with 1,000 or more employees were surveyed during a two-week period in April 2025.

When selecting the industries, sample sizes were defined in order to achieve the most balanced result possible.





# The position as well as an existing CX reference qualified for participation

To ensure that the questions of the study can be answered from both an operational and strategic perspective, participants in different positions were interviewed. Almost half of those surveyed classify themselves as middle management. For over 57 percent of the participants, customer experience is a central part of their daily working life. For 32 percent, customer experience is included in some aspects of their work. The participants' CX reference thus underpins the focus of the study as well as its significance with regard to lived CX management in practice.

## Position

### **BOARD**

(strategic corporate management)

### **SKILLED WORKER**

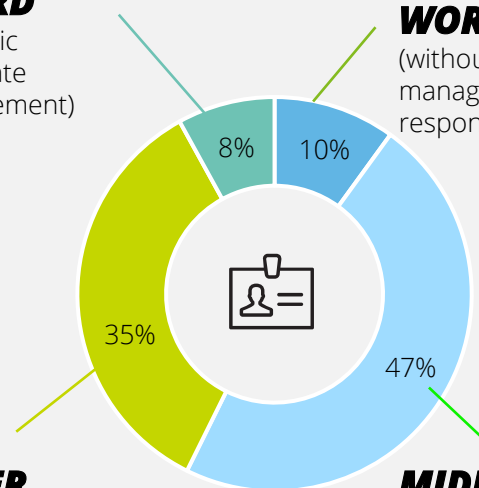
(without management responsibility)

### **UPPER MANAGEMENT**

(Division Management, Managing Director)

### **MIDDLE MANAGEMENT**

(team leader, department head)



## CX Reference

### **Reference**

**57%**

CX is a central part of my daily working life.

**32%**

While CX feeds into some aspects of my work, it's not the main focus of my day-to-day tasks.

**11%**

I occasionally deal with CX, but it is not constantly present in my everyday work.

Fig. 2 Participant overview: Position and relation to customer experience

## 02 | CX Management in Practice

## CX management is lived in practice in many ways

In theory and practice, there are numerous approaches to successfully designing a customer experience. Company size, organizational structure, industry and product play a decisive role in this. While some companies have already established dedicated CX teams, others are integrating CX into workflows of existing structures and departments. Our study findings make it clear that dedicated CX teams are common practice in more than half of the companies surveyed.

In addition to a suitable organizational structure, consistent customer centricity is also essential in order to understand the needs and expectations of customers and to meet them accordingly. Although customer centricity is often a declared goal, its consistent implementation is usually an area of tension between internal structures, resources, and strategic clarity.

A clear CX strategy and target image contribute to an improvement of CX. They help prioritize tasks accordingly, distribute responsibilities efficiently, and reduce potential roadblocks.

**This chapter sheds light on the status quo of CX management of companies in Germany: We look at the degree of customer centricity, the priority of CX, the strategic anchoring, responsibilities and tasks as well as obstacles.**

### CHAPTER HIGHLIGHTS

**57%**

... state that their company is fully customer-centric

**92%**

... confirm that CX is a high priority for their organization

**54%**

... of companies see the primary responsibility for CX with a dedicated CX team

# Customer centricity seems to be well advanced in companies

According to the participants, customer centricity in large companies in Germany already seems to be very established. 57 percent state that their company is already fully customer-centric, while 31 percent report initiated measures for customer centricity. This rather strong assessment could also be due to the prerequisite CX reference of the panel.

In particular, participants from the healthcare and pharmaceutical sectors (73 percent) and the service sector (67 percent) state that their company is completely customer-centric.

## To what extent is your company customer-centric?

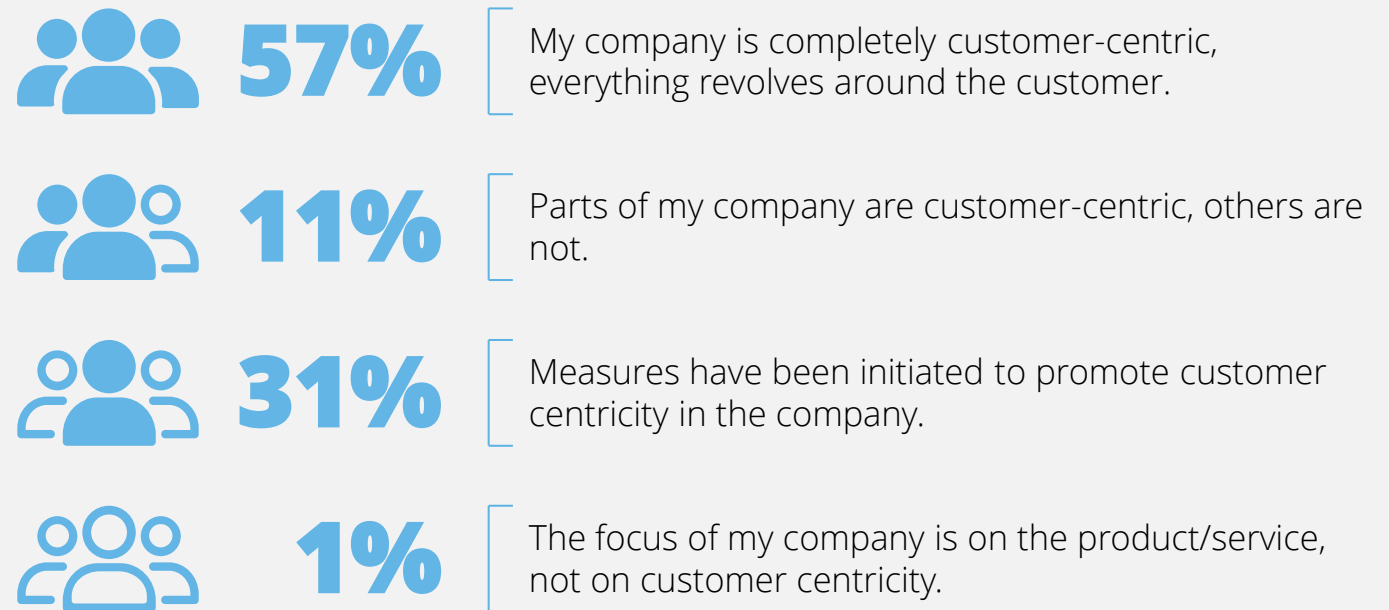


Fig. 3 Customer centricity

"For us, customer centricity is a system approach that affects several disciplines in the company. We want to differentiate ourselves through a first-class customer experience. The key lies in cross-functional cooperation, across organizational boundaries."

**Eldin Thomas**

Head of Customer Experience Management, R+V Insurance

Depending on the product and industry, there are usually different interpretations of "customer centricity". This is therefore also reflected in practice, how customer centricity is strategically anchored and operationally lived. In this example of the insurance industry, the emphasis is on cross-organizational cooperation and differentiation from the competition through a unique CX.

