



Highlights:

- Drives output to a wide range of physical and electronic communications channels
 - Supports input of data from multiple enterprise applications
 - Enables LOB staff to populate and personalize customer documents quickly
 - Allows templates to be updated and edited in a controlled manner by LOBs
 - Runs in centralized mainframe and distributed computing environments
 - Designed to work seamlessly with IBM mainframe platforms and content analytics
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icon and IBM: Enhancing the customer experience

Interactive, enterprise-level CCM solutions enable faster, efficient, multichannel delivery of highly personalized documentation

Empowered by technology, financial services customers have significantly elevated their service expectations. For insurers, banks and other organizations, the implications are clear. The customer experience must remain consistently exceptional across all communication channels and points of interaction, from websites and call centers to apps and printed materials.

Creating an outstanding experience for every customer requires organizations to adapt to rapidly evolving needs and implement changes efficiently. Mature technology is not suited to the task. Traditionally, customer communications management (CCM) applications designed for mainframe computing offered tremendous power but often required IT teams to modify templates and document logic. To make changes faster, lines of business (LOBs) may deploy off-the-shelf software. But the proliferation of these tools creates issues for compliance and brand consistency.

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Solution overview

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Tech-savvy customers have effectively raised the bar for the communications they receive from their insurance agency, bank, financial advisor and many others. Namely, they expect communications to be personalized with accurate information. They want to receive important documents by mail, email and mobile devices. In every case, speed to market is essential.

This puts many large and mid-sized enterprises in a difficult position. LOBs are required to fill out a change order to modify anything from the entire design of a loan application form to the placement of a comma within a policyholder document. As a result, LOBs have adopted homegrown or commercial word processing alternatives, compromising both compliance and brand identity requirements.

The solution from icon and IBM offers a fundamentally different way for financial services organizations to enhance customer experiences. The core of the solution is the icon DOPiX suite for CCM, a comprehensive cross-platform application for enterprise document creation, content integration and output management. The solution distinguishes itself with its interactive capabilities at design time and at run time.

The interactivity of DOPiX at design time allows LOB teams to modify forms without direct IT involvement. Permissioned users can access templates directly from the desktop to update the graphic design and content of correspondence, invoices, insurance policies, quotations, statements, contracts and other document types. This eliminates the time between LOB requests and fulfillment by IT, while supporting efforts to maintain compliance and brand integrity.

The interactivity of DOPiX at run time blends centralized template administration with the ability to populate and customize documents in a tightly controlled manner.

For example, a call center claims manager can pull up the required form and, within a pre-authorized scope, add or personalize details. The manager may integrate claim photos or add permissioned individual text. When the call concludes, the manager can send the document for batch printing and/or deliver it directly to the customer via email or text message. In each case, the document is automatically formatted to match the desired output channel.

This powerful enterprise-grade software can process the most sophisticated customer communications and prepare them for output to a wide range of physical and electronic media — from centralized and local printing to email, social media, fax, websites and mobile devices.

These capabilities allow organizations to improve customer response time, utilize the customer's preferred channel and provide everything the customer needs in a single, well-designed package. In the financial services sector, these same functions enable financial advisors to draw customer information from multiple databases, combine them within a complex financial statement and deliver it to the customer through multiple channels.

The DOPiX solution is designed to integrate seamlessly with IBM mainframe environments, so LOBs can continue to use their computing power and avoid deploying individual CCM tools in distributed environments. For organizations seeking to consolidate CCM software tools and bring greater control and oversight to document management, DOPiX offers an ideal solution.

Solution benefits

The solution from icon and IBM gives insurers, financial services firms and others a faster, more efficient and controlled way to create and deliver highly personalized customer communications.

