UNPACKING THE STATE OF
CONVERSATIONAL EXPERIENCES:

How brands can achieve higher Conversational CX Maturity

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Introduction

Today, most businesses function in a highly competitive digital environment. They are under constant pressure to deliver exceptional customer experiences while keeping pace with rapidly evolving technologies and shifting customer expectations.

The rise of digital interactions has transformed the way customers engage with businesses, creating a landscape where instant, convenient, and personalized communication is no longer a luxury—it's a necessity. Take Black Friday for instance – 20 years ago American customers would line up for hours and wrestle their way through crowds to grab the latest products for a discount. Fliers in the mail, paper receipts and warranties, and overloaded call centers were the main ways brands would connect with their customers for this massive event.

Today, Black Friday is a worldwide event, that is spread across four days and primarily consists of online sales. Brands send personalized and targeted messages to promote specific products and deals to specific customers – at least that's the ideal scenario for most customers and businesses.

Creating this kind of conversational experience has proven to be a challenge for many businesses. Fragmented communication channels, siloed data, and outdated legacy systems often prevent businesses from delivering a unified customer experience. These challenges are compounded by increasing competition, where brands that fail to meet customer expectations risk losing them to competitors who do.

Because of these hurdles, improving Conversational CX Maturity is no longer optional—it is a strategic necessity. A mature conversational strategy empowers brands to move beyond transactional communication to deliver meaningful, context-rich, and proactive interactions. By investing in conversational experiences that are intelligent, integrated, and customer-focused, brands can not only differentiate themselves but also drive stronger loyalty, operational efficiency, and long-term growth.

In this white paper, we will break down key findings from the Conversational CX Maturity benchmark from Infobip that gives insight into how brands build conversational experiences, where and why they sometimes fall short, and what can be done to make improvements for better CX maturity.

About the research

We commissioned a survey of 206 enterprise level businesses, focusing on stakeholders from retail, finance, healthcare, and telco businesses worldwide. The survey aimed to uncover how these businesses approach the adoption and use of conversational solutions, how they plan to invest in the future, and where the gaps are in their current solutions are.

There are two factors that are used to measure conversational CX maturity:

- **The journey score:** how many conversational messaging channels are used, and which use cases are automated on these channels

- **The sophistication score:** which technologies businesses are currently using, how well are they integrated, and how do brands use data to influence interactions

The goal of this survey was to use the data to build a Conversational CX Maturity benchmark where businesses can compare their conversational solutions to the industry average and understand where they fall on the scale and most importantly, how to improve.

What makes a brand conversationally mature?

Conversational maturity may seem like an abstract idea. How can you actually measure how "mature" customer experiences are? And what does it mean to be mature?
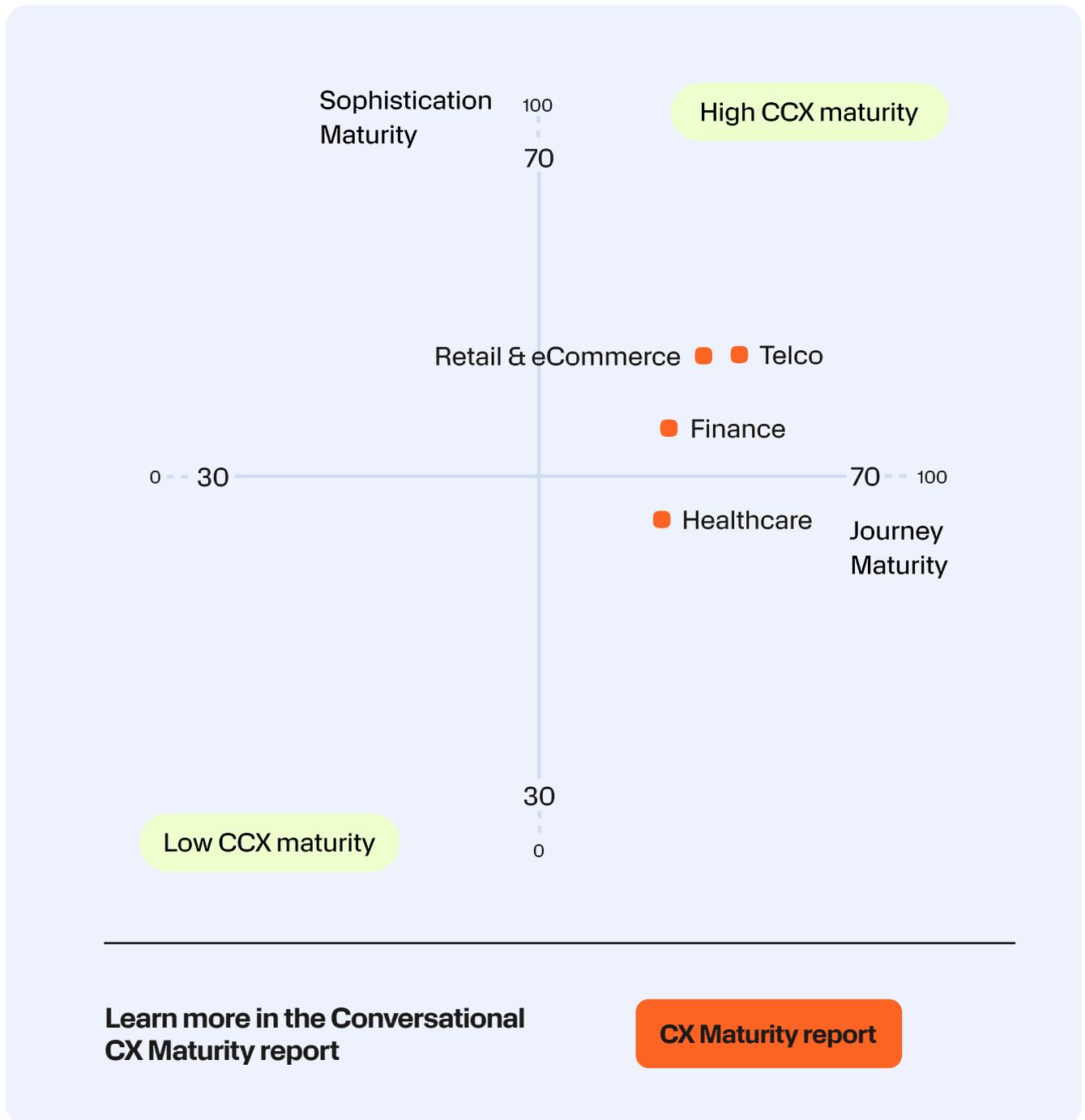
To break it down, let's compare conversational maturity to a city's transport system.

The **journey scoring** is like evaluating how well-connected a city is. A city with a few roads and a few bus routes represents a basic setup, while one with highways, subways, bike lanes, trains, and well-planned routes is more advanced. The more options and efficiency a city offers people to get from point A to point B, the better its infrastructure—just like a brand's customer journey improves with more advanced and automated use cases on various channels – depending on the customer's preference.

The **sophistication score**, on the other hand, reflects how effectively the city's transportation system operates. You can have multiple means of transportation, but the important questions include are the trains running on time? Are traffic lights synchronized? How do riders pay for transportation? Do the buses use the best technology for navigation? Similarly, in conversational CX, we measure how well tools, technology, and processes are connected and support smooth, reliable customer interactions.

Together, these two factors—journey scoring and sophistication—paint a complete picture of how advanced and efficient a brand's conversational capabilities really are, much like how you'd assess both the reach and reliability of a city's transportation system.

Here's how these four industries benchmark on the Conversational CX Maturity scale:

Sophistication Maturity

100

70

High CCX maturity

Retail & eCommerce ● ● Telco

● Finance

0 - - 30

70 - - 100

Journey Maturity

● Healthcare

30

0

Low CCX maturity

Learn more in the Conversational CX Maturity report

CX Maturity report

All four industries score relatively close on their Journey score but vary when it comes to Sophistication. This tells us that they are relatively similar in the number of channels they use and use cases they automate to build their customer journey, but the sophistication of tools and processes behind the journey varies.

Telcos ranked the highest for Conversational CX Maturity, followed by retail, finance, and healthcare. Let's get a better understanding of how these industries made their mark on the Infobip maturity quadrant, and ways in which they can improve.
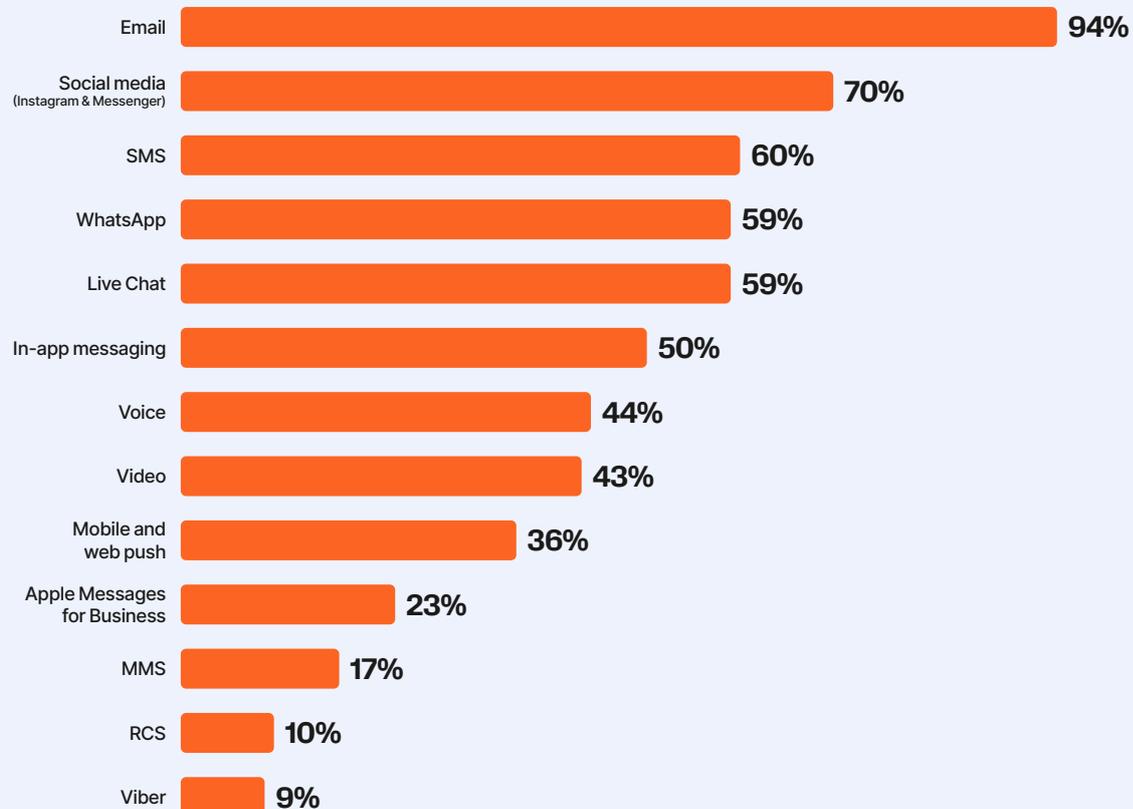
Journey

Channels: The avenues of communication

Channels play a major role in a brand's maturity. A well-developed and tailored journey will take into account what messaging channels are most effective with their audience. In many instances, using various channels in a journey is necessary to give users the best experience. Therefore, brands that have a strong and strategic channel mix that they use to enhance their use cases will have a higher CX maturity than the average.

