



doxim

TRANSFORMING CUSTOMER EXPERIENCE

Doxim Account Opening

For Banks and Credit Unions

Product Brochure

 doxim.com

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"Customers value simplicity when it comes to originating new banking products. Reducing the time and steps needed to open accounts, whether in branch or online, decreases the chance that a customer will get stuck or abandon the process, resulting in more completed applications and more happy customers."

- Nicole Sturgill, Principle Executive Advisor at CEB TowerGroup.

Doxim Account Opening offers a host of benefits:

Speeds and Streamlines Account Opening with an intuitive digital workflow, so you can open accounts in under 10 minutes, and use the information captured once to open multiple accounts at once.

Enables Multichannel Engagement by allowing customers to open accounts at their convenience - online, on a mobile device, at the branch, or through your call center.

Helps Uncover Revenue Opportunities by prompting staff members to uncover and document customers' current and future financial needs, and freeing up their time to do this.

Reduces Error Rates by reusing data intelligently to prevent keying errors and ensuring all mandatory fields are completed and documents are signed correctly the first time.

Cuts Costs by eliminating expenses related to printing, postage and storage of hard copy documents, reducing staff time spent on each account opened.

Increases Regulatory Compliance by recording results of checks that are completed against regulatory lists and Fintrac assessments.



Your All-in-One Solution for Account Opening

Doxim Account Opening is an easy to use, end-to-end solution for paperless digital account opening at credit unions and community banks. From gathering all required information to successfully onboard customers, to selecting desired products, to generating the required documentation using your own templates, this software streamlines and speeds every step of the account opening process.

Open More Accounts, Faster

Doxim Account Opening makes it simple to open any account type, from basic checking and savings accounts to term deposits and registered contracts, for individuals, joint account holders, youths, trusts and estates. Plus, you can save costs and increase wallet share by opening multiple products in a single pass, without having to ask the same question twice. Add in Doxim Loan Origination and you can even process loan applications simultaneously too.

Customer Self-Service with Integrated E-Signatures

Your digitally-savvy customers live their lives online, and that's where they want to open their accounts. Make the process simple for them by integrating the Doxim Account Opening self-serve module right into their familiar banking portal. It digitizes all paper-based processes, from new account forms to collecting electronic signatures, removing friction and simplifying the onboarding experience. If you're trying to capture your share of the elusive Millennial and Gen Z markets, self-service account opening with integrated e-signatures is a must-have.

