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CASE STUDY

AFP Habitat Increases Conversions with Personalized and Interactive Video Pension Statement



Interactive Video Statements Motivate Pension Investors

Objectives

AFP Habitat – one of Chile’s largest pension funds – needed an engaging digital experience to replace their paper pension statements. Their goal: to motivate their 2 million members to open new accounts or make additional pension contributions.



Most people have difficulty understanding their text-based pension statements. The use of personalized and interactive video improves consumer education and engagement, empowers customers to make financial decisions, and motivates them to take swift, decisive action.

Solution

AFP Habitat created an engaging pension statement video to educate and motivate action from 2M pension members. Each video leveraged customer data to create a customized 1:1 experience unique to that member.



The Video Included:

- Relevant changes to the consumer’s pension fund
- Pre-populated pension data and a detailed analysis of the consumer’s balance
- Options to optimize their pension through additional contributions including the associated benefits of the effort

Results



Watched Entire Video

74% of viewers watched 100% of the video, fully engaging with the experience

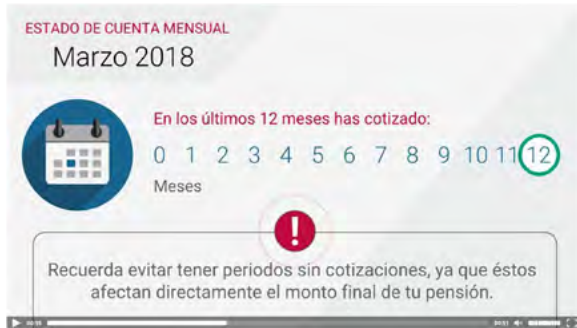


Positive Survey Response

90% of consumers reported increased satisfaction and better understanding of their pension statement



Doxim Solutions For Wealth Management



01

Personalizing the Journey

The solution delivers a video experience personalized to each of AFP Habitat's pension customers.

02

Personalized Email and Video

The video statements replace the need for printed statements. Video statements are delivered within a personalized email and recipients simply click the enclosed link to access their unique video statement.



03

Up-Sell Opportunities Presented in CTA

AFP Habitat's videos explain pension details and product options bespoke to each member, increasing engagement, conversions, and member retention.



04

Data Gathering

AFP Habitat now receives insights about their customer interactions with the video, and can track their activity as a result of engaging with the experience

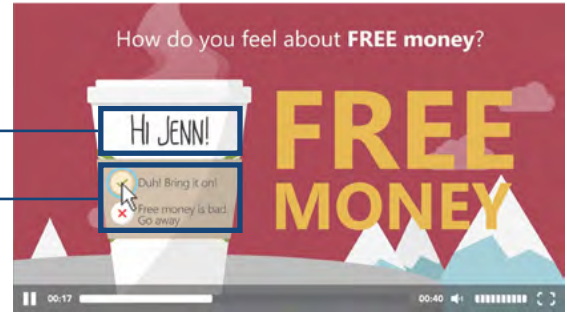
05

Personalized Journey Success!

Doxim Solutions For Wealth Management

Interactive Video Statements Motivate Pension Investors

Create a memorable experience, simplify complex products, and ensure immediate relevancy using Doxim's Interactive Video platform.



Doxim's data-driven video solution can increase conversions and decrease funnel abandonment at every stage of your customers' journey. Working with Doxim, you can deliver engaging statements to your customers cost-effectively and at scale, deployed and managed in an environment purpose built for data security and compliance.

Why Interactive Video Is So Powerful For Your Audience



Immediacy



Makes the complex simple



Visual vs. textual storytelling



Personal and relevant



Memorable

Why Interactive Video Is So Powerful For You And Your Business



Fits into what you're already doing



Marketing-controlled creative



Accelerates buyer journey



Cost-effective scalability



Customized to your data security standards

Personalized & Interactive Video Statements

Leverage the power of video statements to:

Engage customers with 1:1 interactive experiences with individual customer data

Increase contributions by visually educating about account opportunities

Improve customer satisfaction and Net Promoter Scores (NPS) while decreasing customer care costs

Reduce churn and strengthen the customer relationship for cross-sell and upsell

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Doxim is the customer communications and engagement technology leader serving financial and regulated markets, providing omnichannel document solutions and transforming experiences to strengthen engagement throughout the entire lifecycle. Learn more at www.doxim.com.