

doxim[®]



Doxim CCM Print Communications

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World-Class Print & Mail Infrastructure

- Strategically located across North America within close proximity to key markets
- Equipped with the latest inkjet technology
- End-to-end services for delivery, tracking, billing
- Robust practices for data security (IT, training, etc)
- Complete N+1 redundancy
- Business continuity as a service (optional)
- Ongoing updates to our equipment, technology stack and services

While digital channels offer new and convenient ways of reaching and engaging consumers, print and direct mail are strongly preferred by many segments of the North American market and remain the optimal channel for reaching them. Personalized, well designed, and attractive mail pieces garner excellent results. They have lasting visibility on the desktop or countertop and, in some cases, are the format mandated by regulatory bodies.

Doxim is an experienced and trusted partner you can depend on for all your customer communications needs. Over the span of 20+ years, we have honed our expertise and customized our operations to compose, print, and deliver complex transactional documents that meet the stringent regulatory requirements of our clients in financial services, wealth, insurance, utilities and healthcare. Today, we are the communication provider to over 2500 organizations – providing the scale, operational excellence, and quality our clients have come to expect – bar none.

A Resilient Network of Print & Mail Facilities; Common Approach

Doxim maintains an extensive, resilient, and scalable network of state-of-the-art print & mail facilities across North America, strategically located near key markets for optimized delivery and cost efficiencies.

Across our network of operations, common equipment, processes, technology and staff training ensure consistent service and timely job completion – for stringent adherence to SLAs. Jobs can be moved seamlessly between sites 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). In addition, the Mail Anywhere USPS program allows mail to be inducted at any site.

Modern Equipment for Optimal Quality

We have invested in the latest inkjet technology for superior print quality, speed, and cost. Our capabilities common to each site include:

- On-demand high-speed printing
- Color or black and white printing
 - Continuous feed full color inkjet
 - Monochrome inkjet or toner based
- Dynamic perforation
- Camera-based inserters capable of reading OMR, 3 of 9, or 2D barcodes
- 100% mail piece accountability cameras on each inserter



Verified Security and Compliance

Our responsibility to protect our clients' sensitive information is of the utmost importance.

- Our solutions are housed in state-of-the art, highly secure data centers with built-in redundancy and high availability.
- Our print locations have rigorous on-site security in compliance with Facility Security Clearance (FCL) guidelines.
- Our secure processing environment is verified by 3rd parties, top ranked across all requirements, and exceeds all industry standards. We are proud to publish our "A" verified Security Scorecard.
- Ongoing investments in our Governance, Risk and Compliance (GRC) enable us to track compliance and provide security awareness training with our employees.
- Based on location, we are compliant with AICPA SSAE18 with SOC1 and SOC2 audits completed each year, PCI-certified WORM and HIPAA compliant.



Managed Services with Client Self-Service

Our modern network of facilities and streamlined operations enable us to provide quality results of the highest caliber while optimizing operational efficiencies and costs. To achieve these results, we employ a unique managed services approach that shields clients from the complexity of composing regulated communications while, on the other hand, providing business user control over key administrative tasks through the Doxim CCM Client Self-Serve Portal. This unique business model manages your risk and costs while increasing your speed, agility, and control over day-to-day campaigns.

Set-Up and Configuration

Every client requires a process that is customized to their needs and environment. Our experts manage all the complexity for you: creating document templates and managing the application of rules – to ensure communications created are 100% accurate and fully compliant. We oversee the integration with your existing back-end systems, including your industry-specific core systems, and ensure all business-critical systems work together seamlessly – for optimal performance and results.

- Flexible data input – We leverage any type of structured data, in any format, from any platform or application.
- Centralized information – We centrally manage your customer data to maintain a single source for print or digital communications, enabling omnichannel efficiencies as needed.

Statement and Document Design

We understand how document design and information layout impacts readability, attention, and customer response. Our experts will leverage best practices to ensure your communications are clear, compelling, and designed for optimal response rates.

The diagram illustrates the layout of a financial statement document with four key callout areas:

- Who we are communicating with:** Points to the client's name (Mr. John Doe), address (37 Main Street, Toronto, ON), and email (MJD@DXM).
- Key summary information:** Points to the 'Portfolio Summary' table, which includes columns for 'Last Period' and 'Current Period' for various account types like Cash, US, and Canadian.
- Targeted Marketing Message:** Points to a photograph of a family (a man, a woman, and a child) with a blue banner overlay that reads 'TALK TO US ABOUT A YOUTH ACCOUNT TODAY'.
- Main Message:** Points to the large blue banner at the bottom of the page.

Marketing Messages for Cross-Sell and Up-Sell

Doxim lets you include personalized, variable-driven, targeted marketing messages within your statements and communications – to cross-sell, upsell, and drive additional revenue to your bottom line.

- Inserts – Include marketing content on separate print pages for insertion into the customer envelope. Doxim can print and stock these inserts.
- Onserts – Leverage unused whitespace directly within the statement or document. Once these onsert zones are identified in your templates, you can upload content on-demand. Onserts eliminate the need to manage an inventory of stock, can be hyper-personalized, are read more often, and have an extended shelf life over inserts – as they are less likely to be binned; more likely to be saved and retained.

Though the Doxim CCM Client Self-Serve Portal, your business user can directly engage Doxim production staff and manage which inserts and onserts to include in specific print jobs.



