



# CX Maturity Assessment Playbook

Moving from Capability Scores  
to Business Outcomes

June 2026





# Introduction

Customer experience has become a strategic priority for utilities, driven by rising customer expectations, increasing regulatory scrutiny, expanding digital engagement, and growing pressure to demonstrate measurable business value. Despite significant investments in customer programs, technology, analytics, and process improvement, many organizations still struggle with a fundamental question: How mature are our customer experience capabilities and where should we focus next?

A CX maturity assessment provides a structured way to answer that question. It evaluates how customer-centric practices are embedded across the organization, from leadership and governance to technology, measurement, culture, and day-to-day operations.

This playbook provides a practical framework for conducting, interpreting, and acting on CX maturity assessments. It is designed to help utilities move beyond evaluation alone and use assessment insights to prioritize investments, assign accountability, and drive measurable outcomes.

## ***Included Chartwell Resources Throughout the Playbook***

- Ten Dimensions of CX Maturity Graphic
- Maturity Assessment Framework
- Journey-Based Maturity Assessment Worksheet
- Sample CX Assessment Question Bank
- Maturity to Impact Prioritization Matrix
- Outcome Mapping Worksheet
- Executive Discussion Guide

## PURPOSE

CX maturity assessments are widely used to understand current capabilities, but many organizations struggle to translate findings into meaningful operational change.

This playbook provides a structured approach to ensure that does not happen. It helps utilities:

- Conduct a consistent and evidence-based assessment
- Interpret findings through a business-outcomes lens
- Prioritize improvements based on impact, not volume
- Assign clear ownership and accountability
- Translate insights into measurable results





A strong CX maturity assessment should consistently connect three things: capabilities, customer outcomes, and business performance.

### ↳ **Why Maturity Assessments Matter**

- Establish a common understanding of current capabilities
- Align leadership around CX priorities and investments
- Identify gaps across customer experience disciplines
- Focus improvement efforts where they matter most
- Create a roadmap for measurable CX and operational improvement

# Common Assessment Pitfalls

Many organizations encounter similar challenges after completing a CX maturity assessment. Without clear focus and follow-through, even well-designed assessments can produce insights that are difficult to act on or fail to translate into meaningful operational change.

- 
**Assessing Everything:** Broad assessments create long opportunity lists without clear priorities.
- 
**Capability Over Outcomes:** Measuring whether capabilities exist instead of whether they work.
- 
**Lack of Ownership:** CX teams are assigned fixes that require cross-functional accountability.
- 
**No Action Plan:** Findings are documented but not tied to planning, budgeting, or execution.



# Ten Dimensions of CX Maturity

A comprehensive CX maturity assessment evaluates the capabilities, practices, and organizational conditions that collectively shape the customer experience. While individual models may vary, the ten dimensions outlined below represent the core areas that influence an organization's ability to understand customers, deliver consistent experiences, and drive improvement. Together, they provide a balanced view of current-state maturity and help identify the strengths, gaps, and priorities that should inform future CX investments and initiatives.



Download Chartwell's Ten Dimensions of CX Maturity Graphic

---

# CX Maturity Levels

CX maturity evolves as organizations strengthen their customer-focused capabilities, processes, and culture. Maturity levels provide a framework for understanding where an organization is today and what progression looks like as customer experience becomes increasingly embedded in decision-making, operations, and strategic planning.

Maturity levels are not a scorecard. They are a guide for identifying growth opportunities and shaping a practical path toward greater customer-centricity.

↘	<b>ADHOC</b>	<ul style="list-style-type: none"><li>• Inconsistent &amp; reactive</li><li>• Limited customer data</li><li>• Minimal measurement</li><li>• Department decision making</li></ul>
↘	<b>DEVELOPING</b>	<ul style="list-style-type: none"><li>• Inconsistent execution</li><li>• Basic metrics are in place</li><li>• Limited integration</li><li>• Some structure</li></ul>
↘	<b>DEFINED</b>	<ul style="list-style-type: none"><li>• Consistent practices</li><li>• Clear responsibilities</li><li>• Regular reporting</li><li>• CX strategy is documented</li></ul>
↘	<b>MANAGED</b>	<ul style="list-style-type: none"><li>• Data-driven decision making</li><li>• Performance management</li><li>• Governance models exist</li><li>• Cross-functional alignment</li></ul>
↘	<b>OPTIMIZED</b>	<ul style="list-style-type: none"><li>• Predictive insights</li><li>• Continuous improvement</li><li>• CX embedded into culture</li><li>• Enterprise-wide accountability</li></ul>

Download Chartwell's CX Maturity Model 

---

# Assessment to Action

A CX maturity assessment is most valuable when it directly informs decisions. The following steps outline how to move from assessment to execution in a structured way.

