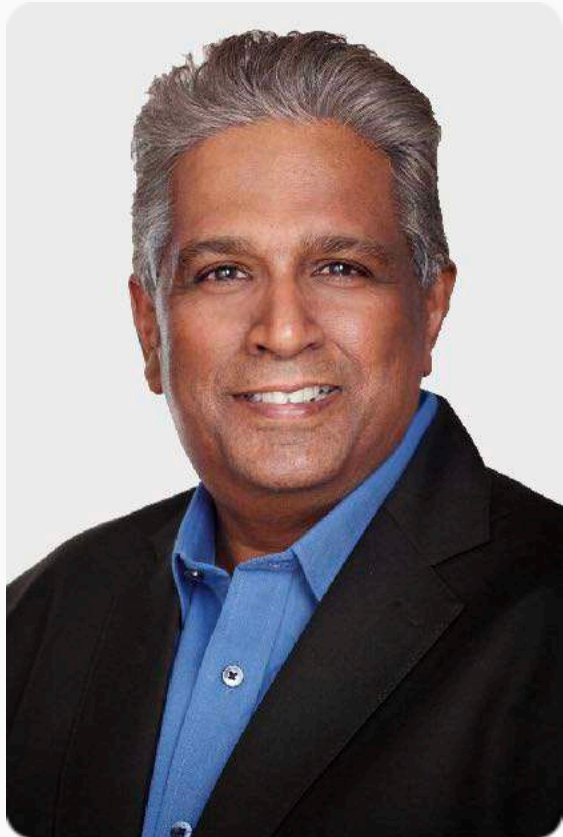


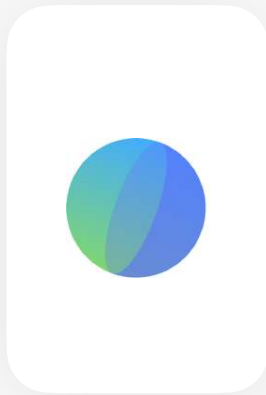
Your OneStop Client Interaction Hub for accounting

Modernize Client Interaction
Workflows





About Us Co-Founded by Subrah Iyar, CEO and Co-Founder of WebEx, and Stanley Huang, Senior Director of Engineering at WebEx



MOXO

Our Vision Client-business engagement for the mobile era



WEBEX

Our Background Client-business engagement for the internet era



The Problem

Client Management in Complex Business.

‘Complex Business’ - High Value B2B and B2\$\$\$C business

Client Management Workflows in Complex Business: Centered on External Interactions

ACCOUNT ONBOARDING



Multi-Step Interactions

ACCOUNT SERVICING



Many-Many, Knowledge-Worker
Role based

EXCEPTION HANDLING



Multi-channels, multi-mode



e-Paper Artifacts



High Security, Audit-Trail
Requirements



Timely Exception Handling
Requirements



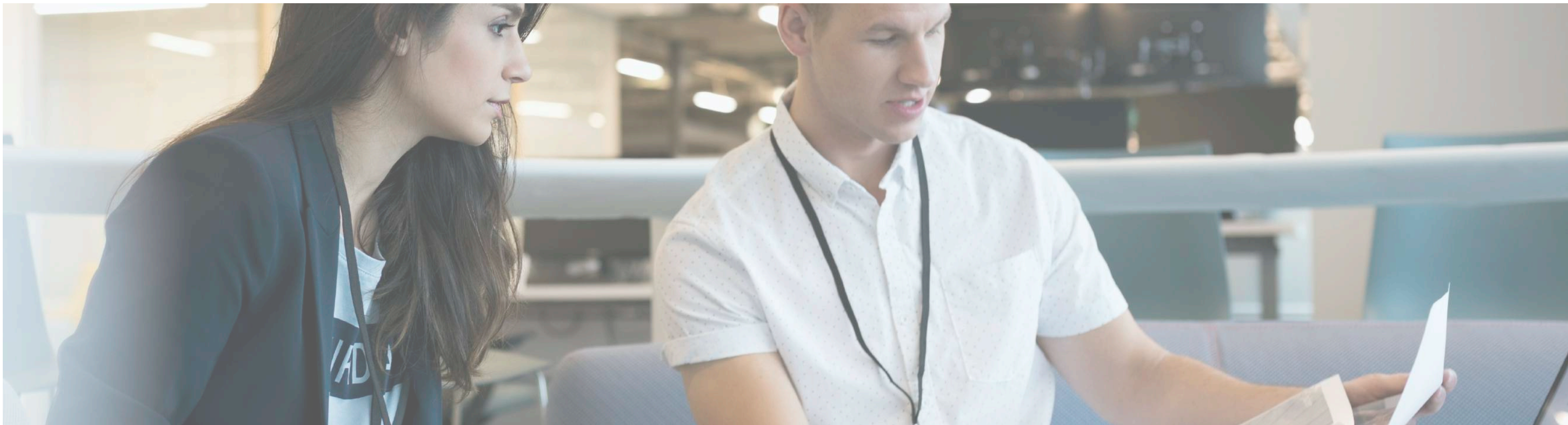
Process and Data level
Integrations with Systems
of Record

THE CHALLENGE



Disjointed Workflows with Disparate Tools, over Disparate Channels,
Significant Manual Interventions, Low Efficiency

The Urgent Pain



Situations

Permit Planning

Onboarding before Billing

Trade by End of Day

Tax Filing

Closing Transactions

Purchase Order Approvals

Offer on Property

Legal Case Management

Escrow Close

How it's Done Today



Emails



Meetings



Attachments



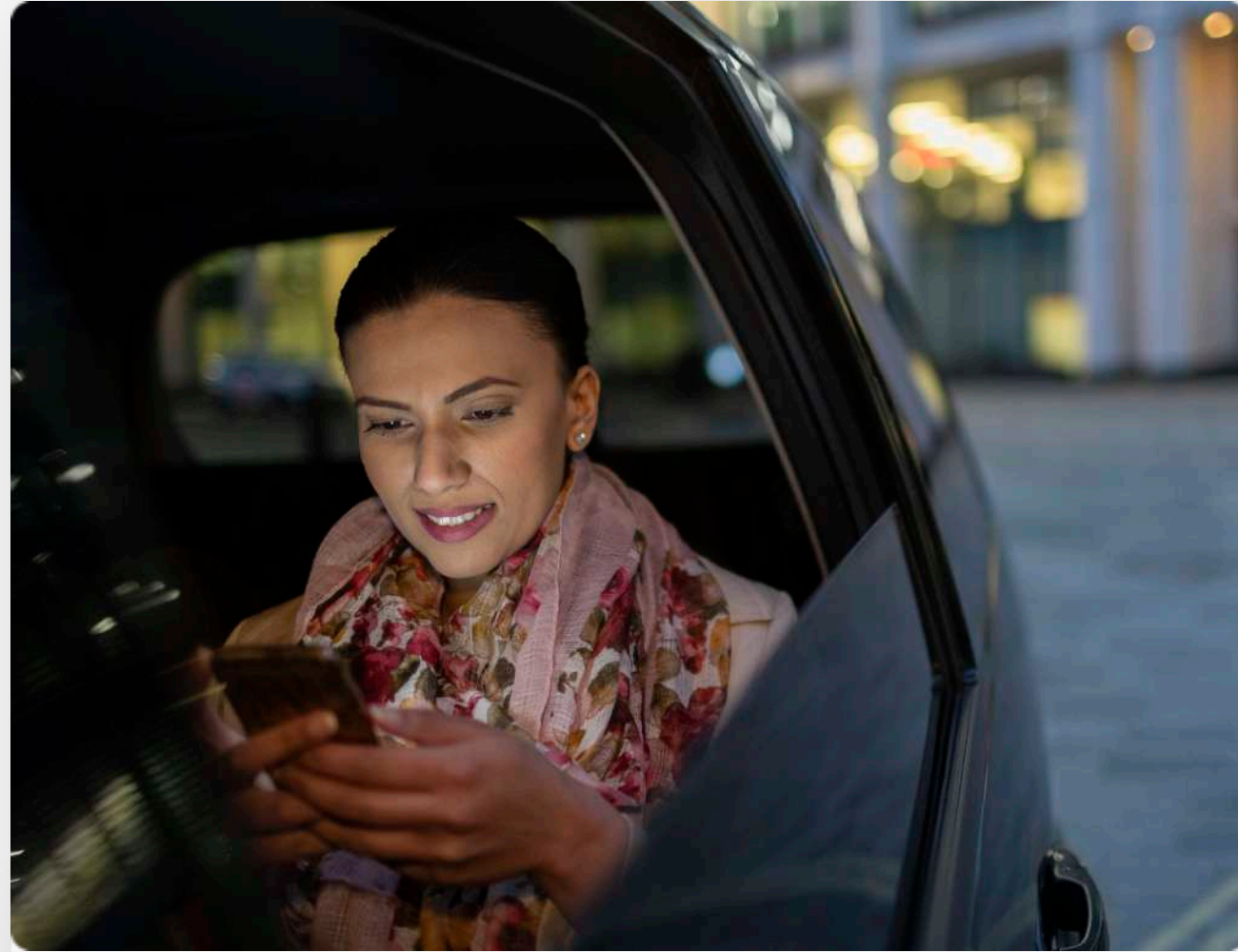
Doc Exchange
Tools



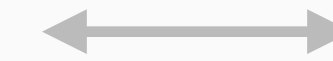
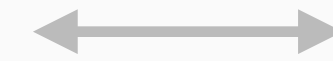
Other Systems