On average, enterprise level brands from all four industries use about 6 channels. The most popular ones include:

1. Email
2. Social media
3. SMS
4. WhatsApp
5. Livechat
6. In-app messaging

Channels used for customer communication

Channel	Percentage
Email	94%
Social media (Instagram & Messenger)	70%
SMS	60%
WhatsApp	59%
Live Chat	59%
In-app messaging	50%
Voice	44%
Video	43%
Mobile and web push	36%
Apple Messages for Business	23%
MMS	17%
RCS	10%
Viber	9%

Email, SMS, and Voice are staple channels brands have traditionally focused on to communicate with their customers. And they still rely heavily on email (94%) and SMS (60%) to generate interactions with customers, but voice usage (44%) has lagged behind as digital channel usage, such as social media and WhatsApp, have grown in popularity.

Voice has been, and still is, a reliable and necessary channel for things like customer support, with call centers being the backbone of many customer service departments. But with the turn of digital engagement and customer expectations changing, brands have taken notice and began adopting more engaging and rich channels to interact with customers over.

Social media channels, like Instagram and Messenger, have crept up the ranks to get on the same level as the classic channels, with 70% of brands harnessing them for interactions. WhatsApp spikes as the most popular digital channel to use among all brands – with rich features and high popularity as a P2P channel for messaging, it's an obvious choice for many brands that want to cut the noise in busy inboxes and grab the attention of customers.

We are also starting to see the rise of RCS as a channel for business messaging. With its native integration in Android and iPhones and rich messaging capabilities, it combines the benefits of SMS and digital channels like WhatsApp.

Why are brands leaning towards digital channels?

For starters, digital channels like WhatsApp, RCS, and social media offer far more features that allow brands to show case products, services, and even offer self-service options like creating an account or booking an appointment within a chat app. They also offer a more personalized approach to messaging, as many customers are already using these apps to connect with friends and family, making business interactions feel more human-like and tailored to their desired experience.

Overall, digital channels make it easier to carry on a conversation from lead generation all the way to conversion and re-engagement – hence making the entire experience more conversational.
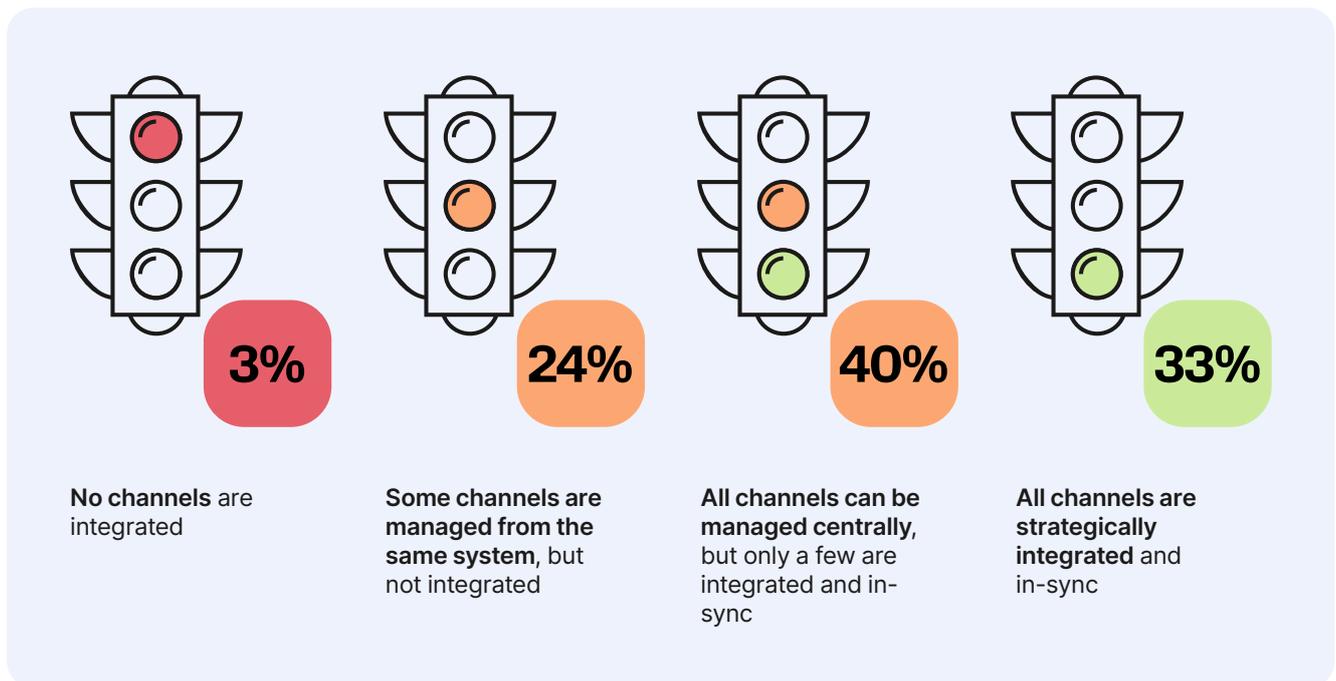
But brands know they cannot rely solely on digital channels. **On average, business will use about six channels for customer communication.** The channel usage usually depends on a few factors:

- **Point in the journey:** all channels have different advantages, perhaps a brand uses in-app chat for customer support, social media for lead generation, and SMS for transactional messages.

- **The use case:** different channels carry different features, making use cases an important aspect of deciding which channels to use. For example, a support chatbot might be more effective on a digital channel where images, videos, and other media can be exchanged.

- **Customer preference:** depending on the location, lifestyle, and demographic of a brand's audience, their channel usage can differ greatly.

- **Deliverability:** brands need to ensure their messages are being delivered, and having fallback channels is essential

What does this tell us? Brands are meeting customers where they are and understand the importance of choosing the right channel to interact with their audience.

Why channel integration matters

Having six or more channels in your communication mix isn't enough to make an impact on your customer experiences. While offering channel variety is the first step, if those channels are not properly integrated into a business' existing systems it won't have the impact businesses are looking for.

3%

No channels are integrated

24%

Some channels are managed from the same system, but not integrated

40%

All channels can be managed centrally, but only a few are integrated and in-sync

33%

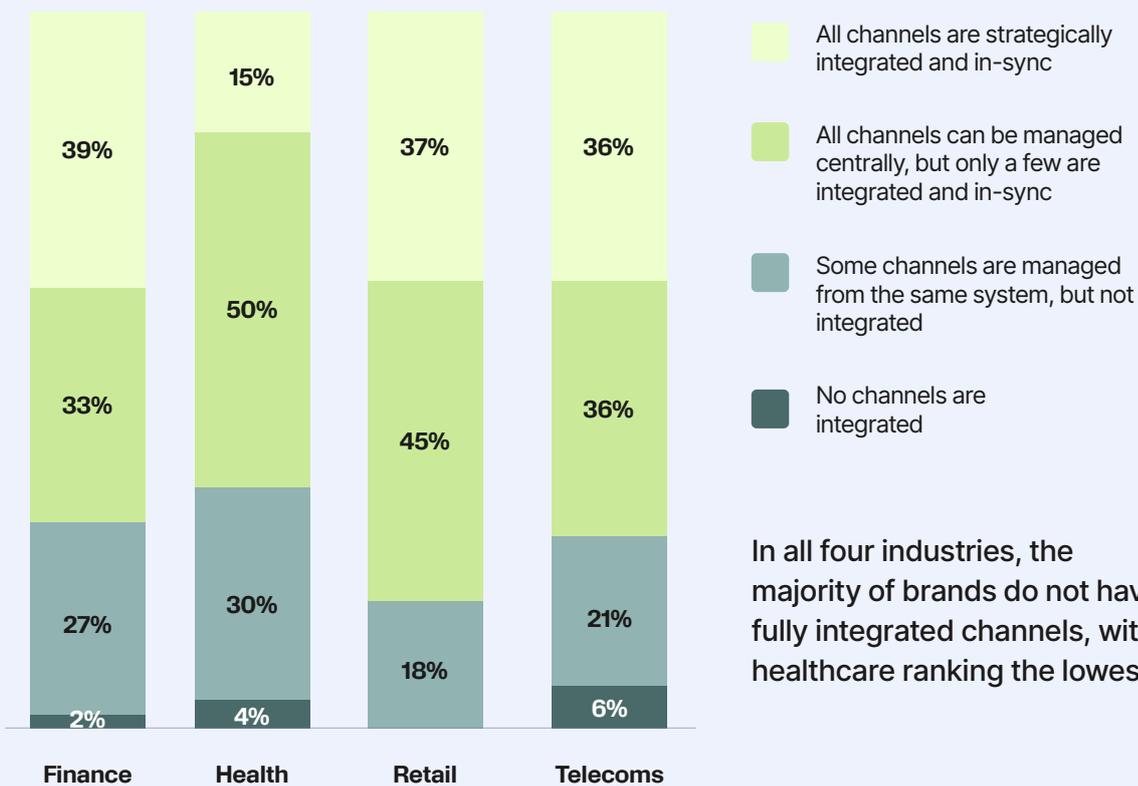**All channels are strategically integrated** and in-sync

Integration levels vary with three quarters of businesses failing to fully integrate channels. This can lead to disjointed conversations, inefficiencies with support, and even missed sales opportunities.

