



Enterprise Content Management

Easy, Online Content Management for Your Staff & Your Customers

The need for financial service organizations to identify ways to improve the quality and speed with which they manage customer documents, images, and files is an ongoing issue.

Time spent searching for and organizing files, the inability to efficiently address customer inquiries in a timely fashion, and excessive reprinting costs are common complaints from organizations that keep their important business information stored as hard copies.

"Employees spend an average of 30 hours per month searching for documents, reproducing documents, or creating redundant ones."

To address these issues, organizations must embrace content management tools, technologies, and processes to efficiently deliver easy, secure, and instant access to online documents on time so that they can meet the expectations of their customers and staff alike.

Doxim works with hundreds of organizations to help them streamline and manage business processes, strengthen communications, improve information access, and reduce the expense, effort, and environmental impact associated with document workflow, delivery, and archiving.

Key Points

- Improve staff efficiency by eliminating the need to search through paper files to find a document
 - Enhance the customer experience with instant online document access
 - Streamline document storage and retrieval across all departments and branches
 - Eliminate costs related to printing, couriering, and long-term hard copy document storage
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LEADERSHIP, EXPERTISE, AND EXPERIENCE

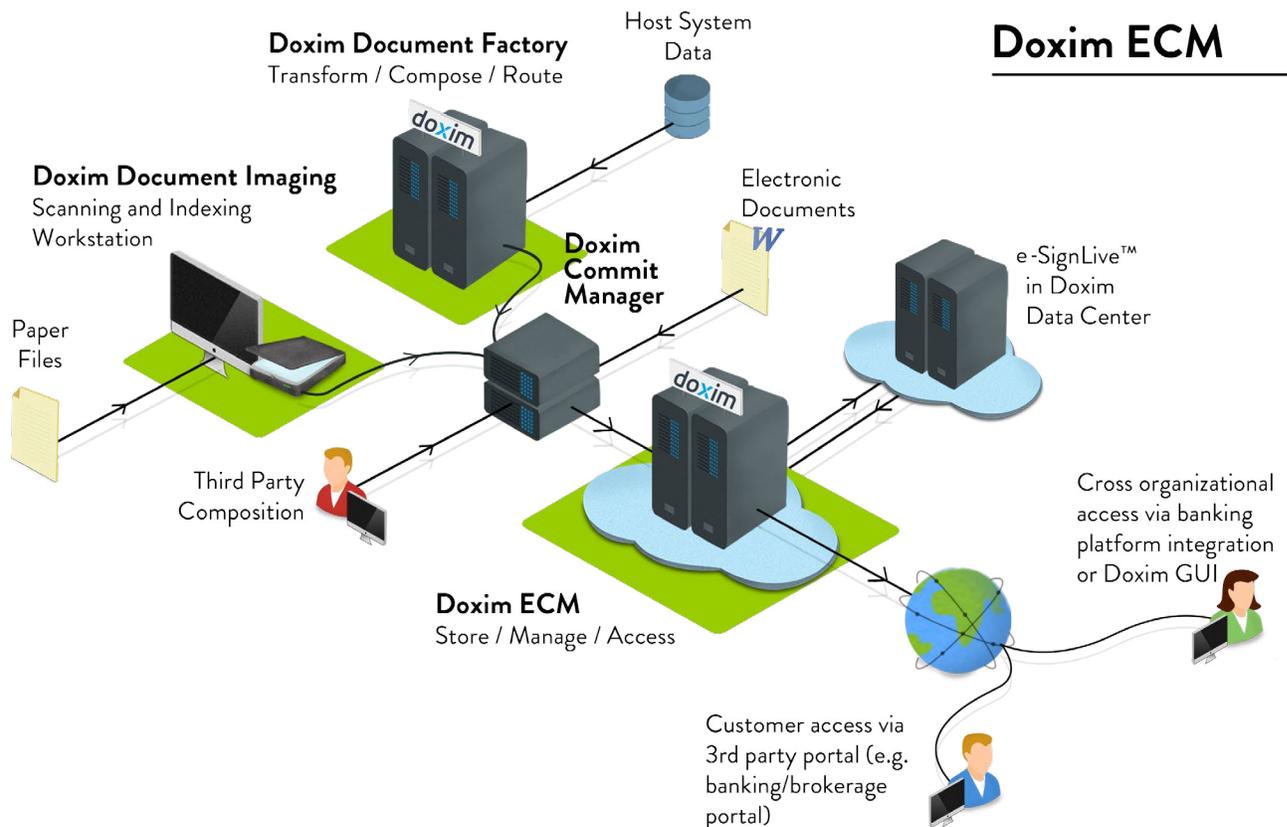
Doxim is recognized as a leading provider of Enterprise Content Management (ECM) solutions, with tools built specifically for the unique archiving, workflow, and image capture requirements of Financial Service organizations - at a price point that enables you to provide cost-effective document services to your customers. Even more importantly, Doxim leverages a tried and tested implementation process. Using a tailored combination of consultation, training, rollout roadmaps, and change management techniques, we ensure that your internal adoption of Doxim technology is smooth, efficient, and effective.

