



CASE STUDY

5 Practical Ways to Bridge Your Experience Gap



The widening gap between your customers' expectations of a perfect digital relationship and your ability to deliver it is threatening your business and putting customer relationships at risk.

Here are **5 practical ways** to improve your customer experience, using customer engagement tools:

- 1. Get started on the right foot** - Offer a frictionless first experience, without all the paper and time it typically consumes, using automated onboarding and loan origination solutions. Your customers will appreciate not having to give you the same information time and time again, and your staff will get more time to have that all-important revenue-building conversation.
- 2. Engage more fully with each customer** – Your customers see all of their interactions with your organization as one conversation. Do you? A customer relationship management (CRM) tool can really help to ensure that every customer interaction is noted and recorded, regardless of origin, so your customers never have to repeat themselves. It's the sort of personal touch that builds loyalty and increases satisfaction.
- 3. Find out what your customers actually need and want** – Collect, store, aggregate and analyze customer data across multiple channels and back-office systems using a combination of CRM and a business analytics tool. They'll help you pinpoint opportunities to offer the right products and services to the right customer at the right time. Personalized and pertinent communications deliver a more compelling experience, engaging your customers and making them feel like you really understand their needs.



- 4. Identify more opportunities to communicate** – Take your regulatory communications to the next level with modern statements and reports, delivered through the customer's preferred channel. Deliver better looking statements, with targeted marketing messages that support the messaging used in your other promotional channels. It's a great way to turn a simple statement into a powerful marketing vehicle.
- 5. Pay attention to application integration** – It's essential to provide a streamlined and seamless experience across all your customer touch points - from digitizing new account opening and loan processing, to replacing legacy content management systems with cloud-based ECM and responsive eStatements. If it can all be easily and tightly integrated, then you can simply begin your digitization journey addressing your most urgent need, and confidently build from there.

All the Solutions You Need to Bridge the Gap - In One Place

At Doxim, we know that bridging the Experience Gap is the key to retaining customers, attracting new ones, and streamlining your customer-focused processes. That's why we designed the Doxim Customer Engagement Platform (CEP). A modular suite of SaaS-enabled applications, it has all the customer engagement solutions you need in one place – and the best part — they all are fully integrated. With the Doxim CEP, you can start by optimizing one customer experience, then move to the next. As you add more digitization capabilities, it all just works, right out of the box.



Close the Experience Gap with the Right Tools:

- Doxim Client Onboarding – Create an enduring first impression with automated account opening and increase wallet share with customer selfservice features.
- Doxim Loan Origination – Streamline lending with 5 step paperless loan origination avoiding errors and rework and delivering loans to your customers through their preferred channels.
- Doxim Customer Relationship Management – Centralize the tracking and management of every customer interaction to increase loyalty, uncover sales and service opportunities, and maximize lifetime value of each customer.
- Doxim Business Analytics – Slice and dice CRM and back-office data to identify opportunities and make more informed decisions for targeted campaigns.
- Doxim Campaign Management – Deliver powerful, targeted marketing campaigns through your customers, preferred channels.
- Doxim Statements & Reporting – Add value to the communications you know your customers consume by turning them into a one-to-one marketing opportunity.
- Doxim Enterprise Content Management – Improve the customer experience and reduce your costs with fast, secure access to digital documents.

Ready to Close the Gap?

Schedule conversation with Doxim Solution consultants and discover how an integrated approach to digitizing customer experience can benefit your financial institution.

Connect with Doxim

Learn more about how the Doxim Customer Engagement Platform can benefit your financial institution



[Start a Conversation](#)

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Doxim is a leading provider of SaaS-based customer communications and engagement software for banks, credit unions, and wealth management firms. Doxim's Customer Engagement 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.