

doxim®



Doxim CRM

Transforming Customer and Staff Experience

Purpose-Built Solutions For Utilities

Key Benefits

- Purpose-built for banks and credit unions, based on decades of industry experience
- Centralized access to data from multiple core systems, customer databases, and analytical tools
- Campaign management tools to send targeted, relevant offers
- Workflows to reflect real-life sales and service processes
- All interactions and activity captured and aggregated for analysis and reporting
- Complete member profile information available to all areas of the organization
- Individual customer and household profiles to understand the economic micro-community
- Mobile-responsive interface and mobile app for off-site engagement
- Powerful features and modules that can replace point solutions and help cut costs

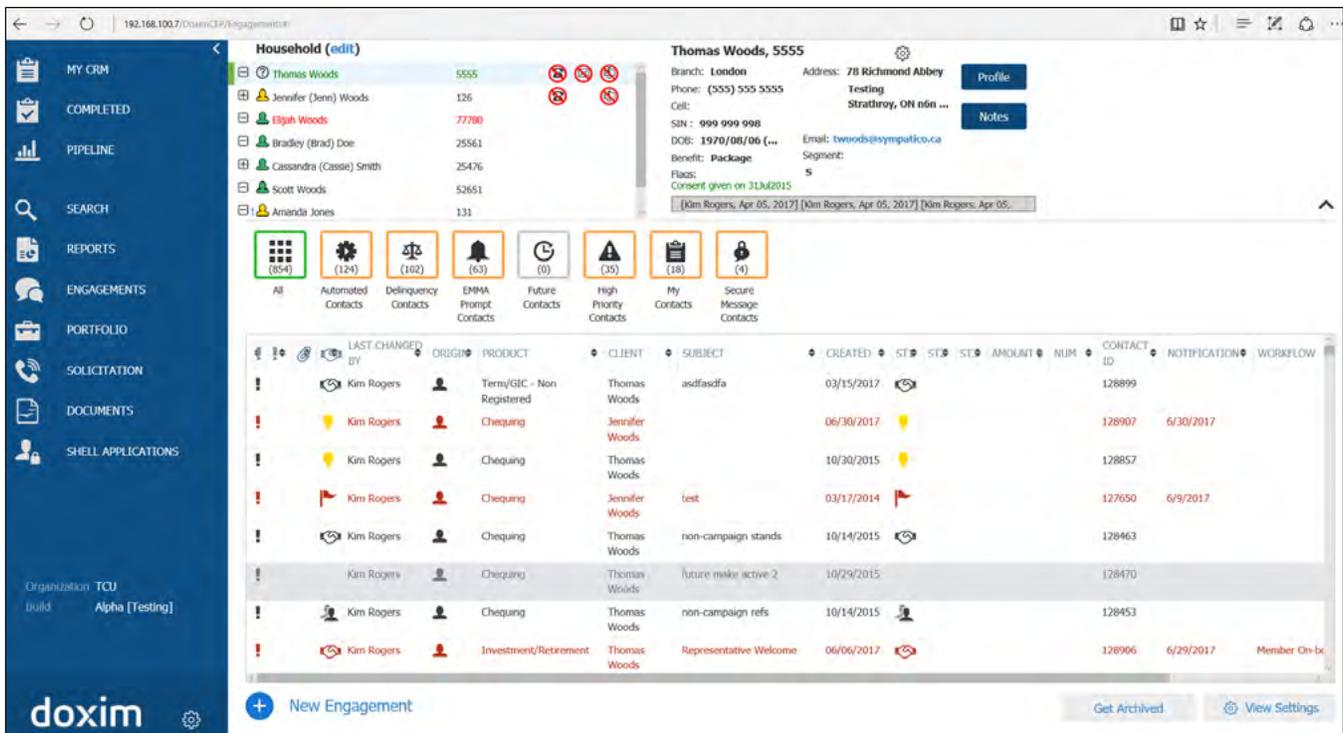


Community banks and credit unions offer a uniquely personal experience that large banks may struggle to match. But as customers increasingly interact with them across multiple channels, maintaining that personal touch can become a challenge.

Doxim Customer Relationship Management helps community banks and credit unions build and maintain great relationships with new and existing customers by providing staff with the information and tools they need to understand customer needs, all in one place. It is your central hub for managing customer engagement and will help uncover growth opportunities across multiple lines of business.

Build a 360° Customer View

Centralize all important data from 3rd party systems in one place. The resulting 360° customer profile will allow the teams across your financial institution to access data on demographics, household, investment details, financial planning, external and related accounts, transactions, owned products, and much more.



Understand the Customer

Get a snapshot of the customer's products in your core processing system and those held by 3rd party organizations. Doxim CRM provides insight into the customer's investment objectives and preferences, and displays the credit rating and the overall contribution the customer or their household makes to the growth of the bank or credit union.