Texting



CLIENTS, PARTNERS



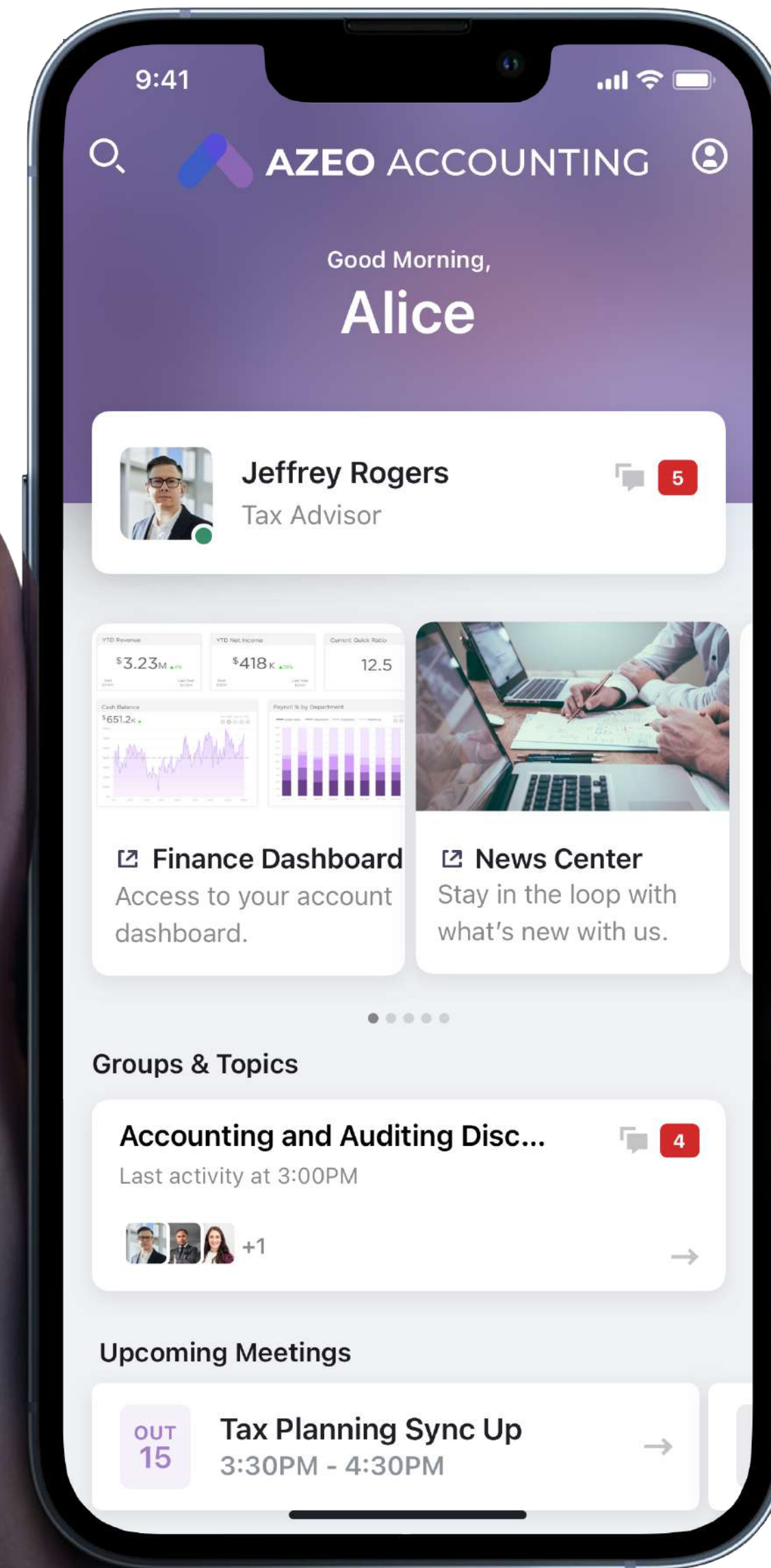
ACCOUNT MANAGEMENT TEAMS

End to End Orchestration of External Interaction Workflows

Your OneStop Client Interaction Hub

Streamline deadline-driven
client interaction flows.

Provide a OneStop destination
for client-centric workflows.



— One Stop Digital Hub

— 1:1 Designated Connection

— Your Relevant Business
Content

— Groups & Topics

— Audio and Video Meetings

Streamline deadline driven client interactions

Break down time-consuming bottlenecks, collect approvals faster, and accelerate operations. Manage & orchestrate your flows across:

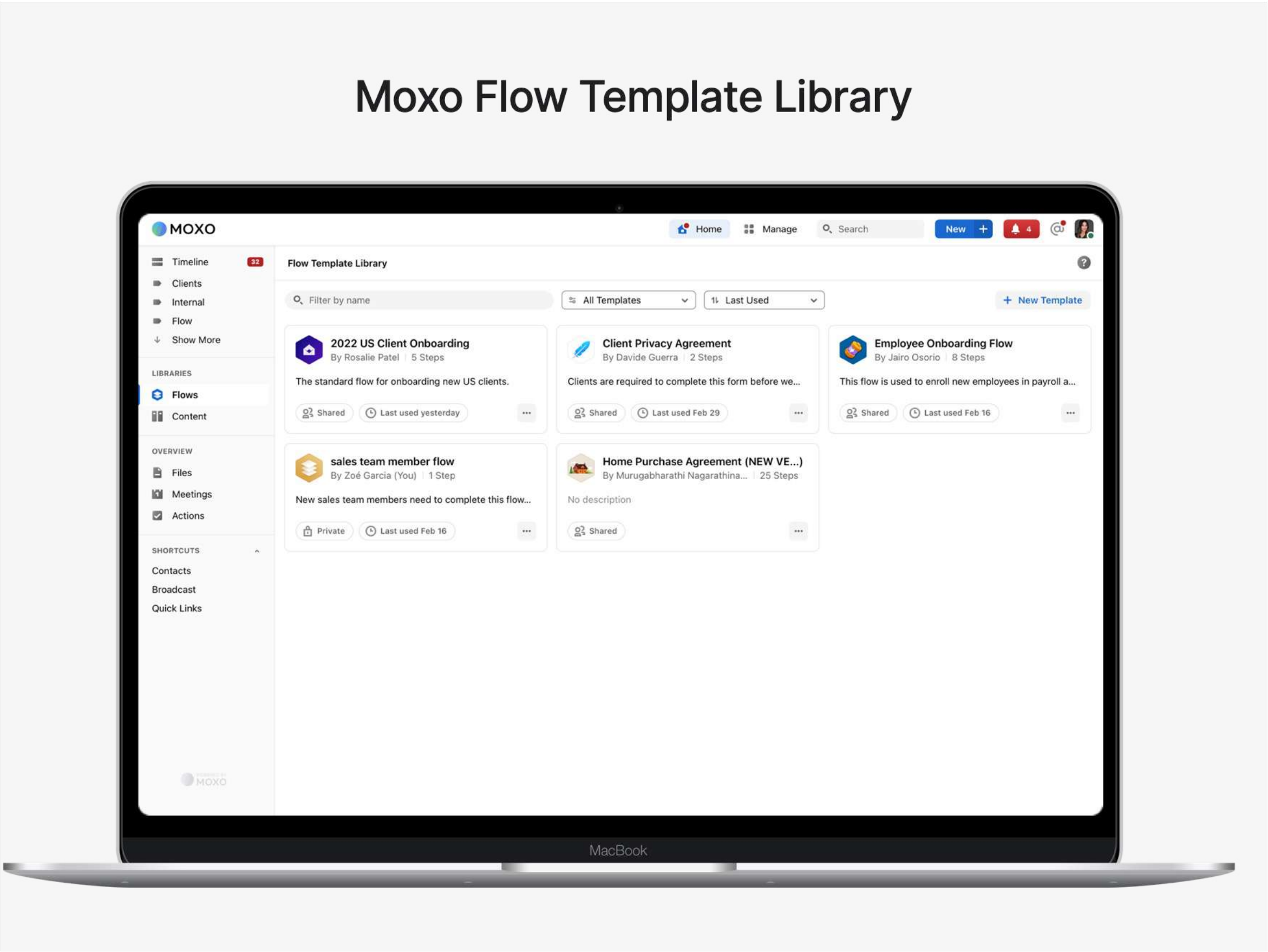
- ✓ Account Onboarding
- ✓ Account Servicing
- ✓ Exception Handling



