

doxim®

TRANSFORMING CUSTOMER EXPERIENCE



Doxim CCM Platform Overview

LEADING THE WAY WITH Doxim CCM

In today's world, optimizing customer engagement at each step of the customer journey is a moving target. Doxim helps you stay on the cusp of changing requirements – so you're not playing catch-up or offering "me too" services – you're leading the way.



- **Consumers.** More and more, consumers prefer communications that are personalized, engaging, and convenient – delivered through their channel of choice, with the option to respond, and the ability to access information self-serve. Doxim innovation helps you delight customers and optimize the customer journey.
- **Regulators.** The regulatory landscape is complex and constantly changing. Our platform equips you for compliance and ensures you remain up to date with new and changing regulations.
- **Marketing.** You need speed and agility to respond to new opportunities, target new segments, launch campaigns, and build new revenue streams. Our platform provides the analytics, insights, and self-serve control you need – for the freedom to scale.
- **IT/Operations.** Legacy technology is complex, inefficient, and increases your business risk. Outsourcing to Doxim gives you access to future-facing technology managed in world-class data centers by Doxim experts. Our platform is designed for flexibility, scalability, and seamless integration with your environment – now and well into the future.

WHY WE'RE Different

Our proven approach to managing customer communications has evolved over two decades, refined over time to deliver optimal results. Here's what makes us unique.



Managed Complexity

Our platform centralizes your customer data creating a common source from which your communications originate. This centralized approach is key to success, but highly complex to manage. Doxim shields you from the complexity of data handling and composition while, at the same time, giving you self-serve control over essential tasks – for increased speed and agility.

In the Cloud

Our multi-tenant SaaS solution is completely browser-based, meaning there is zero infrastructure for your IT staff to manage. And, since its accessible via the cloud, you team members can login, manage day-to-day tasks, and collaborate with increased ease and reliability – anytime, anywhere.

Client Self-Service

Doxim gives control to your business user – enabling your operations, marketing, and customer support teams to author, make changes, administer communications, and rapidly respond to customers. Our Client Self-Serve Portal is the primary gateway to the CCM platform and a one-stop-shop for managing your omni-channel communications.

Digital-First with Print Excellence

We invest heavily in R&D to equip our customers with leading digital and print technologies, so they can deliver a modern and engaging customer experience to customers – bar none. While digital engagement is growing, print will remain a communication staple well into the future. Our state-of-the-art data centers and print facilities are strategically located across the nation to deliver cost savings, convenience, and business continuity.

Working together, we produce communications that are cost effective, compliant, and built on the latest technology. Working together, we deliver communications that create an exceptional, modern customer experience across all touchpoints of the customer journey.

TOUCHPOINT ACROSS The Customer Journey

The best way to describe the tangible value Doxim CCM delivers, is to highlight the different touchpoints we enable you to manage and control.



All of our communications are...

- Business-user enabled – eliminating reliance on IT
- Managed through the Doxim Client Self-Serve Portal
- Delivered omni-channel, based on customers' preferences
- Personalized with variable data and customer insights
- Leverages centrally managed content and assets for brand consistency
- Enables white space management, for marketing messages that drive additional revenue
- Securely stored and easily accessible via central document archive
- Data-driven, with reporting & analytics

Regulated Documents

Transactional documents such as statements, bills, trade confirmation, and tax documents are a customer communications staple. We compose these template-based documents from source data and deliver them through omni-channel print and digital channels. These complex documents require sophisticated handling and processing of customer data in compliance with regulations.

Digital Business Messaging

In response to growing demand for frequent and timely engagement with service providers, our Digital Business Messaging enables you to set-up and automatically deliver 1-way notifications (e.g. your statement is ready) or 2-way messages (e.g. fraud alert) over email, SMS, or IVR to notify customers about account activity and, as needed, receive a customer response.

Customer Experience Portal (CXP)

More and more, customers want instant, unrestricted access to their information – anytime, anywhere through an online portal. Our platform centralizes customer documents in a secure enterprise content management system (ECM) for secure sharing with customers. Our Customer Experience (CX) Portal is an important touchpoint where customers can view and manage their account information, access documents, and send messages to customer support. It can be fully branded and seamlessly integrated into your core systems – for convenient self-serve access.



Customer Service Center

Customer support engagement is another important touchpoint. Your organization needs to manage your customers' queue of inbound messages and rapidly respond. Within the Doxim platform, messages are received through the CXP or through response to a 2-way digital business messaging.

The Customer Service Center lets you view the messages queue, assign cases to staff, and log the resolutions. And, when resolving the issue, it provides rapid access to the most current, up-to-date customer information and historical records – to drive down call duration and costs and increase customer satisfaction.

Self-Serve Correspondence

Within Doxim CCM, business users can quickly assemble bulk letters and correspondence using pre-defined templates and pre-approved content. Through this touchpoint, the client can then edit those blocks of content, merge a list of recipient data, and submit a document for delivery – sent via print and mail or email (as PDF or HTML).

Email Marketing

Doxim CCM ensures you are fully equipped to reach customers through email marketing campaigns. The solution enables you to deliver mobile-responsive, personalized email marketing campaigns to segmented lists – to engage customers with upsell and cross-sell offers and drive increased loyalty using more sophisticated campaigns.

Payments

A good customer experience is frictionless and enables convenient, immediate action. When your communications notify the customer about outstanding payments, Doxim CCM lets you incorporate payment options – so customers can take immediate action to complete the process.

THREE Bundled Packages

Our three CCM bundled packages are designed to meet your needs today and tomorrow. We're here to grow with you over time.



DOXIM CCM COMMUNICATE

Fulfill your customers' desire for print communications with Doxim's world-class printing and mailing services.



DOXIM CCM EXPERIENCE

Migrate customers from print to digital to save printing and delivery costs, and provide a customer experience that is immediate, convenient, and self-serve.



DOXIM CCM ENGAGE

Equip yourself with future-facing technology for a CX that leads the way, optimizes customer engagement, and leverages new revenue opportunities.

Contact us to learn how Doxim CCM can empower your organization to deliver a modern, engaging, and optimized customer journey.

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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.

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