



Doxim CCM for Credit Unions

Member Communications from an Expert Service Provider



Elevate Your Member Experience

You want to support your members' financial needs at every stage of life. Your statements and account communications are essential touchpoints on the member journey and key for building strong relationships.

By partnering with Doxim, you can join the hundreds of credit unions who trust us to manage their member communications.

Doxim Customer Communications Management (CCM) is a managed services solution for delivering personalized omnichannel communications at scale. Our coast-to-coast production operations, technology platform, and experienced in-house team provide the scale and expertise you need to reduce costs, execute digital strategies, and engage your members in ways that are personalized, interactive, and drive revenue.



In addition, the Doxim CCM client portal gives your staff a window into our operations – providing insights and reporting, and giving you control over key aspects of your communications across every member touchpoint.

Whether print or digital delivery, we've got you covered! We are your single, expert partner for member communications – today and tomorrow.



Omnichannel, end-to-end CCM software and services that empower business users to improve the member experience across every touchpoint – whether print or digital

What We Offer...



Document Generation/
Composition



Marketing Messages/
Onserts



Accessibility / ADA /
AODA



Print & Mail



Mobile-Responsive
HTML Statements



Modern eStatement
Site



Enterprise Content
Management (Digital
Document Archive)



Self-Serve Letters /
Notices



Email Marketing



Secure Document
Delivery (Push by
Email/SMS)



Personalized,
Interactive Video



Business Continuity
Services



Self-Serve Content
Creation Tools



Analytics and Reporting



Integrations/APIs

Future-Facing Member Communications, Ready for You Today!

Improve Member Experience

Deliver attractive and engaging communications in your members' channel of choice, securely push mobile-responsive documents, provide a targeted eStatement experience integrated with online banking, deliver personalized video and notification by email or SMS, conduct 2-way conversations via in-portal messaging – all this is available with Doxim CCM.

Outsource Operational Complexity

Let Doxim handle your omnichannel document design, production, storage, and delivery so you can focus on improving your members' financial wellbeing. With our scale and expertise, we can manage all the operational complexity – ensuring quality and consistency across all channels and reducing your team's workload.

Unlock Additional Revenue

Statements and notices are like regular meetings your members simply have to attend! Use every chance to personalize account communications, and maximize the value of each touchpoint and channel, while cross-selling and up-selling to drive more revenue and wallet share.

Ensure Compliance, Business Continuity

Don't leave privacy, security, and compliance to chance. Doxim operates state-of-the-art, fully

compliant data centers and production facilities across North America. We have processes in place to control risks associated with the production, storage, and delivery of business-critical communications. Our scale and reach allow us to enable your business continuity even in the most challenging times.

Empower Your Business Users

An easy-to-use client portal empowers business users to author, personalize, and administer key aspects of communications self serve and on demand – to maintain member intimacy, gain insights, and respond to inquiries.

Discover Many Ways to Save Costs

Print and mail is one of the most expensive ways to communicate with your members. Accelerate the adoption of digital channels by offering choice and delivering engaging, interactive communications, purpose-built for modern devices and easily accessible. For your staff, save time managing paper documents and reduce support calls with self-serve tools to enable digital workflows. In cases where you need to print and mail, minimize your costs by leveraging our production scale, postal service compliancy, and value-added mail management services such as consolidation, householding and more.



Why Choose Doxim?

There are many vendors that provide statement services and member communications management; but hundreds of your peers have chosen to partner with us. Here's why...

Industry focus

For over 20 years, we have delivered purpose-built solutions for credit unions. With hundreds of credit unions clients from coast to coast, we understand the unique needs you face, as well as best practices – its all we do at Doxim. Leverage our knowledge and expertise to guide you as your business continues to evolve.

Technology Ecosystem Integration

It's our mission to help credit unions leverage data to deliver relevant and meaningful communications to their members. From core processing to online banking, to CRM and marketing automation, we connect the data within your technology ecosystem to ensure a frictionless communications experience. With the modular nature of Doxim CCM, its library of APIs, and our deep integration experience, we ensure your communication workflows are seamlessly integrated to drive operational efficiencies and deliver a cohesive member experience.

eAdoption & Digital Delivery

Our omnichannel platform lets you shift members to digital seamlessly and easily – providing a modern member experience while lowering your costs. Securely deliver digital documents (PDF, HTML, video) or notifications by email, text/SMS or member portal. Access comprehensive digital activity reporting to refine your member engagement strategy and ensure

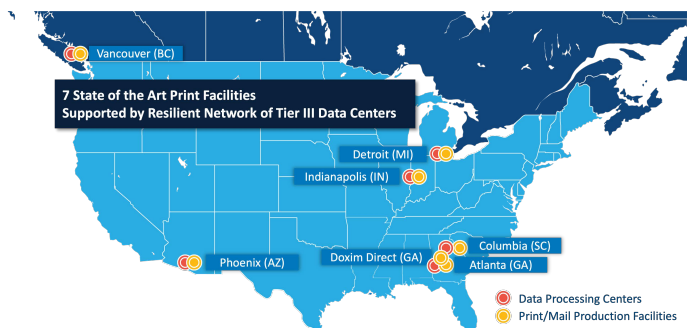
continued delivery of the 'digital promise' as members' needs evolve. You can rely on Doxim to provide the personalized and interactive engagement your members desire and will respond to.

Print & Mail Excellence

Our fully controlled and resilient production environment delivers print & mail excellence you can rely on. With Doxim's high volume, roll-fed, full color inkjet production and intelligent insertion technologies, we manage the production requirements of all statements and member communications with industry-leading security, integrity and quality. As a designated, high-volume mailer with integrated address validation and standardization services, our clients enjoy the lowest postal rates. Streamlined mail entry workflows ensure your members receive their documents as soon as possible.

Project Management

Our full scale, end-to-end implementation methodology ensures projects will be transitioned on time, on budget, and with no disruption of service. We define business needs at the beginning of the project and we maintain visibility throughout. Our timelines are backed by experienced developers, business analysts, Certified Project Managers (PMP), and dedicated cross-functional resources.



Secure & Compliant



Award-Winning





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.

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