



# Doxim CCM

## Customer Experience Portal (CXP)

### Provide a Secure Customer Portal for Digital Document Delivery & "In Portal" Engagement

Customers today want self-serve access to their information and documents, control over updates to their account information, and the ability to engage your organization on demand without waiting on a call center queue.

Included in the Doxim CCM Platform, the Doxim Customer Experience Portal (CXP) provides your customers with a brandable microsite for digital document delivery and customer engagement from within a secure, responsive web interface, compliant with accessibility regulations. The solution satisfies your customers' expectations for instant on-demand engagement, while helping you to transition customers to a digital experience, reduce your print and mail costs, and gain access to new digital marketing opportunities.

With Doxim, you can deliver a branded self-serve portal experience to your customers either as a standalone portal with an enrollment process and its own login page, or by integration with your existing online banking portal either through single sign-on, APIs, or an iframe.

### The Doxim CXP provides customers with a centralized location for accessing their documents and communications, managing account preferences, communicating with your Customer Service team and engaging with targeted marketing.

- User-friendly and responsive
- Advanced communications preferences management
- Accessible and compliant with WCAG 2.0 AA
- Fully aligned with your branding and customized views
- One place to access current and historical documents
- Gateway for secure communication with CSRs

### Flexible & Engaging Digital Documents

Engage your customers with HTML documents – the perfect format for today's mobile-first customers. HTML is mobile-responsive and can deliver content-rich and interactive experiences on any device.

### On-Demand Access to Communications

Provide a single, centralized portal for customers to access their statements, documents and communications, and easily manage their account information.

### Centralized Preferences Management

Give customers the ability to set and manage their communication preferences, including their preferred channel (email, print/mail, SMS/text, or web), type and frequency of communications, and time of delivery windows\* – for ultimate control and flexibility.

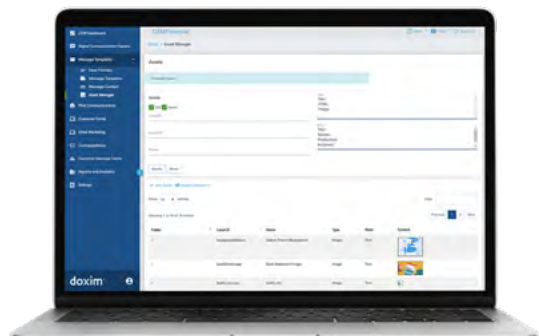
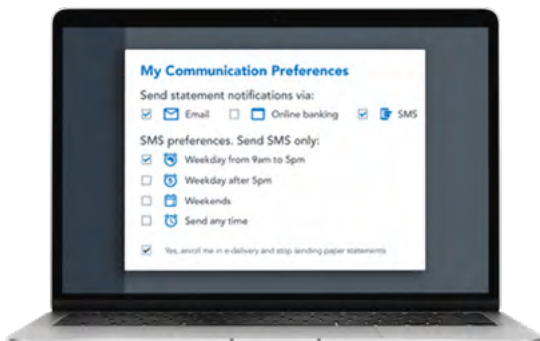
### Secure Customer Service Messaging

Provide customers with convenient, seamless access to your Customer Service team via two-way "in portal" messaging and engagement.\*

### Relevant, Personalized Marketing

Leverage opportunities to deliver targeted marketing messages to customers. From welcome splash screens to graphical banners within the customer microsite to onserts within the digital statement, we empower marketing users to create and deliver targeted content and receive detailed engagement reports.

\*Advanced feature available in Doxim CCM Engage solution.



### Actionable Engagement Analytics

Reports and dashboards provide customer engagement insights into messages delivered, viewed, and engaged. Track digital communications enrollment, email engagement, response to targeted marketing on customer microsites, and more.

### Easy Implementation, Your Way

Doxim CXP can be implemented the way that is best for your business.

- **Single sign-on (SSO):** as a standalone microsite with seamless access via single sign-in.
- **APIs:** fully embedded into your existing digital ecosystem
- **iFrame:** integrated into your own customer portal as an iframe.

## Doxim Customer Experience Portal

### On Demand Access to Communications & Customer Service Engagement

#### Features

##### Portal Features

Fully customized to clients branding, language

Linkages to clients existing online content

Accessible and compliant with WCAG 2.0 AA

Mobile responsive

##### Integration

Standalone microsite via SSO (single sign on)

API integration with core systems and other applications

iFrame integration into existing customer portal

##### Messaging & Customer Service Engagement

Two-way secure messaging "in portal" with Customer Service

##### Marketing Messages

Welcome / splash screen, individual web pages, and statement inserts

Digital inserts with tracking statistics

##### Account Information, Historical Records & Preferences

Customer profile

Advanced preferences management

Flexible display of documents (list view or card view)

Presentation layer for compliant archive of documents & communications

##### Administration

Roles based access to functions

#### Included

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Connect with us to book a demo of the Doxim CCM Platform and the Customer Experience Portal.

Request Demo

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. The Doxim Customer Communication Management platform helps clients communicate reliably and effectively, improve cross-sell and upsell opportunities, and drive increased loyalty and wallet share through personalized communications. The platform addresses key digitization, operational efficiency, and customer experience challenges through our suite of plug-and-play, integrated, SaaS software and document technology solutions. Learn more at [www.doxim.com](http://www.doxim.com).