



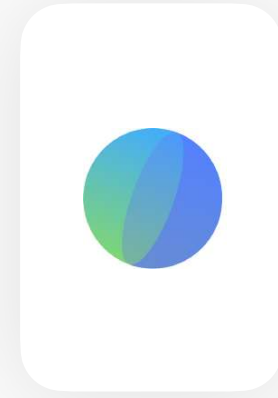
Your OneStop Client Interaction Hub for logistics

Modernize Client Interaction Workflows



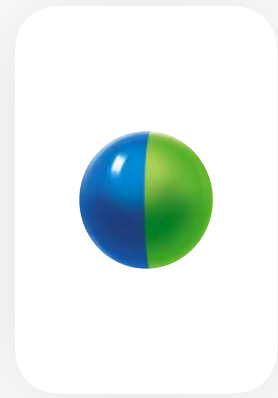


About Us Co-Founded by Subrah Iyar, CEO and Co-Founder of WebEx, and Stanley Huang, Senior Director of Engineering at WebEx



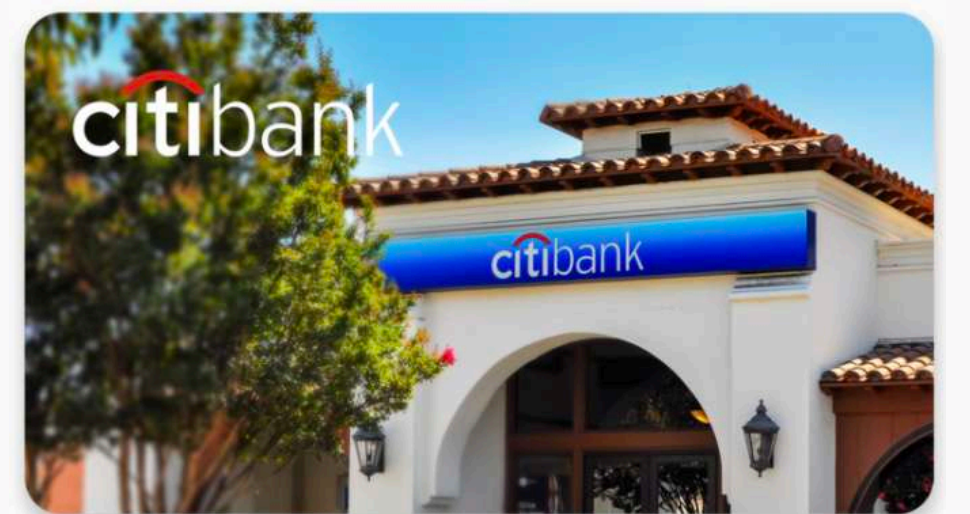
MOXO

Our Vision Client-business engagement for the mobile era



WEBEX

Our Background Client-business engagement for the internet era



Client Management Workflows in Complex Business: Centered on External Interactions

ACCOUNT ONBOARDING

ACCOUNT SERVICING

EXCEPTION HANDLING



Multi-Step Interactions



Many-Many, Knowledge-Worker
Role based



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



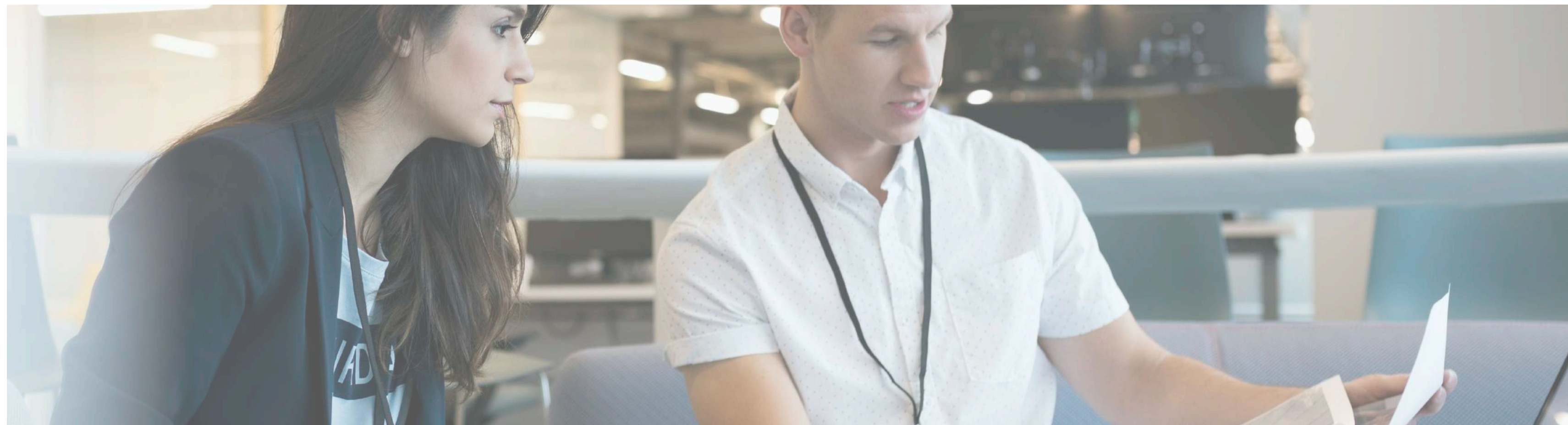
Disjointed Workflows with Disparate Tools, over Disparate Channels,
Significant Manual Interventions, Low Efficiency

