



doxim[®]

TRANSFORMING CUSTOMER EXPERIENCE

Doxim e-Brochures

 doxim.com

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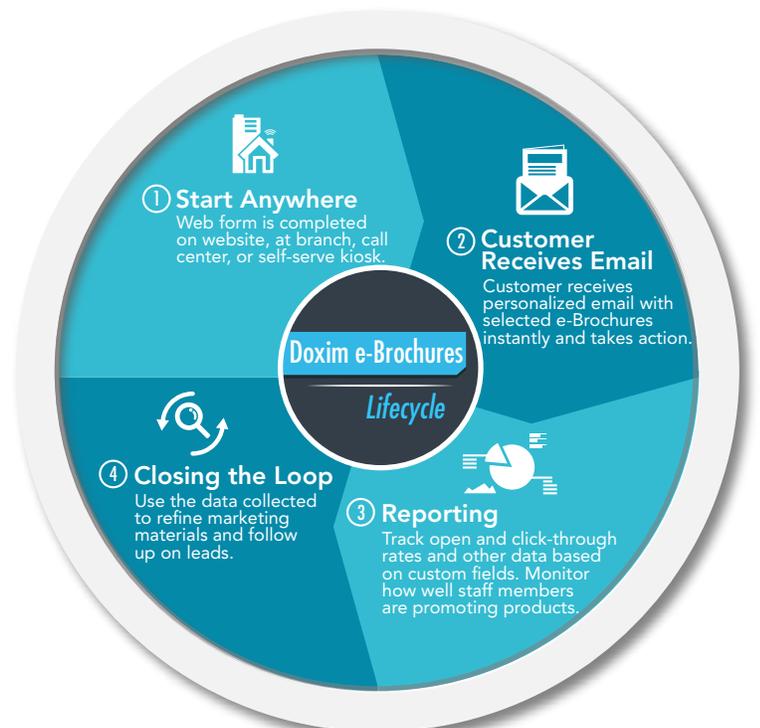
Cut Costs and Build A Stronger Sales Culture with Digital Brochures

- Track the sales process from start to finish
- Give your call center the tools they need to cross-sell effectively
- Add eye-catching imagery, as well as links and videos to support your message
- Easily customize and change your digital brochures
- Save money by cutting unnecessary printed brochures

Doxim e-Brochures is an innovative digital brochure solution. With the click of a button customers can be provided with relevant product or service information in the form of a mobile-friendly e-brochure delivered right to their email inbox.

How Does It Work?

When a customer requests information about your products from a staff representative, only their email address is needed to send them a personalized electronic brochure. Doxim e-Brochures support cross-selling by making it simple to collect details about account holder needs, track how collateral is being distributed and place the requested information at customers' fingertips.



On average, financial services organizations have eliminated 65% of their printing costs by using Doxim e-Brochures, according to the Filene Research Institute

Streamline Information

Customers instantly receive an email with the information they requested. Open and click-through rates are tracked throughout the process. Financial institutions have reported open rates as high as 70%, and click-through rates as high as 25%.

Make Self-Service Simple

The benefits of Doxim e-Brochures can be extended beyond personal interactions to reach your increasingly digital customers. By embedding e-Brochures into your website, or placing the subscriber form on a self-service kiosk in branch, you make it easy for all customers to access your digital collateral – and you capture lead data like email addresses and names automatically.

Reduce Your Printing Costs and Carbon Footprint

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Update Your Brochures without Reprinting

It can cost tens of thousands of dollars for a financial institution to create, print and distribute paper brochures every year. Given these costs, it's no wonder organizations tend to keep their messaging vague to avoid having to reprint. With Doxim e-Brochures, you don't have to worry about print costs, so you can include more detailed information about the product and the next steps the customer must take. And your e-Brochure content can be updated within minutes and automatically cascaded out to staff at all locations, keeping everyone on the same page.

Send and Receive e-Brochures from Any Device

Distribute collateral via a simple web form that can be used anywhere there is internet access. Collect customer information from inside the branch, at the call center, via tablet, smartphone, or even on your website. Doxim e-Brochures are fully mobile-enabled, so they look good on any device the customer might be using.

e-Brochure messages get great conversion rates. Financial institutions have reported open rates as high as 70%, and click-through rates as high as 25%

Encourage Cross-Selling at Your Branches and Call Centers

Doxim e-Brochures make it easy for your staff to take an educational approach to sales and service. Offering customers a personalized e-Brochure is an excellent conversation starter. Staff can collect more information about the customer during the conversation for future cross-sell opportunities and improved customer experience. Additionally, Doxim e-Brochures allows you to monitor which team customers are distributing your collateral most effectively, so you can reward your top performers and support those who need a little extra training.

