

**Customer Engagement**

Personalized Customer Engagement

EngageOne® Digital Self Service

Help your customers help themselves.

Turn your self-service interactions into long-lasting, profitable relationships. Now, you can unburden your call centers and give customers what they want: The ability to quickly find the answers they need. Our modular approach provides fast, affordable implementation and plenty of choices. That lets you offer the seamless experience that your customers desire across channels and portals.

Select your preference from secure document access, interactive bill navigation, and flexible payment options. You can build a new portal or enhance an existing one. Add best next engagement analytics and engaging Interactive Personalized Video that answers questions before they're asked. Plus, you can provide an empowering, unique experience that builds loyalty and drives revenues.

Deliver the real-time experience your customers demand.

- Personalized, relevant and timely
- Quick and convenient—it can be accessed anytime, anywhere
- Intuitive and easy to use
- Engaging and empowering

Transform your self-service experience in weeks.

Fast to market

Whether you opt for a new portal or want to enhance an existing one, you can be in market within weeks and have room to grow as needs evolve. You don't need a big budget or a huge IT department. Digital Self Service builds on your existing systems, so benefits quickly accrue to your bottom line.

Profitable in many ways

When you make it easy for customers to find answers to routine questions online, you save big without compromising satisfaction. You can also drive digital adoption, increasing uptake of additional services while slashing print and mail costs.

Exceptionally engaging

Create a single, seamless experience with options that your customers will be happy to use. You can provide instant access to document history, interactive billing and online bill payment. Embed Interactive Personalized Video that can preempt calls to customer service. It can then apply best next engagement analytics to target offers and communications based on customers' preferences, behaviors and needs.

Select an approach that's right for your organization.

Choose from three flexible options.

Whether you're just getting started or striving for a more streamlined, engaging self-service experience, Digital Self Service puts you on the fast track to success. It enables you to select the precise capabilities you need:

- 01, EngageOne® Smart View secure document access
- 02, EngageOne® Smart Bill™ interactive bill navigation
- 03, EngageOne® Smart Pay flexible payment options

With Digital Self Service, you can connect data from any source, including multiple printstreams and billing systems. Synchronize messaging across channels, and present a consistent, personalized experience at every interaction. A high-speed repository indexes, stores and retrieves data in real time, providing instant access to customer documents for both customers and customer service representatives.

EngageOne Smart View

Smart View can be deployed in as little as three weeks. Give your customers access to their entire communication history in a secure, personalized portal. The intuitive interface puts a wide range of capabilities at the customer's fingertips, including:

- Account summary
- Profile management
- Search by date range
- Downloadable PDFs
- Automated email and SMS notifications
 - Reminders
 - Confirmations
 - Document availability and more

The screenshot shows the Pitney Bowes EngageOne Digital Self Service interface. At the top, there are tabs for 'OVERVIEW', 'NOTIFICATIONS', and 'PROFILE'. The 'OVERVIEW' tab is active, displaying a summary of the account. It includes the account number (0000123456891), the customer name (Hello, Eric Ryan), and a message stating 'This is your document Archive. Have a nice day!'. Below this, there are sections for 'Search document history' and a 'Display' dropdown set to 'Full Results'. The main area shows a table of documents with columns for 'Document number', 'Document type', 'Due Date', and 'Amount Due'. Some rows have checkboxes next to them. At the bottom right of the table, there is a PDF icon.

EngageOne Smart Bill

When your customers require more interactive capabilities, Smart Bill delivers. Deploy Smart Bill in as little as six weeks. You can enhance your existing portal with Smart Bill HTML plugins that present account summaries, video explainers, special offers and more. You can also create an entire new portal with our customizable, HTML5 responsive templates.

Smart Bill includes robust document access capabilities. Plus, your customers can enjoy sophisticated account management tools that add clarity, reveal trends, and minimize customer service calls, featuring:

- Contextual, in-bill help
- Interactive reporting tools
 - Search
 - Filter
 - Current charges
 - Usage

The screenshot shows the EngageOne Smart Bill portal. At the top, it displays the account number (00001234567891) and the customer's name (Eric Ryan). Below this, there is a 'SUMMARY OF YOUR ACCOUNT CHARGES' section with tables for 'Previous charges', 'Overdue charges', and 'Current charges'. To the right, there is a 'Current billed usage' chart for the period Jan 1, 2015 - Jan 31, 2015, showing voice usage for Eric, Sarah, John, and Emma. Below the chart, there is a 'Discounts and rebates' section with a note about discounts being automatically applied to the total bill. Further down, there is a 'Support' section with a phone number and email address, and a 'TOTAL BALANCE DUE' section showing a balance of \$296.88. At the bottom, there are sections for 'Customize your product with more features', 'Unlimited storage', '256 bit encryption', 'High speed connection', and 'Unlimited back-ups'.

