



## Doxim CCM

### Interactive Video

#### Engage Your Customers with Interactive, Personalized Video Experiences

Consumers want a digital experience that is convenient and available on demand. But, when making financial decisions that are important and complex, many prefer to engage an advisor / agent – assuming they are best suited to interact and personalize the outcome to their specific needs. However, staffing is expensive, has capacity limitations, and cannot scale.

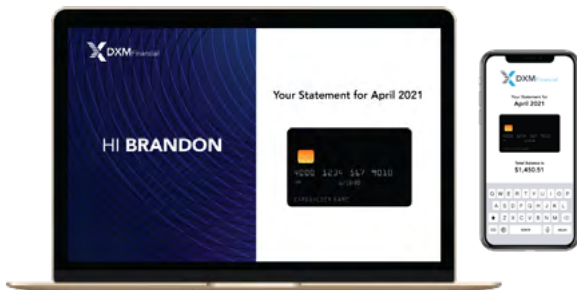
Doxim Interactive Video can be used to automate key processes across the customer journey – providing an interactive and personalized experience that satisfies customers, motivates them to act, drives conversions and wallet share, and lowers the cost per sale.

- Financial Statements – Interactive wealth, credit card, mortgage, loans, lines of credit, statements, with opportunity to cross-sell/up-sell
- Insurance – Interactive claims or policy renewals for life, home, auto, health, with opportunity to cross-sell/up-sell

#### Guide the Engagement

The customer experience is personalized using the client's data and personal information. Following a pre-set workflow, the video can accept input from consumers (they can click a button or input data), pivot the engagement based on customer responses, perform calculations as needed, and provide highly personalized output/engagement.

#### Doxim Interactive Video delivers personalized, interactive, data-driven experiences across touchpoints of your customer journey.



#### Deliver Personalized Outcomes

Based on your needs, the workflow of the interactive video can conclude with a report, quotation, or pre-approval; the promotion of additional products/services; or direct connection to your service organization. In this way, you can provide meaningful on-demand digital engagement while driving conversions and revenue opportunities.

#### Provide the Personal Touch

The solution's visual/video engagement and real-time interactivity provide the missing 'personal touch' needed to drive increased satisfaction, engagement, conversions, and revenue.

#### Templates

During onboarding, Doxim creates a set of master templates/workflows branded to your guidelines. As needed, Doxim can update fonts, logos, messaging, and any 'interactive elements' (e.g. modify a button's linked URL).

#### Flexible & Secure Delivery

Each video created produces a URL that can be pasted into a variety of channels (email, mobile app, SMS/text, social). Following login, the consumer opens and engages with the video workflow. Viewer-specific data is injected securely and directly into the video template, in real time, directly on the webpage being displayed to the user, delivering a personalized and unique experience.

- Improved click-through rates
- Increased conversions, sales, and wallet share
- Better statement comprehension
- Greater customer satisfaction / NPS
- Lower cost-per-sale

# Doxim Interactive Video

Deliver Personalized Video Experiences that Drive Conversions and Revenue

## Features

## Included

### Ease of Use

- Master templates and pre-set workflows are pre-configured for clients ✓
- Delivery via pasting the video URL into a variety of channels (email, mobile app, SMS/text, social) ✓
- Video can be available to consumers via Doxim CXP ✓

### Workflow & Data Management

- Client data transformed into JSON file, held in Doxim ECM (Enterprise Content Management) ✓
- When the video is run, data is injected from the JSON file into video template on the webpage in real time ✓
- Video render engine responds to key customer decisions ✓

### Security and Compliance

- Private Real-Time (PRT) is the most secure way to personalize videos ✓
- Solution refers to customer data in JSON file but never saves it ✓
- Consumer views video on webpage from behind login ✓

### Reporting

- Each campaign produces interactive, real-time analytic feedback for accurate ROI metrics ✓

Contact us to see how Doxim Interactive Video can drive increased satisfaction, engagement, conversions, and revenue.

[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 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).