## Optimizing CX is a high priority for companies

Overall, 92 percent of respondents say that optimizing CX is a high priority in the company. CX is particularly important at C-level. Among board members, 100 percent vote "high" or "very high," while far fewer in middle management (66 percent) rate CX's priority as "high" or "very high." There seems to be a slight imbalance in the perception of CX's priority along the corporate hierarchy. In short, the closer to day-to-day operations, where good CX needs to be implemented, the lower the priority of CX.

**On a scale of 1 (very low) to 6 (very high), how high do you rate the priority your company places on optimizing CX?**

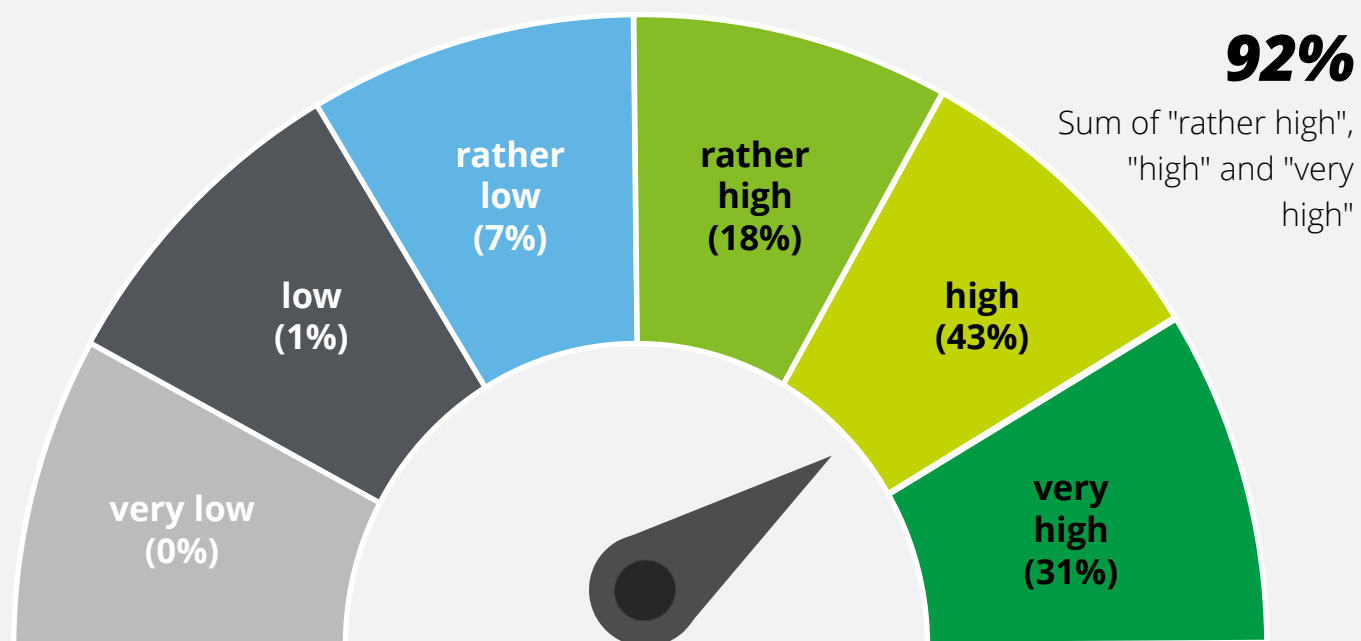


Fig. 4 Priority of customer experience in companies



A prioritization of customer centricity initiated and clearly communicated by the company's management not only creates a strategic orientation, but also actively promotes the design of customer-oriented workflows and processes. This has a lasting positive influence on the company's success, which makes top-down communication of customer orientation a key success factor for both business and customer.

"The drive for greater customer focus came directly from the board of directors. They clearly believe that only customer-focused companies will be successful in the long term."

**Marion Wasser**

Head of Customer Experience, Telefónica

## The vast majority pursues a clear CX strategy and target image

Of the 150 companies surveyed, 141 state they have a clear strategy and vision for CX. Comparing the positions of the respondents, it can be seen that among board members, 75 percent “agree,” while in middle management, only 39 percent express clear agreement. It therefore appears –similar to the question about the priority of CX – that there is a discrepancy in the responses according to position.

In the financial services and machinery & plant engineering sectors, approval is particularly high at 100 percent each.

**To what extent do you agree with the following statement? – “In my company, we have a clear strategy and vision for CX”**

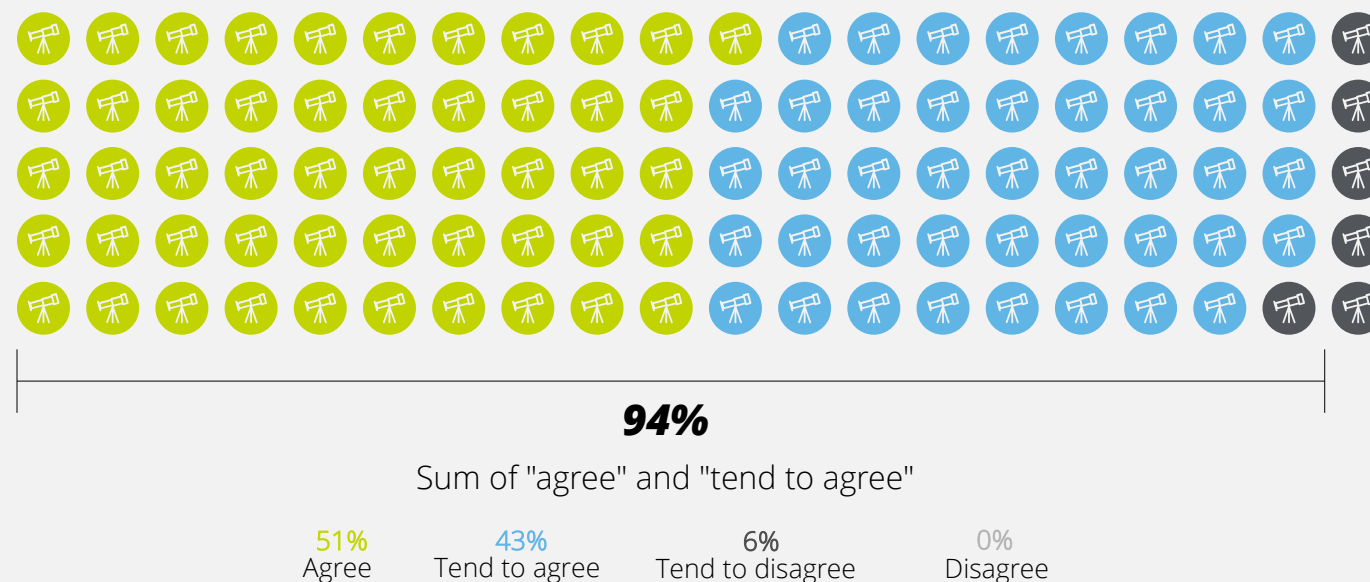


Fig. 5 CX strategy and vision

## CX must be a core element of corporate strategy

“

CX is an elementary part of our overall digital strategy and is accordingly centrally anchored in our mission statements and guiding principles!