DOXIM ENTERPRISE CONTENT MANAGER

Doxim ECM is a comprehensive, web-based, enterprise content management solution with integrated e-signature capabilities that enables organizations to easily capture, store, search, and

share all internal documents, files, and customer information and their signatures safely and securely via an online repository. Doxim ECM enables businesses to:

- Streamline document storage and retrieval across all departments and branches
- Speed up operations by automating business processes and decisions, increasing employee productivity, while reducing costs
- Improve customer service levels, expand customer service offerings, and enhance customer interaction via self-service capabilities
- Ensure document and content security and access rules are maintained in accordance with regulatory mandates
- Employ effective disaster recovery and business continuity strategies
- Contribute more effectively to key corporate environmental mandates



A Centralized, Fast, and Flexible Archive
 Doxim ECM provides a centralized, secure, web-based, highly scalable document archive that helps you consolidate and share documents, both internally and with customers.

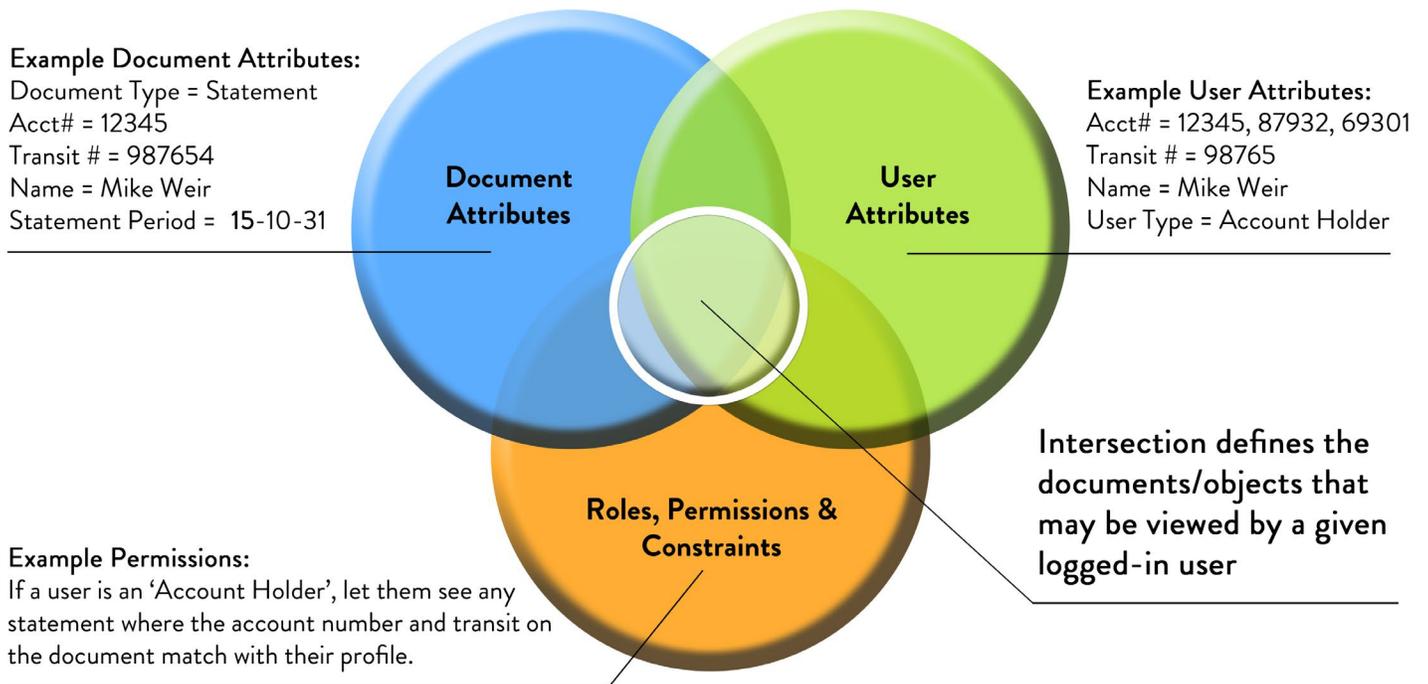
With Doxim ECM, you can:

