



## Doxim CCM

### Doxim CCM Portal for Client Self-Service

#### Empower Business Users to Drive Digital Transformation

As your business transforms to embrace digital communications, you need technology and solutions that will reduce complexity of traditional customer communications systems and allow you to scale while controlling costs and managing risk.

Doxim Customer Communications Management platform (Doxim CCM) is designed to bridge traditional with modern and help you digitize your communications at the pace of your business. To help you be agile and deliver personalized omnichannel communications at scale, we focus on empowering your business users – from Operations and Compliance to Marketing and Customer Service.

The **Doxim CCM self-serve client portal** is a centralized access point to the Doxim CCM features, where your business users can:

- **Create, configure and manage** the key elements of communications
- **Get a single view of the customer**, including their communication preferences, documents and communications history
- **Manage templates and assets** for quick to market updates and to drive consistency across communications
- **Drive ad-hoc and interactive communications** through Email Marketing campaigns or Customer Service Messaging
- **Get reports and insights** on the status of documents and communications, customer engagement and more

#### Simplified Process & Control for Operations

The Doxim CCM portal delivers an easy-to-use interface allowing Operations users to directly access key tools and reports, including:

- Manage document templates and configuration
- Manage omnichannel digital notifications
- Access dozens of operational reports on deliverability, status, and customer interactions with communications
- Leverage all communications channels to accelerate digital customer engagement
- Manage the customer digital communications enrollment process

#### Single View & Customer Engagement for CSRs

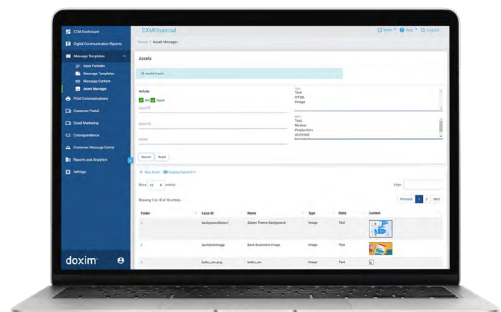
Providing a single source of truth for customer data is essential for delivering great customer experiences. Through the Doxim CCM Portal, customer service representatives (CSRs) can improve the outcomes of customer inquiries by:

- Having access to all customer documents and communications in one place
- Being able to manage customer account profile and communications preferences
- Using the secure Customer Service Messaging center for real-time, two-way communications with customers

#### Marketing Solutions, Personalization, Asset Management & Engagement Insights for Marketers

With Doxim CCM self-serve portal, marketers are empowered to directly create and deliver personalized messages and communications, without the help of IT. Doxim CCM opens all customer communications touchpoints for Marketers to deliver coordinated marketing campaigns. Marketers can:

- Create transactional promotions by defining insert/onsert content and messages on statements, bills, and other regulated documents
- Manage campaigns delivered through the Doxim Customer Experience Portal
- Use the fully-featured Doxim Email Marketing solution to welcome, nurture and grow customer relationships
- Personalize communications for better customer experience and ROI on marketing
- Manage templates, assets, and content all in one place to ensure branding consistency
- Access reports and engagement analytics to understand campaign performance through different delivery channels



# Doxim CCM Portal

Empowering Business Users to Manage Omnichannel Communications at Scale

Features	Included
<b>Operations</b>	
Digital communications reporting	✓
Digital notifications management	✓
Communications deliverability reporting	✓
Business activity batch messaging: real-time and batch, push and two way	✓
<b>Marketing</b>	
Customer Experience Portal content and campaign management	✓
Digital engagement reporting	✓
Management of physical and digital inserts, document onserts and whitespace	✓
Email Marketing: CAN SPAM/CASL compliance, contact list management and segmentation, campaign reporting, a/b testing, dynamic content and more	✓
Digital asset management	✓
<b>Customer Service Representatives</b>	
Point in time official record of communications and documents (in Doxim ECM)	✓
Customer profile/preferences management	✓
Secure two-way customer-CSR messaging	✓
Ad-hoc customer document uploads	✓
<b>Administration</b>	
Roles based access to functions	✓
<b>Integration</b>	
API integration with core systems and other applications	✓
SSO (single sign on)	✓

Book a meeting and we'll show you how Doxim CCM can empower your business users with self-serve communications management

[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](http://www.doxim.com).