**Ingo Lasslop**, VP of Connected Company, Digital Products and Services, BMW

By incorporating the customer in strategic guidelines, CX is established and perceived as a cross-company focus.

“

We have a company-wide and cross-border customer strategy. This is supplemented by a country-specific catalogue of measures that specifies concrete transformational measures.

**Anne Stilling**, Global Director Brand & Media, Vodafone

A global CX strategy is operationalized by specific measures at the country level.

“

We used to have a separate CX strategy in the CX team. In the meantime, CX and NPS have become an integral part of the corporate and B2C strategy and the customer perspective has become indispensable. I think that's much better, because it underlines the high priority that customer satisfaction has for us.

**Marion Wasser**, Head of Customer Experience, Telefónica

CX gains visibility and relevance by being integrated into the company's overall strategy.

## The main responsibility for CX is predominantly held by dedicated teams

In 54 percent of the companies surveyed, the main responsibility for the customer experience lies with a dedicated CX team. In the automotive industry (67 percent) and IT & telecommunications (65 percent), this main responsibility is far above average. Companies in these industries can thus be seen as pioneers in building CX teams.

Six of the companies surveyed (from Healthcare & Pharmaceutical, Real Estate & Construction and Consumer Goods) say that no one in their company has official responsibility for CX.

### Who is responsible for CX in your company?

#### **OVERALL RESPONSIBILITY**

A dedicated customer experience team has overall responsibility, no one else is responsible.

18%

#### **PRIMARY RESPONSIBILITY**

The primary responsibility is a dedicated customer experience team, but everyone in the company contributes to it.

54%

#### **DIFFERENT AREAS**

Responsibility for customer experience is distributed across different areas in our company.

24%

#### **NOBODY**

No one in our company is officially responsible for the customer experience.

4%

Fig. 6 Responsibility for CX

"We work according to a matrix organization in which we identify CX ambassadors in all countries, brands and functional areas who drive the topic of customer centricity there."

**Inga Bohn**

Head of Brand and Customer Centricity, Amorelie

A matrix approach with CX Ambassadors differs from dedicated CX teams. Thus, the responsibility for customer centricity is distributed among different organizational units instead of concentrated in a specific team. The strategic intent of this matrix structure is to embed CX principles throughout the organization and leverage existing roles and responsibilities to drive customer-centric initiatives.

## CX teams primarily measure quantitative customer satisfaction

Of the companies surveyed, 60 percent cite the quantitative measurement of customer satisfaction as one of the core tasks of the CX team. In second place is the definition and prioritization of CX measures, with their actual implementation in fourth place. Almost half of those surveyed cite the implementation of measures to expand internal customer understanding (e.g. change communication, training, etc.) as an essential area of responsibility.

While classic CX activities mainly take place within the company's own CX organization, 18 percent of projects are also accompanied by CX experts outside of it.

**What is the responsibility of your company's customer experience team? (Condition: Overall or primary responsibility with CX team, n = 108 Multiple answers possible)**

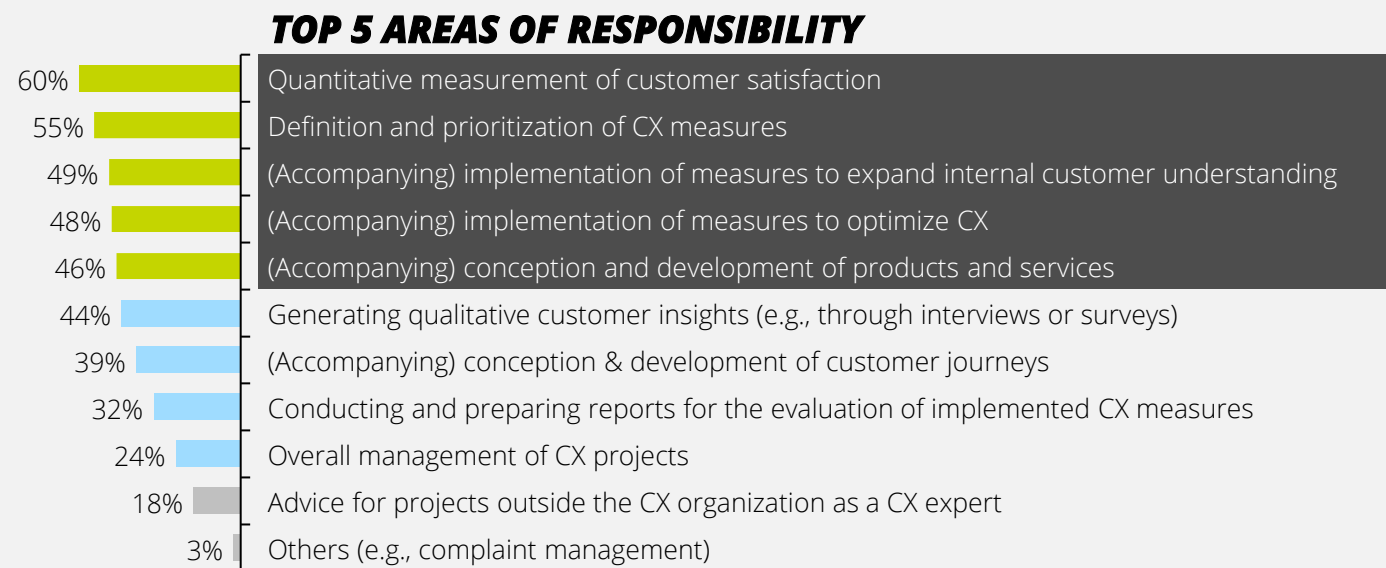


Fig. 7 Responsibilities of the CX team



The collection of customer insights at different touchpoints along the customer journey is the basic prerequisite for the design of customer-oriented products and services. This can be done in different areas of the organization. However, a structural process is needed to bundle this data, analyze it and make it available to the organization. In this way, customer expectations can be addressed in a targeted manner and taken into account in relevant areas.

"Our CX teams focus on enabling, merging customer journeys, and operationalizing data; in doing so, they have brand specifics in mind. Insights are generated through workshops, our test customer panel and an internal market research team, among other things, regularly reviewed and specifically integrated into the specialist departments."

