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Doxim CCM Document Generation



Delivering a modern customer experience (CX) means engaging customers at different stages of the customer journey based on their communication preferences – and this requires the use of multiple channels. Here's why:

- Individual preferences – You need to reach customers in their preferred channel, when and where they 'live', and this can vary from customer to customer. Even within a single account, customers want to receive some documents on paper and others via web, email, or SMS/text message, some during business hours only and others after hours.
- Channel suitability – In reality, different communications are better suited to one channel over another. For example, fraud alerts benefit from the timely nature of SMS/text messaging, while complex purchases are simplified by channels with interactive engagement.
- Campaign performance – It's well known that integrated, multi-channel campaigns outperform traditional campaigns. In one study, campaigns using three or more channels earned 287% higher purchase rates than those using a single channel¹.

Every business needs an omnichannel strategy for customer engagement. But, the process for generating omnichannel communications is highly complex and subject to stringent regulations – and many organizations have difficulty managing and controlling the process.

¹ 'What We Can Learn from Omnichannel Statistics for 2020', Feb 2020, <https://www.omnisend.com/blog/omnichannel-statistics/>

Generating Personalized, Omnichannel Communications at Scale

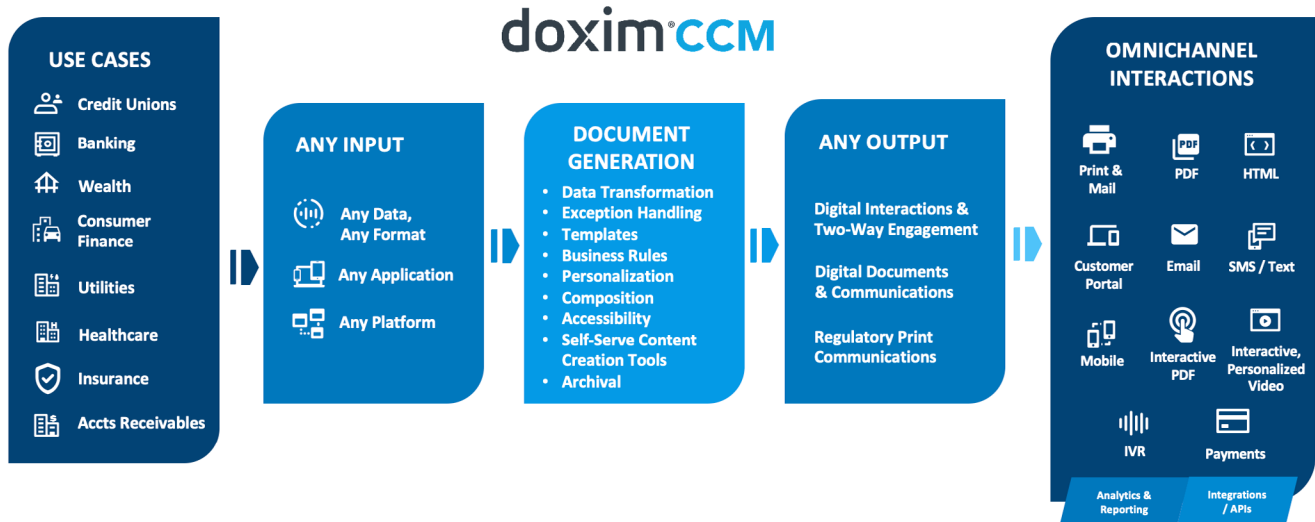


Doxim specializes in the creation and delivery of personalized, omnichannel communications.

- Our network of high-volume operations ensure complex, regulated documents are generated accurately, efficiently, and at scale. State-of-the art equipment, processes, technology, and staff training ensure consistent service and timely job completion – for stringent adherence to SLAs (Service Level Agreements).
- Our processing environment has a flexible, automated, configuration-driven platform purpose-built to create compliant, relevant, and personalized business communications.
- Our innovative and interactive document formats can be delivered by web, email, SMS/text, voice, or through traditional print & mail, based on the customers' designated preferences.

No matter the channel, our operations have you covered. Our process is streamlined and compliant to reduce your risk, control your costs, and provide your customers with an innovative and engaging omnichannel experience that drives revenue opportunities.

A Single Point of Control



Challenges with omnichannel communications arise when organizations use discrete systems for each communication channel. These systems don't interact seamlessly with the others and store separate and duplicate versions of customer data. To make things work, some firms construct digital bridges to relay information from one system to another – structures that are fragile and hard to maintain.

By contrast, the Doxim platform unifies the various aspects of document generation for the different channels and maintains a single source of data for common use – providing a single point of control and update. As shown above, the platform supports a variety of use cases and outputs innovative, personalized communications – for omnichannel interactions and engagement.

Any Input, Any Output



Doxim can accept any type of structured data from any core system or application. Once received, the data is parsed and transformed into 'Doxim standard XML', making it usable by any channel, ideally suited to omnichannel communications, and adaptable to future channels. As new technology emerges, our 'future facing' platform is ready to engage and to connect our clients to the broader ecosystem.

Reliable Processing



Our document generation platform is modularly designed to eliminate redundant processing. Our portal gives clients the ability to access information and engage the process – to ensure our client’s critical business communications are delivered without fail, accurately and on-time.

Value-Add Enhancement



As part of the process, Doxim can enhance documents with value-add content:

- Accessibility – Tags can make documents accessible/readable by assistive technology.
- Targeted, Personalized Onserts – Data-driven campaign graphics and personalized messaging can be included in 'onserts zones' to drive increased loyalty and wallet share.
- Stamps – We can apply variations of digital letterhead with unique fonts, logos, and text.
- Markings – Postal marks and routing bar codes are applied to print documents.