Know the Whole Household

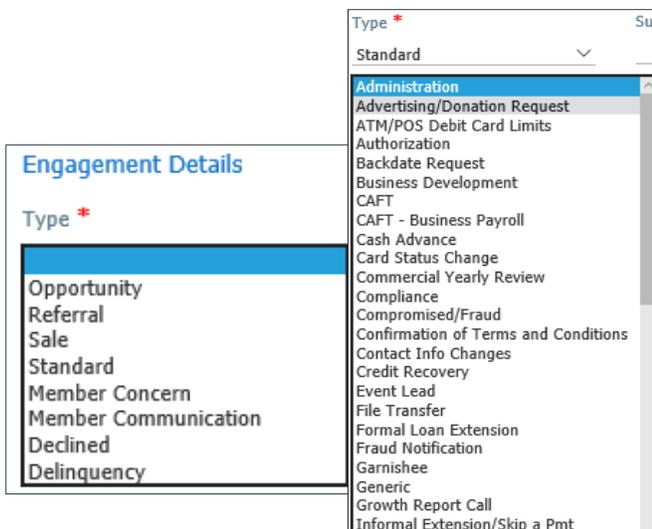
Learn each customer's story as part of the larger picture of their financial "household". Households are preloaded based on address, but staff can move individuals and businesses as required to create an authentic view of the overlapping economic plot lines. This view is a unique feature of Doxim CRM, which reveals real economic micro-communities, and helps staff members assist customers in making better financial decisions.

Focus on Customer Needs

Doxim CRM presents a holistic, customer-centric perspective to sales and service operations. All information is linked to the customer (who they are, who they have been contacting or were contacted by, what their needs are, what products they have purchased, etc.). The information is available to staff across all locations, including the branch, the call center, and the online banking department, with up-to-the-minute details of the customer's engagement history to help understand their current needs.

Better Manage the Sales Pipeline

Doxim CRM tracks the sales process from an opportunity to a sale. With the sales goal module, staff and management can set goals and track their progression at an individual or consolidated level, in real-time. With this powerful, and transparent sales reporting capacity, managers can quickly see how well a campaign is doing, as well as identify and reward top performers, or provide coaching to those who aren't on track to meet their set targets.



Integrations and Flexibility

No two institutions are exactly alike, so Doxim CRM has been created with the flexibility to accommodate every organization's needs. In addition, Doxim CRM easily integrates with external software applications, like your banking portal, to help you build an ecosystem of technology solutions that is both efficient and cost-effective, and allows changing processes without compromising the integrity of the CRM. Using our open API and advanced web services support, we'll ensure that the business-critical systems that need to work together will do so.

Meet Customers Where They Are

Whether your customer contacts you through a branch, a call center or online, Doxim CRM captures data from all interactions, giving users real-time insights into the customer engagement. This complete history helps you manage the customer experience across all touch points and ensures you don't miss opportunities for upsell and cross-sell.

We Understand All Customer Touchpoints

Doxim CRM is purpose-built for financial institutions and offers all key functionality and workflows that reflect their real-life processes. With over a 100 preconfigured customer or member engagement types, banks and credit unions can quickly create, document, and manage all key interactions, including authorizations, investment payouts, letters of credit, loan reminders, renewals, service charges, travel notifications, card status changes, and much more.

A Scalable Platform to Grow with You

Doxim CRM is a part of the Doxim Customer Engagement Platform and offers the added value of helping focus on growth, not point solutions. Doxim CRM seamlessly integrates with:

- **Doxim ECM**, to provide end-to-end electronic document creation, routing, and archiving.
- **Doxim Account Opening & Loan Origination**, to enable faster, more efficient customer onboarding and capture data for use in upsell and cross-sell campaigns.
- **Doxim Business Analytics**, to transform customer profile and activity data into insights that help build targeted marketing campaigns, analyze sales performance, and line-of-business KPIs.
- **Doxim Email Marketing**, to design and execute effective marketing campaigns to drive cross-sell, upsell, loyalty, and wallet share.

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Let's Talk

Contact the Doxim team to discuss your customer experience transformation initiatives.

Doxim is a leading provider of SaaS-based customer communications and engagement software for banks, credit unions, and wealth management firms. Doxim's Customer Communication Management Platform helps financial institutions transform their client experience, communicate effectively throughout the client lifecycle and improve cross-sell and upsell activities that drive increased wallet share. The platform addresses key digitization challenges, from automated account opening, through improved, personalized communications to anytime, anywhere content access, tailored to a client's channel preferences. This eliminates costly traditional paper-based, manual processes and enables cost-effective provision of an omni-channel experience that delights customers and improves their long-term loyalty. Find out more at www.doxim.com.