**Dr. Sandra Walter**

Chapter Lead CRM & CX EnBW Sales, EnBW Energie Baden-Württemberg

# Rigid processes and workflows primarily hinder CX improvements

There are many reasons for a lack of improvement in CX. The participants cite rigid internal processes and workflows as the biggest obstacle, which in 42 percent of cases inhibit the improvement of CX. In addition, 37 percent of respondents cite their company's lack of willingness to invest as the reason for a lack of CX improvements. In 31 percent of cases, there is a lack of customer data and customer knowledge from different company sources to improve CX. The top 4 also includes difficulties in proving the financial contribution of CX to the company's success. Only 17 percent see a hindering corporate culture as an obstacle.

## What is preventing your company from improving the customer experience? (Up to 5 entries possible)



Fig. 8 Barriers to improving CX

## At the same time, the company culture is a strong driver for improved CX

“

Complexity in IT is often the biggest obstacle to a good customer experience. System disruptions are frustrating for our employees and lead to rather suboptimal customer experiences.

**Anne Stilling**, Global Director Brand & Media, Vodafone

A complex and fragmented IT landscape, which has often grown over time, can have a negative impact on the quality of the customer experience.

“

Customer orientation must be authentically anchored in the culture and DNA of the company. This is the only way to ensure that the actions of all the people involved are permanently geared to what is really needed on the market.

**Ingo Lasslop**, VP of Connected Company, Digital Products and Services, BMW

While the obstacles to CX improvement are usually manifold, corporate culture is a key driver of customer centricity.

“

For me, the cultural aspect is the most critical point for customer experience. Subjective opinions can easily overshadow or distort the success of CX measures. That's why constant, transparent communication is so crucial. We need a common mindset: We are all part of the customer journey.

**Eldin Thomas**, Head of Customer Experience Management, R+V Insurance

A collective understanding of seeing oneself as an employee as part of the customer journey creates the basis for customer-oriented work.

## 03 | Measuring CX Success

## Measuring CX success as a decisive factor

Measuring customer satisfaction is now common practice in large companies in Germany. Tools for recording, analysis and control as well as the associated "Voice of the Customer" (VoC) programs are increasingly established. For example, 96 percent of those surveyed state that they systematically record the satisfaction of their customers.

The most commonly used metrics include the Customer Satisfaction Score (CSAT), the Net Promoter Score (NPS) and the Customer Effort Score (CES). Quantitative data from various sources, supplemented by qualitative insights, form a sound basis for identifying and prioritizing relevant fields of action and making customer-oriented decisions.

However, linking CX metrics to return on investment (ROI) goes beyond measurement and is critical to managing investments in a targeted and effective way. Although almost all companies measure customer satisfaction, only 20 percent succeed in translating this data into a quantifiable financial benefit. There is often a lack of a systematic connection between CX metrics and financial results – reliable proof of ROI is often lacking.

**This chapter provides an overview of how companies use satisfaction survey results, measure customer experience success, and prove ROI by linking them to financial metrics.**

### CHAPTER HIGHLIGHTS

**96%**

... measure the customer satisfaction

**94%**

... consider the link between CX metrics and ROI to be essential for investment decisions

**20%**

... link CX metrics to financial metrics



## Satisfaction measurement is primarily used for CX optimizations and reports

Of the 150 respondents, only six say they do not measure customer satisfaction. Of those who have a corresponding measuring instrument at their disposal, three do not use the results of the satisfaction measurement. In the remaining cases (n = 141), the areas of use can be divided into seven clusters. 20 percent of the results of the customer satisfaction measurement are used to identify weak points and optimization potentials. Especially companies with more than 100,000 employees use the results for regular management reporting in 22 percent of cases. An interaction with end customers (e.g. recalls) is based on measurement in only 11 percent of cases.

### What does your company use the results of your customer satisfaction measurement for? (Multiple answers possible)

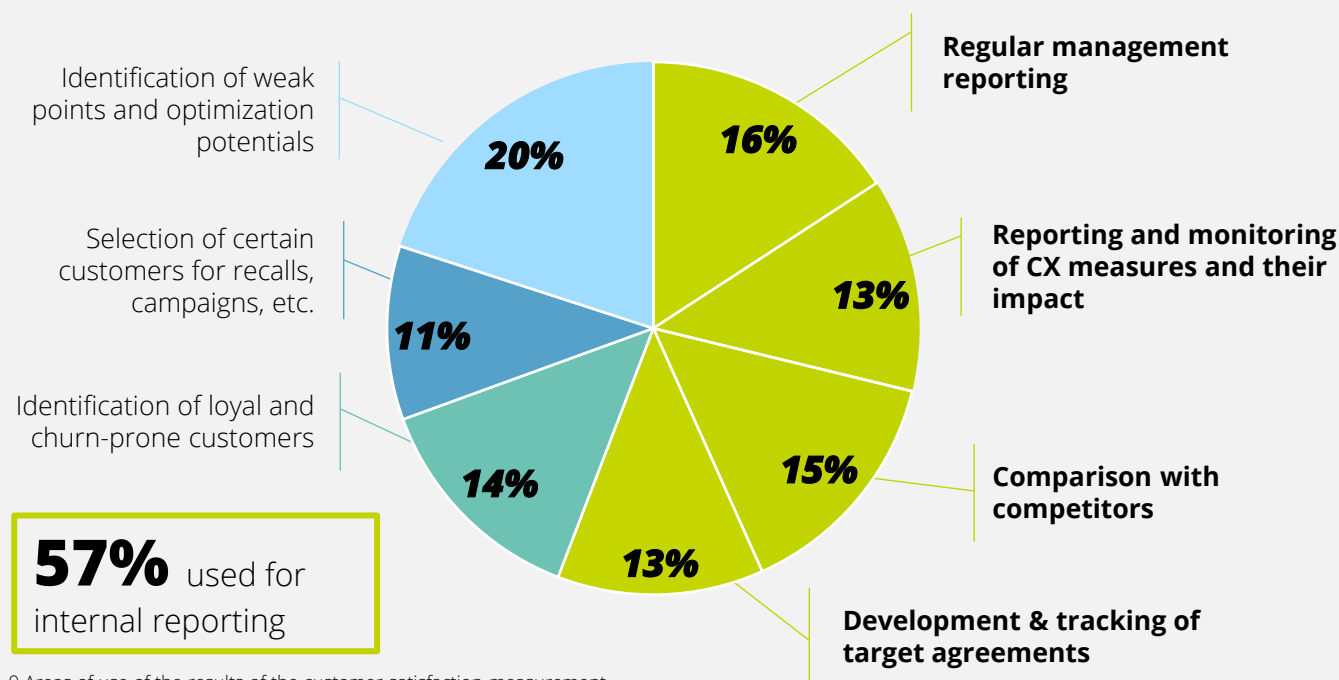


Fig. 9 Areas of use of the results of the customer satisfaction measurement



## Data-driven analyses are used to derive CX measures

“

In the end, CX is also about data, data, data: without data, we can't create a good customer experience. But it's not enough to just have data – you also need the competence to interpret it correctly and make concrete derivations for the customer experience from it.

