

CGAP – Customer-Centric Checklist

Is Your Institution Customer-Centric?

- Does your institution's mission statement refer to creating value for customers; is this a key strategic outcome?
- Do senior management and board members regularly spend time listening to customers?
- Is there a robust market research function, informed by best practice?
- Are there mechanisms for gathering customer insights from front line staff?
- Does the institution mine its data about customers and use it to design and deliver services?
- Do operational areas work together to design products and interfaces based on customer insights?
- Does the product and service respond to customer needs?
- Is the customer experience positive (easy, intuitive, understandable, quick, and dignified)?
- Does the institution value and apply good customer protection practices?
- Does staff training inculcate customer-first values?
- Do evaluation systems reward achievement of good customer outcomes?
- Is profitability and performance monitored at the customer or customer segment level?