## STEP 1: DEFINE THE BUSINESS OBJECTIVE

Before assessing capabilities, determine the business outcomes you want to improve. The most effective maturity assessments begin with a clear understanding of the customer and operational challenges the organization is trying to solve.



### *Business Outcomes to Consider*

- + Reducing call volume
- + Improving payment success rate
- + Increasing digital adoption
- + Reducing cost to serve
- + Increasing customer trust



### *Priority Objectives to Focus On*

- + Customer contact drivers
- + High-friction customer journeys
- + Operational costs
- + Efficiency challenges
- + Strategic business priorities

Download Chartwell's Journey-Based Maturity Assessment Worksheet 

## STEP 2: SELECT ASSESSMENT SCOPE

Assessment scope determines the usefulness of the results. Broad, enterprise-wide assessments often dilute focus and make prioritization difficult. Instead, focus on a small number of high-impact customer journeys where customer friction is highest, operational demand is significant or business risk or cost is elevated. This ensures findings can be directly tied to actionable improvement opportunities.

## STEP 3: CONDUCT THE ASSESSMENT

A strong assessment goes beyond questionnaires. It should be grounded in evidence and informed by multiple perspectives across the organization.

Engage stakeholders who influence or support the customer experience and evaluate each maturity dimension using documented processes, performance data, customer feedback, and operational insights.

For each dimension, capture the current maturity level, supporting evidence, known challenges, and potential opportunities for improvement.



### **Gather Assessment Inputs**

Collect information from multiple sources.

Customer Inputs	Employee Inputs	Performance Data
<input type="checkbox"/> Survey feedback	<input type="checkbox"/> Frontline interviews	<input type="checkbox"/> Call volume
<input type="checkbox"/> Social listening	<input type="checkbox"/> Operational feedback	<input type="checkbox"/> Digital adoption
<input type="checkbox"/> Complaint trends	<input type="checkbox"/> Leadership perspectives	<input type="checkbox"/> Truck rolls
<input type="checkbox"/> Contact center insights	<input type="checkbox"/> Assessment questionnaire	<input type="checkbox"/> Resolution times
		<input type="checkbox"/> Payment behavior

Download Sample CX Maturity Assessment Questions 

## STEP 4: PRIORITIZE FINDINGS

Most assessments produce more opportunities than an organization can realistically address at once. To avoid overwhelming stakeholders and diluting resources, focus on the initiatives most likely to improve customer and business outcomes. Prioritizing findings helps separate meaningful opportunities from lower-value improvements and creates a clear path from assessment results to action.

### *Evaluate Opportunities Based On:*

- ↘ **Customer Impact:** How significantly does the issue affect customers?
- ↘ **Operational Impact:** How significantly does the issue affect cost, efficiency, or workload?
- ↘ **Effort:** How difficult will the improvement be to implement?
- ↘ **Strategic Alignment:** Does the initiative support organizational priorities?

*Download Chartwell's Maturity to Impact Prioritization Matrix* 

## STEP 6: ASSIGN OWNERSHIP

Assessment findings only create value when they lead to action.

Each priority initiative should include:

- A business owner accountable for delivery
- An executive sponsor
- Defined success metrics
- Supporting stakeholders
- A realistic implementation timeline

Ownership should sit within the business function responsible for execution and not solely within CX teams.



## STEP 7: MEASURE OUTCOMES

Completing an assessment and implementing improvements is only part of the process. The true measure of success is whether those efforts produce meaningful customer and business outcomes. Establishing clear performance metrics and regularly monitoring results helps organizations validate progress, demonstrate value, and ensure that maturity improvements are delivering the intended impact.

Focus on metrics that reflect both customer and business performance, such as:

- + Reduced customer effort
- + Lower call volumes
- + Increased digital adoption
- + Improved payment behavior
- + Faster resolution times
- + Reduced operational costs

---

# From Insight to Decision Making

Turning results into action is where CX maturity assessments create real value. Rather than serving as static scorecards that simply document performance, effective assessments are designed to drive decision-making. When they are explicitly used to answer key business questions, such as where customers are experiencing friction, what outcomes are being impacted, who owns the solution, and how success will be measured, they shift from descriptive reporting to active prioritization tools that guide investment, focus, and execution.

## Assessments Generate Value When They Answer These Four Questions:

- Where are customers experiencing friction?
- What business outcomes are affected?
- Who owns the solution?
- How will success be measured?



[Download Chartwell's Outcome Mapping Worksheet](#)

---

# Executive Alignment

The final step in the process is securing executive alignment. This is where assessment insights are translated into organizational commitment.