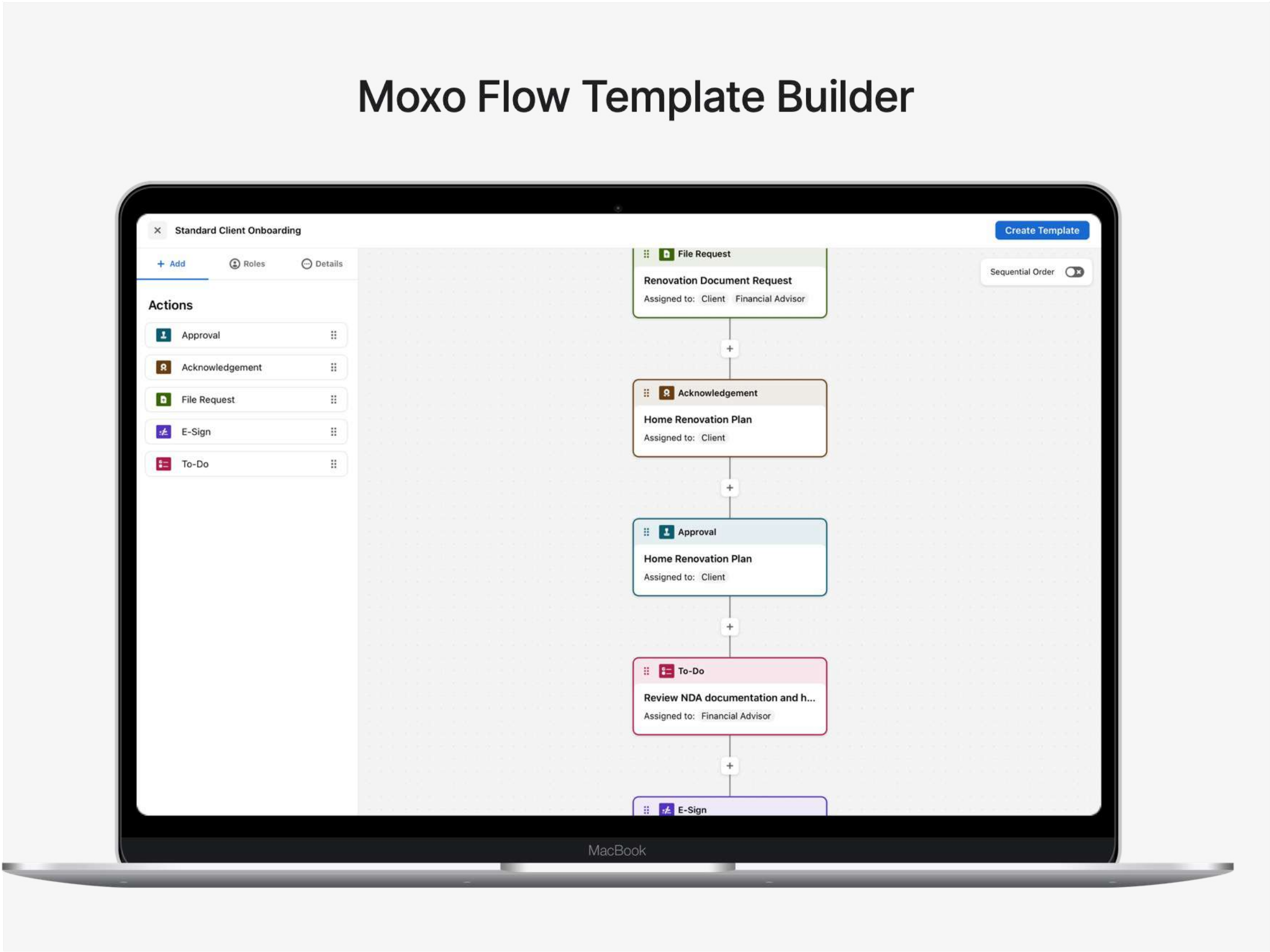
Build Your Template Flows

Bring Structure to your Client Interaction Processes

Moxo Flow Template Library

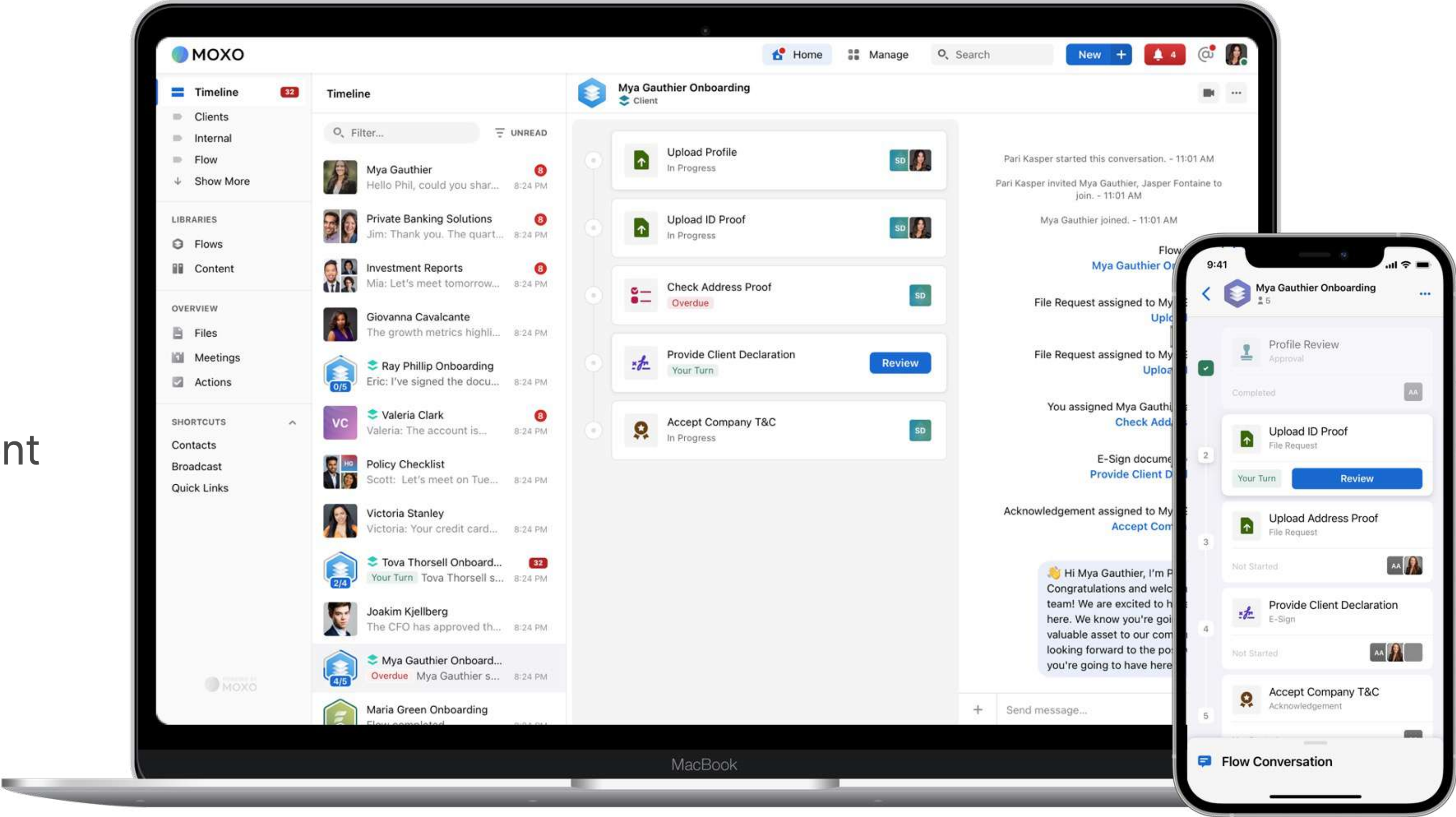


Moxo Flow Template Builder



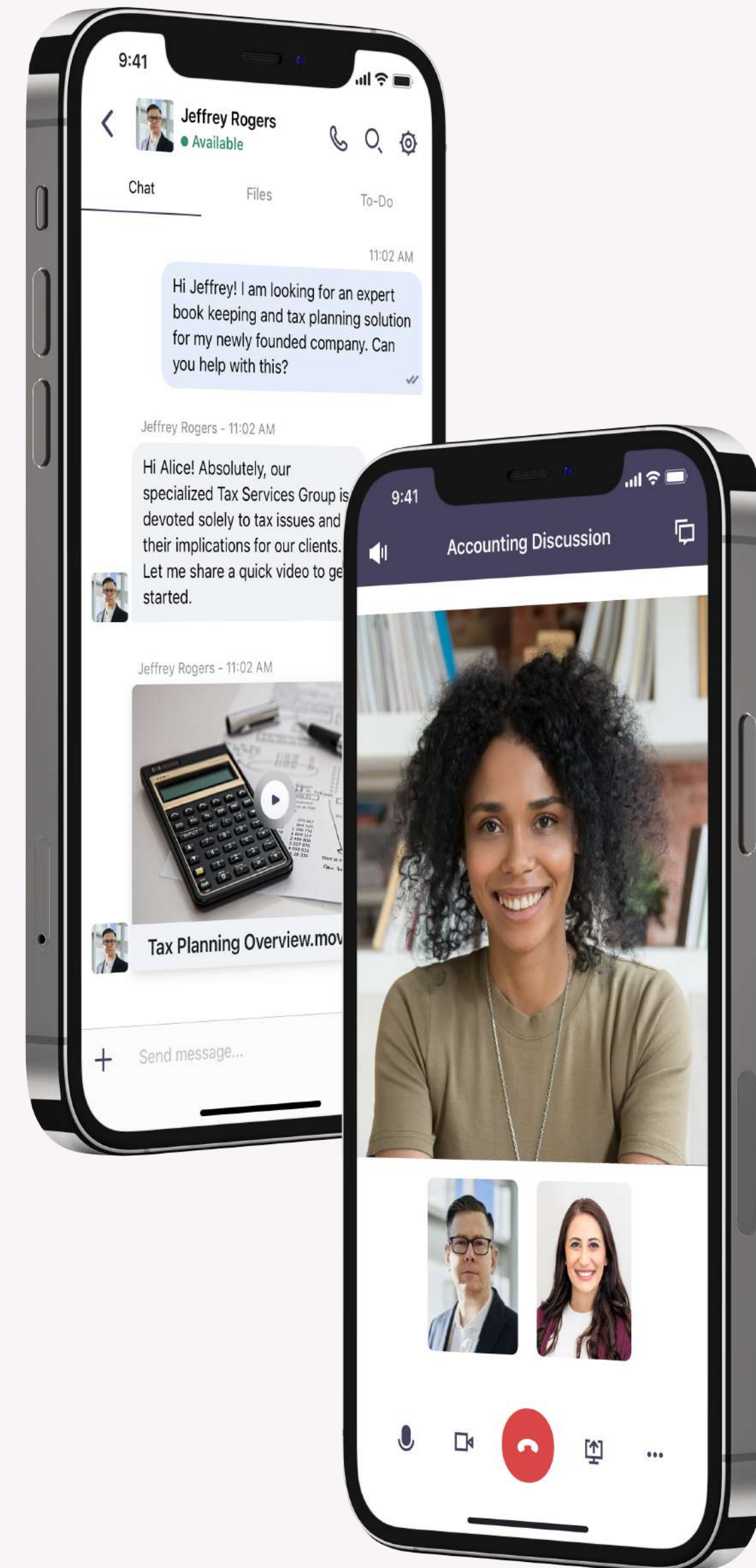
Moxo Flows

Bring structure to your client interaction processes

