



Doxim CCM Digital Business Messaging

Take Your CX to The Next Level with Digital Notifications and 2-Way Engagement

Consumers today use their digital devices as their primary channel for engagement. They are receptive to relevant and timely digital messages from you, their key service provider, related to their account activity. Customer engagement through digital channels is the modern CX they desire. But digital engagement also benefits you, as every customer you shift to digital reduces the printing and mail costs that would otherwise impact your bottom line.

Doxim's Digital Business Messaging (DBM) solution helps you deliver a modern digital CX, while reducing your costs. With DBM, you can set-up and automatically deliver personalized messages to your customers – received on their digital devices, in their preferred delivery channel – to inform them about scheduled and unscheduled account activity.

- Notify customers when new documents are available – “your statement is ready to view online”
- Notify customers about new transactions – “your order has been placed”
- Engage customers when urgent events occur (e.g. suspected breach) and you need a timely response – “we have locked your account; would you like to restore access? y/n”
- Delight your customers with the modern CX they desire; while reducing your printing and postal costs

Business User Authoring

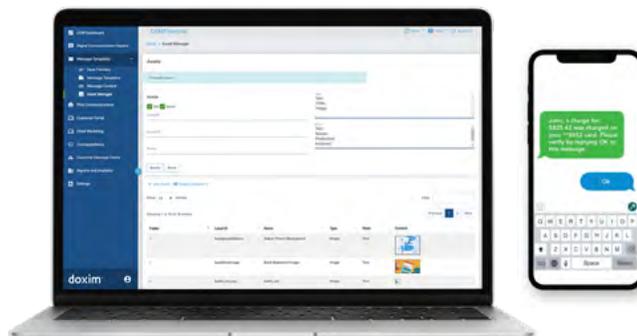
Doxim DBM is designed to give control to your business users – enabling fast, efficient authoring and simplified change management. During onboarding, Doxim creates master templates for each document type, designing a specific layout, enabling zones, integrating data streams, rules, and more. Then, using those master templates, your business user can author a portfolio of messages to support your firm's specific processes across your various lines of business.

Once messages are set-up, approved, and released to production, they are automatically delivered without further human intervention. In the same way, your business user can make changes to messages and, once approved, release them “live” into production.

Scheduled or On-Demand Delivery

The DBM solution gives you the flexibility you need to author messages for a variety of business processes, to notify customers about a variety of account activities. There are two main types of delivery:

- **Scheduled:** these notifications are sent out on a regular cadence (e.g. monthly, quarterly).
- **On-demand:** these messages are triggered by unscheduled account activity and sent immediately.





True Digital Engagement: 1-way or 2-way

Some business processes depend on a regular cadence, while others require urgent feedback from customers to drive the business process forward. To this end, DBM lets you deliver 1-way or 2-way messages based on your needs.

- 1-way messages notify the customer about account activity and typically provide a link where they will find further information (e.g. your statement is ready).
- 2-way messages enable the customer to engage with you and respond instantly, for immediate action as needed (e.g. freeze account).

Leverage Delivery Preferences

Through the Doxim Customer Experience Portal (CXP) your customer can login and specify their preferences regarding delivery channel (email, SMS, IVR), time of day, day of the week, and more. Once designated, the DBM solution adheres to these preferences, delivering scheduled or on-demand communications as outlined.

Marketing Messaging and Email Digital Signatures

Cross-selling is essential for growing your revenue. With the DBM solution, you can leverage unused whitespace in email messages to drive additional revenue, include personalized content about a new product, a loyalty campaign, or to provide supplementary information about the customer account. Emails can include personalized attachments and support the use of email digital signatures.

Centralized Management of Content and Assets

Ensuring brand consistency across omni-channel communications is a common challenge. To address this, the DBM solution provides a centralized hub for content blocks and visual assets, which can be used in DBM and across communications – enabling the use of consistent, approved, compliant assets.

Message Archival

Every customer notification sent and delivered is securely archived, complete with attachments or digital email signatures (as applicable). A record of these messages is accessible to the customer and CSR through the Doxim Customer Service Center solution.

Secure and Easy Integration

While DBM is an integral part of the Doxim CCM platform, it's also designed to easily integrate with web applications in your enterprise communications framework through our published SOAP and RESTful APIs. This ensures that existing, familiar application UIs are maintained for your teams and customers:

- Digital business messages can be pulled into an existing call center application for CSRs to address customer inquiries
- Engagement statistics can be shared across the business to understand communication best practices

Digital Business Messaging Use Cases

- Statement / bill ready notifications
- Fraud alerts
- Transactions
- Account activity
- Event & service alerts
- ... and more!

Entire Customer Lifecycle

- Acquisition
- Billing
- Customer service
- Marketing
- Product and service interactions
- Upsell and cross-sell

Doxim CCM Digital Business Messaging

Modernize your CX with personalized, digital conversations related to account activity

Features

Included

System

- Multi-tenant solution ✓
- Access to messages, delivery status by CXP and Customer Service Center solutions ✓
- APIs enable flexible uploading of content and plug-in to customer service GUIs ✓
- Enables easy/rapid addition of new channels, proprietary channels (e.g. fax) ✓

Authoring

- Message authoring and change management by business users ✓
- Centralized hub for content and assets ✓
- Mandatory approval workflow ✓
- Use of whitespace for marketing messages in emails ✓
- Support for variable data and personalized attachments in emails ✓
- S/MIME support for encrypting and digitally signing emails ✓

Delivery

- 1-way or 2-way communications ✓
- Scheduled cadence or on-demand triggers ✓
- Adherence to delivery preferences defined in the CXP solution ✓
- Historical access to all messages sent and received ✓
- Message priority control to ensure that critical messages are processed quickly ✓

Reports & Engagement Statistics

- Merchant transaction summary reports ✓
- Behavioral analytics ✓
- Customer segmentation & analysis ✓

Communications Channels

- Email ✓
- SMS ✓
- Phone / IVR / Fax ✓

Contact us to see how Doxim Digital Business Messaging can modernize your Customer Experience and deepen Customer Engagement

[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 Engagement 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.