



Doxim Client Onboarding

For Financial Service Providers

Doxim

Client Onboarding

Key Benefits

- Streamline client onboarding to improve the client experience and leave time for goal-based conversations
- Onboard clients and e-sign documents securely anywhere on your mobile device or laptop
- Onboard clients in real time, often within one day
- Reduce the sales and administrative costs associated with error correction with automatic NIGO checks



Doxim Client Onboarding helps financial service providers streamline their business by bringing their critical processes, such as new account opening, online. It's a flexible platform that can be adapted for multiple lines of business with multiple business needs – from account opening and account management and maintenance to internal process workflows.

Doxim Client Onboarding quickly and easily transforms paper-based workflows into elegant online processes that speed up end-to-end activity, ensure accuracy through embedded business rules, and drive significant cost savings. With the ability to configure workflows, questionnaires, forms, and business rules, Doxim Client Onboarding delivers the power of a custom solution without the premium price.

Products

Drive productivity and improve customer experience with the edition of Doxim Client Onboarding that's right for you:

- **Standard:** Get started fast with preconfigured workflows based on industry best practices
- **Enterprise:** Create a fully bespoke solution reflecting all your unique client onboarding processes

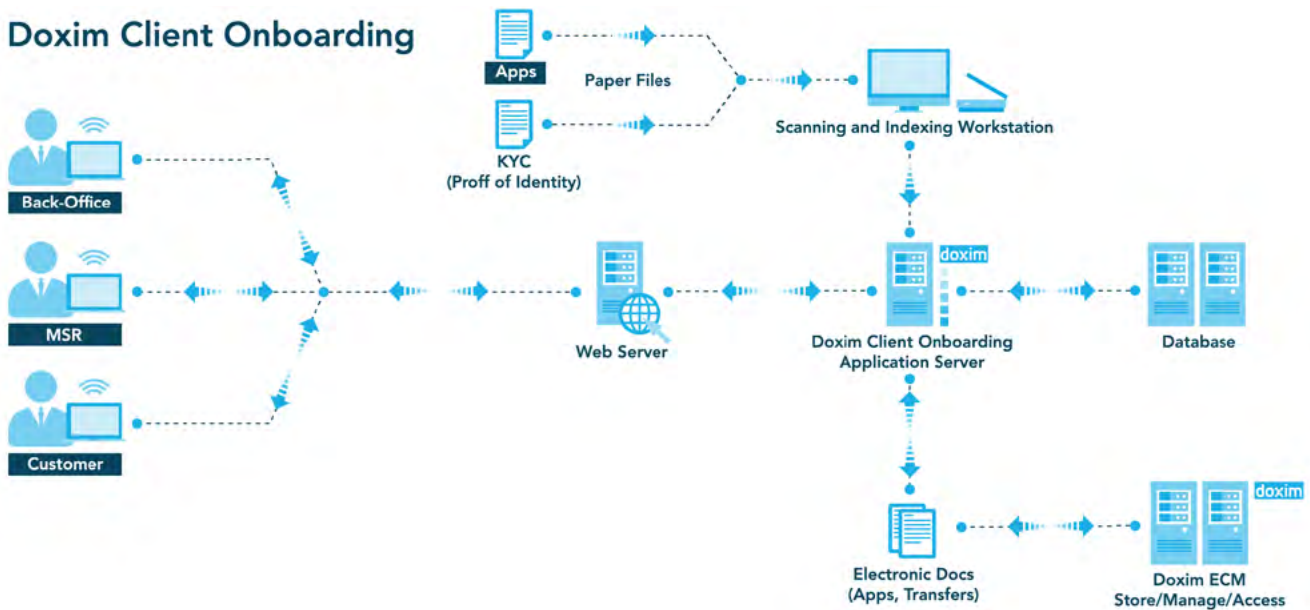
Onboard clients faster

Eliminate slow, manual, error-prone processes by deploying Doxim Client Onboarding to automate your workflows, forms, business rules, data checking, and approvals.

Create Personalized Welcome Kits that can be customized and branded for the client, the sales representative, and for each product.

Reduce Data Entry by ensuring forms are filled out right the first time and eliminating duplicate data entry. A Not-In-Good-Order (NIGO) check is run when you submit the forms, preventing costly rework.

Doxim Client Onboarding



Deliver a Complete Client Onboarding Experience with an application that can simultaneously support all lines of business and expand easily as you grow.

Make It Customer Convenient with mobile device support for the mobile force and a self-service, browser-based application.

Open Accounts in Real Time enabling them to be funded and transaction-ready on the same day.

Rapidly Onboard New Advisors and Clients by quickly transferring client data and automatically generating partially completed applications.

Increase accuracy

Institutionalize best practices and compliance standards by automating workflows, approval processes, and business rules.

Reduce Errors with highlighted mandatory fields and eliminate the need to visit or call a prospect multiple times to gather all information.

Use Advanced Error Checking to automatically check for mistakes and omissions, and improve customer experience.

Identify and Initiate Updates Automatically to report on accounts that do not meet business rules, KYC requirements, or compliance standards.

Reduce client onboarding costs

Clients can be onboarded quickly and effortlessly, taking the focus off paperwork and allowing advisors to spend more time cross-selling/upselling.

Reduce Hard Costs by eliminating costly paper forms, carbon copies, and the costs associated with business and compliance changes.

Reduce Soft Costs such as the sales and administrative time spent on fixing errors.

Increase Staff Productivity by reducing data collection time and automating the generation of personalized welcome kits.

Reduce Application Abandonment Rates with simple, faster to complete applications.

Simplify Staff Training with an intuitive interface that helps advisors through the process of gathering all vital information.

Improve compliance and reduce risk

Simplify and improve compliance reporting by automating time-consuming, manual tasks. Doxim Client Onboarding improves the quality of data captured by ensuring that all required values are entered and that all required documents are tracked.

Get Actionable Insights with over 30 standard reports, including comprehensive compliance and audit reports, business metrics, operational efficiency and portfolio supervision reports.

Generate Missing Document Reports to quickly understand the status of documentation at any business level.

Configure Security Levels with a permissions structure that allows administrators to limit access to a user's own assigned accounts.

Improve the Resiliency of Business Backups with electronic documentation that is secure and can be easily replicated.

Ensure Comprehensive Log Archiving with log data being archived and indexed in perpetuity to meet data retention regulations.

Integrated document management

The Doxim Client Onboarding platform is fully integrated with Doxim Enterprise Content Management (ECM) to enable centralized management and fast retrieval of documents online. Doxim ECM helps speed up the account opening process by eliminating the need to courier paper forms, and access to the archive can be securely shared by authorized users across the organization. Using Doxim Document Imaging, paper documents can be scanned, stored, and organized using barcodes – transforming a paper trail into an easy-to-access, cloud-based, digital document archive.

Get expert implementation services

We understand the unique needs of the different business segments we serve and can tailor a solution to fit requirements. Our services include:

- Needs analysis
- Architecture design and implementation
- Comprehensive post-deployment support
- Training

Our solutions are compatible with multiple back-office systems, providing seamless workflows, while minimizing costly compliance errors.

Doxim customer engagement Platform

Doxim Client Onboarding is an integrated component of the Doxim Customer Engagement Platform. This SaaS-enabled platform addresses key digitization challenges in your organization, from client onboarding automation, to improved, personalized communications to anytime, anywhere content access, tailored to your clients' channel preferences.

LET'S TALK

Contact 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.