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Doxim CCM Platform Overview

Leading The Way With Doxim CCM

It's a juggling act. Your customer communication strategy needs to balance the requirements of various stakeholders. Doxim provides regulated, personalized, omnichannel communications to support your business, without fail. We manage the entire process from design to execution – templates, integration, data management, document generation, delivery, tracking and reporting – all with one integrated platform. Doxim helps you stay on the cusp of changing stakeholder requirements, so you're not playing catch-up – you're leading the way.



- **Customers.** You need to address the customer's preference for personalized, engaging, and conveniently delivered communications in their channel of choice. Doxim innovation helps you delight customers and optimize the customer journey across print and digital channels.
- **Regulators.** The regulatory landscape is complex and constantly changing. Our platform equips you for compliance and ensures you remain up to date with new and changing regulations.
- **Marketing.** Your team needs speed and agility to respond to new opportunities, target new segments, launch campaigns, and build new revenue streams. Our platform provides the analytics, insights, and self-serve control you need – for the freedom to scale.
- **IT/Operations.** Legacy technology is complex, inefficient, and increases your business risk. Outsourcing to Doxim gives you access to future-facing technology managed in world-class data centers by Doxim experts. Our platform is designed for flexibility, scalability, and seamless integration with your environment – now and well into the future.

The Shift to Customer Experience Management (CXM)



Today, there's a shift underway from managing the delivery of individual 1-way communications to managing the entire end-to-end customer experience (CX) – providing customers with a connected series of interactions and engagement across the customer journey.

Here's how we enable your success:

- **The right time** – Frequent, ongoing engagement based on segmentation and in response to customer actions/behavior.
- **The right message** – Data-driven personalization and targeted content to ensure communications are compelling and motivate action.
- **The right channel** – Reaching customers with innovative technology in their preferred channel, for a streamlined and frictionless experience that drives engagement.

The Benefits are Undeniable



All of our communications are...

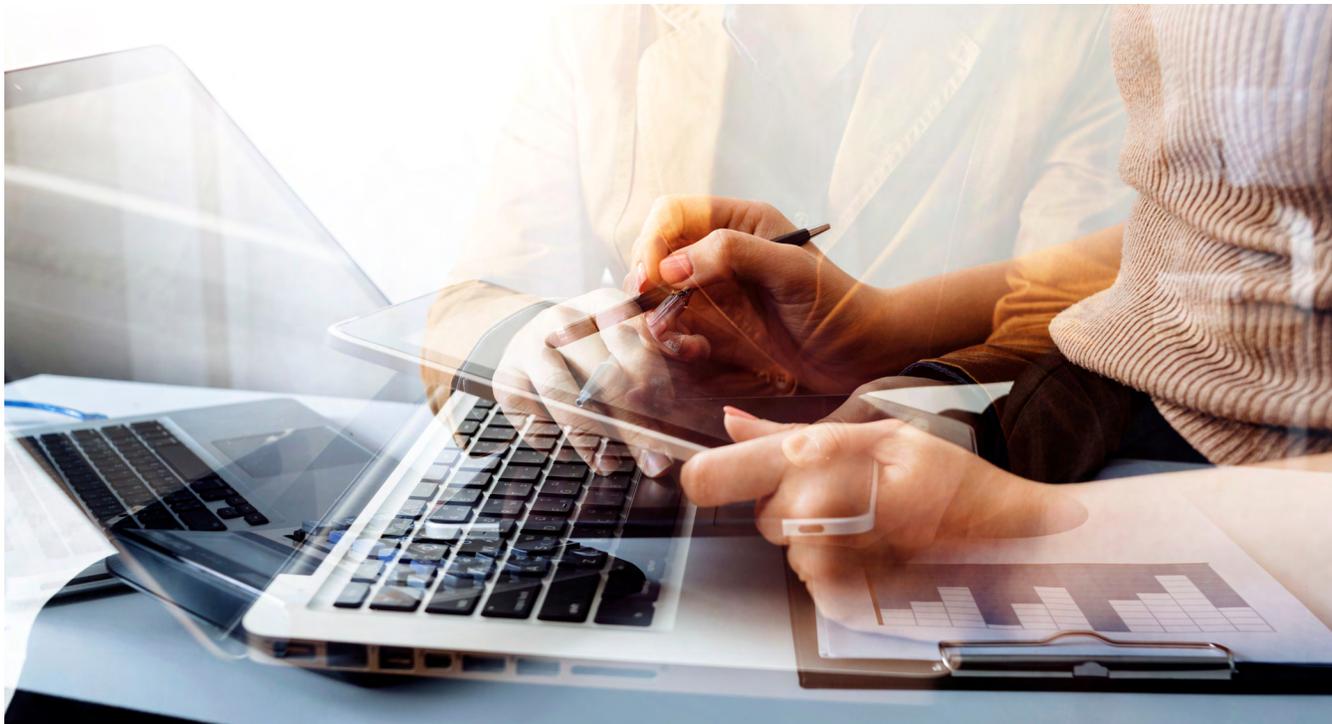
- Business-user enabled – eliminating reliance on IT
- Managed through the Doxim CCM Admin Portal (DAP)
- Delivered omnichannel, based on customers' preferences
- Personalized with variable data and customer insights
- Leverages centrally managed content and assets for brand consistency
- Enable white space management, for marketing messages that drive additional revenue
- Securely stored and easily accessible via central document archive
- Data-driven, with reporting & analytics