The Problem

Client Management in Complex Business.

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

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



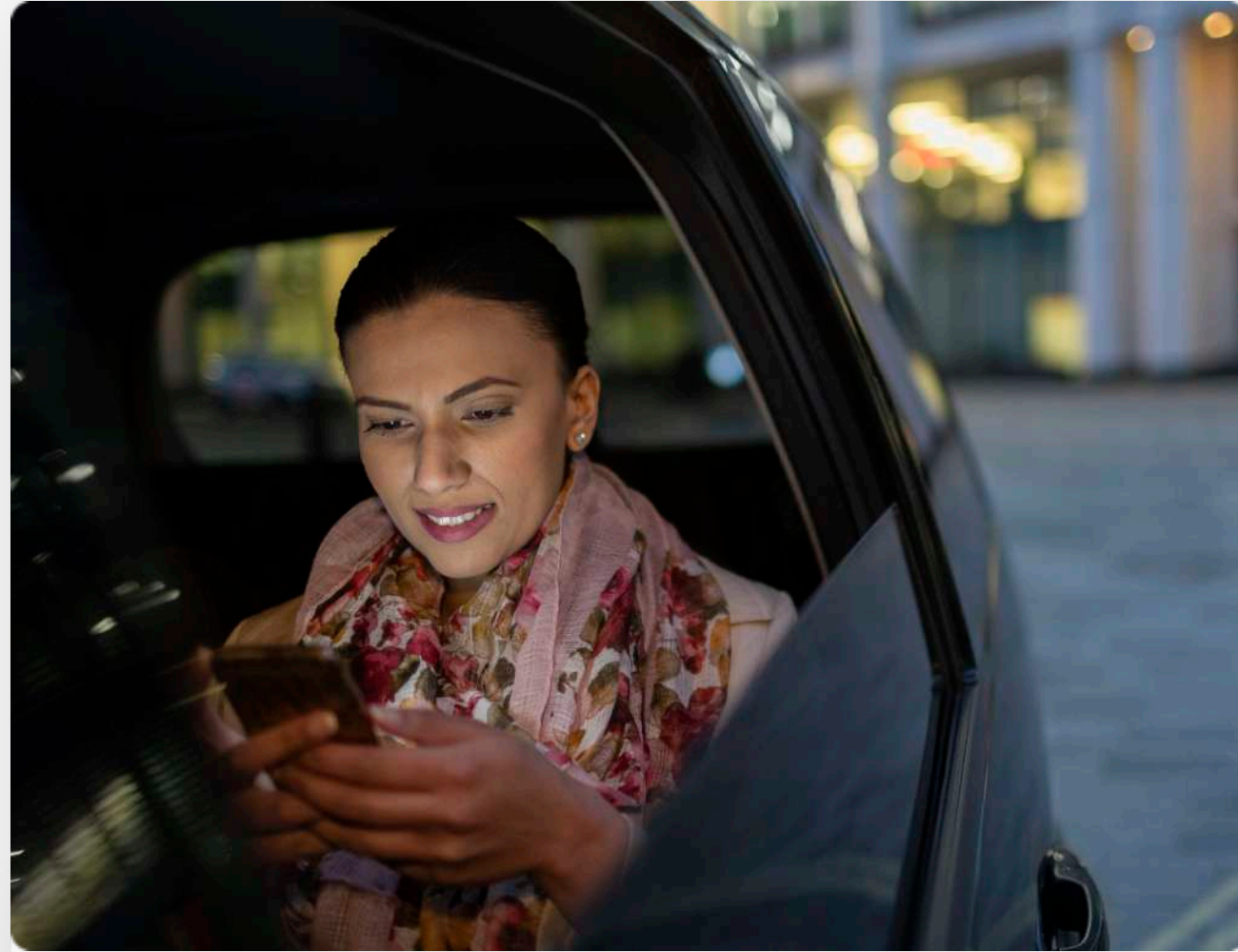