When channels are fully integrated with existing systems, it allows for:

1. **Continuous customer experience:** Fully integrated messaging channels ensure consistent and personalized interactions, reducing friction and repetition for customers.

2. **Unified data:** Integration connects customer data across systems (CDPs, CRM, analytics, etc.), enabling better insights and decision-making.

3. **Automation & efficiency:** Streamlined workflows, chatbots, and automated responses save time and reduce errors.

4. **Scalability:** Integrated systems handle higher volumes while maintaining service quality.

5. **Competitive edge:** Delivering fast, connected support builds loyalty and strengthens brand perception.

Channel integration by industry

	Finance	Health	Retail	Telecoms
All channels are strategically integrated and in-sync	39%	15%	37%	36%
All channels can be managed centrally, but only a few are integrated and in-sync	33%	50%	45%	36%
Some channels are managed from the same system, but not integrated	27%	30%	18%	21%
No channels are integrated	2%	4%		6%

Legend:
- All channels are strategically integrated and in-sync
- All channels can be managed centrally, but only a few are integrated and in-sync
- Some channels are managed from the same system, but not integrated
- No channels are integrated

In all four industries, the majority of brands do not have fully integrated channels, with healthcare ranking the lowest.

What to consider when looking at your own channel mix:

1. What channels are popular among your users (based on demographic, location, and use case)?

2. What channels have the best delivery and open rates?

3. Do you have a fallback channel to ensure messages are always delivered?

4. Do you take advantage of rich messaging features of different channels to elevate the use case and experience for users?

Use case automation: Empowering customers with self-service

Every touchpoint influences your customers' experience and opinion on your brand. So, designing the perfect journey includes strategically choosing which use cases to deploy and when.

Use case automation is a crucial part in building digital customer journeys because it helps tailor the experience to specific customer needs, behaviors, and expectations while lowering the load on live agents and efficiently using tools and resources to optimize experiences.

Use case automation varies in complexity. Some are quite simple to design and launch and others require more resources and time to deploy properly. We organize their complexity in 3 tiers:

1. **Tier one:** simple use cases that do not require a lot of time and resources to design and deploy (simple FAQ chatbots, appointment booking, sending OTPs)

2. **Tier two:** Slightly more complex use cases that require more technical support to set up and manage and some integration between different tools or systems (product returns, providing account information, onboardings)

3. **Tier three:** The most complex use case to design, requiring seamless integrations between various systems and tools like customer data platforms and CRMs (transfer to a live agent, account setup, product recommendations

Access the use case cheat sheet

89% of brands are automating interactions with customers to some extent

Whether it be automating newsletters over email, or OTPs over SMS, automation has become a staple requirement to making journeys enjoyable for both customers and brands. But the more a brand invests in use case automation, the smoother their journeys will be – boosting their maturity.

Top five most automated use cases by industry

Finance	Health	Retail	Finance
3 - Transfer to a support agent (44%)	1 - Appointment booking (61%)	1 - Delivery notifications (55%)	1 - FAQs and support (64%)
1 - Self-service contact info updates (44%)	1 - FAQs and support (57%)	3 - Product recommendations (53%)	1 - Customer satisfaction survey (64%)
3 - Product recommendations (38%)	1 - Personalized reminders (54%)	3 - Transfer to a support agent (51%)	3 - Product recommendations (51%)
1 - Payment due reminders (38%)	3 - Connect with medical expert (52%)	1 - FAQs and support (49%)	1 - E-billing messages (49%)
3 - Automate new account creation (36%)	2 - Send diagnostic results (43%)	2 - Product returns (47%)	1 - Personalized promotions (43%)
3 - Support onboarding process (36%)		1 - Order confirmation (47%)	
2 - Provide usage & account info (36%)			
1 - OTPs (36%)			

The most popular use cases to automate are simple tier one use cases as they require the least amount of resources, setup, and time to launch. They are also made up mostly of customer support use cases such as FAQs, returns, e-billing, reminders, OTPs, and more.

Finance brands tend to automate more complex use cases, making them slightly more mature than other industries when it comes to their use case score.

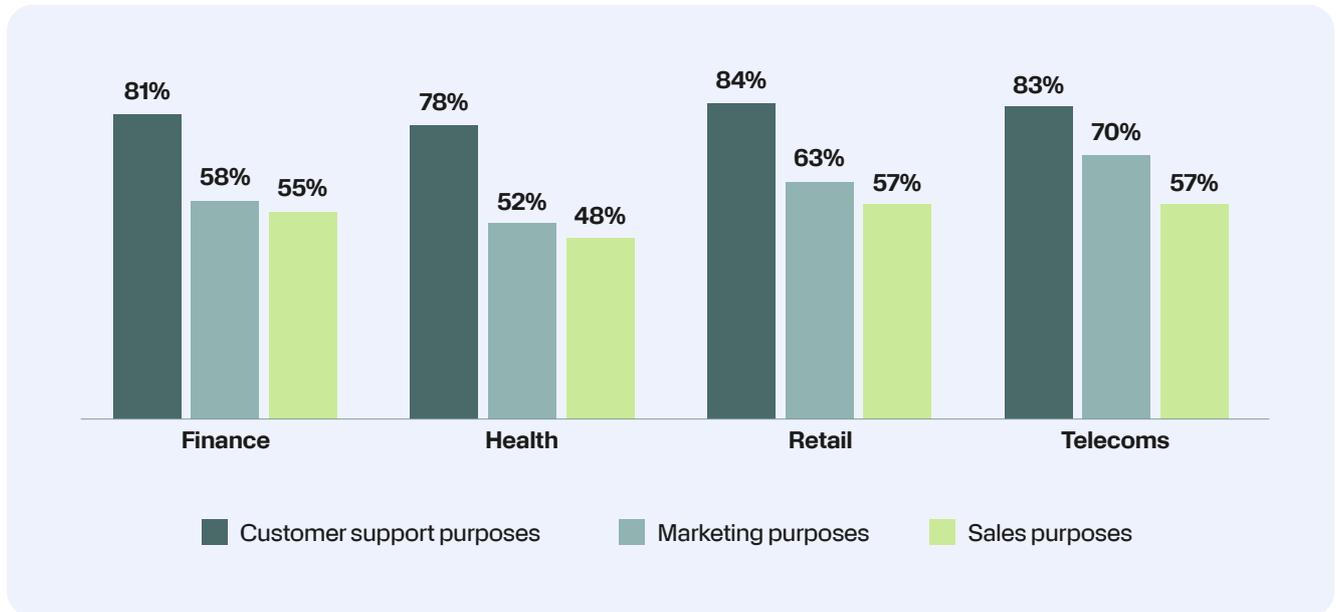### Use cases least likely to be automated by industry

Finance	Health	Retail	Finance
3 - Form-fill abandonment reminder (23%)	3 - Disease management services (26%)	1 - Cart abandonment reminders (22%)	2 - Account usage and top-up (28%)
3 - Apply for loan or credit card (23%)	3 - Symptom tracker (30%)	2 - Re-engage inactive customers (29%)	1 - Loyalty program messages (34%)
1 - Search for local services (25%)	1 - Search for local services (33%)	3 - Product registration and setup (31%)	1 - Appointment booking (36%)
1 - Appointment booking (31%)	2 - Education and onboarding (35%)	1 - Loyalty program messages (41%)	2 - Upselling / cross-selling to existing customers (38%)
1 - Personalized promotions (33%)	2 - Disease awareness campaigns (35%)	1 - Personalized promotions (43%)	1 - Personalized reminders (38%)
			3 - Product registration and setup (38%)

Unsurprisingly, the use cases least often automated are tier two and three – more complex use cases.

Why should brands be investing in more complex use cases?

Offering consistent, seamless, and enjoyable interactions is part of what qualifies a business as conversationally mature. That means investing in developing complex use cases and automating them to give customers a continuous experience, lower the number of pain points, and streamlining internal processes and workloads. It's a win-win situation when done right, but requires time and resources to make it work, which is why many brands avoid it.

When we look at what businesses are using automation for, it's consistent across the board for brands to focus more on customer support. Marketing and sales interactions get less focus.

| Industry	Customer support purposes	Marketing purposes	Sales purposes
Finance	81%	58%	55%
Health	78%	52%	48%
Retail	84%	63%	57%
Telecoms	83%	70%	57%

How complex use cases drive Conversational CX Maturity

Let's explore a complex use case for each industry, what makes it complex, and how they lead to greater CX maturity.

RETAIL: Product registration and setup

Why is this use case complex?