Print/Production Services

We have a broad expertise and key services for delivering world-class print and mail operations:

- Document Composition – We parse, transform, and compose the document or communication – ensuring the right information is delivered in the right template, to the right person. The ability to manage complex data and rules gives you the ability to create communications that are highly targeted and personalized.
- Cross-Channel Preferences Management – Our process enables automated print suppression for customers who opt in to receive electronic documents, to ensure delivery in the customers' preferred channel.
- Householding – We have the ability to deliver multiple combined documents, related to different members of the same household, in a single package.
- Variable Package Sizes – We manage a broad range of sizes, including #10 6x9 and 9x12 envelopes, pressure and glue seamed mailers.
- Secure Document Repository – We offer a secure, centralized repository to manage your completed documents following processing.
- FSC Stock – We print on Forestry Stewardship Certified (FSC) environmentally friendly paper stock.

Address Hygiene Services

We are a USPS-designated full-service mailer. As such, we validate and update your mailing lists to ensure delivery accuracy.

- Address Standardization – We can ensure our clients' mailing addresses conform to required USPS address standardized formats to ensure the lowest possible mailing rates (via Coding Accuracy Standard (CAS) & Delivery Point Validation (DPV)).
- Forward Mail – Doxim leverages the USPS Mail Forward service for piece-by-piece mail forwarding in accordance with temporary and permanent Change of Address (COA) orders.
- NCOA Mailing List Validation – Doxim leverages the National Change of Address (NCOA) database, maintained by USPS and made available to organizations across the country, to validate client mailing lists, ensure they are maintained and up-to-date, and to eliminate waste and cost associated caused by incorrect addresses. Clients are provided with a change of address report, so they can upload correction to their lists.



Postal Disposition / Mail Entry Services

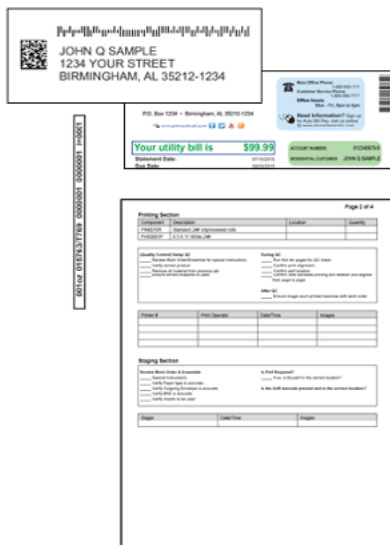
Doxim offers unrivaled USPS mail entry services to ensure the lowest possible postage rates. All full-service mailings are pre-sorted in development and trayed/palletized according to USPS specifications.

In addition, Doxim qualifies for regular pick up and seamless mail acceptance by USPS due to our large scale and consistently high volumes. Mail Anywhere with USPS allows mail to be inducted at any site provided postal point of entry is correct.

Tracking & Visibility

We leverage a variety of tools to ensure postal deliveries are tracked and securely dispositioned, as appropriate.

- Outbound Mail Tracking & Reporting (Informed Visibility / NetTrak) – We can track mail pieces (letters, flat pieces, bundles, handing units and containers) in-transit, providing end-to-end visibility from acceptance by USPS through to a “Logical Delivery Event”, which is as close to the point of delivery available without sending certified or UPS/Fedex.
- Inbound Tracking and Secure Destruction (Intelligent Return) – We support the Intelligent Mail® opt-in service offered by the USPS and the Secure Destruction (SD) service. Clients can opt to have Undeliverable-as-Addressed (UAA) letter-sized First-Class Mail®, which would normally be Return-to-Sender (RTS), identified, captured, destroyed, and recycled in a secure manner. In addition, we return pertinent data back to our clients, enabling them to update and correct their mailing data base and prevent future UAA mailings.



Built-In Quality Control

Our commitment to quality is demonstrated through our standardized processes and continuous improvement methodologies. All production operations conform to our Quality Control Plan. We facilitate customer audits and SLA measurement, as required.

Data Input

- Data transmissions are received, automatically logged, processed and tracked to the point of production printing.
- Production samples are created and submitted to one or more approval authorities where they remain, pending receipt of approval, before being released into the print queue.
- The system indicates the process date, the number of records received, the time of receipt, and pertinent edit check information.
- We monitor data communication file transfers to track activity daily to assure that expected data transfers have been completed.
- If an expected transfer is not received within two hours of the scheduled time, a call is placed to the client to determine why a file was not received.
- Errors that are contained in the input data file are documented and the client is notified immediately of errors that would prevent production from continuing.

In-Process Automation

- Doxim adds an inserter barcode (3 of 9 or 2D) to each sheet to be read by the insertion equipment.
- Doxim adds a 2D Barcode to the address block of each mail pieces to facilitate closed loop processing via automated camera systems.
- QC Pieces are generated systematically for review and sign off by Production Supervisors on the floor periodically.

Manual Oversight & Validation

- A quality control slip accompanies each print job.
- Doxim adds a control line on the right-hand side of the page to aid in manual reconciliation if needed.
- QC process steps are listed on each workorder and must be followed and signed-off.
- Electronic spec sheets are created for each application and must be reviewed prior to each job run.
- Operational production status reports are available through the dashboard on our Doxim CCM Client Self-Serve Portal.

Closed Loop Reprint Process / Touch and Toss

- As part of our process, we automatically reprint mail pieces damaged in the print process, providing increased accountability and quality control.





Simplified Client Engagement

We are committed to delighting our clients by continuously improving how we engage and partner together.

- Pricing – Our all-in, flat fee 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.
- Print Summary Reporting – Doxim automatically generates a print summary for every job – reports you can easily access and upload to validate usage and support your internal accounting and/or operational processes.

Contact us

We want to partner with you – and we have the scale, operational excellence, and client-focussed approach to enable your success. Book a meeting with us today to learn more.

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Doxim is the customer communications and engagement technology leader serving financial and regulated markets, providing omnichannel document solutions and transforming experiences to strengthen engagement throughout the entire lifecycle. Learn more at www.doxim.com.