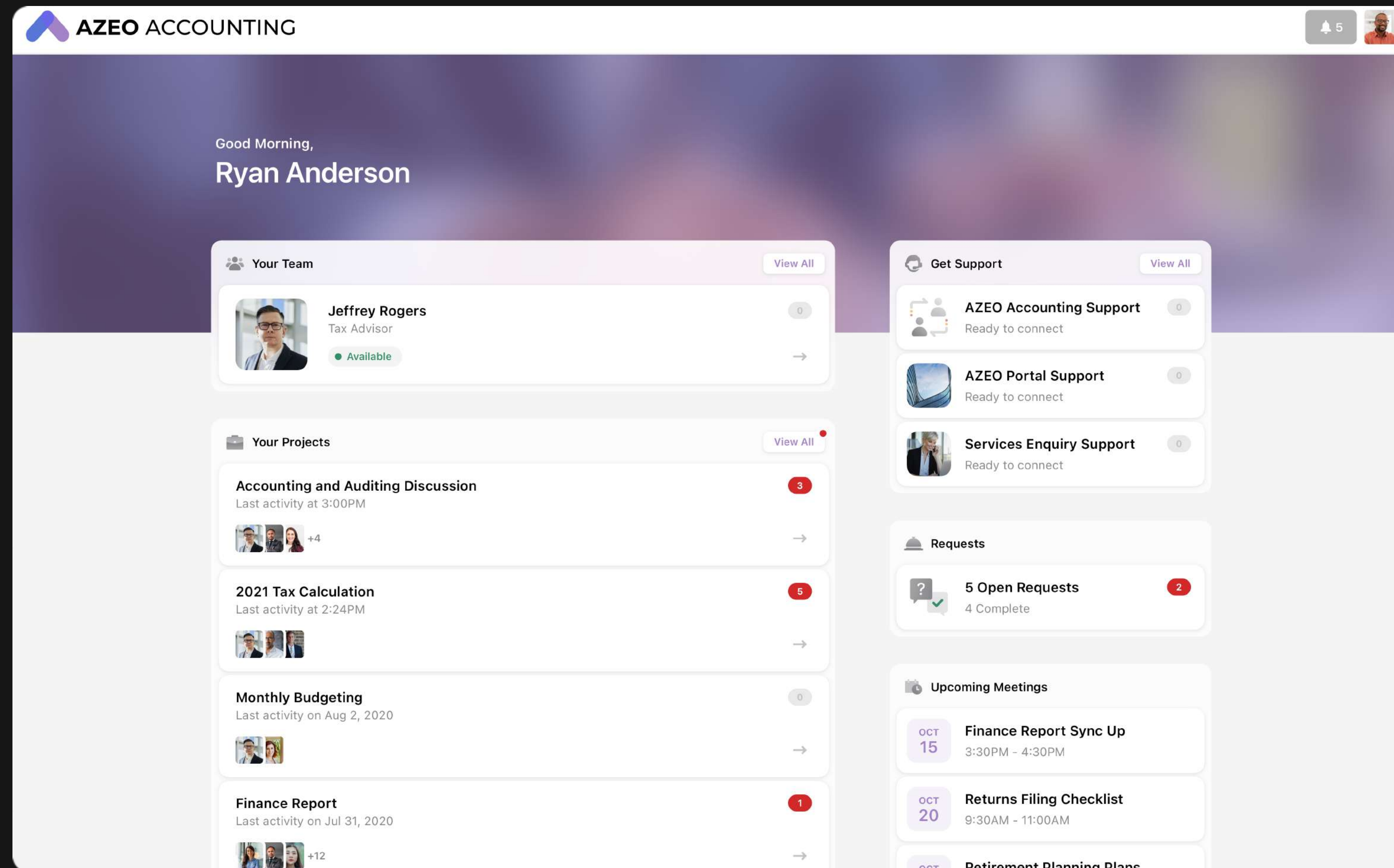


Orchestrate Your Client Interaction Flows in OneStop

- ✓ New Client Onboarding
- ✓ Retainer Fee Agreement
- ✓ Invoice Approvals
- ✓ Administrative Management
- ✓ Tax Advisory Planning
- ✓ Bookkeeping Discussions
- ✓ Statement of Accounts Reviews
- ✓ Audit Preparation
- ✓ Financial Proposals

