



Doxim Customer Relationship Management

Knowing Your Customers Was Never So Easy

Doxim Customer Relationship Management (CRM) helps community banks and credit unions build and maintain great relationships with new and existing customers by providing staff with the information and tools they need to manage all engagements, referrals, opportunities and conversations with existing and prospective customers in a single system.

Build a 360° View of the Customer

Turn customer data from core banking and channel interactions into a unified, complete single source of truth. With advanced, predictive analytics, understand needs and grow customer relationships through 360° dashboards and member-centric views of opportunities, service cases, communications, balances and accounts, preferences and more.

Optimize your Sales and Referral Processes

Track your sales process for opportunities or campaigns all the way to actual revenue or units sold. Managers can easily set and track goals, manage pipeline and identify coaching needs and top performers. Quickly refer leads from the frontline to the appropriate department, staff member, or division.

Build Team Collaboration and Automation

Set organization hierarchies, restriction groups and roles to provide appropriate visibility to accounts and collaborate on shared prospects or leads. Set automated workflows to guide staff through onboarding, service, or product-specific processes.

Reach Customers via Email or Text Messaging

Enable staff to connect with your customers securely through two-way email and text messaging while maintaining a complete communications history in one place.

Built-In Document Generation and Signing

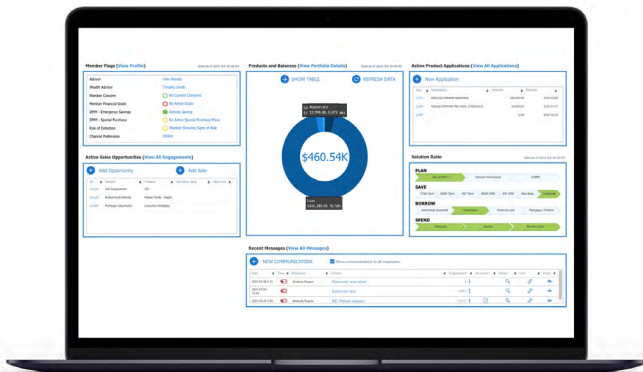
Give staff robust ECM functionality right from within Doxim CRM including generating personalized documents, secure storage, document search and compliance reporting. Electronically sign documents in-branch or remotely via email.

Integrations and Scalability

CRM has pre-built integrations to all major core banking systems as well as Doxim solutions for Account Opening, Loan Origination, Document Management (ECM), Digital Business Messaging (DBM) and Email Marketing (EMM). REST API endpoints allow CRM to easily integrate external applications and build an ecosystem of solutions that is efficient and scalable.

Intelligent Workflows and Automation

Build and assign workflows manually or automatically for every type of process, whether it's for new member onboarding, following up with abandoned leads, mortgage term renewals, addressing member concerns, or dealing with delinquencies.



Doxim CRM

Transforming Customer & Staff Experience

	Doxim CRM	Doxim CRM + Email Marketing	Doxim CRM + Business Messaging
Customer and Account Management			
Customer Profile and Dashboard	✓	✓	✓
Householding/Customer/Account grouping	✓	✓	✓
Product balances, limits, and rates from Core banking	✓	✓	✓
Banking advisor and investment profile data	✓	✓	✓
Customer Document Generation with banking data merge	✓	✓	✓
Document Upload, Search, View/Edit and Versioning ¹	✓	✓	✓
Electronic Document Signature ²	✓	✓	✓
Customer Communications			
Profile and Communication preferences	✓	✓	✓
Inbound call pop/Outbound dialing integration ³	✓	✓	✓
Two-way Email Messaging with Customers ⁴			✓
Two-way Text Messaging with Customers ⁴			✓
Team Management and Collaboration			
Single sign-on ⁵	✓	✓	✓
User management and Role privileges	✓	✓	✓
Data visibility set to your branch/organization structure	✓	✓	✓
Configurable Restriction Groups for individual engagement visibility	✓	✓	✓
Automated Workflows per Sales/Service/Product Type	✓	✓	✓
In-app Assignment and Messaging Notifications	✓	✓	✓
Prospecting and Sales			
Prospect to Customer Lifecycle Management	✓	✓	✓
Opportunity and Referral Management	✓	✓	✓
Sales Goals and Pipeline Management	✓	✓	✓
Referral and Sales Attribution	✓	✓	✓
Individual/Team Sales Performance Reports	✓	✓	✓
Campaigns and Marketing			
Campaign List Upload and Scheduling	✓	✓	✓
Campaign Goals and Performance Reports (Units or Sales)	✓	✓	✓
CASL/CAN-SPAM Email Consent Validation		✓	✓
Email Response Tracking (per Customer or Campaign-wide)		✓	
List Management		via EMM UI	
Template Design and Management		via EMM UI	
Email Autoresponders		via EMM UI	
Email Compatibility Check and A/B Testing		via EMM UI	
Service and Operations			
Engagement assignment and tracking	✓	✓	✓
Auto-forward and bulk switch engagements	✓	✓	✓
Delinquency tracking	✓	✓	✓
Past Due/Escalation Notifications via Email	✓	✓	✓

¹ Via integration of Doxim Enterprise Content Management (ECM) API and predefined document views. Content management of documents not sourced via CEM, customized document views and other ECM capabilities are not included and require a separate Doxim ECM license.

² Via customer's contracted agreements with Onesign or DocuSign e-signature solutions

³ Inbound available for dialers supporting tel/sip protocol calls to external applications. Outbound available for dialers supporting call hyperlinks from web pages.

⁴ Requires subscription to CEM Business Messaging add-on; additional license and text messaging transaction fees apply.

⁵ For organizations subscribing to Azure AD. Customer-side configuration of Azure and user accounts required.



Ready To See What Doxim CRM Can Do For Your Team?

Find out how Doxim CRM's powerful capabilities can help create stronger customer relationships, drive better sales insights, and improve share of wallet.

[Book A Personalized Demo](#)

doxim[®]

Doxim is the customer communications management and engagement technology leader serving highly regulated markets, including financial services, utilities and healthcare. We provide omnichannel communications and payment solutions that maximize customer engagement and revenue, while reducing costs. Our software and technology-enabled managed services address key digitization, operational efficiency, and customer experience challenges through a suite of plug-and-play, integrated, SaaS software and technology solutions. Learn more at www.doxim.com.