

Intelledox

On-Demand Customer Communications Management



Transforming CCM and Document Generation for the Digital World

Your digitally-savvy customers, prospects and partners today expect you to communicate instantly via SMS, email, web, digital PDFs and sometimes even print – often across multiple channels at once. They also want personalized responses that enable them to complete tasks quickly.

The faster you can deliver a custom quote, policy or contract upon request, the more likely you are to win new customers, drive customer/partner loyalty and grow your business.

Leading companies and government agencies are leveraging the On-Demand Customer Communication Management (CCM) and document generation capabilities inside the Intelledox Infiniti platform to make their digital transformation and serve customers and partners faster than ever.

“We expect others to follow suit with the workflow and content automation journey approach that Intelledox has pioneered.”

– Aragon Research Globe™ for Digital Transaction Management



Intelledox's Infiniti Platform for On-Demand Customer Communication

The Infiniti platform enables fast, accurate and compliant production of documents, emails and all forms of digital communications. Infiniti can produce multichannel, multi-format outputs tailored to individual business requirements and delivery methods.

And, unlike other CCM platforms, Intelledox Infiniti can automate document or message generation in real time using the customer data you already have in your core systems, rather than waiting for batch production.



Next-Generation Forms: The Outward Face of On-Demand CCM

What makes Intelledox Infiniti unique is the built-in integration of what we call “next-generation forms.” Instead of static fillable paper or web forms, Infiniti delivers a personalized, adaptive digital interview, taking the power of smart forms to a whole new level. This interview is an

Examples of On-Demand CCM

Acquisition

- Application confirmations
- Custom quotes and proposals
- Contracts
- Negotiated loan agreements
- License registrations

Onboarding

- Policy or other enrollment documents
- New account opening
- Know Your Customer (KYC) verification
- Automated billing setup
- Welcome kits

Customer Service

- Claims / first notice of loss confirmations
- Self-service account updates
- “Skip a payment” or payoff requests
- Financial Statements of Advice (SOAs)
- Account reports
- Renewals
- Real-time correspondence

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intuitive, guided journey that collects information needed to complete an interaction based on the customer's personal preferences, device and location.

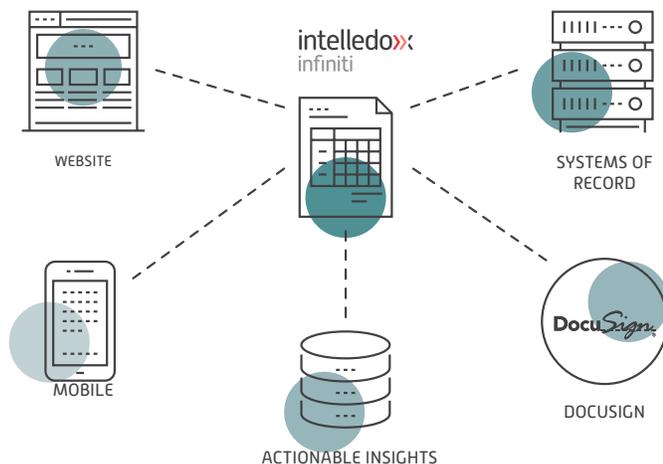
Infiniti combines customer response data with data you already have in your core systems of record to deliver one-to-one, highly relevant conversations. Rather than presenting customers with blank forms, now you can "show what you know" about an individual and prompt her in a more personal and meaningful way to extract even more information about her.

The Infiniti system uses this new information – as well as existing data – to dynamically create a digital "document" or message that can be submitted electronically to a third party, saved as a PDF or even printed for recordkeeping.

Automatic Archiving for Future Reference

You can further set up Infiniti to automatically archive completed agreements and documents into a third-party ECM solution, such as IBM FileNet, Microsoft SharePoint or EMC Documentum. Infiniti captures the data, which can be manipulated and then sent back to the systems of record simultaneously with any generated or uploaded documentation. You can then store the entire set of customer information together in your CRM or separately between your CRM and ECM systems.

Finally, a CCM platform that leverages ALL communications data:



Success Story:

A federal agency uses Intelledox Infiniti to produce thousands of pieces of customer correspondence every week – driver's license warning letters, license suspension letters and commercial letters. The agency needed a system that would significantly reduce document production time, while also enabling staff to easily maintain and monitor data quality in both templates and output documents. Intelledox Infiniti supports both batch and ad-hoc, real-time correspondence needs.