Provide a Consistent Experience Across All Channels

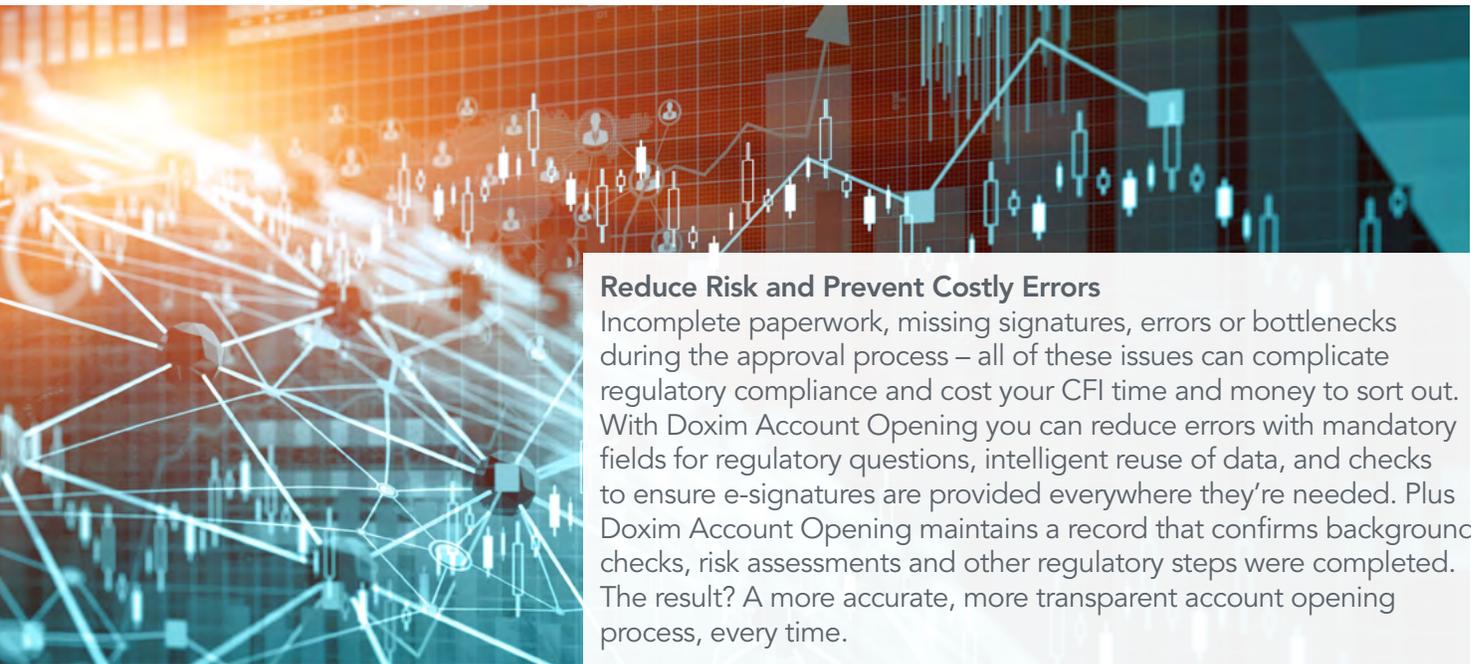
Today, your customers expect to be able to open accounts through any of the touchpoints that make up a modern banking relationship. That's why Doxim Account Opening is designed to help you stay ahead of the curve, by offering a consistently excellent account opening experience across all channels, including mobile devices. Customers can even start an application online and finish it in-branch or over the phone.

Leave Time for a Conversation...

Say goodbye to focusing on complicated forms, and say hello to having a real conversation with a new customer about their wishes, needs and aspirations. Why's that so important? Because it sets you up for a successful ongoing relationship with the customer during that all important 90 day onboarding window, which is the period where you are most likely to garner deeper customer commitment.

... and Use That Information Wisely

Using the data your staff members capture in the fully configurable survey questions and financial analysis screens, you can proactively communicate with your customers about ways to use their new account (like online and mobile banking, bill payment, and direct deposit). Include personalized messaging about other products and services that fit the needs you've already uncovered, and you'll be well on your way to increasing both customer engagement and wallet share.



Reduce Risk and Prevent Costly Errors

Incomplete paperwork, missing signatures, errors or bottlenecks during the approval process – all of these issues can complicate regulatory compliance and cost your CFI time and money to sort out. With Doxim Account Opening you can reduce errors with mandatory fields for regulatory questions, intelligent reuse of data, and checks to ensure e-signatures are provided everywhere they're needed. Plus Doxim Account Opening maintains a record that confirms background checks, risk assessments and other regulatory steps were completed. The result? A more accurate, more transparent account opening process, every time.

Cloud-Based and Fully Integrated with the Doxim Customer Engagement Platform

Doxim Account Opening is cloud-based and SaaS enabled, so you get all the advantages of a market-leading account opening solution, at a predictable monthly rate. This also means the solution can scale up with your organization without requiring physical infrastructure or eating up your IT department's time. And because Doxim Account Opening is fully integrated into the Doxim Customer Engagement Platform, you can start by perfecting your onboarding processes and then expand from there, leveraging the modular design that allows individual components to be adopted in any order, and remain seamlessly integrated.

See Doxim Account Opening in Action

Call 866.475.9876 to book a personal demo and see how Doxim Account Opening can help you open accounts faster while reducing costly errors and improving the customer experience.

Doxim is a leading provider of SaaS-based customer engagement software for banks, credit unions, 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 up-sell activities that drive increased wallet share. The platform addresses key digitization challenges, from automated customer onboarding, through improved, personalized communications to anytime, anywhere content access, tailored to a client's 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.