**Eldin Thomas**, Head of Customer Experience Management, R+V Insurance

In addition to data availability, competent interpretation and use are crucial for added value.

“

We work intensively with data, report and analyze customer behavior and feedback in detail. This is good, because it helps us to identify process errors and pain points and take action based on them.

**Marion Wasser**, Head of Customer Experience, Telefónica

CX professionals use data primarily for reporting to proactively control quality and continuously improve the customer experience.

“

Our products and applications are further developed on the basis of customer feedback from the market launch until in some cases well after the end of production and are continuously updated "over the air".

**Ingo Lasslop**, VP of Connected Company, Digital Products and Services, BMW

The interviewees emphasized iterative improvements to their products through direct customer feedback from different touchpoints.

## The impact of CX on the bottom line is largely evident

While 86 percent of respondents say they have a clear idea of the impact of CX on the business results, 29 percent (Ref. p.22) cite the lack of verifiability of financial contribution as a key obstacle to CX improvements. This shows that the need to measure success is recognized, but concrete proof of financial results remains a challenge for many companies.

The comparison also shows that the larger the company, the more pronounced the awareness of the influence of CX on business success.

**To what extent do you agree with the following statement? – "In my company, we have a clear idea of the impact of customer experience on business results."**

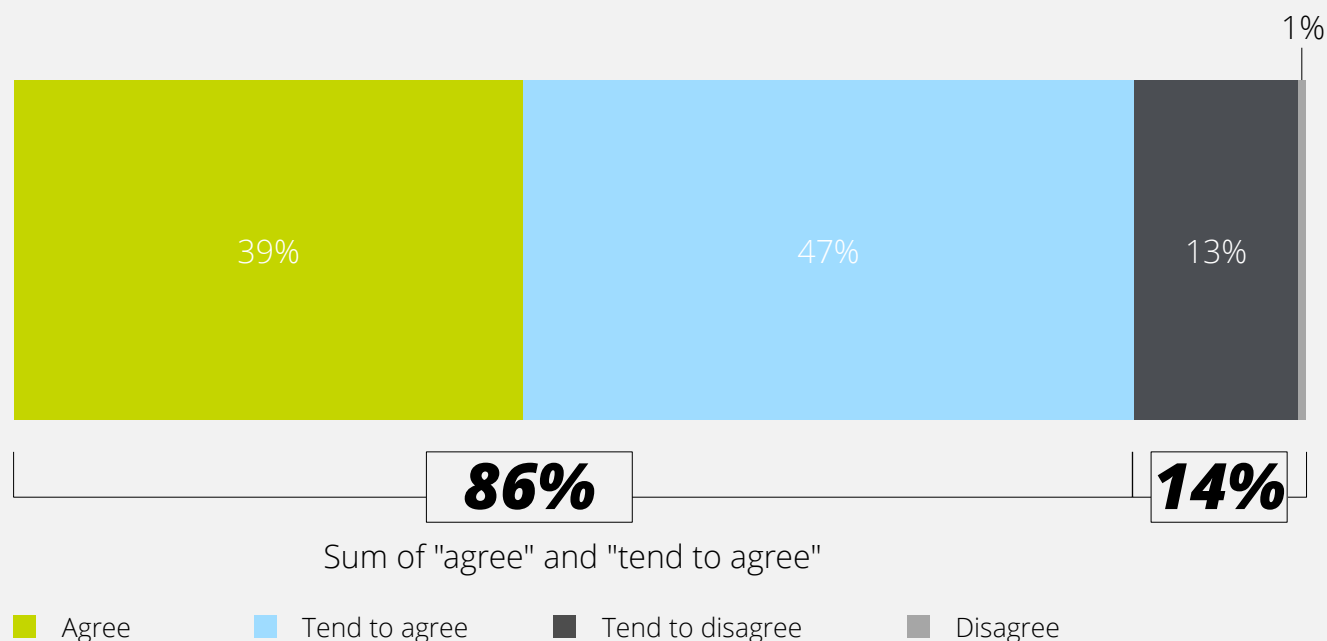


Fig. 10 Impact of CX on the bottom line

"A robust NPS allows us to draw clear conclusions – for example, how many customers are less likely to churn [due to improved CX]. This makes the benefits of CX measures directly measurable."

**Marion Wasser**

Head of Customer Experience, Telefónica

By correlating CX metrics, such as the Net Promoter Score (NPS), with other KPIs, a clear idea of the impact of customer experience on business results can be created. Business-relevant key figures such as the churn rate, revenue per customer, conversion rate, customer lifetime value or repurchase rate are equally suitable for this purpose.

## The success measurement of CX is usually based on classic CX metrics

Only three of the 150 companies surveyed state that they do not measure the concrete success of CX (e.g. the influence of certain measures on business success) at all. Among the most frequently mentioned metrics used to measure CX success are primarily classic CX metrics such as CSAT (by a wide margin), 5-Star Rating, NPS and CES. These can be primarily attributed to the "customer experience" category. CLV is the only top 5 metric to fall into the category of "financial metrics". Other metrics, traditionally used to measure "operational efficiency" and "customer retention," are less commonly used to measure CX success.