Why should you make the shift? A personalized, omnichannel CX is what your customers want and it's better for your bottom line. Customers are more engaged and motivated to act. They purchase 3X more¹ and have an increased customer lifetime value (CLV). Because they are more satisfied by the personalized experience, call center engagement declines and brand loyalty increases. The shift to digital also reduces your postage outlay and, by avoiding any USPS delays, accelerates the communication delivery.

+ engagement, attention & clicks
+ conversions & wallet share
+ satisfaction & loyalty

¹Jennifer Lund, "How Digital Transformation is Driving The Customer Experience", ([superoffice.com](https://www.superoffice.com)), May 4, 2021.

Doxim CCM: An Integrated Platform for Personalized, Omnichannel Engagement



You can access a complete set of integrated products for delivering personalized, omnichannel engagement across the customer journey – all with Doxim as your one-stop trusted partner.

- **Document Generation** – Our automated, configuration-driven platform delivers quality communications without fail. Our experts manage the complexity of day-to-day document generation for optimal results. Our client portal let's your business user administer key aspects of the process for increased agility and control.
- **Digital Engagement** – Leverage a variety of innovative technologies for digital engagement. Deliver digital documents through a fully branded customer portal; engage customers in conversations via email, SMS/text, interactive video, interactive documents or IVR; maximize your revenue with targeted marketing and orchestrated email campaigns.
- **Print Communications** – Continue to satisfy your customers' desire for printed documents with pieces that are attractive and cost-effective, with optimized delivery.

Three Bundled Packages Aligned to Your Strategic Needs



**DOXIM CCM
COMMUNICATE**



**DOXIM CCM
EXPERIENCE**



**DOXIM CCM
ENGAGE**

Our three bundled packages are designed to meet your needs today and tomorrow. We're here to grow with you over time.

- **Doxim CCM Communicate** – Fulfill your customers' desire for print communications with Doxim's world-class printing and mailing services.
- **Doxim CCM Experience** – Migrate customers from print to digital to save printing and delivery costs, and provide a customer experience that is immediate, convenient, and self-serve.
- **Doxim CCM Engage** – Equip yourself with future-facing technology for a CX that leads the way, optimizes customer engagement, and leverages new revenue opportunities.

Partnering with Doxim

Our process and deep industry expertise ensure a smooth integration and transition. We are committed to delighting our clients with ongoing innovation to streamline our engagement and constantly serve you better.

- **Onboarding** – As part of our client onboarding, we design a process tailored to your specific needs with data integrations to core systems and templates for each communication optimized for the given output channel (e.g. mobile first). Our experts leverage best practices in statement and document design to optimize readability, comprehension, and to motivate action. To increase wallet share, templates can include 'onsert zones' for targeted campaign graphics and personalized messaging, which your business users can manage and update.
- **Managed Services** – Our production experts manage the complexity of day-to-day document generation and delivery on behalf of our clients – for optimal results.
- **Self Service** – The Doxim CCM Admin Portal (DAP) gives your business users control over managing / updating key aspects of every communication. Insights and reports are provided through an easy-to-use reporting dashboard.
- **Business Continuity** – As needed, jobs can be moved seamlessly between designated Doxim locations to enable "load leveling" at peak times or to provide business continuity in response to a business interruption (e.g. power outage, natural disaster, etc).
- **All-In, Flat-Fee Pricing** – Our monthly pricing model simplifies onboarding, contracting, and invoicing. It provides you with greater cash flow predictability, while giving you the flexibility to grow and adopt new features without impact to your budget.
- **Client Services & Support** – Our Client Services team have the expertise you need to extract maximum value from your Doxim investment. The team can provide assistance on the daily use, configuration, and functionality of all your Doxim products.
- **Digital Transformation Consulting** – Doxim's strategic consulting team can guide your digital transformation efforts. Leverage their expertise to assess your needs, develop strategies, chart your course, and improve each step of the CX.

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Doxim is the customer communications management and engagement technology leader serving highly regulated markets, including financial services, utilities and healthcare. We provide omnichannel communications and payment solutions that maximize customer engagement and revenue, while reducing costs. Our software and technology-enabled managed services address key digitization, operational efficiency, and customer experience challenges through a suite of plug-and-play, integrated, SaaS software and technology solutions. Learn more at www.doxim.com.

Contact us

Learn how Doxim CCM can empower your organization to deliver a modern, engaging, and optimized customer journey. Contact us today!