- Improve staff efficiency by eliminating the need to search through hard copy filing to find a document
- Enhance customer service responsiveness with instant online document access
- Improve your customers' online experience to searched documents through a fast, efficient and effective search capability
- Eliminate the cost of longterm hard copy document storage
- Provide customers with self-service document access through customer web portals
- Streamline access to document storage of all types of content including statements, check images, invoices, loan applications, Know Your Customer documents, board packages, and other internal documents

Advanced Permissions and Security
 Doxim ECM allows you to decide who can view, modify, create, delete, and administer documents and content at both user and group levels. You retain complete control and determine how information is accessed according to your business rules. As documents are added to the system, it is pre-determined who can access them by the intersection of the document attributes and the user attributes. The result is a robust, flexible, completely secure content management system.

Integrated E-Signature Capabilities
 Doxim has fully integrated e-signature technology into Doxim Enterprise Content Manager. This integration provides quick and easy access to e-signature technology for all Doxim ECM customers via Silanis' e-SignLive™. Users can simply upload documents to the Doxim ECM, then kick off an e-signature workflow that routes the documents to e-SignLive™ and brings them back fully signed into the ECM. Once complete, the signed documents can be accessed by authorized users through the ECM and exposed to customers via integration with any client facing portal.

Dynamic Rules-Based Access



Rapid Deployment, Hassle-Free Maintenance
Doxim's Professional Services team ensures that you get up and running quickly. With our extensive project expertise and hundreds of roll outs, you benefit from our knowledge every step of the way. Doxim's unique, multi-tenant Cloud Computing platform lowers the barrier of entry to content management, allowing you to manage both your content and your IT budget intelligently.

You can also benefit from:

- Zero infrastructure required from your IT department
- Enterprise class content management at an affordable price
- Rapid deployment and ramp up
- A flexible, yet easy to understand and use administration system to minimize the time spent on administration
- A highly scalable platform that will accommodate business growth

Seamless Integration With Existing Systems

Doxim ECM integrates easily with all existing back-end systems including banking and brokerage platforms, online banking and brokerage portals, and account and loan origination systems. Your infrastructure and processes need not change. Using our open API and advanced web services support, we'll ensure that the business critical systems that need to work together will do so – smoothly and without a hitch.

NOT JUST SIMPLE DOCUMENT MANAGEMENT

Many organizations will first experience Doxim ECM through the implementation of an eStatement initiative. While this alone presents a significant value, this is just the beginning. Doxim ECM presents many other opportunities to eliminate manual tasks and streamline your document processes.

Doxim is a leading provider of SaaS-based customer engagement software for credit unions, community banks and wealth management firms. Doxim's Customer Engagement Platform helps financial institutions transform their client experience, communicate more 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 client onboarding, through improved, personalized communications to anytime, anywhere content access, tailored to a clients' 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.

Toronto | Kitchener | Vancouver | Montreal | New York

TRANSFORMING CUSTOMER EXPERIENCE

Doxim offers a full range of ECM-based solutions that can be leveraged to help your business efficiently implement electronic document consolidation and improve document-related business processes. These solutions will help you move from time-consuming, paper-centric manual systems, to a responsive, web-based alternative that adds real value to your business.

Better Looking Statements

Doxim Enhanced Statement Design and Composition converts difficult to read, unattractive statements into attractive, easy-to-read statements complete with integrated, targeted marketing messages.

Document Imaging

Doxim Document Imaging helps scan, index, and upload hard copy documents to a secure online repository. This allows you to provide immediate, cross-branch access to customer documents, such as mortgage and loan documents and Know Your Customer files, via a secure, web-based archive.

DOXIM CUSTOMER ENGAGEMENT PLATFORM

Doxim ECM is an integrated component of the Doxim Customer Engagement Platform. This SaaS-enabled platform addresses key digitization challenges in your organization, from client onboarding automation, through improved, personalized communications to anytime, anywhere content access, tailored to your clients' channel preferences. Digitization eliminates the costs of traditional paper-based, manual processes and enables you to cost-effectively provide an omni-channel experience that delights your customers and improves their long-term loyalty.



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