With Smart Bill, you can also opt for additional features that align with the specific needs of B2B customers, including:

- Support for hierarchical organizations
- Role-based access control
- The power to handle large datasets
- Sophisticated analysis and reporting tools

EngageOne® Smart Pay

Make it easier and more convenient for your customers to pay their bills online. With Smart Pay, you can accept multiple forms of payment, including major credit cards. Integration with popular payment gateways such as Cybersource®, Paymentech™ or Authorize.Net® is built in. Complete end-to-end payment processing includes authorization and settlement. EngageOne® Digital Self Service is a PCI compliant application to help you guard against fraud and protect customer data.

The screenshot shows the Pitney Bowes EngageOne Smart Pay interface. At the top, there are tabs for ACCOUNT OVERVIEW, MY BILLS, BILLS HISTORY, PAYMENT (which is selected), and SETTINGS. Below these are three sub-tabs: Bills and invoices, Payable statements, and Statements. A large table lists invoices to pay, each with a checkbox, account number, invoice number, due date, and amount due. The total amount due is \$1921.20. Below the table, there are sections for 'Pay using' (Choose existing account or Use new credit card) and 'Pay on the' (date 05/05/2015). A note says 'Please note this is the date that money is taken out of your account, not the date the payment posts'. A 'Card holder details' section asks for first name (Ricky) and last name (Gervais). A 'Card details' section includes fields for card name (optional), card type (VISA), card number (1234567890111213), expiration date (MM/YY), and card security code (123). A 'Billing address' section asks if the user wants to use this billing address (112 ½ Beacon Street, Boston, MA) or a new billing address. There is also a 'Save to wallet as Card name' option. At the bottom are 'SAVE' and 'CANCEL' buttons, and a note about a 4-5 business day wait for payment posting.

The ideal fit for today and tomorrow

Unlike many custom solutions, Digital Self Service is designed to evolve as organizational needs and customer preferences change over time. You can add capabilities step by step. Embed new capabilities within an existing portal or establish an entirely new self-service portal. With Pitney Bowes, the choice is yours.

Beyond the bill:

Add value to every interaction.

Make Digital Self Service an integral part of your organization's customer engagement strategy. Pitney Bowes solutions work together to deliver a more meaningful, personalized experience that keeps your customers coming back for more.

Use sophisticated analytics for proactive engagement.

The key to successful engagement lies in the ability to discern individual customer needs and intent. Our best next engagement capability combines account and behavioral data to determine what most interests each individual and what they are most likely to respond to. It lets you present personalized communications in real time that demonstrate that you understand each customer as an individual.

- Timely notifications
- Educational insights
- Targeted offers
- Appealing cross-sell and upsell

Exclusive self-service innovations from Pitney Bowes

With Digital Self Service, you can take interactivity to a whole new level. Imagine a bill that explains itself and knows your name. Interactive Personalized Video makes it possible. It's automation that responds to customer inputs in real time, but with a distinctly human touch.

Interactive Personalized Video lets you present offers, bills and other customer information in a compelling, visual way. It's a smart way to lower costs and boost satisfaction by educating customers and answering many questions before they're asked.

Digital Self Service embedded with best next engagement. That means Interactive Personalized Video can help you:

- Engage and inform prospects.
- Welcome new customers.
- Explain complex documents such as detailed bills, policies or contracts.
- Boost renewals and retention with targeted offers.
- Increase cross-sell and upsell by presenting the most relevant options.

Choose the precise capabilities you need.

Get the solutions that are modular, scalable and complete.

Install the full range end-to-end or select individual capabilities to complement your existing infrastructure.

EngageOne® Smart View

Meet customers online in as little as three weeks.

- Secure document access
- Self-registration
- Two-factor authentication
- Communications search, download and reprint
- Profile management
- Email and SMS notifications
- Access for your customer service representatives

EngageOne® Smart Pay

Accept customer payments online in as little as six to eight weeks.

- Flexible payment options
- Online payments support
- Pre-integration with popular payment gateways
- Defined reconciliation output
- PCI PA-DSS certified product

EngageOne® Smart Bill™

Engage customers online in as little as six to eight weeks. Smart Bill includes all Smart View capabilities plus:

- Interactive Smart Bills™ bill navigation
- Advanced user management and access control
- Search and filters for large datasets
- Billing analytics and reporting
- Adaptable template design

EngageOne® Liaison

If you prefer a fully custom solution, Pitney Bowes EngageOne Liaison provides a comprehensive application development kit for developing custom billing and self-service portals. EngageOne Liaison is the right choice when you need to:

- Consolidate multiple lines of business.
- Integrate all back-end systems.
- Provide flexible spend/usage analysis.
- Integrate enterprise portals with SSO (Single Sign On).

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