- **Diverse product types:** Handling a wide range of products with unique setups
- **Integration:** Accessing customer accounts, product databases, and warranties, and updating information after registration
- **Step-by-step guidance:** Providing clear, adaptive instructions for different user scenarios

- **Multimedia support:** Accepting photos, videos, or scans for registration validation
- **Input errors:** Managing user mistakes or unclear inputs effectively
- **Personalization:** Tailoring instructions based on the user's skill level or accommodating to their device
- **Language & region variations:** Adapting instructions to local languages or regulations
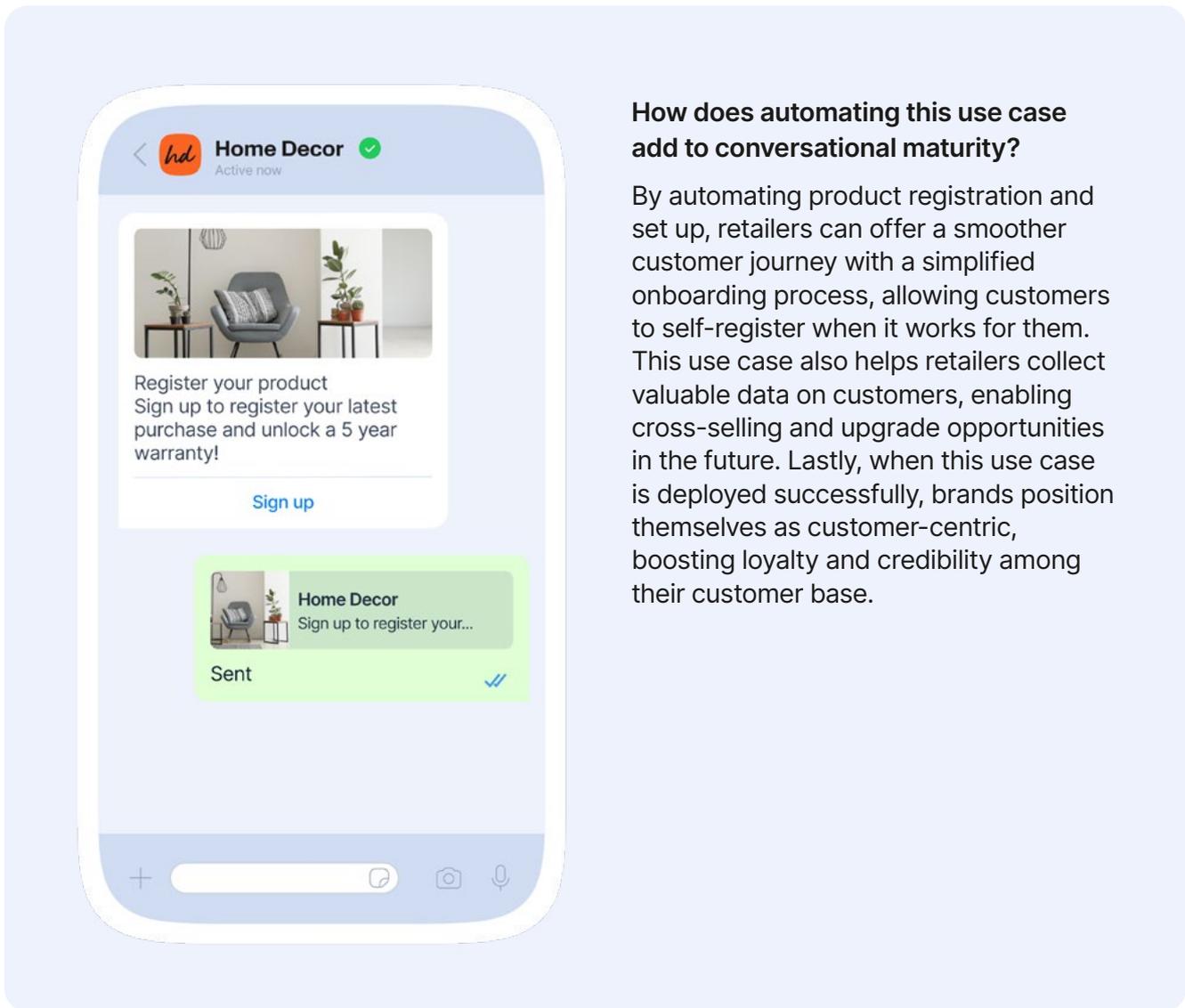
How does automating this use case add to conversational maturity?

By automating product registration and set up, retailers can offer a smoother customer journey with a simplified onboarding process, allowing customers to self-register when it works for them. This use case also helps retailers collect valuable data on customers, enabling cross-selling and upgrade opportunities in the future. Lastly, when this use case is deployed successfully, brands position themselves as customer-centric, boosting loyalty and credibility among their customer base.

Why is this use case complex?

- **Data collection:** Gathering sensitive personal, financial, and employment details securely, and retrieving and updating customer profiles

- **Verification:** Real-time validation of identity, income, and credit history to keep the interactions conversational

- **Compliance:** Adhering to laws and regulations for banking interactions

- **Integrations and algorithms:** Incorporating credit scoring and risk assessment models, and integrating multiple banking systems

- **Document handling:** Accepting, processing, and verifying uploaded files

- **Error resolution:** Addressing incomplete or incorrect applications filled in by the customer

- **Personalization:** Tailoring offers based on the applicant's profile without agent intervention

- **Trust and security:** Ensuring users feel safe sharing sensitive data in a conversational app
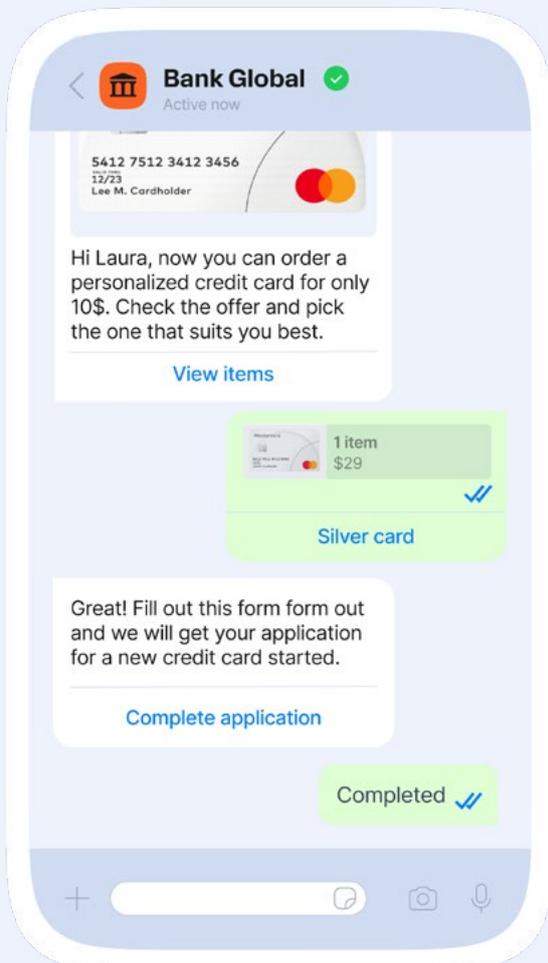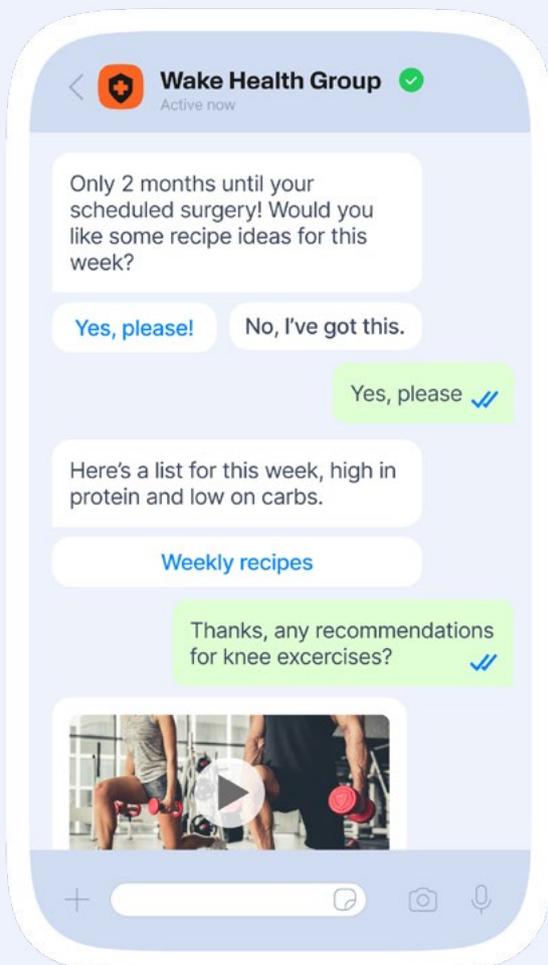

How does automating this use case add to conversational maturity?

By automating loan and credit card applications, banks can streamline their internal processes and scale the amount of applications they can handle at once. This use case provides 24/7 self-service access for customers, can boost conversion rates, and collects valuable data from customers that can be used in the future for personalized product recommendations and consultations.

Healthcare: Disease management services

Why is this use case complex?

- **Compliance:** Adhering to strict healthcare regulations (GDPR and HIPAA)

- **Data sensitivity:** securing highly sensitive patient data provided to ensure the use case is valuable to the patient but also secure

- **Real-time monitoring:** Integrating wearables or devices for ongoing health tracking

- **Complex interactions:** Handling nuanced medical queries and emotional support needs while remaining ethical

- **Medical accuracy:** Ensuring responses align with up-to-date clinical guidelines

- **Integration:** Connecting with EHRs, labs, and care teams for seamless coordination

- **Risk management:** Identifying and escalating critical health issues promptly

How does automating this use case add to conversational maturity?

Automating disease management services helps healthcare providers offer consistent monitoring, timely interventions, and proactive reminders. It enhances accessibility with 24/7 support, reduces costs by easing the burden on care teams, and scales care delivery to reach more patients efficiently. Automation also streamlines workflows by integrating data for coordinated care and boosts patient engagement by encouraging patients to stick to their treatment plans. Ultimately, it fosters patient loyalty by delivering personalized, ongoing support that builds trust, and matures the overall care experience.

TELCO: Transfer to a support agent

Why is this use case complex?

- **Context preservation:** Ensuring the chatbot or self-service tool accurately captures and transfers all relevant customer information, avoiding the need for customers to repeat themselves.

- **Escalation triggers:** Identifying the right moments to escalate, based on issue complexity, urgency, or customer frustration, which requires sophisticated decision-making

- **Seamless handoff:** Facilitating a smooth transition between the chatbot and support agent, ensuring agents are fully briefed on the situation

- **Dynamic routing:** Ensuring the right agent with the correct expertise is assigned, based on the nature of the query (billing, technical support, etc.)

