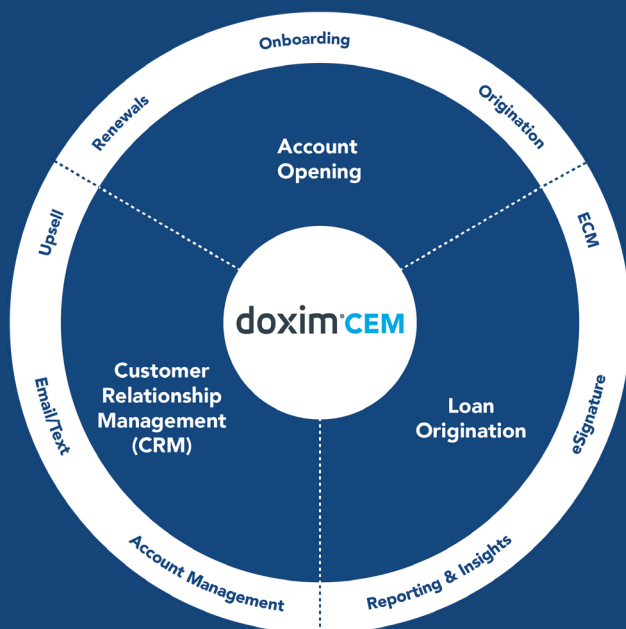# doxim®

Doxim CEM Platform Overview

For Banks and Credit Unions

Doxim Customer Engagement Platform

As consumers adopt digital solutions at breakneck speed, financial institutions need to provide consumers with options for how they engage to open accounts or apply for loans. Giving consumers the choice to engage through traditional in-branch services or through self-serve digital services will not only improve the customer experience but will also drive increased operational efficiencies – allowing your staff to focus on value-added activities that strengthen your profitability.

Doxim Customer Engagement Management (CEM) is a suite of solutions purpose-built for community banks and credit unions – with modules for both in-branch and self-serve, for retail and business customers. The modules in CEM guide you through the process of onboarding clients, opening accounts, originating loans, and managing customer information and documents – delivering maximum productivity, customer satisfaction, revenue and profitability.

Account Opening
With the Doxim Account Opening solution you can streamline, accelerate, and modernize your account opening processes. From gathering required information to successfully onboarding customers, selecting desired products, and generating the required documentation. This end-to-end solution automatically guides the account opening process and allows your customer-facing team to deliver a seamless and speedy experience – opening accounts in 5 minutes or less. Explore our modules for in-branch or self-serve engagement, for retail or business customers.

Loan Origination
With the Doxim Loan Origination solution you can originate retail or commercial loans, performed by in-branch staff or retail consumers. Financial institutions that are struggling with inefficient paper-based processes can digitize and automate the lending process, reduce errors, accelerate speed, while providing greater convenience for customers. Explore our modules for retail or business customers.

Customer Relationship Management (CRM)
With Doxim CRM you can build and maintain great relationships with new and existing customers by providing staff with a 360 view of client information and giving them efficient tools to manage all engagements, referrals, opportunities, and conversations, all in one place.

Why Choose the Doxim CEM Platform?

Doxim CEM is a complete, all-in-one solution that streamlines origination and customer engagement – for maximum benefit to your customers, your staff, and your bottom line.

Omnichannel Engagement
Engage consumers when and where they prefer – either in the branch or online through digital self-serve channels. Connect and respond to applicants and customers using 2-way communications with a unified, consistent view for staff.

A Single Workflow
Address all your needs with a single, paperless, automated workflow. Combine multiple individuals in a household and multiple loan products – all within a single application process to reduce the need to re-enter common data. This can reduce your application processing time, allowing you to process a greater number of applications with the same headcount.

A Seamless Experience
Move seamlessly between retail and business workflows or between in-branch and self-service channels without gaps. The consumer can even complete a portion of the process self-service, then switch to in-branch, if assistance is needed, for seamless engagement.

Core Integration Expertise
Pre-built, in-app integrations to third-party service providers, including core banking systems, with real-time data uploading. You can rely on our expertise with data sources, structure, and core system integration.

Centralized Core Lending Services
Ability to create a cost-efficient and scalable base for growth, exposing core lending services that are centralized and shareable.

Better Lending Decisions & Fraud Prevention

Leverage readily available customer, business, and third-party data, and a robust decision engine. Gain instant verification while providing maximum fraud prevention and compliance.

Prevent Costly Errors & Reduce Risks

We've incorporated mandatory fields for regulatory questions, the intelligent reuse of data, and automated checks to ensure eSignatures are provided everywhere they are needed. For audit purposes, maintain a record confirming background checks, risk assessments, and other required regulatory steps.

A 360 View of the Consumer

Using our CRM solution, access a complete view of the consumer including member, household, holdings, loan information and associated documents, in one place, for a true 360 view. Leverage predictive analytics for rich insights and engagement suggestions.

Compliance Excellence

With control over permissions and access, and up-to-date audit-logs accessible in real-time, financial institutions can always ensure compliance excellence. Furthermore, lenders and compliance officers never have to worry about missing data or paperwork with dynamic forms and the ability to drag and drop documents on each application screen.

Capabilities to Grow Your Business

Modules in the CEM platform integrate seamlessly with other Doxim products, so you can deepen your engagement, expand your services, and extract more value for your business.

- Doxim ECM - Store and retain all key customer data and documents in a secure, cloud-based enterprise content management (ECM) repository for high-speed search, retrieval, and secure ePresentment.

- Doxim DBM - Engage your customers by text/SMS from within the application workflows using our Digital Business Messaging (DBM) solution.

- Doxim EMM – Leverage customer information and insights to deliver orchestrated email marketing (EMM) campaigns to expand your business and grow your revenue.

Let's Talk

Contact Doxim to learn more about our flexible and streamlined process for account opening, loan origination and customer information management.

doxim®

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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