Using the assessment results and supporting materials, prepare a focused, decision-oriented summary that guides an executive working session. The objective is not simply to present findings, but to facilitate alignment on priorities, ownership, and next steps required to move into execution.

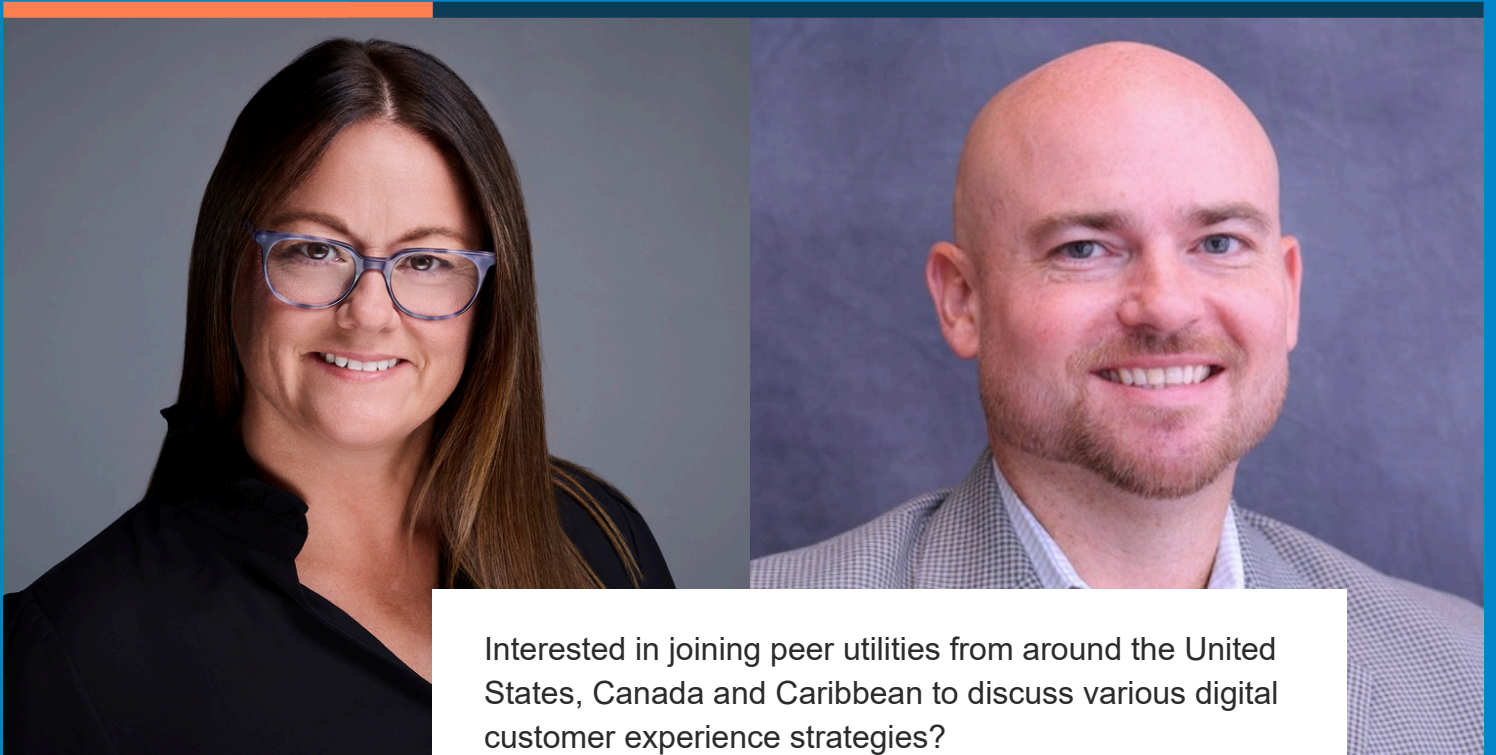
This session should conclude with clear agreement on what will be done, who will own it, how success will be measured, and how progress will be governed moving forward.

## **Executive Meeting Checklist**

- Review Assessment Findings
- Identify High-Impact Customer Journeys
- Prioritize Improvement Opportunities
- Determine Ownership
- Define Success
- Build the Action Plan
- Executive Decision & Funding Discussion


Download Chartwell's Executive Discussion Guide 

# Contact Information



Interested in joining peer utilities from around the United States, Canada and Caribbean to discuss various digital customer experience strategies?

Chartwell's Councils bring utility leaders together to problem-solve, share strategies and lessons learned, and collaborate on key issues facing the utility industry.

 Contact us today.

**Customer Experience Council**

Heather Siebken  
hsiebken@chartwellinc.com

**Council Memberships**

Tim Herrick  
therrick@chartwellinc.com