- **Customer expectation management:** Setting proper expectations around wait times or available resources, while minimizing frustration

- **Omnichannel integration:** Handling transfers across different communication channels (chat apps, voice, email) without disrupting the customer experience

- **Handling sensitive data:** Maintaining privacy and compliance when transferring personal or sensitive information to an agent
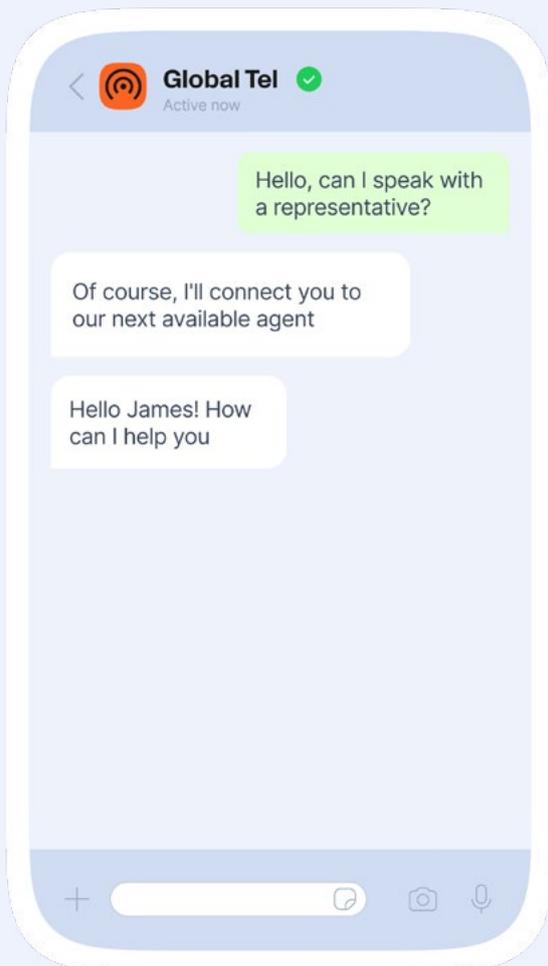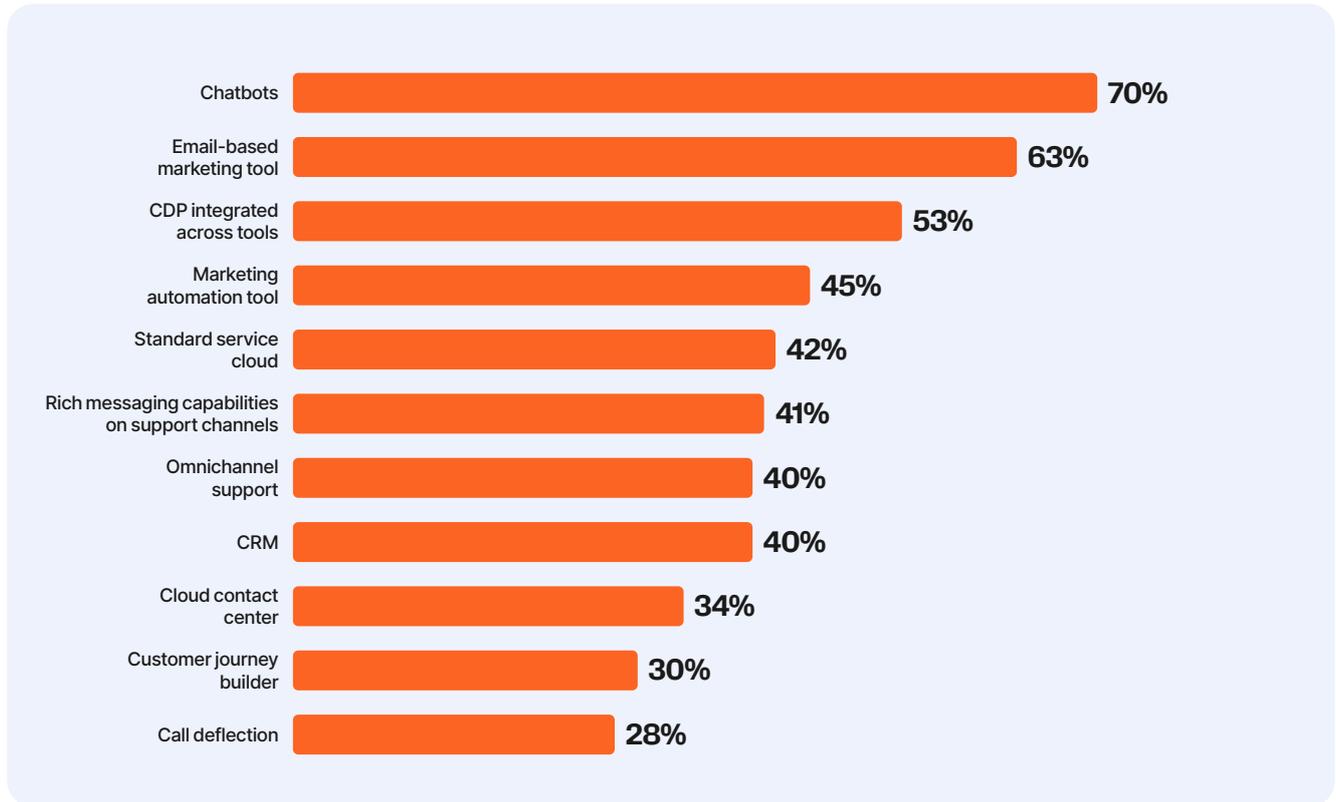

How does automating this use case add to conversational maturity?

Automation streamlines the escalation process, ensuring that issues are quickly identified and routed to the appropriate agent, reducing wait times and enhancing the overall experience. It also helps minimize agent workload by handling routine inquiries, allowing support teams to focus on more complex issues, but including them when necessary. Additionally, it enables better resource management and ensures that agents are given updated contextual information, which leads to faster and more effective resolutions to inquiries.

Sophistication

Software: The puppeteer of mature CX

The software score evaluates what happens in the background of business interactions with customers. The tools and systems used to orchestrate conversations are critical to conversational maturity and offering seamless experiences. The tools brands chose to invest in tell us a lot about their conversational priorities and how they approach building interactions.

Tool	Percentage
Chatbots	70%
Email-based marketing tool	63%
CDP integrated across tools	53%
Marketing automation tool	45%
Standard service cloud	42%
Rich messaging capabilities on support channels	41%
Omnichannel support	40%
CRM	40%
Cloud contact center	34%
Customer journey builder	30%
Call deflection	28%

Conversation facilitators

Chatbots: 70% of all brands use chatbots for customer communication

Chatbots are an excellent tool for automating interactions, collecting data, and speeding up time to resolution. As we mentioned, brands tend to put most of their focus on customer support, and chatbots play a large role in that.

Cloud contact center: 34% of brands are using a cloud contact center

Having a unified tool like a cloud contact center benefits both the user and the employee managing inbound and outbound conversations. A cloud contact center gives live agents the support they need to offer the best customer service possible and avoid overloaded call centers

Data management tools

Customer data platform: 53% of brands are using a CDP
A CDP collects, organizes, and manages customer data from various sources to create a unified customer profile that can be accessed across marketing, sales, and service teams.

Customer relationship management: 40% of brands are using a CRM
A CRM system manages customer relationships by tracking interactions across sales, service, and marketing, helping teams keep a history of customer interactions and ensuring personalized follow-ups.

Designing journeys

Email based marketing tool: 63% of brands use an email marketing tool
A staple in any communication arsenal, an email marketing tool enables brands to design email marketing campaigns and materials to send to their audiences. With email being the most used channel across all industries (over 90%), Email marketing tools allow brands to send targeted, automated, and personalized email campaigns to engage customers, build loyalty, and drive conversions.

Journey builder: 30% of brands use a journey builder
A journey builder helps design, visualize, and manage customer journeys across different touchpoints and channels. A brand that uses a journey builder can manage marketing touchpoints with customers to help organize interactions and strategically move customers from discovery or re-engagement to conversion.

Call deflection: 28% of brands use call deflection
This tool can help smooth the user journey by transferring a customer from a call queue to a chatbot to quickly resolve their issue. Aside from improving customer experience, call deflection helps boost business productivity and helps agents better manage conversations

By leveraging multiple tools, brands can ensure consistency and coherence in interactions across all channels. A seamless omnichannel experience is a key indicator of high CX maturity. So are personalized experiences – they allow brands to be more responsive and relevant that fosters loyalty and satisfaction, hallmarks of a mature CX strategy.

Real-time insights allow for agile decision-making, enabling brands to react swiftly to changing customer behaviors and preferences. As CX maturity grows, organizations shift from reactive to proactive (or even predictive) approaches to managing customer interactions, creating smoother and more satisfying experiences, and proper use of tools and software will help them get there.