Doc Exchange Tools



Other Systems



Texting



CLIENTS, PARTNERS



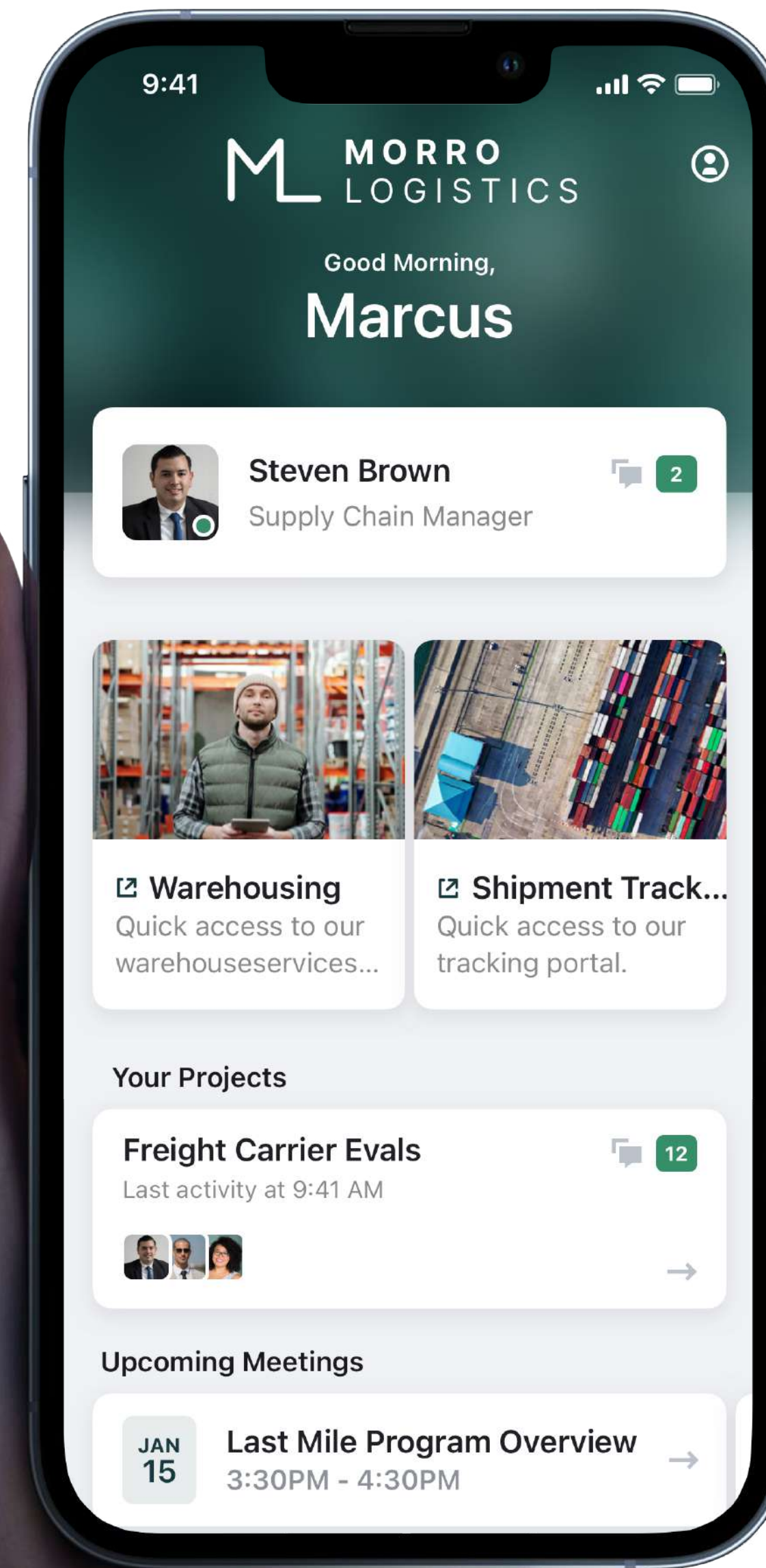
ACCOUNT MANAGEMENT TEAMS

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.