"Is your visit today regarding the car and boat policies you have with us?"

"Your mortgage application is pending review. Would you like to amend it today?"

"Did you know, as a Premier Savings Account holder, you can have our new credit card with no annual fee plus earn miles?"

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Support Modern Collaboration to Create Complex Documents

Many business processes involve multiple people contributing information to generate a quote or contract. Some interactions require information from customers, their spouses, financial advisors or insurance agents and company employees.

Infiniti On-Demand CCM enables multiple parties in a single project or interaction to engage with different interviews tailored to their role and step in the process. Instead of manually combining the responses into a single document or system, automated workflows can produce the resulting communication or document and route it for review and approval.

If you need to produce even more complex documents, Intelledox Infiniti also integrates with Business Process Management platforms and rules engines such as Pega and IBM.

Instead of hiring tens or hundreds of people to review or assemble content, you can automate and digitize the process for significantly faster, more accurate results.



Substantial Efficiencies from E-signature Integration

Further time and cost savings arise from Infiniti's e-signature integrations. Once Infiniti prepares documents in your system of agreement, you can connect with e-signature tools like DocuSign to streamline execution of agreements, contracts, policies and other forms of customer communications. In fact, DocuSign found that electronic document flow with e-signatures reduced loan processing time by 80 percent, which also helps organizations close new business and drive revenue growth.



Empower Business Users & Reduce IT Dependence

Anyone who owns a business process can use Infiniti's web based, intuitive drag-and-drop designer tools to create a communication template. They can build and maintain these digital adaptive Interviews without relying on IT teams. This means you can launch new products and offers even faster to market.

Moreover, as an authoring tool, Infiniti leverages the tools your users already know: Microsoft Word and Excel, a dramatic improvement over other platforms that require supplemental training for their own proprietary language. You can also import PDFs and turn them into highly personalized communication templates. After all, your business

Success Story:

A U.S.-based health insurer uses Intelledox Infiniti to update and deliver custom benefit summary documentation for Medicare beneficiaries. The government provides a new base template in Word every year, but the company had to manually recreate the template in its legacy system using proprietary authoring language. With Intelledox, the Word document is imported and the new template created in just minutes.

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people are closest to the interviews. So, why not put the power of conversation into their hands?



Simplify Global Business with Multilingual Communications

Intelledox Infiniti provides full multilingual support, so you can expand globally and customize your communications for any local market. Available platform customizations provide user interaction in Spanish, Portuguese, Korean, Chinese, Dutch, French, German, Arabic, Thai, Italian and many more languages.



The Benefits of Intelledox Infiniti On-Demand CCM

- Improve customer satisfaction by delivering personalized relevant information in real time
- Reduce reliance on paper and manual processes for document assembly
- Improve customer self-service across mobile, online and tablets
- Reduce development time of new digital applications by more than 75%
- Extend your investment with e-signatures by generating documents on demand to create a seamless, end-to-end process
- Reduce calls to contact center by as much as 45% by enabling customer self-service

Take the next step

Whether you need to generate a quick confirmation or a document package for digital or live signature, Intelledox On-Demand CCM enables you to use data collected via interviews, along with customer information, to deliver documents or messages instantly – anywhere along the customer's journey.

Learn more about **Intelledox On-Demand Customer Communications Management**: <https://www.intellexox.com/on-demand-customer-communication-management/> and contact us to see Intelledox in action.

Contact Us

Contact an Intelledox Digital Transformation Expert near you and let us show you how you can realize the benefits of digital transformation in your organization.

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About Intelledox

The Intelledox platform is used by many of the world's leading companies and government organizations to transform outdated forms and processes into intelligent, customer-centric experiences.

Through its solution-ready platform, Intelledox enables customer-focused businesses and governments to transform customer interactions into adaptive digital journeys, from acquisition to onboarding to service.

More than 200+ global customers and millions of users worldwide, including top insurance companies, financial services firms, and government agencies, trust the Infiniti platform to enhance customer engagement, increase customer satisfaction, streamline efficiency and drive down operational costs. With North American headquarters located in Dallas Texas, Intelledox has offices in New York, Singapore, Sydney and global headquarters in Canberra, Australia.