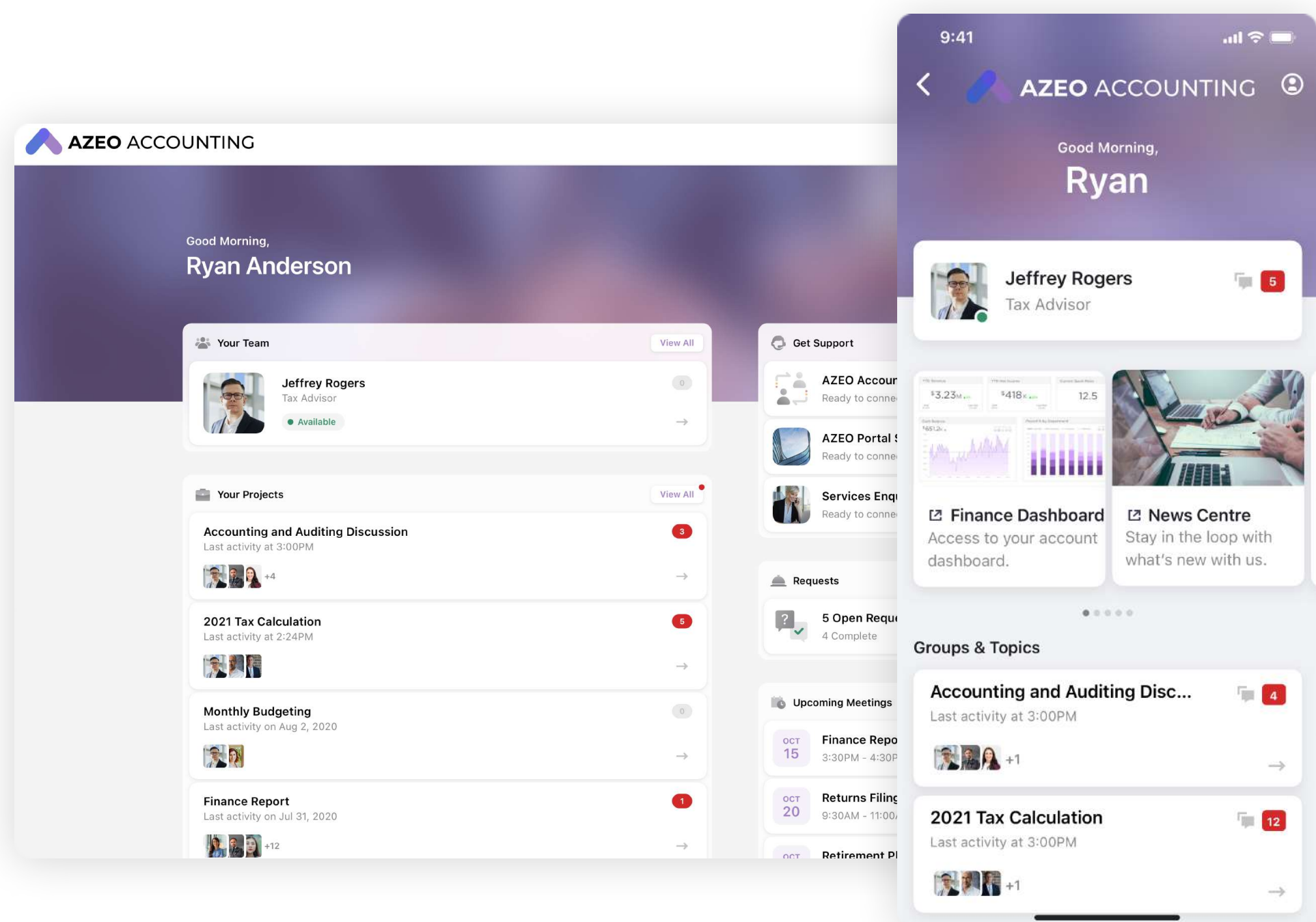


Modernize your deadline-driven client interaction flows



Orchestrate and Streamline Client Interaction Flows

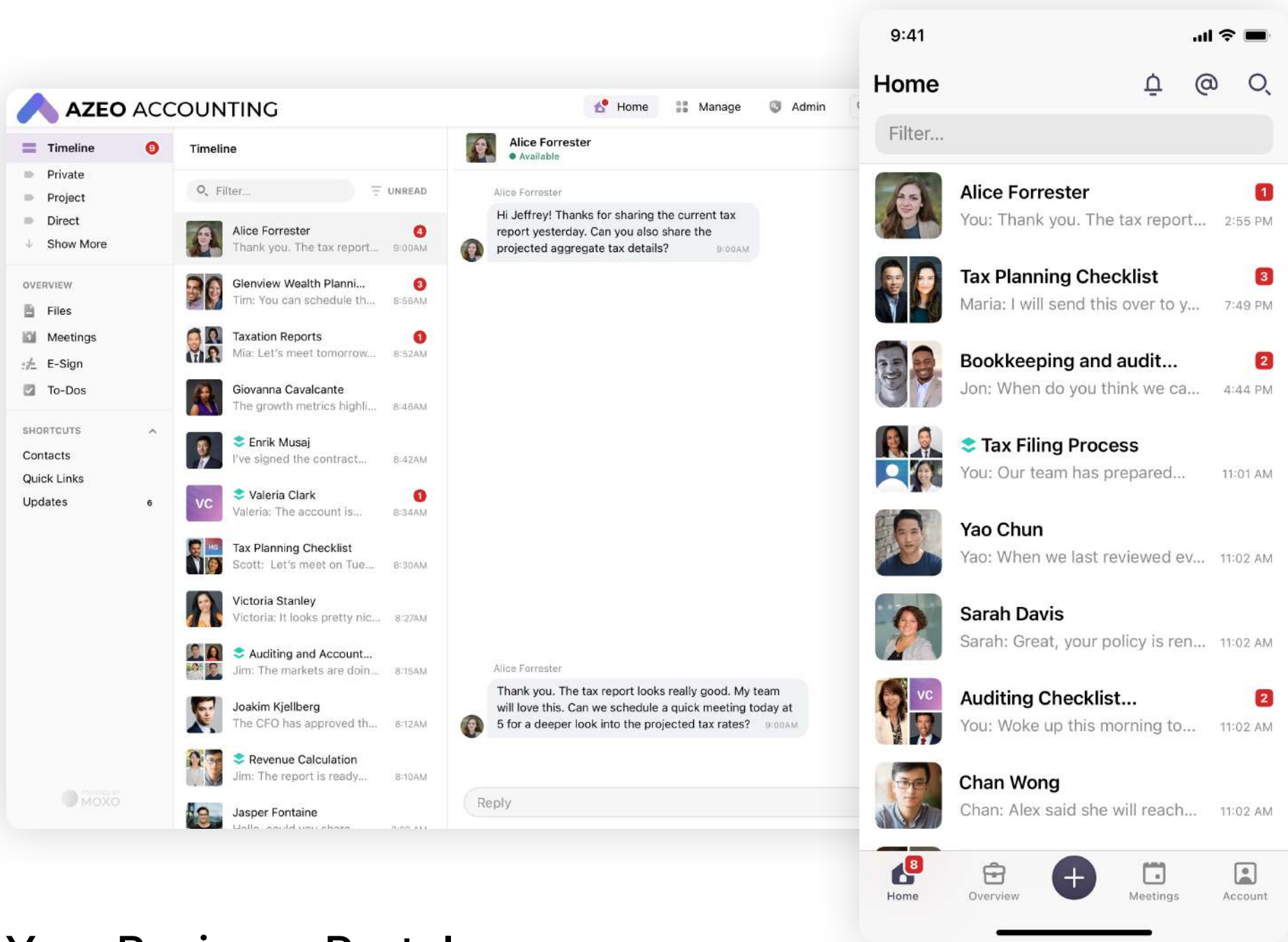
Control the chaos of client management



Reach In, Receive Service



Reach Out, Deliver Service

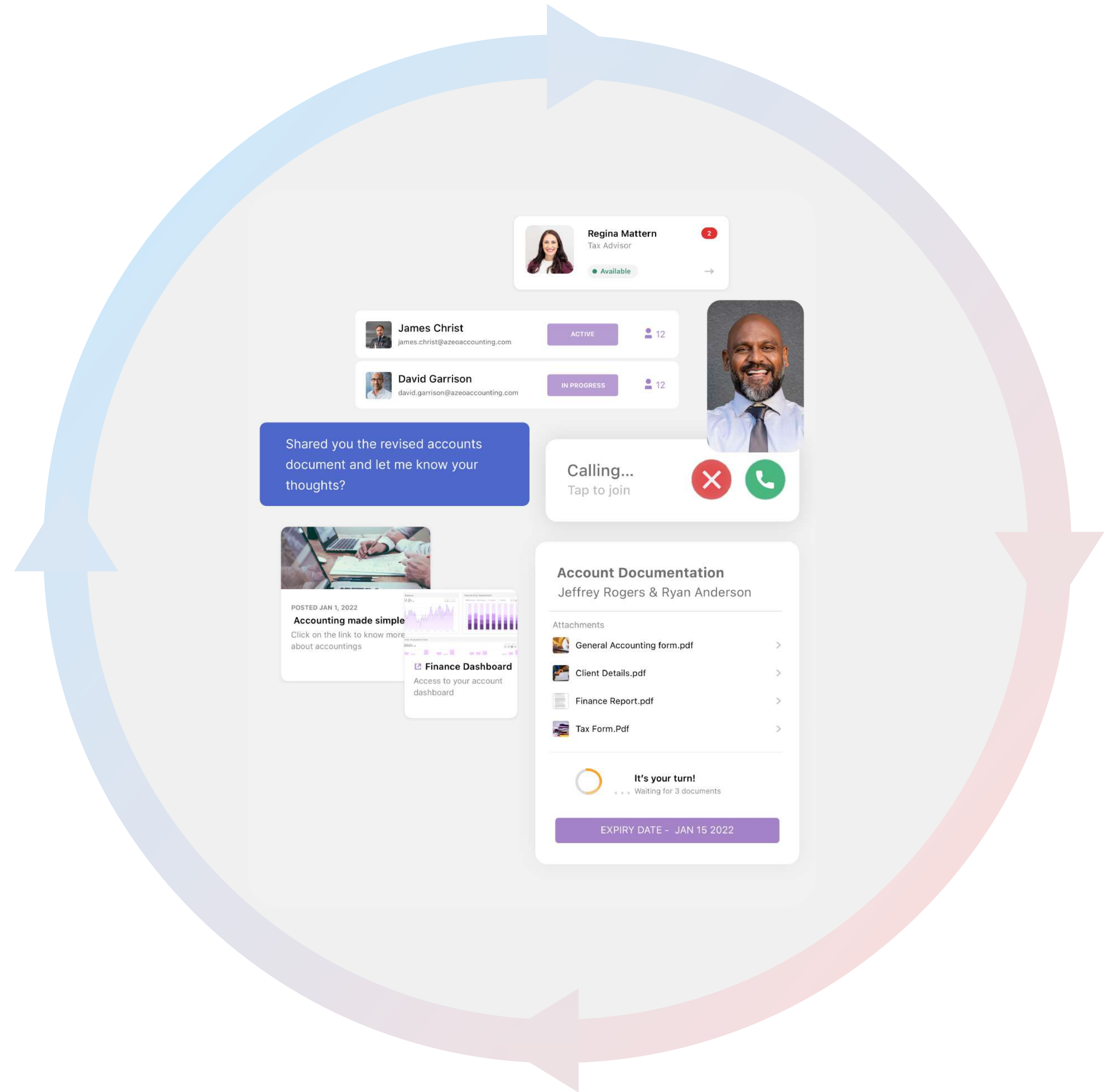


Your Client Portal
Clients, Partners

Your Business Portal