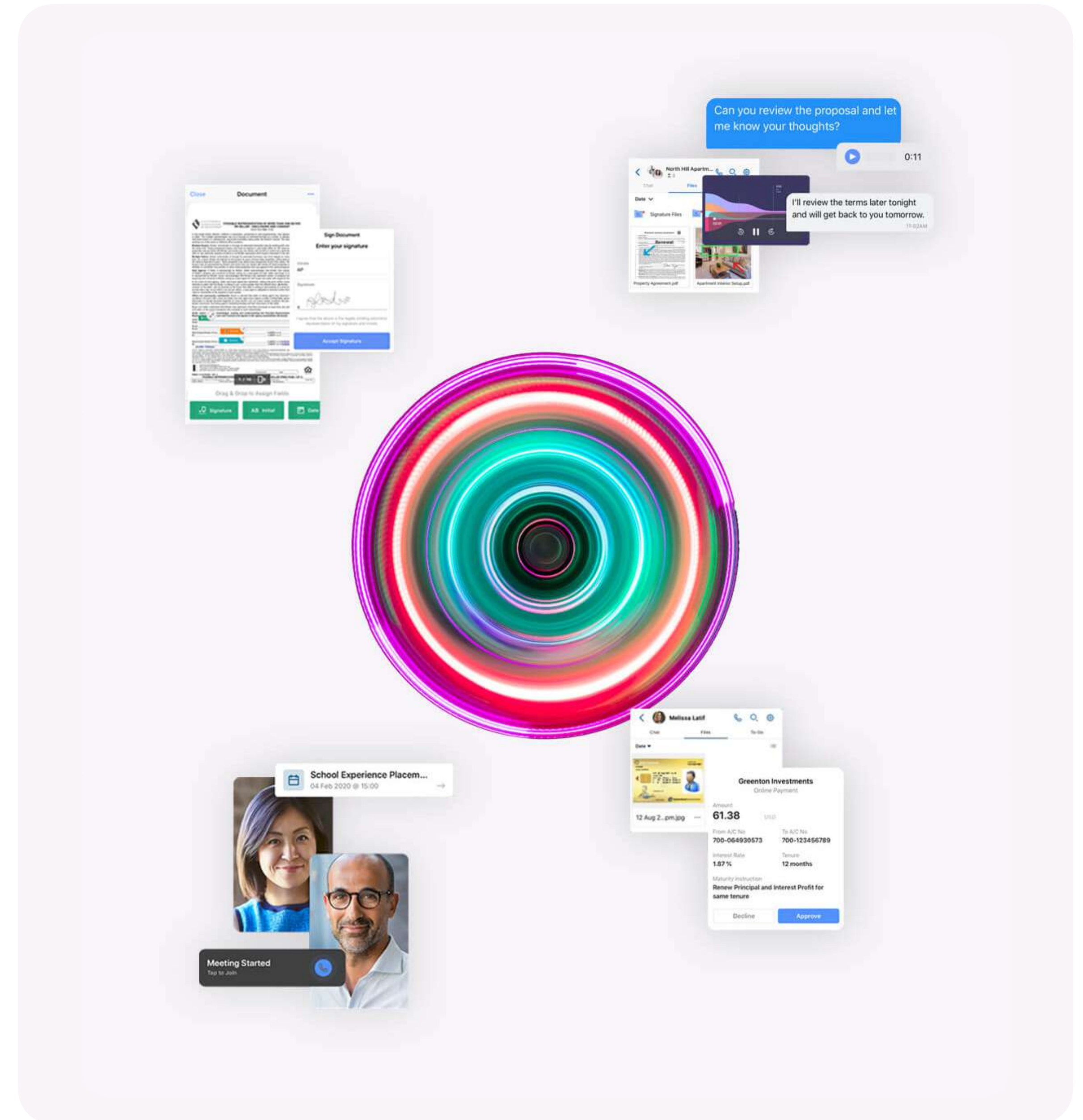


- One Stop Digital Hub
- 1:1 Designated Connection
- Your Relevant Business Content
- Groups & Topics
- Audio/Video Meetings

