

doxim[®]



Doxim CRM Transforming Customer and Staff Experience

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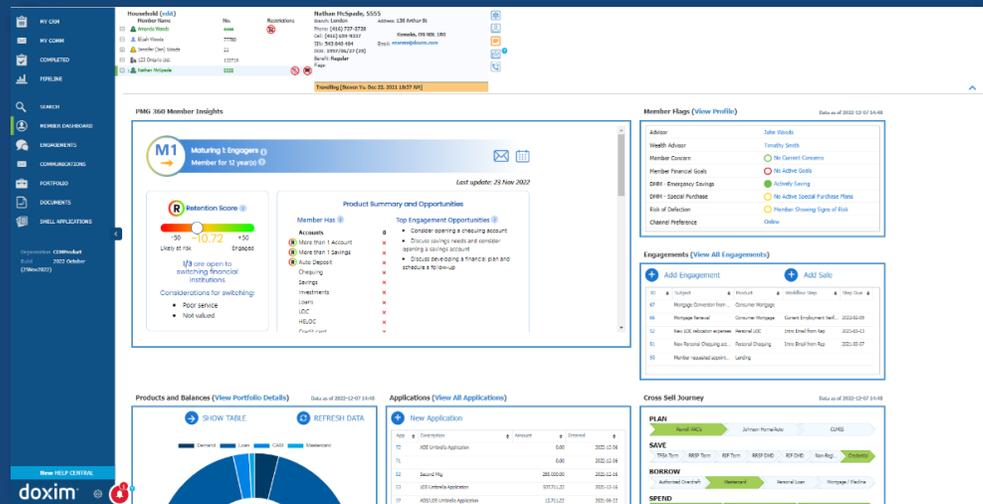
866 475 9876

Purpose-Built for Financial Services



Key Benefits

- Purpose-built for community banks and credit unions, based on decades of industry experience
- Centralized access to data from multiple core systems, customer databases, and analytical tools
- Campaign management tools to send targeted, relevant offers
- Workflows to reflect real-life sales and service processes
- All interactions and activity captured and aggregated for analysis and reporting
- Complete customer/member profile information available to all areas of the organization
- Individual and household profiles to understand the economic micro- community
- Mobile-responsive interface and mobile app for off-site engagement
- Powerful features and modules that can replace point solutions and help cut costs

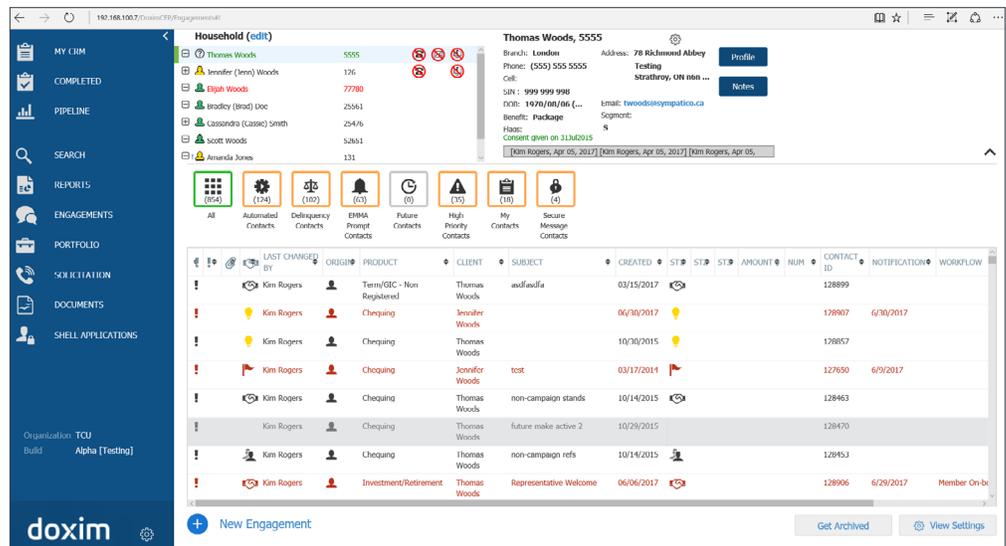


Community banks and credit unions offer a uniquely personal experience that large banks may struggle to match. But as customers increasingly interact with them across multiple channels, maintaining that personal touch can become a challenge.

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 understand customer needs, all in one place. It provides a central hub for managing customer engagement and will help expose growth opportunities across multiple lines of business.