Business Teams, Staff, Executives

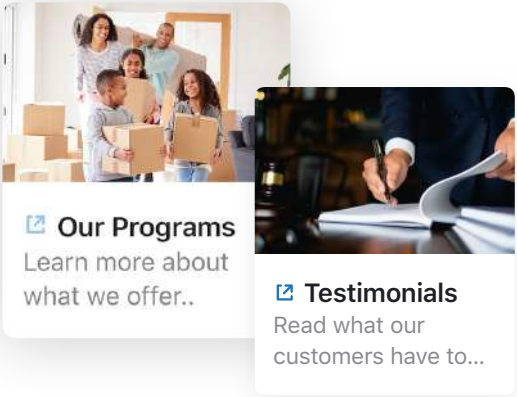
End-to-end client interaction management

Unstructured ePaper workflows with persistent audit trails

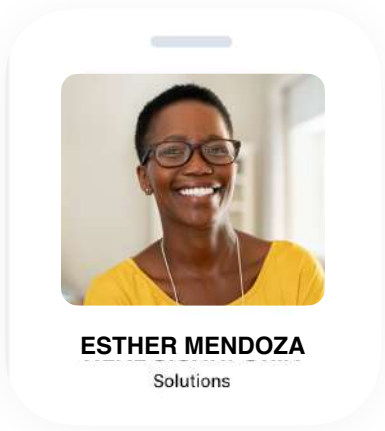


Orchestrate end-to-end client collaboration with the power of OneStop

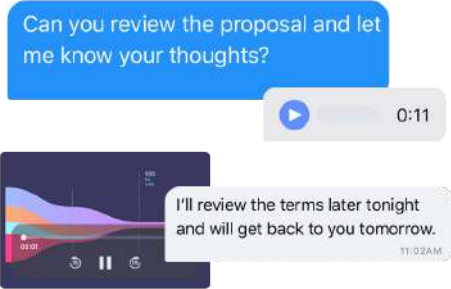
Manage Your Client Business Flows and Deliver an All-in-One, Continuous, Connected Journey