Streamline deadline driven client interactions

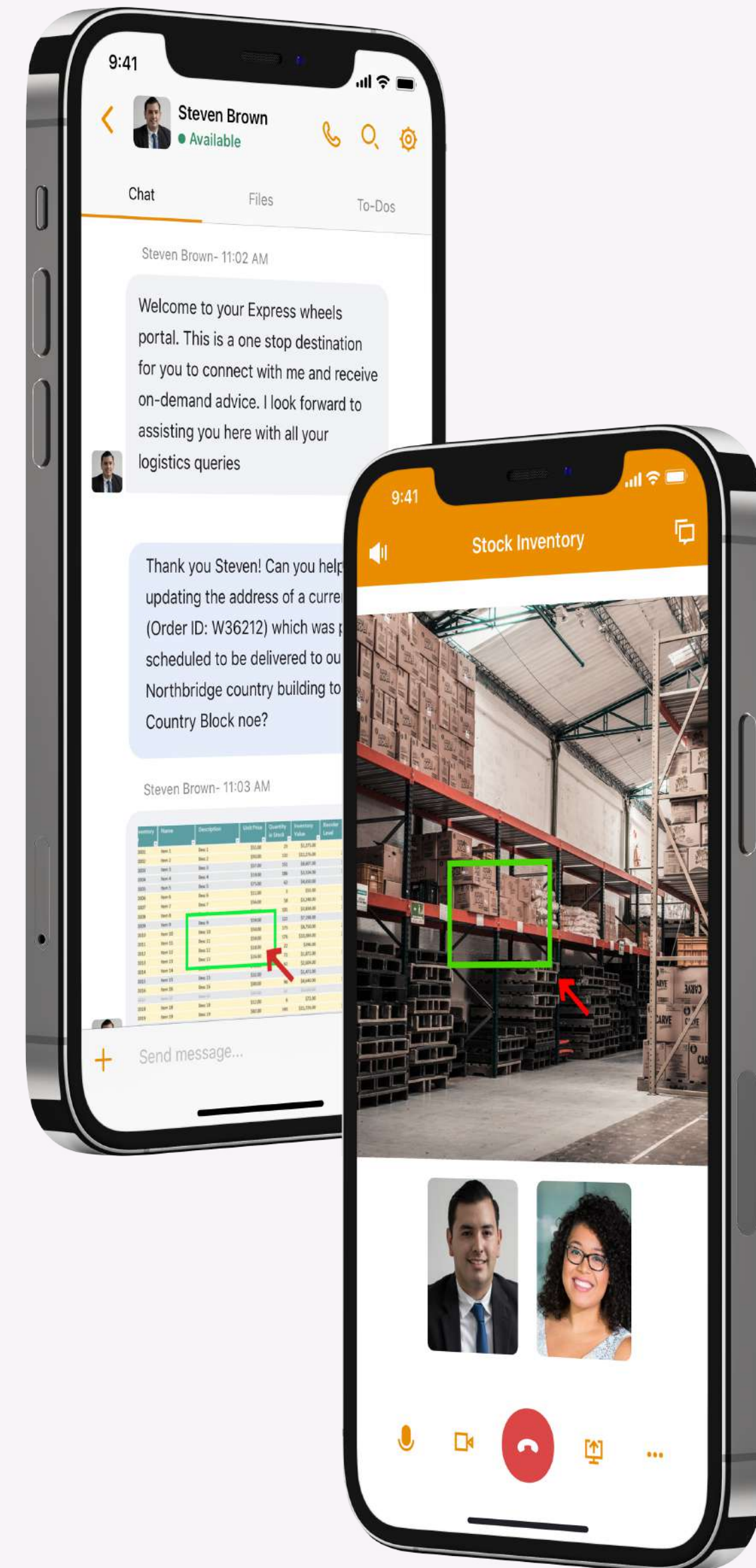
Break down time-consuming bottlenecks, collect approvals faster, and accelerate operations. Manage & orchestrate your flows across:

- ✔ Account Onboarding
- ✔ Account Servicing
- ✔ Exception Handling



Orchestrate Your Client Interaction Flows in OneStop

- ✓ New Client Onboarding
- ✓ Order to Cash Management
- ✓ Purchase Order Approvals
- ✓ Client Notification Cycles
- ✓ Delivery Service Management
- ✓ Vendor Negotiations
- ✓ Exception Resolution
- ✓ Procurement
- ✓ Supplier Contracts