70% of businesses say they are already using AI

Most companies are already using AI or machine learning for customer comms, there is little difference across industries

Use of AI or machine learning customer comms (by industry)
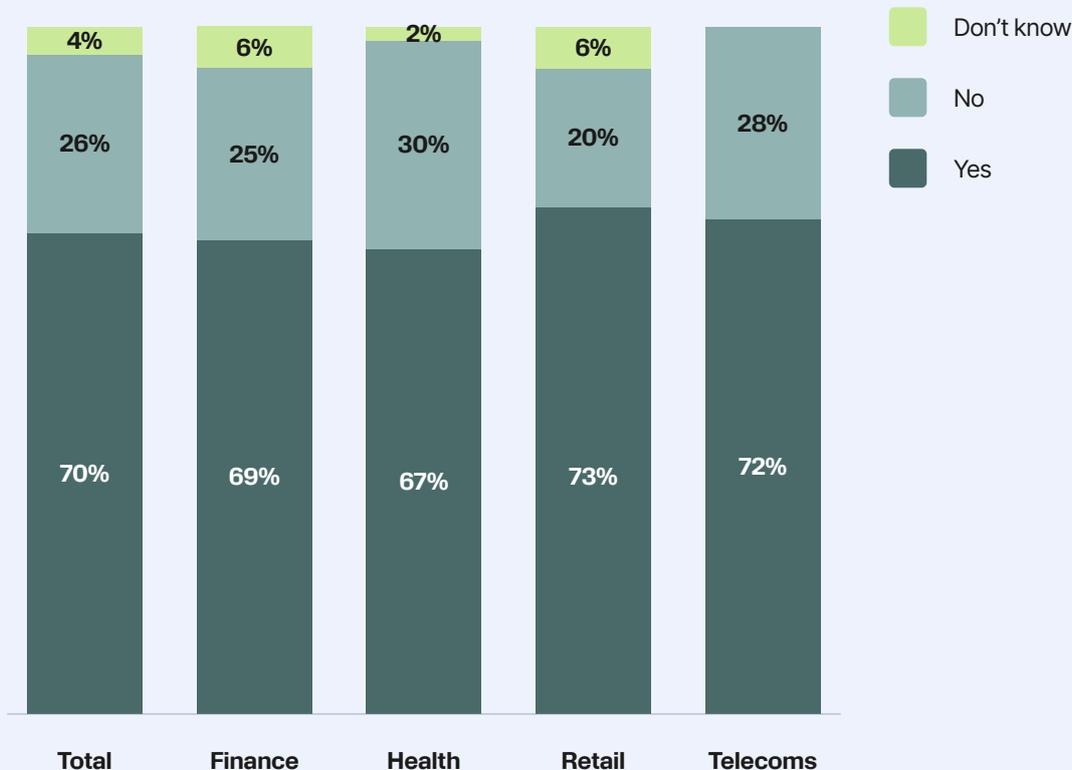
Of the 30% that are not using AI, 79% plan to use it in the future for these purposes:

- **81%** plan to use AI for customer service
- **69%** plan to use AI for sales
- **67%** plan to use AI for marketing

Again, customer support is the priority for the majority of brands when it comes to communication. This might be a solid strategy for many brands to adopt. Start with an area where you can use AI often and where you have many touch points with customers. This will allow you to play with the interactions and see what works for your brand before moving to something more complex like sales or marketing applications.

What to consider when evaluating your software:

- Do your support agents have a full view into past interactions?
- Is software the root cause of any common pain points for customers?
- Do your software and tools work in unison, or are they fragmented?

Support management: Automated customer service – but make it conversational

Customer support is a critical part of the customer experience. With poor support comes bad reviews, unsatisfied customers, and high churn over rates. Optimizing customer support and creating enjoyable and efficient experiences for customers greatly contributes to a brand's maturity.

When you traditionally think of customer support, you might imagine slow call centers, and overworked agents. And this is still true for the most part.

50% **of brands say they struggle with overloaded call centers and long wait times**

Chatbots can ease up the workload on call centers and direct customers to self-service customer support solutions. Interestingly, 70% of businesses use a chatbot, but majority still rely heavily on customer support teams to resolve majority of issues:

Managing customer support

32%
have a dedicated team handling all support enquiries

41%
have a basic chatbot solving enquiries but most are handled by team

10%
have a chatbot handling most enquiries

17%
have a GenAI chatbot handling most enquiries

Chatbots or virtual assistants are a great first step to improving the efficiency of support processes. There are a few types of chatbots brands can implement, and depending on the use case and need, they can be quite simple or quite complex. Here are a few examples of use cases different chatbots can handle:

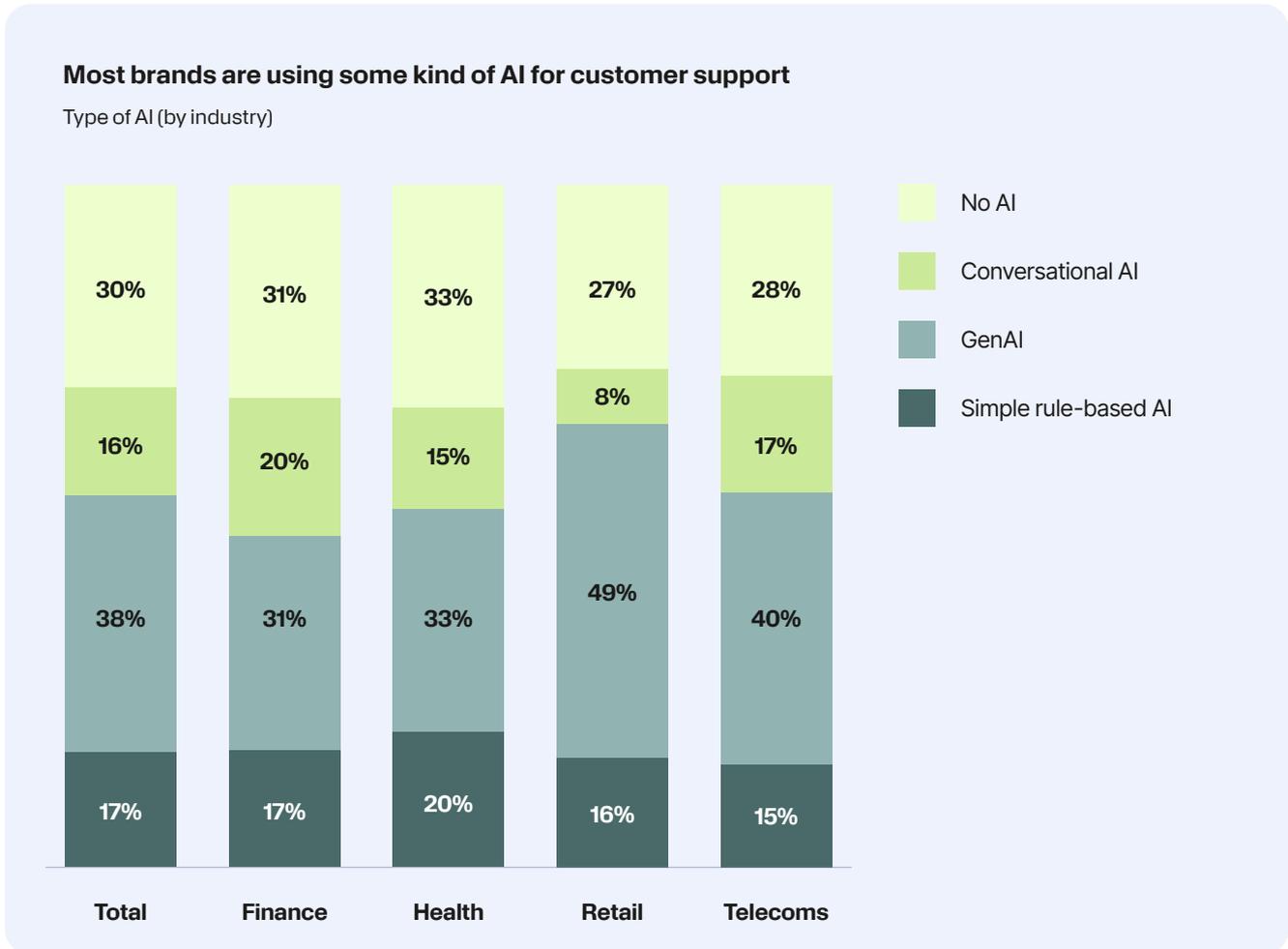| Basic chatbot	Advanced chatbot	Complex chatbot
• FAQs • Order tracking • Appointment scheduling • Account information • Password reset	• Product recommendations • Return processing • Feedback collection • Basic troubleshooting • Intelligent complaint resolution	• End-to-end claims processing • Advanced troubleshooting • Fraud detection and verification • Predictive support • Purchasing assistance

But what makes a chatbot basic, advanced, or complex? Usually this comes back to your software maturity, your integration level, and what technology you are using to power your chatbots. Advanced or complex chatbots require full integration with existing systems like CDPs or CRMs for contextual information and to be powered by AI to make them impactful and successful.

Most brands are using some kind of AI for customer support

Most brands are using some kind of AI for customer support

Type of AI (by industry)

	Total	Finance	Health	Retail	Telecoms
No AI	30%	31%	33%	27%	28%
Conversational AI	16%	20%	15%	8%	17%
GenAI	38%	31%	33%	49%	40%
Simple rule-based AI	17%	17%	20%	16%	15%

How do I know when to use generative AI or conversational AI for customer support?

There has been a lot of buzz around "conversational AI" and "generative AI" - but what exactly is the difference, and why would a business opt to use one over the other?

Generative AI

What is it?

Generative AI focuses on creating new content (text, images, audio, etc.) based on patterns and examples it has been trained on. It can generate responses dynamically, often sounding natural and human-like.

Uses in customer support:

- Summarization of information for agents
- Translations, for multi-language support
- Producing unique and new responses in conversations

Conversational AI

What is it?

Conversational AI combines multiple technologies like Natural Language Processing (NLP), Natural Language Understanding (NLU), speech recognition, and AI-driven logic to enable chatbots to have intelligent, goal-oriented, and meaningful conversations with users.

Uses in customer support:

- Advanced virtual assistants and chatbots
- Structured customer support flows

The ideal AI chatbot solution should be able to understand intent, conduct sentiment analysis, constructively guide customers with accurate information, and make the entire experience human-like and conversational.

To do that, conversational AI and generative AI can be used in unison for a more conversationally mature solution:

- While Conversational AI structures the conversation, generative AI can be used to make responses sound more natural, empathetic, and human-like.
- Example: "I'm sorry to hear about that, John. Let me process your refund right away—you'll receive an update when it hits your account."