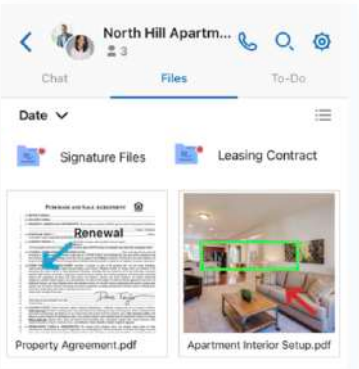
Content Channels



Customer Click & Connect



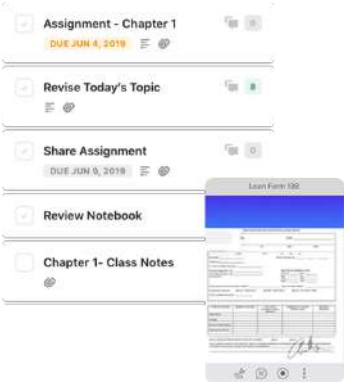
Secure Messaging



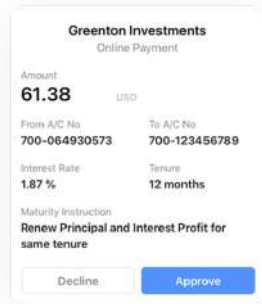
Document Collaboration



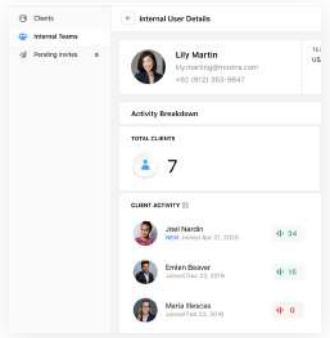
Spotlight



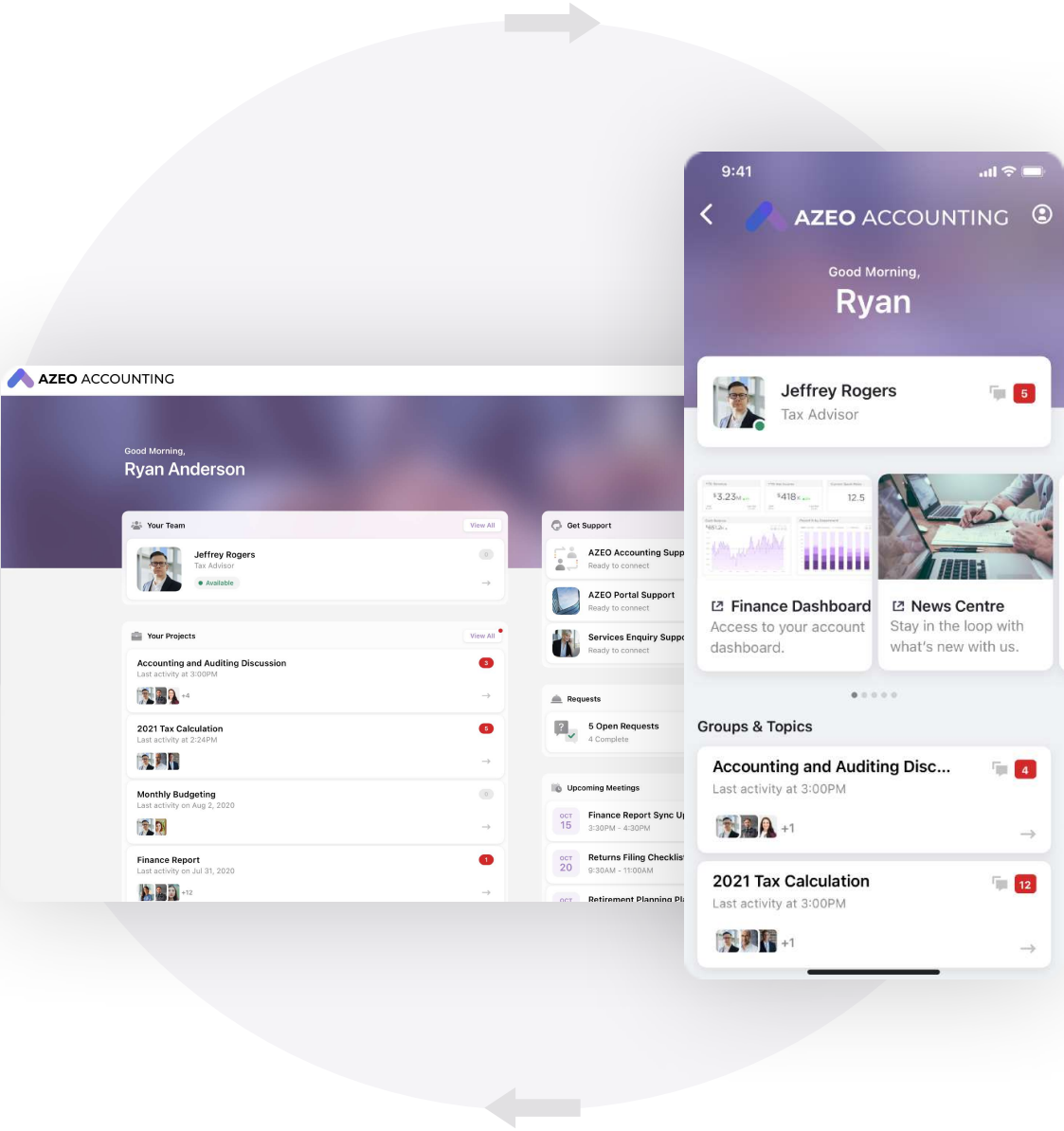
Manage Approvals and Deadlines



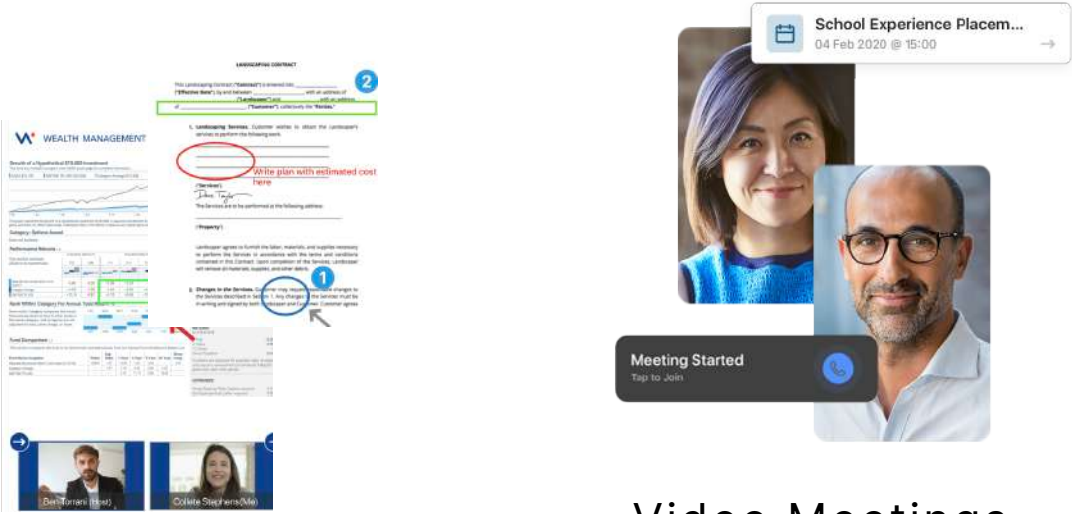
Transactions



Management Portal



Digital Signature



Video Meetings



Co-Browsing

Account Management Control

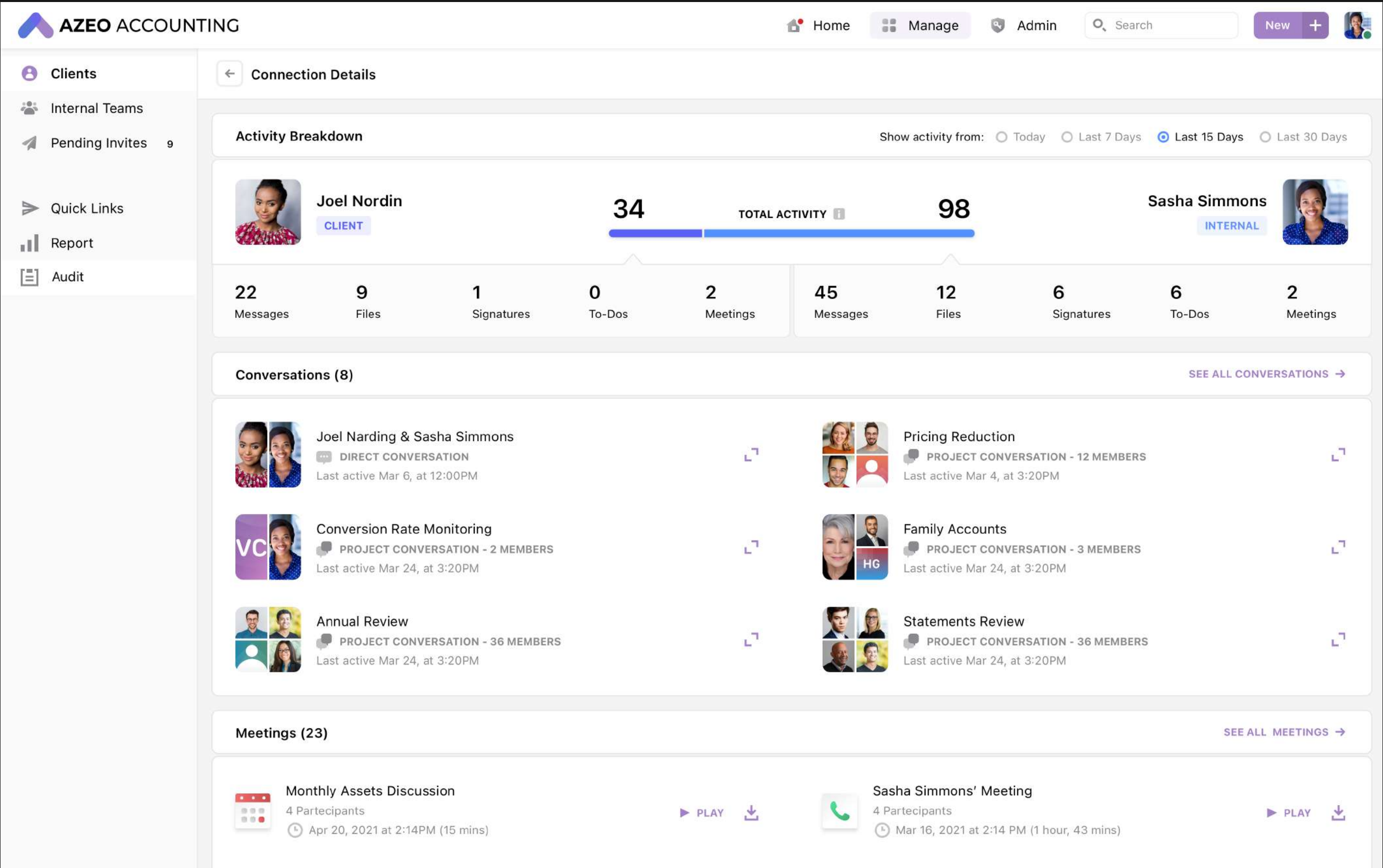
The Client Management Dashboard

Manage & streamline timeliness, cost, and quality for account retention and growth:

Have fingertip access to all client interaction workflows and get immediate status insights.

Extend existing client interaction workflows with triggers, mobile alerts, & notifications.

Directly manage your team to KPIs related to timeliness, cost, and quality.



Your Control and Compliance Center

The Admin Portal

Manage client interaction workflows, incorporating the roles and access controls of your organization.

Significantly reduce ‘Flight Risk’ of clients and accounts with complete oversight.

Seamlessly transfer accounts, preserving all account interaction history.

Track all interactions with a complete digital e-paper trail in the audit log.

Ellie Bergeron
Administrator

Internal Users

Clients

Branding

Advanced Features

Settings

Getting Started

Business Portal

Log Out

AZEO ACCOUNTING

Internal Users (230)

Search for user...