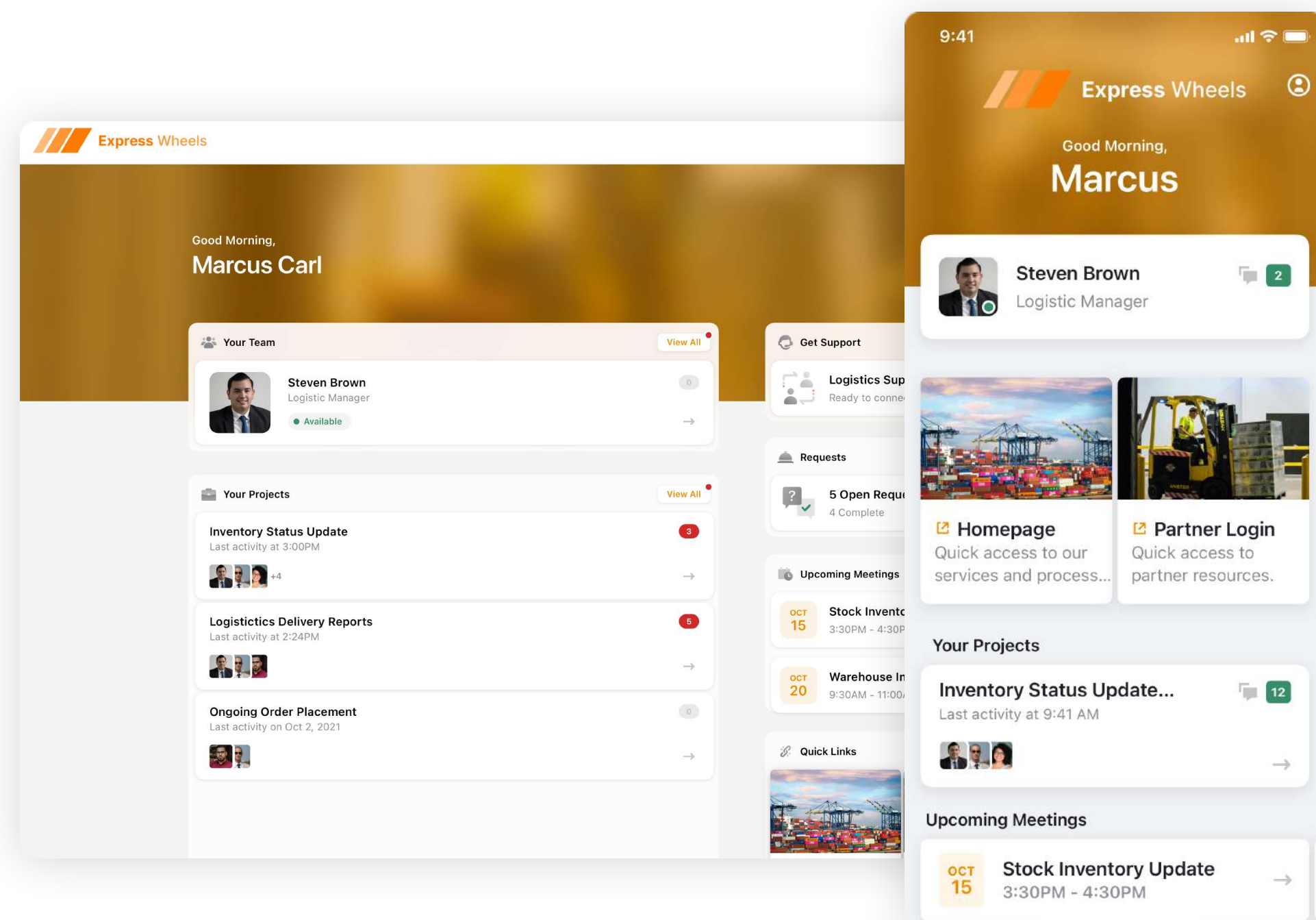


Modernize your deadline-driven client interaction flows

The screenshot displays the Express Wheels dashboard interface. At the top left, the logo consists of three orange slanted bars followed by the text "Express Wheels". On the top right, there is a notification bell icon with the number "5" and a small profile picture of a man. The main content area has a gold gradient header with the text "Good Morning, Marcus Carl". Below this, the dashboard is organized into two columns of white cards. The left column contains three cards: "Your Team" featuring a profile for Steven Brown, a Logistic Manager who is available; "Your Projects" listing "Inventory Status Update" (3 items, last activity at 3:00PM), "Logistics Delivery Reports" (5 items, last activity at 2:24PM), and "Ongoing Order Placement" (0 items, last activity on Oct 2, 2021). The right column contains four cards: "Get Support" for Logistics Support (Ready to connect); "Requests" showing 5 Open Requests (2 in red) and 4 Complete; "Upcoming Meetings" for "Stock Inventory Update" on Oct 15 (3:30PM - 4:30PM) and "Warehouse Inventory Audit" on Oct 20 (9:30AM - 11:00AM); and "Quick Links" with two image thumbnails. Each card has a "View All" link in the top right corner.

