

How a Leading Retail Bank Took Control of Its Experience Management Program

- ✔ **Recognized the need for a more capable XM platform**

This bank's EX team had already been working in Qualtrics, while the CX team was using a different platform. The CX team decided to switch to Qualtrics to gain more knowledge and insight into their customers' opinions to improve their experience management program.
- ✔ **Walker is brought in to make the big move**

Walker stepped in to migrate 15 customer surveys, three data migration surveys, and 16 historical data import shells. To track and analyze the survey results, 21 dashboards were created. A closed-loop ticketing process ensures timely follow-up. Three surveys use custom sample processes, and the rest use standard Qualtrics automations.
- ✔ **New platform plus training allows for full control over XM program**

With the Qualtrics platform and Walker's expertise, this leading retail bank is now able to more efficiently collect, analyze, and report on customer feedback. Walker trained the team, which now has the capability to create, edit, and have full control over their surveys and reporting. The CX and EX teams are now both working within the Qualtrics platform, creating consistency across the company.

RESULTS

3

custom sample processes

increased

customer insights

unified

CX and EX teams' platforms