STATUS All

ASSIGNED TO All

Export

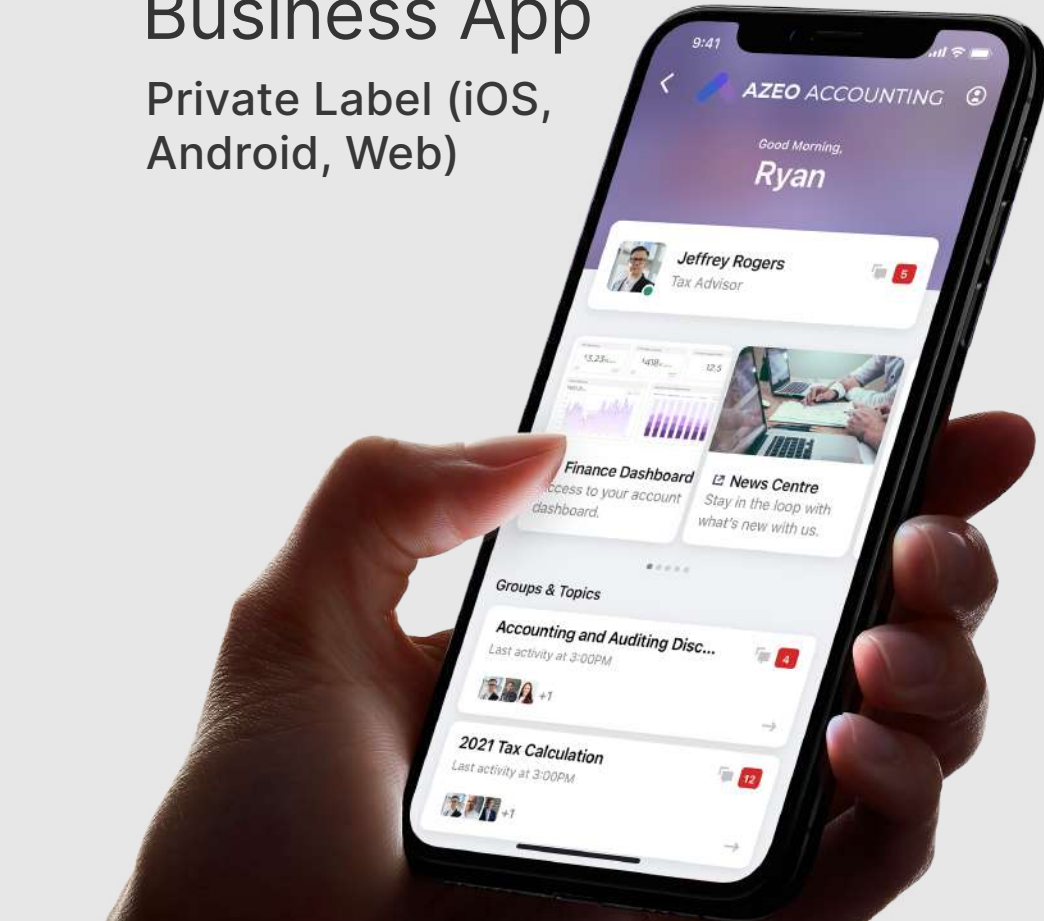
	NAME	JOB TITLE	ADMIN	STATUS	CLIENTS		
<input type="checkbox"/>	<div><div>Zack Reed</div><div>zack@azeoaccounting.com</div></div>	Key Account Manager	-	ACTIVE	6	<div></div>	<div></div>
<input type="checkbox"/>	<div><div>Jennifer Lee</div><div>jeniffer@azeoaccounting.com</div></div>	Financing Analyst	-	ACTIVE	8	<div></div>	<div></div>
<input type="checkbox"/>	<div><div>Grace Nguyen</div><div>grace@azeoaccounting.com</div></div>	Director, Finance	-	ACTIVE	4	<div></div>	<div></div>
<input type="checkbox"/>	<div><div>Sefton Lambert</div><div>sefton.l@azeoaccounting.com</div></div>	Mortgage Officer	-	ACTIVE	23	<div></div>	<div></div>
<input type="checkbox"/>	<div><div>Beth Murphy</div><div>beth@azeoaccounting.com</div></div>	Senior Analyst, Finance	-	PENDING	4	<div></div>	<div></div>
<input type="checkbox"/>	<div><div>Gordon Morgan</div><div>gordon@azeoaccounting.com</div></div>	Auditor	<div></div>	PENDING	4	<div></div>	<div></div>
<input type="checkbox"/>	<div><div>Sumitra Harris</div><div>sumitra@azeoaccounting.com</div></div>	Account Manager	-	ACTIVE	15	<div></div>	<div></div>
<input type="checkbox"/>	<div><div>Julian Gruber</div><div>julian@azeoaccounting.com</div></div>	Finance Analyst	-	ACTIVE	21	<div></div>	<div></div>
<input type="checkbox"/>	<div><div>Rebecca Brabec</div><div>rebecca@azeoaccounting.com</div></div>	Key Account Manager	-	ACTIVE	3	<div></div>	<div></div>
<input type="checkbox"/>	<div><div>Sebastian Burns</div><div>seb@azeoaccounting.com</div></div>	Sales Manager	-	ACTIVE	5	<div></div>	<div></div>
<input type="checkbox"/>	<div><div>Wan Hong</div><div>wan.h@azeoaccounting.com</div></div>	Senior Auditor	<div></div>	ACTIVE	24	<div></div>	<div></div>
<input type="checkbox"/>	<div><div>Henry Richardson</div><div>henry@azeoaccounting.com</div></div>	Financial Advisor	-	PENDING	0	<div></div>	<div></div>
<input type="checkbox"/>	<div><div>Alicia Stanger</div><div>alicia@azeoaccounting.com</div></div>	Sales Associate	-	ACTIVE	12	<div></div>	<div></div>
<input type="checkbox"/>	<div><div>Jeremy Watson</div><div></div></div>	Loan Officer	-	ACTIVE	5	<div></div>	<div></div>

OneStop Client Interaction Hub Editions

Starter App
Moxo Branded



Business App
Private Label (iOS, Android, Web)



Advanced
Embeddable SDK



Moxo is named best **digital banking solution provider** in the Banking Tech Awards.

Moxo wins best **client relationship management platform** in the LegalTech Awards.

Moxo is named best **mobile experience** at the Bank Customer Experience Summit.

Moxo is named **an innovator** in the Aragon Research Globe for Digital Work Hubs.



BNP Paribas Financial Services



K&A Mobile Tax Accounting



Entourage Collection Concierge



Virtually Noire Consulting



Falconi Consulting Professional Services



Island Pet Movers Pet Relocation Services



Intrepid Networks Emergency Response



Just White Shirts Clothing



AMCK Group Talent Management



Raiffeisen Bank Financial Services



Standard Chartered Financial Services



Sasha Esposito San Roman Therapy



Bank Of Queensland Financial Services



Keebeck Wealth Financial Services



Cornerstone Permit Company Real Estate



Balfour Homes Real Estate



Terraza Balear Real Estate



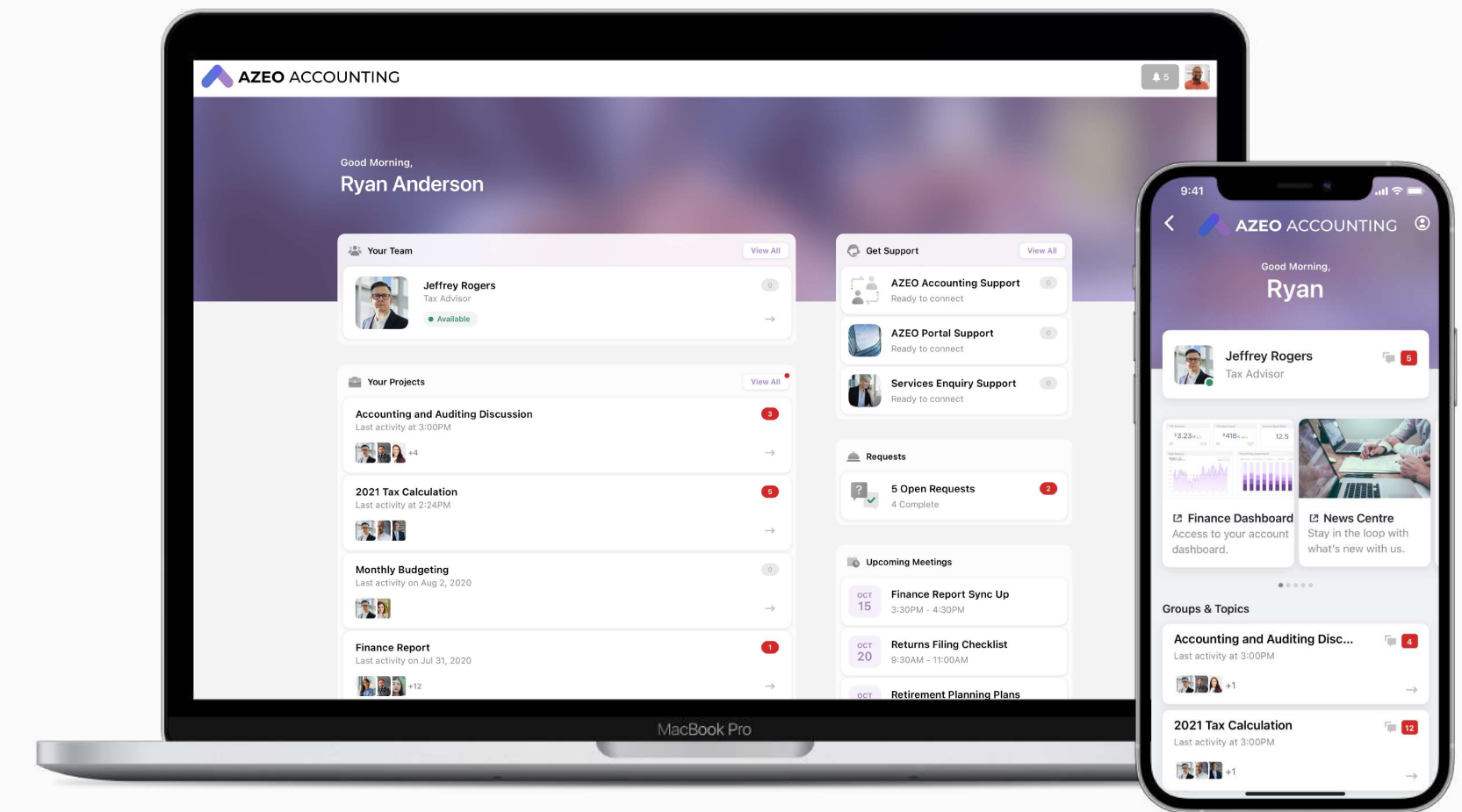
Citi Bank Financial Services



Form Collective Interior Design



Van Lanschot Financial Services



Get your OneStop Client Interaction Hub

Modernize client interaction workflows.