



Doxim CCM

Self-Serve Correspondence

Empower Your Business Users to Author Rapid Communications

Doxim supports your business by generating regulated omnichannel communications on a regular cadence (daily, monthly, quarterly) and delivering them in the customers' channel of choice.

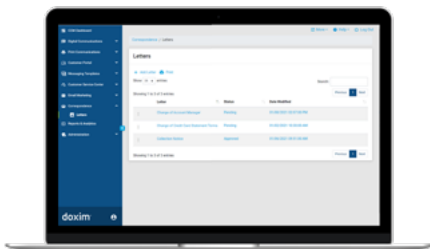
There are situations, however, when your business needs to quickly send 'impromptu' communications to a group of customers (e.g. related to a marketing opportunity, customer service announcement, or an operational issue). In these instances, the standard process for document generation – with its regular roster of communications already filling the queue – may not meet the need.

Doxim's Self-Serve Correspondence empowers your business users in Marketing, Operations, and Customer Service to quickly author simple letters and correspondence using pre-approved templates. Once created and approved, these documents can jump directly into the standard production process for delivery to customers without delay.

Master Templates

During client onboarding, Doxim creates a set of master templates customized for the needs of each client. All regulatory information and branding elements are locked to manage compliance risk and ensure only approved fonts, logos, and messaging are used. Unlocked areas can be edited by the user to personalize the communication's message and call to action.

Doxim Self-Serve Correspondence empowers your business users to author letters 'on demand' and submit them directly into the standard production process – bypassing the standard queue and accelerating their time to delivery.



Authoring & Editing

Business users can quickly author letters and communications 'on demand' from within the Self-Serve Correspondence area of the CCM Client portal. To begin, they select a master template and create a working copy. Alternatively, past/historical letters the user has created can be the basis for the working copy.

Within the working copy, the user updates the data fields to ensure they will map with the variable client data they are planning to import via CSV file. With the variable fields mapped, the user can proceed to personalize the body of the communication. Editing of text, graphics, fonts, and more are performed using an intuitive WYSIWYG editor.

Preview & Approve

When changes to the letter are complete, the user imports/merges the variable client data into the letter, previews the job, and submits it for approval.

Release Directly to Production

Once approved, the letter 'job' is released directly into the production workflow where it is composed, enhanced, and delivered to the customers' preferred output channel for delivery. Doxim ECM is the end point where all self-serve letters and correspondence are securely stored and easily accessible in PDF format.

Assigning Roles

You can assign 'user' or 'admin' roles to ensure only individuals with permissions can view communications in production.

- Accelerate the delivery of urgent, time-bound communications
- Enable business user authoring for greater speed and agility
- Bypass the Operations queue and submit directly into production
- Agility to address market opportunities, operational, or support issues
- Support for a remote/virtual team, accessible anytime, anywhere

Doxim Self-Serve Correspondence

Rapid authoring and delivery of time-bound communications

Features

Included

Ease of Use

- Available anytime, anywhere via Doxim CCM Client Portal ✓
- Master templates pre-configured for client requirements ✓
- WYSIWYG editor accelerates user productivity ✓
- Variable data uploaded via CSV ✓
- Generates document in the format (print or PDF) and channel (mail or email) based on customer preferences in data file ✓

Reporting

- View list of letters "in progress" (user role can view their own letters, administer role can view all letters) ✓
- Reports indicate successfully printed, failed, count of documents sent, data sent ✓

Security and Compliance

- Templates have locked portions to protect regulatory and branding elements ✓
- All messages securely archived; documents are maintained in Doxim ECM ✓
- Role-based access control – user / admin ✓
- Operational reports for admin access ✓

Contact us to see how Doxim Self-Serve Correspondence can accelerate your customer communications and increase your business agility.

[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.