Understand how Customers Use Your Collateral

The single greatest shortcoming of printed brochures is that you cannot track who took one, what action they took afterwards or how effective the messaging and call to action were. Using digital brochures, you can collect information about what specific consumers want and track how staff are distributing collateral. If the e-Brochure is opened or a hyperlink is clicked, you will know. And if your e-Brochure isn't getting the results you need, your marketers will have the data they need to troubleshoot.

Sample Welcome Package e-Brochure



Welcome to DXM Financial



Hi Wendy,
I wanted to extend you a warm welcome to DXM Financial. We recognize the trust you've placed in us, and we look forward to working with you to implement an individual plan that will serve your long-term financial goals.

Below, you'll find a list of the services offered by DXM Financial. I invite you to familiarize yourself with the resources available to you as our valued client. Please contact me by phone or email with any questions.

Sincerely,
Tanya Murthy, Advisor,
DXM Financial, 888-555-1212

Retirement



Your Financial Plan
What is right for one individual may not be right for another. That's why it's important to lay out an investment strategy that works with your personal financial goals. After careful study, your DXM Advisor will produce and review with you a detailed, customized report with recommended strategies for asset allocation and diversification.



Saving for Your Retirement
Wondering how much you need to save for retirement? Your DXM Advisor can help you determine your retirement timeline, and how much retirement income you'll need. Then together, you can put a retirement savings plan into action.

Educational Resources

Seminars
We are dedicated to helping you increase your financial literacy through complimentary investor education.

Market Updates
Wondering what's happening in the market today assess timely videos and articles on current market trends.

Calculators
Handy tools to help you know where you stand on a variety of topics.

Advisor Newsletters
Our quarterly electronic newsletter is packed with helpful information to help keep your financial life in balance.

Our DXM Advisors

For 30 years, DXM Financial has been assisting clients in creating comprehensive financial plans to help meet their wealth management goals.

Our professionally qualified financial advisors are dedicated to always serving our clients' needs first. They take a long-term view to financial planning and building strong client relationships.

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Phone: (555) 555-1212 | Toll Free: (888) 555-1212 | Fax: (555) 555-1313

Sample digital banking e-Brochure



Digital Banking / Anytime, Anywhere Banking with DXM Financial Savings & Credit Union



ONLINE BANKING FROM DXM FINANCIAL

Today, you spend more time than ever online – so why not manage your finances there as well? DXM Financial's updated, easy-to-use online banking system makes it simple to access your accounts, transfer funds, pay bills, and review your expenses. It's just one of the ways DXM Financial is evolving to meet the needs of members like you.



Reviewing Your Accounts
Today, you spend more time than ever online – so why not manage your finances there as well? DXM Financial's updated, easy-to-use online banking system makes it simple to access your accounts, transfer funds, pay bills, and review your expenses. It's just one of the ways DXM Financial is evolving to meet the needs of members like you.



Bill Payment
Paying bills is easy with DXM Financial online banking. Pay multiple bills at once, set up future or recurring payments, and review your past payments, including the date and amount paid.



Fund Transfers
DXM Financial makes it easy to set up transfers, including post-dated and recurring transfers. You can easily set up and execute transfers between your accounts, or to accounts at different financial institutions. We also support e-Transfers, so you can send money quickly and securely to an email recipient.



Statement and Data Access
Access your current and past e-Statements, download them for review, or request a printed copy of a previous statement. Or, if you prefer, download your account data into your preferred format and review it on your home computer.

MOBILE BANKING

Take your banking on the road, on your tablet or mobile device! With the DXM Financial mobile app, you can access online banking over Wifi or using your cell phone data plan.

You can even deposit cheques on the go, just by taking a photo with your phone's camera. The DXM Financial mobile app is available through Google Play, the App Store, BlackBerry World, and Microsoft.

FOR MORE INFORMATION:
• Visit DXMFinancial.com/digital
• Email: info@DXMvFinancial.com
• Call: 1-888-555-212



Grow Your Sales Culture

Visit doxim.com/e-Brochures

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 customer experience, communicate more effectively throughout the customer 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 customers' 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.