This way, customers can get a goal-oriented customer support experience while keeping a conversational element to the interactions. As much as customers want digital experiences, they still want to feel like they are speaking to a person, not a bot.
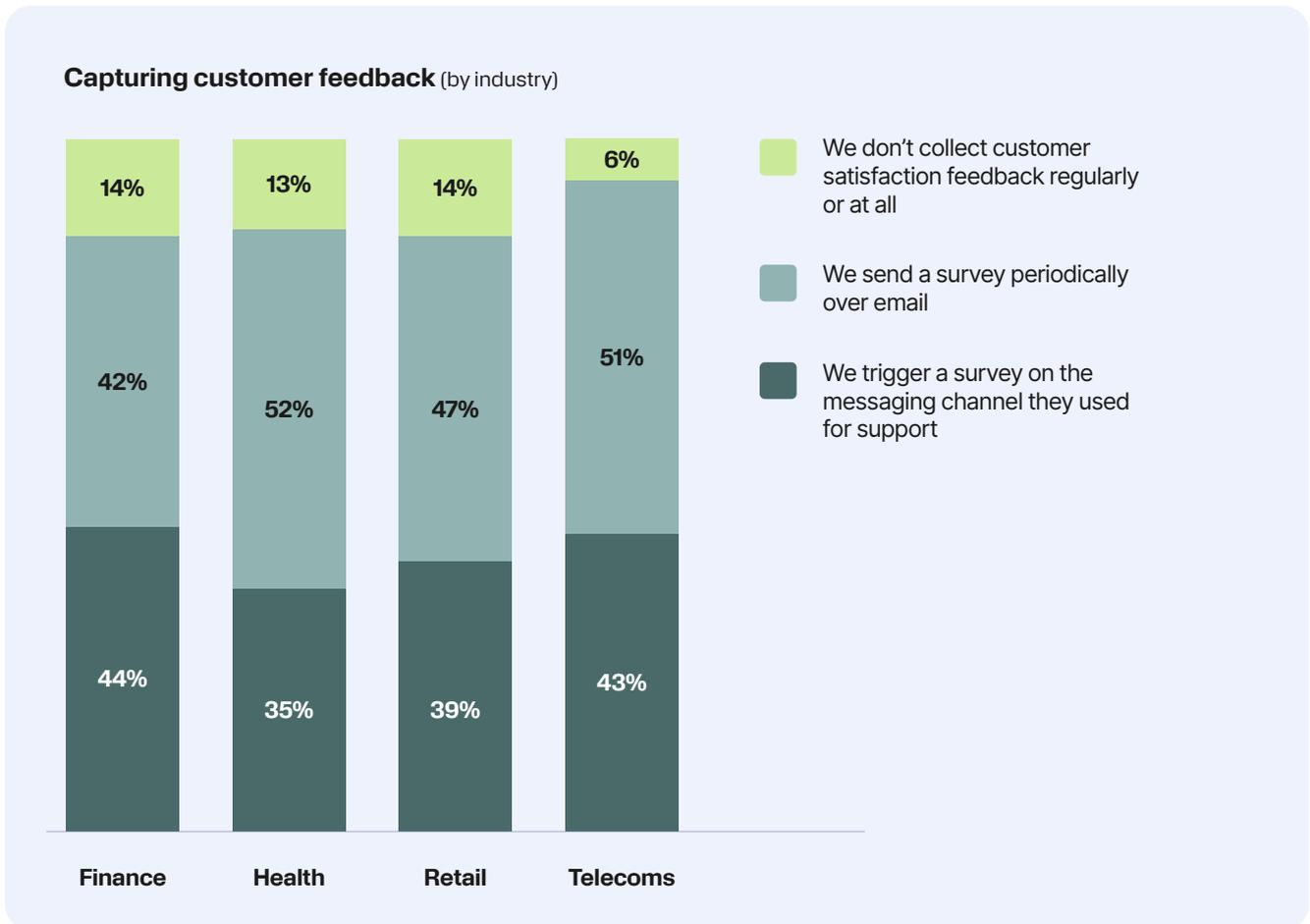
AI chatbots are scalable, can handle multiple conversations at once, and can be launched over any channel, offering customers that omnichannel experience they are looking for.

It's important to note that although these chatbots are built to lessen the workload on support agents, they are not meant to replace human workers. It is essential to keep a human in the loop, ensure transfer to an agent when the query can't be solved, and allow agents to focus on the most complex inquiries.

It's not about replacement but rather doing more with what you have.

Feedback

Listening to your customers is key to understanding how to improve their experiences – especially when it comes to support.

Capturing customer feedback (by industry)

Finance: 14%, 42%, 44%
Health: 13%, 52%, 35%
Retail: 14%, 47%, 39%
Telecoms: 6%, 51%, 43%

Legend:
- We don't collect customer satisfaction feedback regularly or at all
- We send a survey periodically over email
- We trigger a survey on the messaging channel they used for support

Most brands are asking customers for feedback after customer support interactions. But the most mature brands are considering how and when they are collecting this information, for the best possible results.

Imagine these two scenarios, when would you be more likely to provide a brand with feedback?

1. You resolve a customer support query over WhatsApp and immediately get a WhatsApp survey to provide feedback on the experience you just had.

2. You resolve a customer support query over web chat. A week later you get an email asking about how your experience was.

In the latter scenario, the customer is likely to have forgotten the specifics of the experience and is much less likely to respond to the email.

Things to consider when looking at your support journeys:

- What simple use cases can be offloaded to a basic chatbot?
- If you already use a chatbot, what needs to be done to enable an AI chatbot that can handle more complex interactions?
- Are your customers getting caught in a chatbot loop?
- How are you utilizing data from support interactions to improve future experiences?
- What channels are you using for support – why did you choose them?

Marketing management: Growth potential for CX

Marketing messages and campaigns are another important aspect to Conversational CX Maturity. They are a delicate type of interaction that can help guide your customers toward purchasing or, when done poorly, turn them off from your brand. There are three key elements that contribute to the success of marketing interactions. Let's deep dive into each to understand how they contribute to CX maturity.

1. Customer data

Customer data includes demographics, purchase history, browsing behavior, preferences, and engagement metrics. This data is the foundation of all successful marketing interactions and allows brands to deeply understand their customers.

How can brands use customer data to improve experiences:

37% of businesses still send generalized messages and campaigns without any personalization

1. **Building personas:** Building personas involves creating detailed profiles of audience segments to understand their needs, goals, and behaviors. By enabling human-centric messaging, targeted content, and tailored tone, personas make marketing interactions more relevant and personal, fostering trust and loyalty.

2. **Segmenting audiences:** Audience segmentation divides customers into smaller groups based on shared characteristics, enabling brands to deliver hyper-targeted, relevant messaging. This increases engagement, optimizes campaign efficiency, and ensures customers receive meaningful interactions that align with their expectations.

3. **Personalize content:** Accurate customer data allows brands to craft tailored messages that resonate with individuals, increasing engagement and conversion rates. This goes beyond just adding their name to a subject line – truly personalized experiences will include products and information that is relevant to that specific customer.

Most companies are using customer data to enhance their comms, with personalizing content being the most common use

Use of customer data to enhance communication

73%
Personalized content based on demographics and behavior

65%
Add customer's name to communications

54%
Use it to re-engage dormant customers

Why is customer data important for CX Maturity:

- Customer Journey Mapping: Understanding where customers are in their journey (awareness, consideration, purchase, post-purchase) ensures that marketing messages are timely and relevant.
- Informed Decision-Making: Brands can use data to analyze campaign performance and continuously optimize future campaigns based on customer behavior.
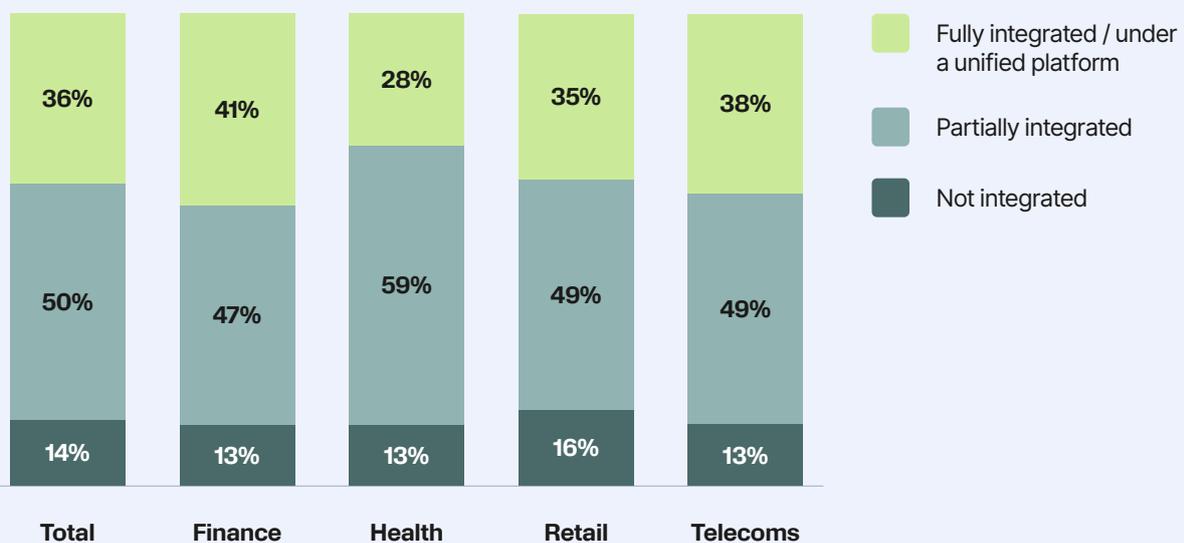
How can customer data improve CX

By using customer data effectively, brands ensure they send the **right message**, to the **right customer**, at the **right time**, avoiding generic or irrelevant interactions that frustrate customers.

2. Integration of marketing tools

Personalization, segmentation, and building personas wouldn't be possible without proper integration. You are collecting customer data from multiple sources, and consolidating all this data into one place, where all systems and marketing professionals can access it to build the best experiences.

Integration of marketing tools (by industry)

	Fully integrated / under a unified platform	Partially integrated	Not integrated
Total	36%	50%	14%
Finance	41%	47%	13%
Health	28%	59%	13%
Retail	35%	49%	16%
Telecoms	38%	49%	13%

Having partially integrated marketing tools can make building marketing interactions difficult and slow.