Build a 360° Customer View

Doxim CRM centralizes all important data from 3rd party systems in one place. The resulting 360° customer profile allows the teams across your financial institution to access data on demographics, household, investment details, financial planning, external and related accounts, transactions, owned products, and much more.



Understand the Customer

Get a snapshot of the customer's products in your core processing system and those held by 3rd party organizations. Doxim CRM provides insight into the customer's investment objectives and preferences, and it displays the credit rating and the overall contribution the customer or their household makes to the growth of the bank or credit union.

Know the Whole Household

Learn each customer's story as part of the larger picture of their financial "household". Each household is preloaded based on address, but staff can move individuals and businesses as required to create an authentic view of the overlapping economic plot lines. This view is a unique feature of Doxim CRM, which reveals real economic micro-communities, and helps staff members assist customers in making better financial decisions.

Focus on Customer Needs

Doxim CRM presents a holistic, customer-centric perspective to sales and service operations. All information is linked to the customer (who they are, who they have been contacting or were contacted by, what their needs are, what products they have purchased, etc.). The information is available to staff across all locations, including the branch, the call center, and the online banking department, with up-to-the-minute details of the customer's engagement history to help understand their current needs.

Better Manage the Sales Pipeline

Doxim CRM tracks the sales process all the way from an opportunity to a sale. With the sales goal module, staff and management can set goals and track their progression at an individual or consolidated level, in real-time. With this powerful, and transparent sales reporting capacity, managers can quickly see how well a campaign is doing, as well as identify and reward top performers, or provide coaching to those who aren't on track to meet their set targets.

AUTOMATION NAME	CLASSIFICATION	STATUS	ACTION
1 Low Equity Renewal - HELOC Discussion	SOLD	Active	ⓘ 🗑️
2 Low Equity Renewal - Cancelled/Declined Renewal	DECLINED	Active	ⓘ 🗑️
3 High Equity Renewal - Cancelled/Declined Renewal	DECLINED	Active	ⓘ 🗑️
4 Markets - New Membership - Sold	SOLD	Active	ⓘ 🗑️
5 Onboarding Day 1	COMPLETED	Inactive	ⓘ 🗑️
6 Onboarding Day 30	COMPLETED	Inactive	ⓘ 🗑️
7 Onboarding Day 120	COMPLETED	Inactive	ⓘ 🗑️
8 Markets - New Membership - Declined	DECLINED	Active	ⓘ 🗑️
9 High Equity Renewal - HELOC Discussion	SOLD	Active	ⓘ 🗑️

Integrations and Flexibility

No two institutions are exactly alike, so Doxim CRM has been created with the flexibility to accommodate every organization's needs. In addition, Doxim CRM easily integrates with external software applications, like your banking portal, to help you build an ecosystem of technology solutions that is both efficient and cost effective. It also allows the configuration of automated triggers to prompt conversations and engagement. Using our open API and advanced web services support, we'll ensure all the business-critical systems that need to work together will do so.

Meet Customers Where They Are

Whether your customer contacts you through a branch, a call center or online, Doxim CRM captures data from all interactions, giving your staff real-time insights into customer engagement. This complete history helps you manage the customer experience across all touch points and ensures you don't miss opportunities for upsell and cross sell.

We Understand All Customer Touchpoints

Doxim CRM is purpose-built for financial institutions and offers all key functionality and workflows that reflect their real-life processes. With over a 100 preconfigured customer or member engagement types, banks and credit unions can quickly create, document, and manage all key interactions, including authorizations, investment payouts, letters of credit, loan reminders, renewals, service charges, travel notifications, card status changes, and much more.

A Scalable Platform to Grow with You

Doxim CRM is a part of the Doxim Customer Engagement Management (CEM) platform and offers the added value of helping focus on growth, not point solutions. Doxim CRM seamlessly integrates other Doxim solutions including:

- **Doxim Account Opening** to streamline, accelerate, and modernize your account opening processes.
- **Doxim Loan Origination** to enable faster, more efficient origination and to capture data for use in upsell and cross-sell campaigns.
- **Doxim ECM** for end-to-end electronic document creation, routing, and archiving.
- **Doxim Email Marketing**, to design and execute effective marketing campaigns to drive cross- sell, upsell, loyalty, and wallet share.

Contact us

Book a personal demo to see how Doxim CRM can help you build and maintain great relationships with your customers.

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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.

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