### What metrics does your company use to measure CX success?

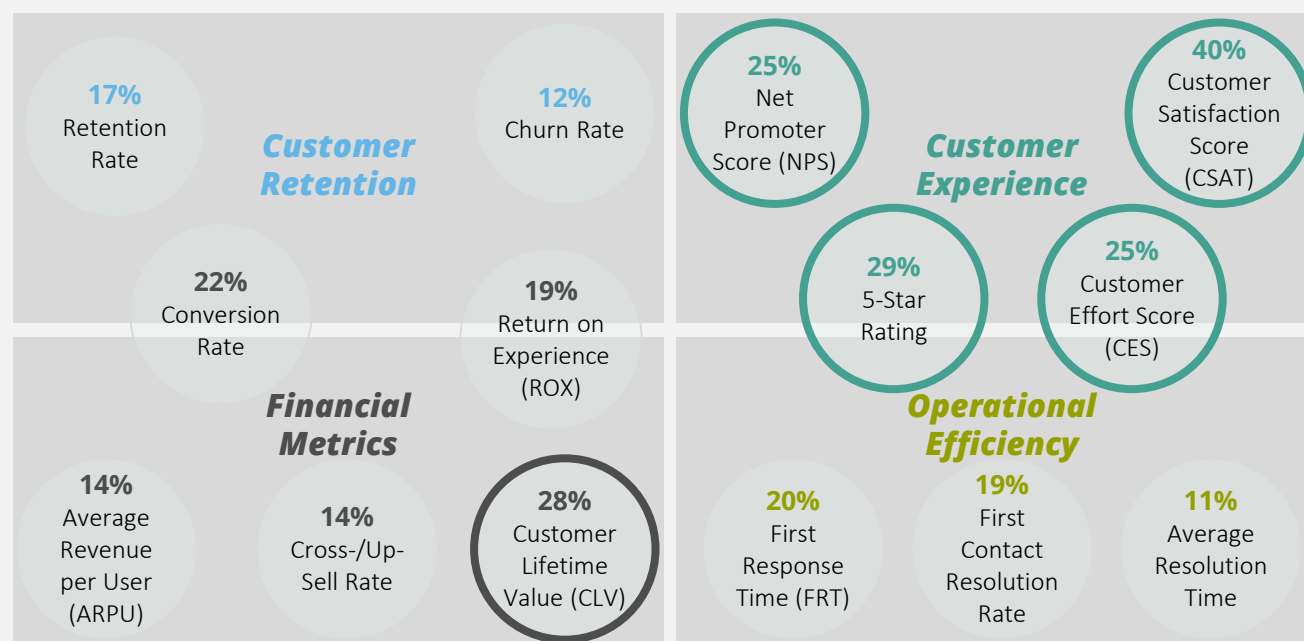


Fig. 11 Metrics to measure CX success

Classical CX metrics such as NPS and CSAT can be used for long-term, overarching measurement, but they are not very meaningful for the management of individual CX measures. In addition, specific, project-related KPIs must be defined for each CX initiative in order to specifically measure the actual effect. This makes the impact of CX measures within the company transparent.

"We use NPS and CSAT as overarching CX metrics. However, I have to admit that I don't find them so valuable for controlling individual CX measures. Instead, we define separate KPIs for CX initiatives in order to measure the effect in concrete terms."

**Inga Bohn**

Head of Brand and Customer Centricity, Amorelie

## CX metrics are linked to financial metrics depending on the context

The majority of respondents (54 percent) say that their company does not link classic CX metrics to financial metrics. 26 percent have no precise knowledge of this. Only 20 percent state that they link these key figures. Among the participants in the quantitative survey, this approach is therefore rather uncommon. However, our interviewed CX experts share different experiences: While the linking of metrics at the level of individual measures depends heavily on the respective measure, a translation of promoters and detractors to the overall success of the company is common practice. (Ref. p.33)

**Do you link classic CX metrics (e.g. NPS) with financial metrics (e.g. ARPU, cross-/up-sell rate) in your company?**

**54%**

No

**26%**

I do not know

**20%**

Yes

**If so, which metric(s) and in what context? (Excerpts)**

"NPS with retention rates"

"The CES is very important for us and of course also affects the cross-/up-sell rate."

"To improve our performance"

"In connection with the effort to satisfy the customer"

Fig. 12 Linking CX metrics



"We understand that satisfied customers buy more and are more loyal. This is also confirmed by our profitability analysis of detractors and promoters. Increasing the NPS is therefore one of our key objectives, regardless of where customers are on their journey."

**Eldin Thomas**

Head of Customer Experience Management, R+V Insurance

For our interview participants, the linking of classic CX metrics and financial key figures is already common practice in their companies. In particular, transparency about the financial added value of promoters as opposed to detractors underpins the importance of CX and appropriate measures to improve CX.

## The link would underpin the strategic importance of CX...

While only 20 percent of respondents already link CX metrics to financial key figures, 85 percent consider this link to be crucial for underpinning the strategic importance of CX in the company.

There is a clear gap between the status quo in practice and the desire to link both types of metrics. In order to be able to substantiate the strategic importance of CX in the company in the long term, this gap must be closed.

**To what extent do you agree with the following statement? - "Linking CX metrics to financial metrics helps us or would help us to underpin the strategic importance of CX in our company."**

**85%**

Sum of "agree" and "tend to agree"

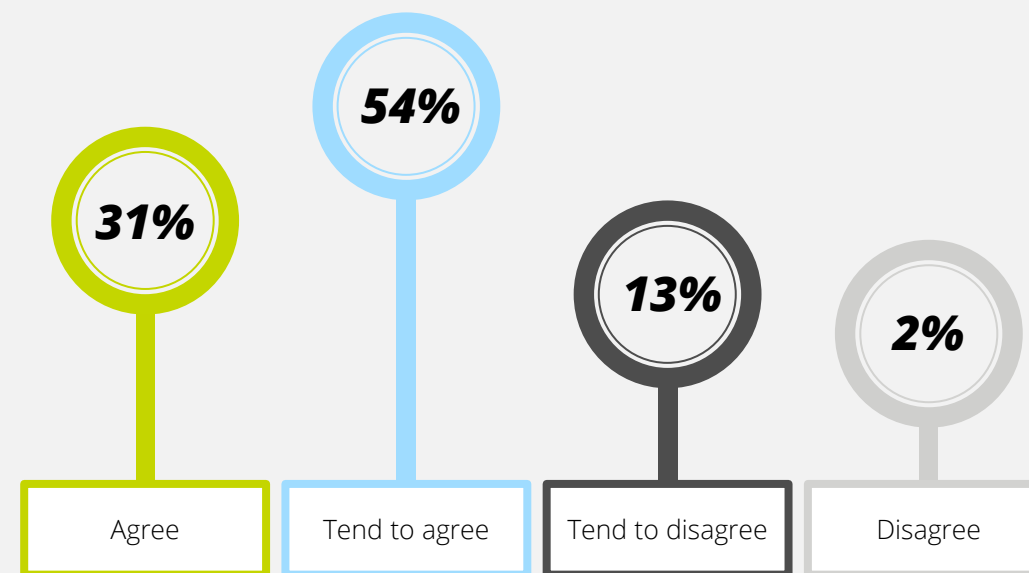


Fig. 13 Linking CX metrics to underpin the strategic importance of CX

... and is crucial for prioritizing CX actions and investments

According to 94 percent of the experts surveyed, it is crucial to prove the return on investment (ROI) and thus link CX metrics with financial metrics to prioritize CX measures and investment decisions.