Orchestrate and Streamline Client Interaction Flows

Control the chaos of client management

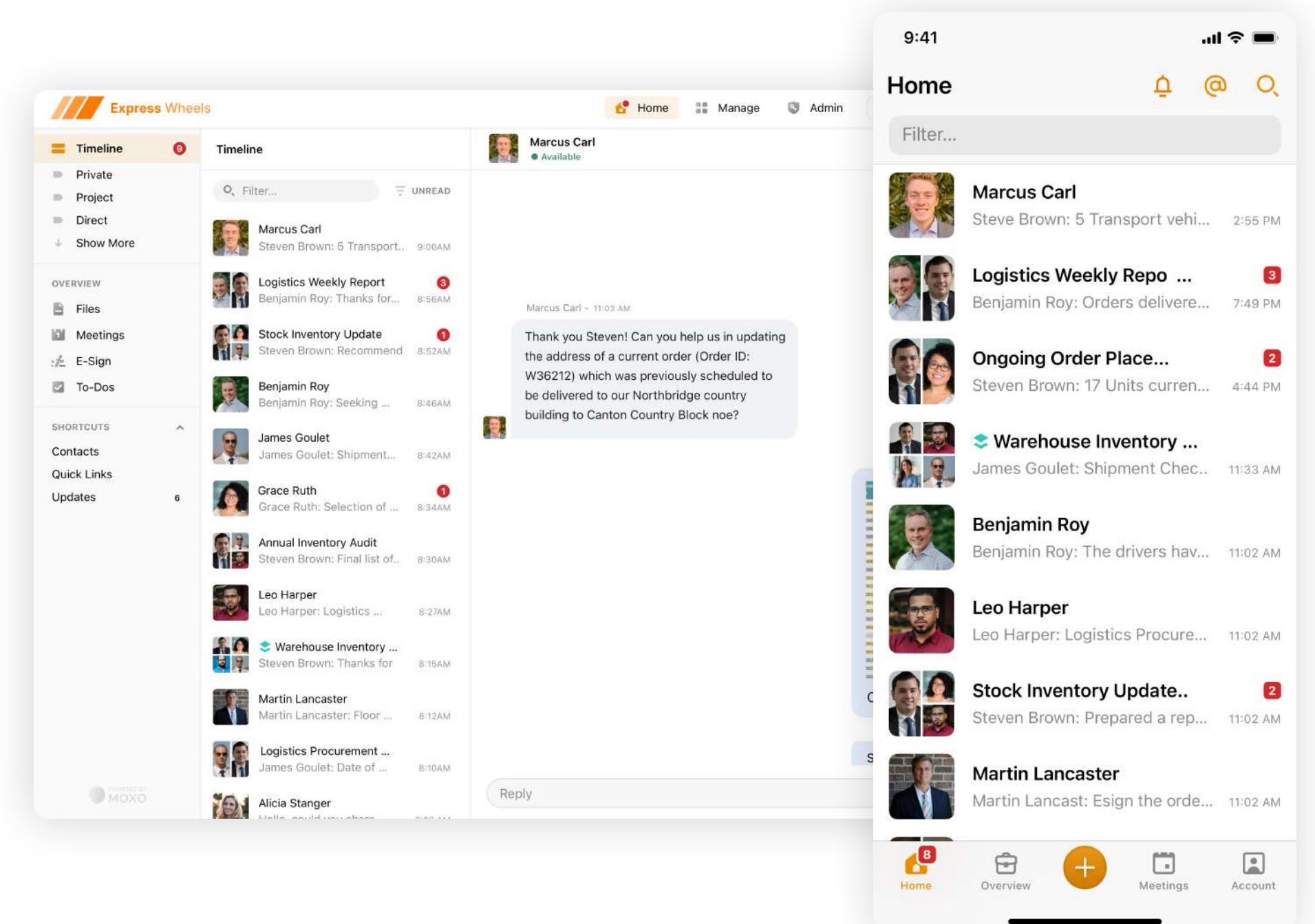


Your Client Portal
Clients, Partners