Merging & Bundling



Our platform ensures items are packaged together based on a defined identifier (client ID, customer address, etc) and may involve:

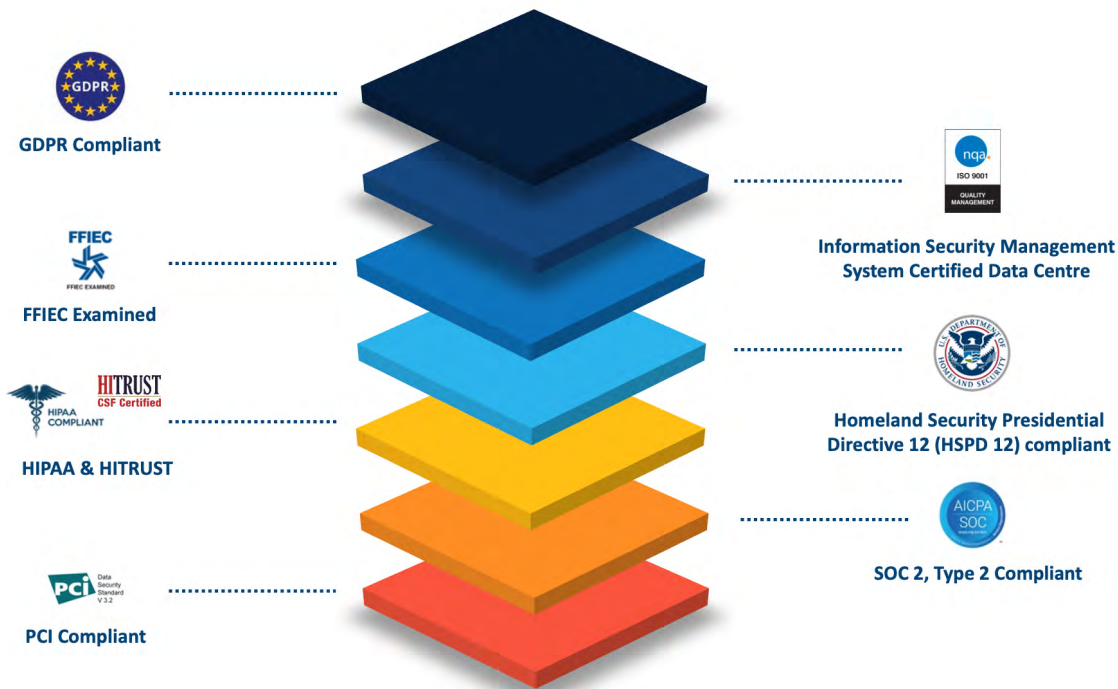
- Consolidation – Combining multiple account statements for the same person into one statement.
- Aggregation – Appending different document types into one document (collated/appended but not the same file format). For example:
 - Inserts, electronic newsletters, flyers, brochures, and other documents can be appended directly to documents.
 - Customer checks can be appended to statements (for banks or CU clients).
 - Interactive Documents or Interactive Video can be attached to emails or SMS/text messages.
- Householding – Combining multiple statements into one physical package for the same household (for print only). For example, inter-sorting and combining customer checks with their statements is frequently performed for bank customers or credit union members.

Routing for Output & Delivery



After quality checkpoints and client approval, documents are routed to the appropriate output application (digital channel) or to the production floor (print & mail) based on customer preference and distribution instructions. All digital documents are routed to Doxim ECM (Enterprise Content Management) – a centralized end point for secure document storage, ePresentment, or delivery by email or SMS.

Security & Compliance



- Our responsibility to protect our clients' sensitive information is of the utmost importance.
- Our efficient and streamlined operations are housed in state-of-the art, highly secure, Tier 3 data centers with built-in redundancy and high availability.
- Our print locations have rigorous on-site security in compliance with Facility Security Clearance (FCL) guidelines.
- Our secure processing environment is verified by 3rd parties, top ranked across all requirements, and exceeds all industry standards.
- Ongoing investments in our Governance, Risk and Compliance (GRC) enable us to track compliance and provide security awareness training with our employees.
- Based on location, we are compliant with AICPA SOC2 Type 2, GDPR, PCI, HIPAA and WORM.

Partnering With Doxim



Doxim has a proven process and deep industry expertise to ensure a smooth integration and transition.

- Onboarding - As part of our client onboarding, we design a process tailored to your specific needs with data integrations to core systems and templates for each communication, optimized for the given output channel (e.g. mobile first). Our experts leverage best practices in statement and document design to optimize readability, comprehension, and to motivate action. To increase wallet share, templates can also include 'onserts zones' for targeted campaign graphics and personalized messaging, which your business users can manage and update.
- Managed Services - Our production experts manage the complexity of day-to-day document generation and delivery on behalf of our clients – for optimal results.
- Client Self Service - We know speed and agility are key to your success. The Doxim CCM Admin Portal (DAP) gives your business users control over managing / updating onserts and inserts included in each batch. Insights and reports are provided through an easy-to-use reporting dashboard.
- Business Continuity - To ensure business continuity in response to a business interruption (e.g. power outage, natural disaster, etc) outsource a portion of your production to Doxim.

Contact us to learn more about Doxim's innovative approach to omnichannel engagement and to discuss your requirements.

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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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