doxim®

TRANSFORMING CUSTOMER EXPERIENCE

Doxim CRM

Driving Marketing Success

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PRODUCT SPOTLIGHT
Doxim CRM for Marketing

Attract Customers and Grow Wallet Share

To become the financial institution of choice in today's highly competitive environment, you need to engage prospective customers with personalized, relevant communications. You need to continue to communicate with your existing customers throughout their lifecycle, implementing smart marketing campaigns that drive increased revenue through intelligent targeting and cross-selling.

To manage such personalized campaigns, you need a CRM solution that makes outreach and response management simple, and keeps the focus on customers and their needs. With a CRM that is purpose-built to address the needs of marketers at banks and credit unions, you can truly understand your audience and be successful.

Using Doxim CRM, integrated with Doxim Email Marketing you can create multi-step campaigns that showcase relevant offers. You can then develop a 360° view of your customers and their households and leverage this intelligence to generate leads from your expanded customer base, increasing wallet share.

Add in Doxim Business Analytics to the mix, to mine multiple back-end data sources, and you can start to segment your existing customer base, developing campaigns that deliver the right message to the right person at the right time, maximizing response rates and further driving up engagement.

HOW IT WORKS
Doxim CRM for Marketing

Here's a simple 5 step way to implement a campaign using the CRM and other applications of the Doxim Customer Engagement Platform that will drive more opportunities into your lending pipeline:

1. **Segment Identification** – Using Doxim Business Analytics, analyze customer data and identify the customer segment with the highest propensity to respond to the loan offer you wish to make. Customers can be segmented by demographics, current product mix, or any other data element or combination of data elements available in back office and third-party data sources.

2. **Campaign Creation** – Design your multi-step campaign workflow, and upload the target segment into Doxim CRM, using the intuitive Campaign Loader tool. Then simply associate the list with your campaign workflow, and kick off the automated campaign.

3. **Engaging Outreach** – Trigger a sequence mobile-friendly emails with the CRM workflow. These emails will take the customer through the purchase journey, from the top of funnel to the bottom.

4. **Personalized Follow-up** – When a customer interacts with an email (by opening, clicking, or forwarding), marketing staff will know this and can assign the qualified lead to the appropriate resource (via the CRM or otherwise). Depending on the customer's actions and interests, follow-up could come from marketing, CSRs, or your call center. All responses are tracked through Doxim CRM, so a sales opportunity never slips through the cracks.

5. **Analysis and Fine-Tuning** – Review sales pipeline and campaign analytics to see how well your campaign is working, then adapt your messaging or assign additional staff as needed to close opportunities faster. Real-time analytics let you tweak in-flight campaigns and you can apply lessons learned to future marketing activities as well. Doxim CRM also captures rich contact data for later re-use, so your marketing gets smarter and more targeted with every campaign you send out.

Why Choose Doxim CRM?

Unlike generic customer relationship management solutions, Doxim CRM is specifically designed and built for banks and credit unions, so it meets your specific needs, right out of the box. Over the years, our highly engaged customer advisory boards have helped us ensure that all its features are designed to meet the changing needs of financial institutions like yours. Plus, Doxim CRM has a rich, open API set, making it quick and easy to integrate with the back-office systems you rely on. So it all just works, without putting any strain on your IT department.

A Vision for Customer Engagement

Doxim CRM is a fully integrated component of the Doxim Customer Engagement Platform, a complete solution for transforming your customer experience. From new customer onboarding and loan origination, through marketing and communications, to full colour statement services, the Doxim Customer Engagement Platform brings together a suite of integrated applications to centralize the management of every customer touchpoint. So you can start by addressing your top of mind challenges, and then expand your engagement strategy, knowing every Doxim application will integrate seamlessly with those you already have in place.

USE DOXIM CRM TO SELL AND SERVE EFFECTIVELY THROUGHOUT THE CUSTOMER LIFECYCLE:

- Encourage customers to bring third party loans to you as their loan terms end
- Promote the most relevant products during the critical 365 day onboarding period
- Manage term and other renewals more
- effectively to protect and retain business
- Automate delinquency management and
- collections to free up staff for more important tasks

Talk to Doxim team about your marketing challenges, and we will help find the solution.

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Doxim is a leading provider of SaaS-based customer communications and engagement software for banks, credit unions, and wealth management firms. Doxim's Customer Engagement Platform helps financial institutions transform their client experience, communicate effectively throughout the client lifecycle and improve cross-sell and upsell activities that drive increased wallet share. The platform addresses key digitization challenges, from automated account opening, through improved, personalized communications to anytime, anywhere content access, tailored to a client's channel preferences. This eliminates costly traditional paper-based, manual processes and enables cost-effective provision of an omni-channel experience that delights customers and improves their long-term loyalty. Find out more at www.doxim.com.

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