doxim®

TRANSFORMING CUSTOMER EXPERIENCE

Doxim Customer Engagement Platform

doxim.com info@doxim.com 866.475.9876

DOXIM

Customer Engagement Platform

Key Benefits

- Provide a compelling, consistent experience to clients regardless of channel
- Let clients consume information in the way they want, on the device they choose, at the time they need
- Add value to every interaction with relevant, personalized offers
- Enable staff with tools to focus on value-added activities
- Provide efficient processes to save staff time
- Use analytics to understand your customers
- Never ask the client more than once for the same information

The way your clients expect to engage with your financial institution is changing from traditional, employee-assisted channels to on-demand channels. The threat of losing customers to lower cost virtual financial services organizations that provide similar products and transaction services is imminent. A recent study predicts that banks who are slow to respond could lose 35% of their market share by 2020.

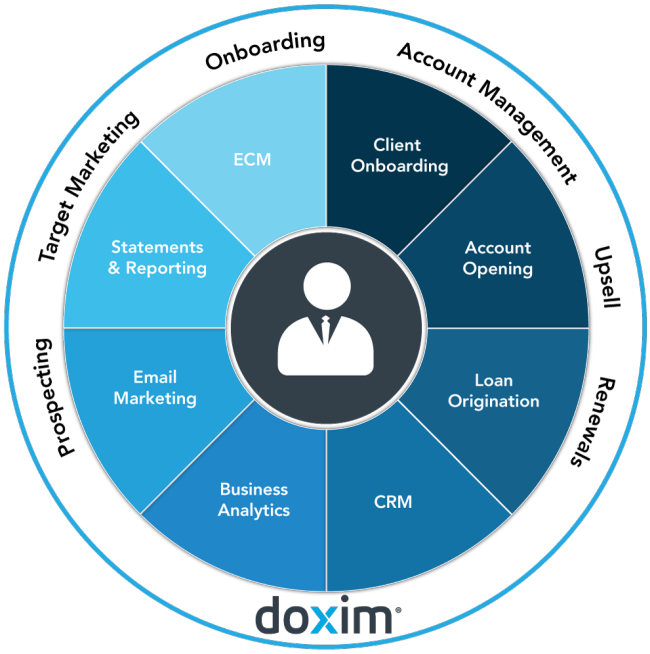
A further challenge for financial services organizations is that historically low base rates have squeezed their margins. They need to create process efficiencies and have employees spend more time on value-added activities that strengthen profitability.

Clients increasingly expect financial services organizations to have a deep understanding of their financial needs and to provide holistic, personalized advice based on this understanding.

Thankfully, addressing these needs just got easier with the **Doxim Customer Engagement Platform**. We can help digitize your customer engagement process, allowing you to focus on revenue generating activities and maximize the lifetime value of your clients. With our platform, you can drive consumer engagement through on-demand self-service, targeted and timely product offers, and personalized expert advice when needed.

DOXIM
CUSTOMER ENGAGEMENT PLATFORM

HELPING OVER 1,500 FINANCIAL INSTITUTIONS GROW



Advisor Assisted

Onboarding and loan origination are digitized and streamlined, freeing up staff to engage in customer conversations

Self Serve

Mobile account opening, online statement access, digital services, on-demand, 24/7

Regulated Communications

All regulated communications including statements, confirms, and reports are digitized and made available through the clients' preferred channels

Account Opening | **Loan Origination** | **CRM** | **Business Analytics** | **Campaign Management** | **Statement & Reporting** | **Content Management**

Engagement Services

Data Warehouse

Fully integrated, plug and play applications, so you acn start by solving a pressing digitization challenge, and then build from there.

Line of Business Back Office | **Content Repository**

The Data Warehouse and Content Repository are core Doxim data-stores which retain all key customer data, and documents in a secure but accessible cloud-based storage. Line of Business Back Office represents the primary banking or trading systems, with which Doxim integrates - helping you break up data siloes.

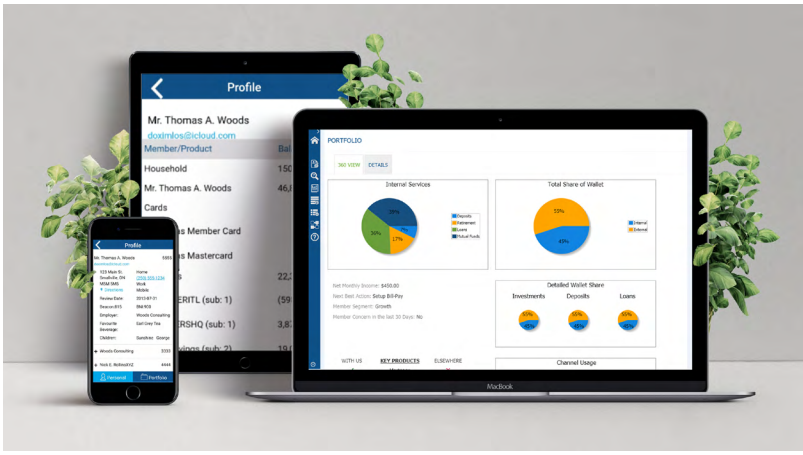
MEET THE DOXIM CEP: INTEGRATED APPLICATIONS

Account Opening & Client Onboarding automatically guide the account opening process, allowing your customer-facing teams to focus on building client relationships and uncovering sales and service opportunities, rather than shuffling forms and papers.

Doxim Loan Origination offers a superior customer experience with a paperless loan application process. The application includes integrated e-signing and leverages automated decisioning to speed loans to completion.

Doxim CRM helps you capture key customer data across multiple channels, as well as aggregate data from all your back-office systems. This helps better understand your existing clients, provide them with holistic financial advice, and target them with relevant products.

Doxim Business Analytics offers powerful data mining and smart analytics capabilities that help you plan effective and targeted campaigns by identifying trends in clients' demographics and behavior.



Doxim Campaign Management helps you design and launch powerful, targeted campaigns and deliver them via your clients' preferred communications channel, including placing campaign ads onto their statements.

Doxim Statements & Reporting helps convert your statements from compliance documents to fully-fledged marketing vehicles; composed, processed, and delivered via your clients' preferred channel.

Doxim Content Management provides archival, search, and retrieval for high-volume compliance documents such as bank and brokerage statements, trade confirmations, and tax forms. It enables easy and secure document access via online customer portals.

LET'S TALK

Contact Doxim team to discuss your customer experience transformation initiatives.

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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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