



TRANSFORMING CUSTOMER EXPERIENCE



# **Doxim** **Self-Serve Account & Loan Origination** Your Branchless Banking Solution For Future Growth

# BE THE BANK OF THE FUTURE

## Bank Beyond The Walls

Increasingly, consumers are shifting their loyalties to institutions who can provide instant service with a seamless experience across channels. Consumers today want to choose how and when they interact with you. With Doxim Self-Service Account and Loan Origination, they can do just that.

We've completely re-imagined the self-service origination experience so that you can take prospects from click to customer in just under 5 minutes. From real-time ID verification and funding, to instant

adjudication and core banking integration – it's all digital. Doxim Self-Service Account and Loan Origination decreases time to fund from days to minutes, giving your customers the immediate gratification they crave.

At Doxim, we've gone beyond the form fill and designed a state-of-the-art solution for frictionless, digital-first journeys that significantly reduce digital abandonment rates and create the 'wow' moment for your customers.

**A truly omnichannel end-to-end paperless solution that takes your prospects from click-to-customer in under 5 minutes**

### A Robust Set of Features For All Your Self-Service Origination Needs



Open deposit products and unsecured loans in a single flow (\*Open deposit products and unsecured loan in a single flow)



Fraud prevention through AI based user scoring



Joint applications for up to 4 remote applicants



Save & resume functionality



Real-time data upload to core banking



Real-time ID verification



Recover and resume abandoned self-serve



Electronic signature support



KYC FINTRAC compliace



Shopping cart functionality for multi-product support



Account feature switching for direct deposit and recurring payments



Photo ID capture and verification



Omnichannel support – online, phone or in-branch



Customizable to meet FI branding requirements



Mobile phone account & device verification



Real-time funding through credit card



Rapid deployment



Facial & social biometrics



Instant approvals and intelligent auto-adjudication



Doxim Customer Engagement Platform Integration (User-Assisted Account Opening and Loan Origination, CRM, ECM)

*\*Mortgages, Secured loans and Business products come soon!*



## Dominate The Digital Origination Market With Doxim Self-Service Account & Loan Origination

### Make Omni-Channel Banking A Reality

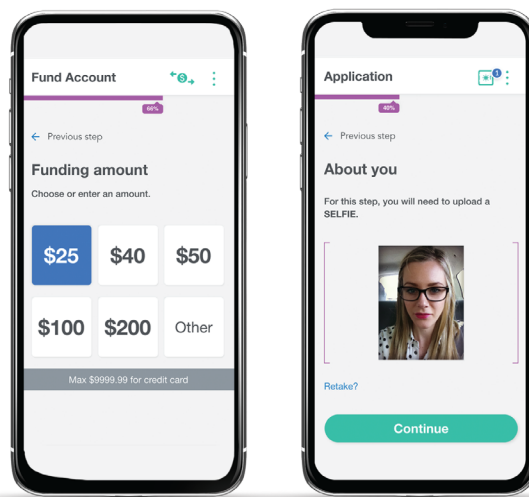
You can now offer your customers the convenience of banking 24/7, from the comfort of their homes, using the channel of their choice, whether it be online, mobile or in-branch. It doesn't just stop there, by pairing Doxim's Self-Service Origination with Doxim User-Assisted Account and Loan Origination, your FI can deliver a cross-channel consistent origination experience so customers have the flexibility to seamlessly switch between channels to complete an application.

### Experience Accelerated Deposit & Loan Growth

Expand your footprint beyond physical branch locations and capture new market share. Doxim Self-Service Account and Loan Origination equips your acquisition team to engage, take action on and convert web-traffic leads immediately, resulting in shorter lead-to-revenue times. And if leads happen to abandon an application, not to worry. The integration with Doxim User-Assisted Account and Loan Origination will capture lead details in real-time and automatically save them as a prospect for immediate follow-up.

### Ensure Compliance Without The Friction

Compliance does not mean sacrificing customer experience. Doxim's Self-Service Account and Loan Origination solutions are designed to give you maximum amount of fraud protection and the compliance without causing friction in the customer journey. Unlike many solutions in the marketplace which require manual intervention to ensure compliance and ID verification, Doxim's solution leverages state-of-the art technology to provide instant verification.





# EXPERIENCE THE POWER OF An All-In-One Origination Solution

Doxim Self-Service Account and Loan Origination is a module of Doxim Digital Origination, a powerful, integrated solution designed to meet all your origination needs through the whole customer journey.

## **Centralized Core Lending Services**

Create a cost efficient and scalable base for growth, by having core lending services that are centralized and shareable.

## **Standardized Processes**

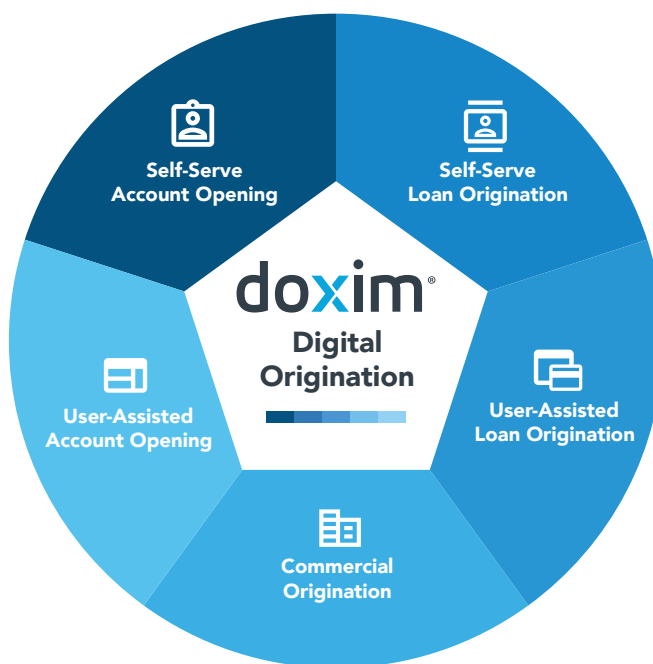
Centrally manage all origination using consistent business rules regardless of channels/input sources.

## **Shared Integrations**

Leverage pre-built integrations to enterprise applications including CRM, ECM, and Core Banking.

## **360 View of the Consumer**

Access member, household, holdings, loan information, and associated documents in one place for a true 360° view of the member.



## **Channel Continuity**

Origination requests can continue across channels seamlessly, creating one single source of truth.

## **Better Lending Decisions**

Readily available customer, business, and third-party data plus robust decision engine to enable better lending decisions.

## **Increased Loan Processing Capacity**

Lower application processing time, which enables you to process a larger number of applications from the same headcount.

# doxim®

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. Learn more at [www.doxim.com](http://www.doxim.com).

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