**To what extent do you agree with the following statement? - "Linking CX metrics and return on investment (ROI) is crucial for prioritizing CX measures and making the right investments."**

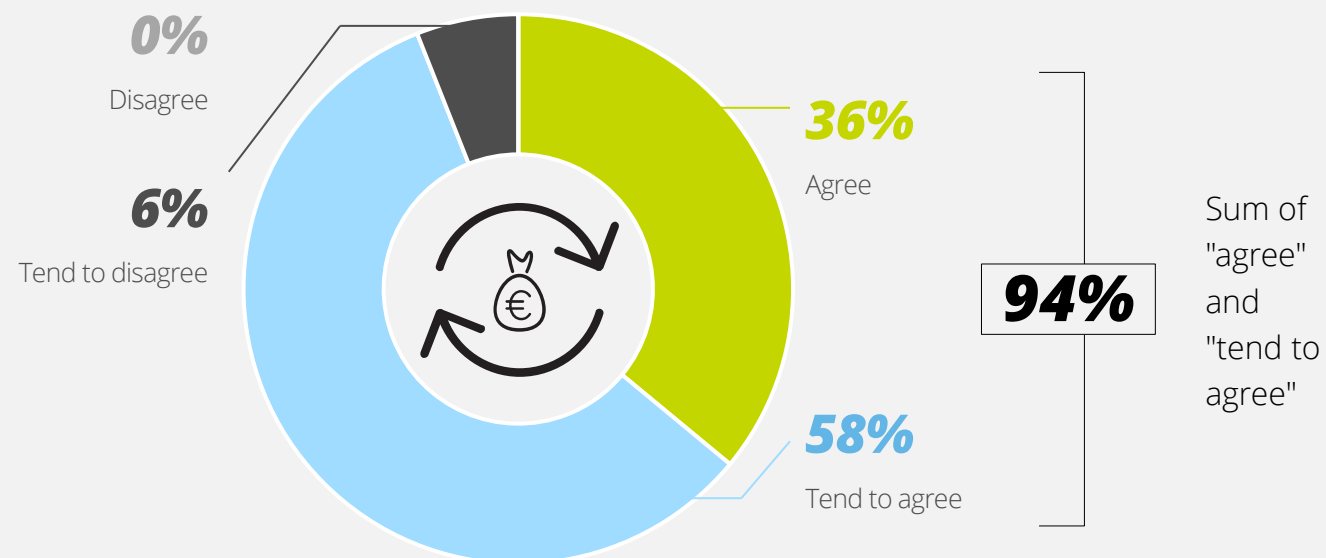


Fig. 14 Linking CX metrics to prioritize CX measures

Based on our quantitative survey, 85 percent see a clear advantage in linking CX metrics to financial key figures. Our interview partners have already implemented this link – with the result that the added value of CX can be measurably proven and communicated throughout the company. This promotes CX awareness across departments and reinforces the importance of CX in the company as a whole.

"For us, one key to success is the measurability of our own projects. That's why we also talk about the contribution CX has made to the success of a measure. The result: our support is actively requested. CX is therefore increasingly perceived as an economic driver in the entire organization."

**Eldin Thomas**

Head of Customer Experience Management, R+V Insurance

## 04 | Outlook for CX

# Customer centricity will continue to gain relevance in the future

In view of current trends and developments, new opportunities and challenges are emerging for CX management. For example, the increasing use of artificial intelligence (AI) is a key driver in the design of customer experiences, the collection and analysis of customer data, and the increased efficiency of internal workflows. It is therefore worth taking a look at the future investments of companies in the CX sector.

The analysis of these investment priorities makes it possible to identify at an early stage which strategic decisions companies are taking in order to adapt to changing customer needs and market conditions. A sound understanding of these areas provides insight into which topics will gain importance in the future and what companies urgently need to address in order to inspire customers and secure competitive advantages.

**In the final chapter of this study, we look at the future prospects of CX. We examine what developments lie ahead and in which areas future investments will flow.**

## CHAPTER HIGHLIGHTS

**83%**

... expect slight to strong growth in CX investments over the next three years

**49%**

... plan investments in the customer-centric optimization of processes

**38%**

... plan to invest in training and enablement of employees on CX



"CX investments should primarily be directed toward motivated employees. For us, the question of customer centricity is already part of the hiring process. The team's mindset is key, the investments in tools simply support the realization."

**Dr. Sandra Walter**

Chapter Lead CRM & CX EnBW Sales, EnBW Energie Baden-Württemberg

Successful CX is not only driven by the use of new tools or technologies, but also by the attitude and motivation of employees. The targeted search for employees who identify with the CX mindset, spread this attitude within the company and actively shape customer experiences is a key factor for successful CX, in addition to a conducive corporate culture.

# CX investments primarily directed at customer-centric process optimization

The most frequently mentioned investment area is the customer-centric optimization of processes. Training and enablement of employees in CX comes in second place. In particular, companies from the healthcare and pharmaceutical industries want to invest in defining a CX strategy in the future. Companies in IT & Telecommunications see the optimization of CX at physical touchpoints as a top priority. A total of 30 percent see complaint management as an investment area of CX. The integration of new technologies as well as the conception and development of customer journeys, products and services tend to take a back seat.

**In which areas does your company plan to invest primarily in CX within the next three years? (Up to 5 answers possible)**



Fig. 15 Areas of investment

## CX experts rely on practical insights along the customer journey

“

The money should be invested in proactive customer care. We want to set up systems so that we can contact customers if, for example, a delivery has failed, instead of waiting for them to call us.

**Alejandro Westen,** Customer Experience Director, Hilti

Proactive service increases customer satisfaction and reduces the effort for the customer.

“

Customer journeys on a small scale can already have strong effects. But it gets really exciting when a customer journey is set up and used company-wide. This is where companies should invest!

**Eldin Thomas,** Head of Customer Experience Management, R+V Insurance

A holistic customer journey enables companies to strategically design and optimize the customer experience.

“

If I had to think about where I would invest, it would be in the ability to intelligently merge data and use it in such a way that we can see exactly where customer processes are stuck.

**Marion Wasser,** Head of Customer Experience, Telefónica

The ability to effectively analyze customer data allows companies to make targeted improvements.

# CX investments will grow over the next three years


The CX experts surveyed are positive about their companies' willingness to invest. 35 percent expect strong growth and 48 percent slight growth. A decline is hardly to be expected despite the tense economic situation in Germany. In particular, strong growth in CX investments is expected in the IT & Telecommunications, Automotive, Machinery & Plant Engineering and Consumer Goods sectors.

## How do you assess your company's willingness to invest in CX over the next three years?

Note: Includes all investments that are intended to lead to the improvement of CX indirectly (e.g. introduction of a customer satisfaction measurement tool) or directly (e.g. increase in service quality)

Industry	Strong growth	Slight growth	No change	Slight decline	Sharp decline
IT & Telecommunications	43%	35%	13%	9%	0%
Consumer goods	40%	50%	10%	0%	0%
Services	28%	50%	11%	6%	0%
Financial Services	15%	62%	8%	8%	0%
Automobile	42%	33%	17%	8%	0%
Machinery & Plant Eng.	42%	50%	8%	0%	0%
Tourism & Leisure	25%	42%	17%	8%	0%
Health & Pharma	27%	64%	9%	0%	0%
General	35%	48%	12%	5%	0%

Fig. 16 Willingness to invest

 Dominant assessment

## 05 | Key Takeaways and Recommendations

# Customer centricity must be practiced and made visible company-wide

## RECOMMENDATIONS FROM OUR CX EXPERTS

What recommendations do you have for other CX managers to successfully anchor customer centricity in the long term?