51% **of businesses struggle with fragmented tools that are not aligned or in sync**

Fully integrating tools like CRMs, email platforms, marketing automation software, and analytics systems creates a unified marketing ecosystem.

Why is integration important for CX Maturity:

- **Seamless omnichannel interactions:** Integrated tools allow brands to deliver consistent messaging across multiple touchpoints—email, SMS, social media, or chatbots.

  Example: A customer who clicks on an email promotion can later receive an SMS reminder if they abandon their cart.

- **Real-time personalization:** Integrated systems enable brands to analyze customer behavior in real time and trigger relevant messages instantly.
- **Elimination of silos:** By connecting marketing tools with sales, support, and customer success systems, brands ensure a unified customer experience.

How does integration improve CX:

A connected ecosystem ensures customers experience smooth, cohesive interactions across channels, avoiding conflicting messages or redundant communication – making a brand's marketing management more mature.
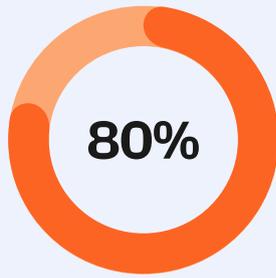
Technical support

Integration and campaign management often requires a lot of technical support to make it run seamlessly.

80% **of businesses require technical support to execute their marketing tasks**

Having access to good technical support or enabling your marketing team with tools that they can manage themselves can help mature your experiences by streamlining processes - ensuring your marketing campaigns are not slowed down due to technical restraints. The goal is to ensure that marketing tools, platforms, and processes are reliable, scalable, and optimized for peak performance.

Technical support for marketing

80% Need technical support for marketing
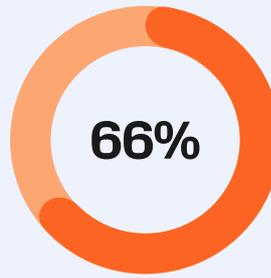
66% say this is slowing down their activities

Why is technical support important for CX Maturity:

- **Error-free campaign delivery:** Robust technical support ensures campaigns run without glitches, avoiding broken links, delayed messages, or system outages.

  Example: Ensuring an SMS campaign hits all intended recipients without failures.

- **Optimized tools for scalability:** Brands can deliver seamless experiences to a growing customer base without breakdowns as demand increases.
- **Advanced troubleshooting:** When technical issues arise, having support ensures they are quickly resolved to minimize disruption.

How reducing technical restraints improves CX:

Reliable technical systems help brands maintain trust and professionalism, ensuring customers receive a **smooth, frustration-free** experience during marketing interactions.

What to consider when looking at your marketing organization?

- Do you send generalized messages or personalized and targeted ones?
- Are your marketers empowered to build campaigns without technical restraints?
- How do you use your customer data? Can this be enhanced to offer a better experience?

Data: The cornerstone of your future CX

Metrics and data help measure the success of a brand's communication strategy. And most brands do track at least some data.

98% of brands evaluate communication effectiveness.

But data holds much more power than we might think. Collecting and analyzing the right metrics and continuously adjusting your communication strategy will help you strengthen your overall approach to CX.

Let's go over some key metrics brands analyze to help them understand how effective their CX strategies are.

61% of businesses track engagement rates	**54% of businesses track site or app visits**	**50% of businesses track account activation**
Measure how actively customers interact with messages (e.g., button / link clicks, opens,) to gauge relevance and resonance	Track traffic to digital platforms to understand message-driven customer interest and behavior	Indicates how successfully interactions prompt customers to take initial action, like creating an account
48% track re-visit or re-purchase rates	**45% track customer lifetime value**	**43% track conversion rates**
Reflect customer retention and loyalty by tracking repeat interactions or purchases	Measures long-term profitability of customers, highlighting the effectiveness of nurturing strategies	Track how well communication drives desired actions, such as purchases or sign-ups
41% track message delivery rates	**40% track reduction of costs**	**25% track abandoned cart rates**
Assess the reliability of message delivery across channels to ensure communication reaches customers	Monitors how efficient communication strategies optimize operational costs, such as reducing support inquiries	Highlights gaps in the purchase journey, helping brands improve follow-up strategies to recover sales

By analyzing these metrics, brands can optimize communication, improve customer experiences, and drive stronger business outcomes.

What to consider when analyzing data:

- Are your CX goals clear and measurable by the metrics you track?
- Do you consider the entire customer journey, or hyper focus on a few touchpoints?
- Do you segment data to better understand your customers?
- Are you creating actionable insights based on the data collected?

Conclusion: Setting up for a future of mature conversations

In the end, becoming mature in conversational experiences isn't just about what channels you use or how satisfied your customers are with your brand. It's a holistic and overarching view of your entire organization – how it functions, operates, and approaches conversational design.

Without the right collaboration between journey building, tech, channels, and strategies, brands will have a hard time reaching true Conversational CX Maturity.

We now know that the average brand falls just above the midpoint between 0 maturity and full maturity. This tells us that brands are changing and adapting to customer expectations and attempting to create better experiences. But there is a long road ahead. Brands need to prepare themselves to enable these automated conversational experiences that are tailored to each customer.

To do that, there needs to be seamless integration with channels and tools and conversational design happening on one unified platform. Getting to this point is a step-by-step process that most brands cannot do on their own. That's where partnering with an experienced conversational platform comes in. Working with conversational professionals will help each individual brand understand where their biggest obstacles are in their conversational transformation, and what they should prioritize first. Making incremental, strategic, and secure changes will help brands mature their conversational experiences at a steady and reliable pace.

How Infobip can transform Conversational CX Maturity

The end-goal for brands is to reach a level of maturity where they can future-proof their conversational strategies and build unique and innovative experiences through things like:

- AI-powered virtual assistants
- Predictive marketing
- Predictive analytics
- Optimized systems and processes
- Cost-efficiency
- End-to-end conversational journeys

Infobip was built to help businesses reach their conversational potential with end customers. We understand that conversational solutions are not a one-size-fits-all fix. Each brand will have specific needs, criteria, limitations, and opportunities that can be leverages for more mature experiences. That's why the Infobip tech stack is fully equipped to enable brands worldwide reach their conversational potential:

- SaaS and CPaaS solutions
- A unified platform
- Composable solutions
- Full range of channels and use cases
- CX consultancy for building experiences in marketing, sales, and support
- High level technical support
- Simple and easy integration processes
- Local data centers
- Authentication and security

Fill out our **self-assessment** to find out how mature your brand is or speak to one of our professionals to get a more detailed analysis of **Conversational CX Maturity** and how to improve.

CX assessment   **Contact us**

The Conversational CX Maturity rubric

Level of maturity Channels	Rookie 0-2	Seasoned 3-6	Master 7+
Use case automation	No use case automation or focus on simple use cases (FAQs, OTPs etc.)	Focus mainly on simple use cases but include a few complex use cases (product returns, account information etc.)	Healthy mix of complex and simple use cases (Transfer to an agent, product recommendations etc.)
Software — Tools	Email marketing tool and/or Standard service cloud	+ CRM And/or Cloud contact center	+ Customer data platform - fully integrated
Software — Omnichannel	No	Yes, but struggle to implement	Yes, successfully implemented
Software — Ai	Yes	Some use of Ai	Advanced use of AI
Support	Dedicated support team with no chatbot support	A basic chatbot for support, but heavy reliance on support team	AI chatbot handling most inquires, support team focuses on complex queries
Support	No feedback collection	Periodic feedback collection on email	Automated feedback collection on channel used for support
Marketing	No or basic integration	Partial integration of marketing tools	Unified platform with fully integrated tools
Marketing	High technical support needed for marketing campaigns	Tech supported needed often for marketing campaigns	Rarely needs technical support for marketing campaigns
Data	Don't use data for enhancing experiences	Use data to make simple personalization to messages	Use data to make targeted and highly personal marketing experiences
Data	Generally don't track conversational effectiveness	KPIs	KPIs, and industry specific metrics

Conversational evolution	Simple one-way texting interactions (SMS, voice, email)	One-way richer interactions with images or buttons (+ rich digital channell)	Testing two-way rich conversations, enabling replies, and chatbots	Two-way rich conversation rollout, enabling AI-powered assistants	Two-way omnichannel AI-powered conversations, tailored to end-user

If you want to find out how to rank on the Quadrant compared to other brands in the industry, contact us!

Contact us

The Infobip Advantage

Global Reach and Local Presence

- 9,700+ Global connections
- Connect with over 7bn people and things
- Strong enterprise client base
- 75+ offices on 6 continents

Our local presence enables us to react faster and have everyday interactions with our customers, providing solutions in line with their needs, local requirements and based on proven global best practices.

Scalable, Fast and Flexible Solutions

- Best-in-class delivery rates
- High speed and reliability
- Low latency
- In-house developed platform

Our solutions are created to adapt to the constantly changing market and communication trends at speeds and levels of precision and personalization that only an in-house solution can offer.

Remarkable Customer Experience

- Technical expertise
- Solutions and CX consultancy
- Customer success management
- 24/7 support and network monitoring

We will help you to get up and running in no time, whether it's assisting with integrations, messaging best practices or solutions consultancy

Own Infrastructure

- Locally available services
- Compliance to local regulations
- 40+ data centers worldwide

Our worldwide infrastructure easily scales horizontally, leveraging the hybrid cloud model to never run out of resources. Our built-in global compliance engine is constantly updated with the latest in-country regulations and operator requirements.

Recognized by the experts

JUNIPER RESEARCH

RCS Business Messaging Established Leader 2024
AIT Prevention Established Leader 2024
CPaaS Established Leader 2024

Gartner.

Gartner® Magic Quadrant™ for CPaaS 2024
Infobip is named a Leader

metrigy

Metrigy CPaaS MetriRank
Infobip named as a top
CPaaS provider 2023, 2024

FAST COMPANY

Infobip named to Fast Company's Annual List of the World's Most Innovative Companies of 2024

IDC

IDC MarketScape
CPaaS Leader 2021, 2023, 2025

OMDIA

Omdia Universe
CPaaS Leader 2022, 2023

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