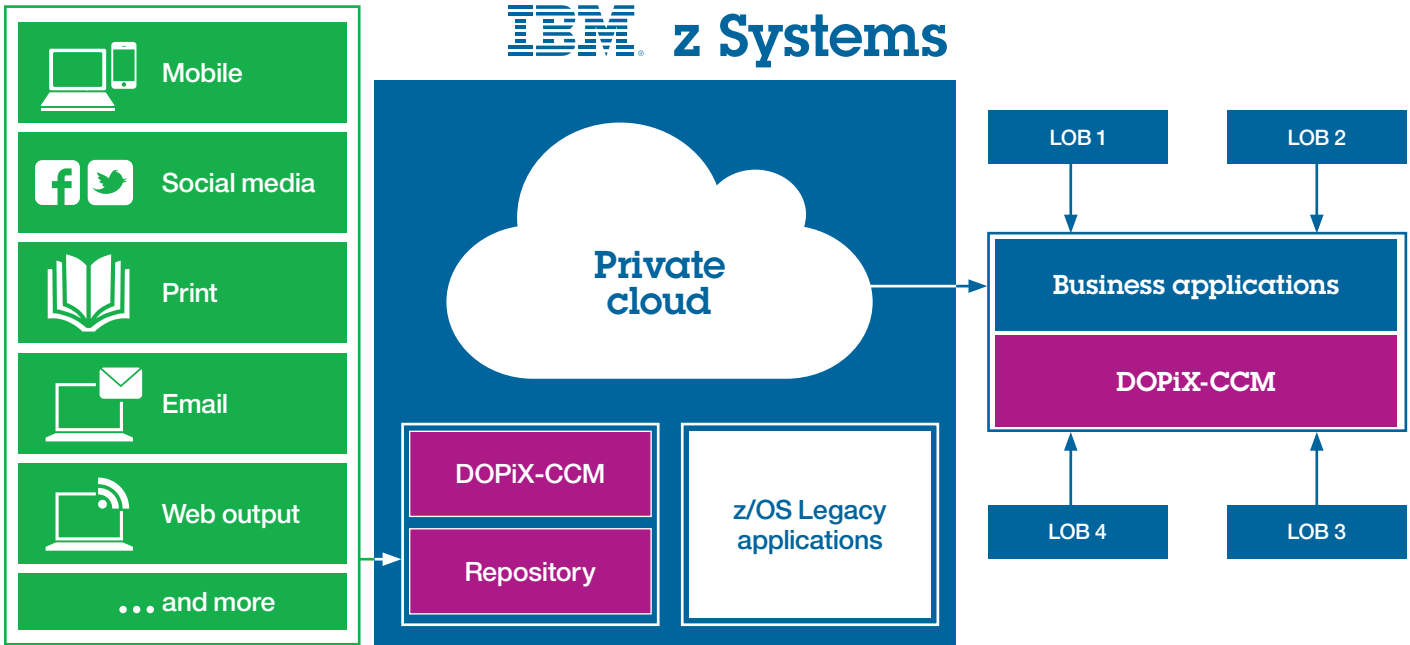
- **Speed to market** – This solution provides the interactivity that individual LOBs need to populate customer communications rapidly and deliver them through virtually any output channel. LOBs can update document templates efficiently in response to changing needs. There is no need to involve IT in these workflows, which both unburdens IT from handling all change requests and empowers teams to provide a better overall customer experience.
- **Easier compliance** – The solution from icon and IBM has been industry tested in the stringent compliance environment of the EU. The DOPiX architecture helps facilitate cost-effective compliance in the insurance and financial industries because it greatly enhances enterprise efficiency. And because DOPiX runs on the mainframe, the enterprise can reduce the proliferation of LOB-level CCM tools by consolidating CCM in a mainframe environment.
- **Flexibility** – The solution from icon and IBM is platform independent and can be accessed quickly, in a highly secure environment, through standard communication interfaces and protocols. With the ability to run equally well in mainframe and distributed environments, it provides a great deal of flexibility. DOPiX is the IBM-designated replacement for IBM Application Support Facility (ASF), enabling organizations to protect extensive investments in very large and highly customized libraries of templates. In addition, DOPiX is the only replacement for Document Composition Facility (DCF), providing the same kind of investment protection for organizations that rely on DCF.

icon and IBM: A closer look

With the combination of the high-powered DOPiX software suite and IBM computing platforms, financial services organizations can produce personalized documents, more efficiently with greater adherence to standards. The solution includes the following components from IBM:

- **IBM CICS® family** – The CICS (Customer Information Control System) family offers application servers and connectors that provide industrial-strength, online transaction management and connectivity for mission-critical applications.
- **IBM IMS™ software** – Information Management System (IMS) software, built on IBM z Systems™ mainframes, is the lowest-cost transaction and hierarchical database management system for mission critical online transaction processing (OLTP).
- **IBM DB2® software** – This database software is optimized to deliver industry-leading performance across multiple workloads while lowering the cost of administration, storage, development and servers.
- **IBM MQ software** – MQ software is a universal messaging backbone, enabling rapid, reliable and highly secure transport of messages and data between applications, systems and services.
- **IBM WebSphere Application Server software** – This software provides flexibility, efficiency and intelligent management. It speeds the delivery of applications and services, helping to ensure efficient, reliable operation and offering comprehensive security capabilities.
- **IBM Cognos® Analytics platform** – This agile, intuitive platform delivers a simplified and personalized approach to analytics by empowering users to find insights and solve challenges on their own – while providing IT with a proven solution that can be easily scaled to business demands.

icon and IBM solution architecture



Together, icon and IBM enable insurers, banks and other financial services organizations to deploy a single, powerful CCM solution that can create and manage personalized documents and deliver them to customers through a wide range of channels.

icon and IBM: Personalized communication

icon

icon Communication Dynamics, Inc., brings best-in-class CCM solutions to the US and North American markets. Its parent company, icon Systemhaus GmbH, founded in Stuttgart, Germany, has delivered comprehensive customer correspondence solutions to leading insurance companies, banks, utility companies and industrial companies since 1995.

IBM

IBM delivers an extensive array of solutions for the financial industry. IBM experts understand the nuances of how to increase profitability and reduce risk while supporting growth and regulatory compliance. IBM offers a broad portfolio of software and hardware combined with decades of experience solving real business problems in banking and finance.

For more information

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To learn more about icon, please visit: icomdyn.com



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