### PRIORITY

CX projects should be cross-functional to promote transformation and collaboration. Leadership buy-in and effective storytelling are crucial.

#### Inga Bohn

Head of Brand and Customer Centricity, Amorelie

### ACCOUNTABILITY

Dear CX teams, implement initiatives yourself instead of just making suggestions to others. Communicate your joint successes. Make visible how you have helped others achieve their goals; as well as your own.

#### Eldin Thomas

Head of Customer Experience Management, R+V Insurance

### CHALLENGES

CX needs to be something that touches everyone in the organization. I can't look at customer centricity in isolation in individual departments – then it won't work.

#### Anne Stilling

Global Director Brand & Media, Vodafone

### FINANCIAL CONTRIBUTION

My three most important recommendations for successfully anchoring CX in the long term:

1. Prove the financial added value,
2. Just start,
3. Secure top-down support.

#### Marion Wasser

Head of Customer Experience, Telefónica

### INVESTMENT

I can really advise every decision-maker to deal intensively with AI. There lies enormous potential for optimizing the customer experience, from direct interaction at all touchpoints to intelligent products and features to internal processes.

#### Ingo Lasslop

VP of Connected Company, Digital Products and Services, BMW



# CX decisions must be made with strategic clarity

	<b>PRIORITY</b>	<b>ACCOUNTABILITY</b>	<b>CHALLENGES</b>	<b>FINANCIAL CONTRIBUTION</b>	<b>INVESTMENT</b>
<b>KEY TAKEAWAY</b>	While top management emphasizes the importance of CX and thus creates an important foundation, this is less strongly perceived by middle management.	Most companies measure customer satisfaction using appropriate tools. However, they tie up more resources for internal reporting purposes than CX optimizations.	Companies are confronted with a variety of challenges in CX management, especially with mostly scarce resources and rigid processes.	Companies recognize the relevance of measuring CX success and its contribution to the bottom line, but are not yet implementing it consistently.	Despite economic tension, CX investments will continue to rise. This is especially true in the areas of customer-centric process optimization, training, and enablement.
<b>RECOMMENDATION</b>	Transparent communication is essential to involve all employees in CX initiatives. The relevance of the participation of each individual must be emphasised. This is the only way to prioritize, live and implement customer centricity across all levels.	CX teams need to focus more on actively shaping and improving the customer experience and bring in their existing tools and skills outside the CX organization and spread them to create multipliers.	All departments and employees must actively involve the customer in their work. Only through a common foundation and the breaking down of corporate silos can a sustainable improvement of CX be achieved.	The linking of CX metrics with financial key figures must be accelerated in order to make successes more visible and tangible. In this way, it is possible to further underpin CX as a corporate priority and promote investment decisions in favor of CX.	Investment decisions must be adapted to industry and customer requirements and take trends into account. However, the latter (e.g. the use of new technologies) must always be checked for viability, desirability and feasibility.

# Our Customer Experience Experts

The Deloitte team of experts will assist you with any questions or suggestions you may have regarding CX management



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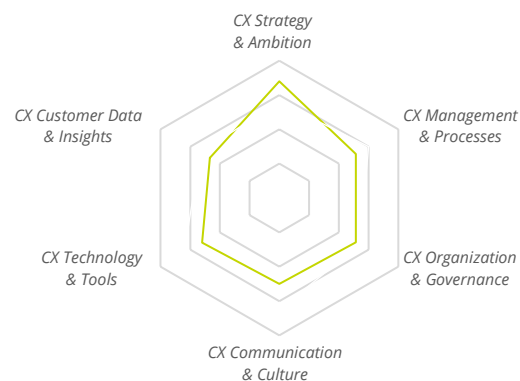
# Improve your customer experience with Deloitte Digital

## Tool

### **CX MATURITY ASSESSMENT**

At Deloitte Digital, we know that achieving CX excellence is a transformative process. Our **10-minute assessment** will help you assess your company's CX competencies and uncover opportunities for growth and development.

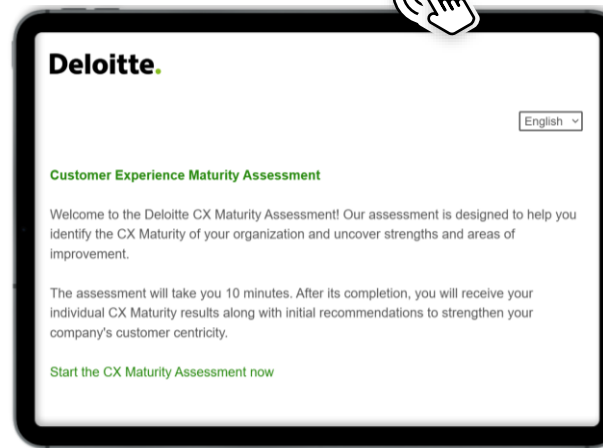
Companies that have successfully integrated CX into their DNA are characterized by a consistent focus on six dimensions. Our assessment evaluates your organization's capabilities in these dimensions and ranks your maturity level into four levels per dimension.



### The CX Maturity Model

34 questions guide you through six dimensions, based on our **CX maturity model**.

**Try it now!**



# More Deloitte insights on customer experience

## Format

### **CX TRANSFORMATION LAB**

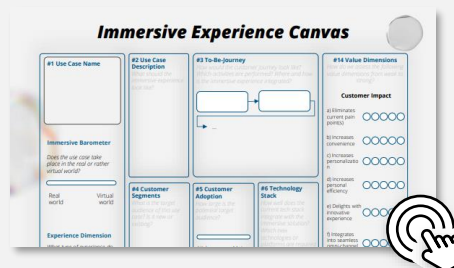
Our CX Lab is designed to identify the organizational skills needed to pursue CX goals. It serves as a launching pad for building successful CX teams and processes.



## Canvas

### **IMMERSIVE EXPERIENCE CANVAS**

Our Immersive Experience Canvas is a handy tool to help you identify, structure, refine, and validate your immersive projects.



## Study

### **CUSTOMER EXPERIENCES IN THE METAVERSE**

This study examines how to achieve successful CX in the metaverse and what companies need to consider.



For more information or if you are interested, please contact us or visit our website at:  
<https://www.deloittedigital.com/de/en/insights.html>



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