Reach In, Receive Service



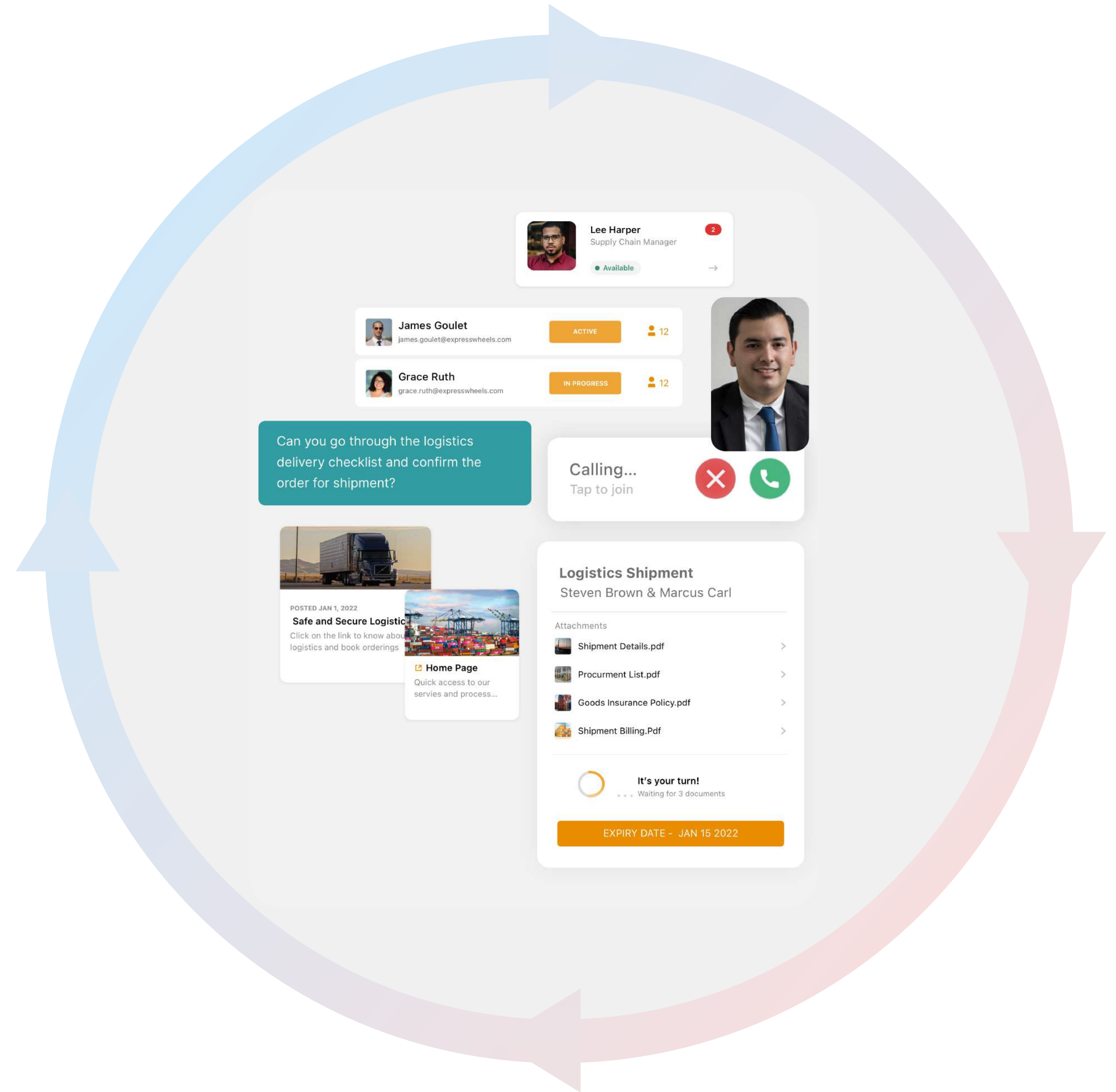
Reach Out, Deliver Service



Your Business Portal
Business Teams, Staff, Executives

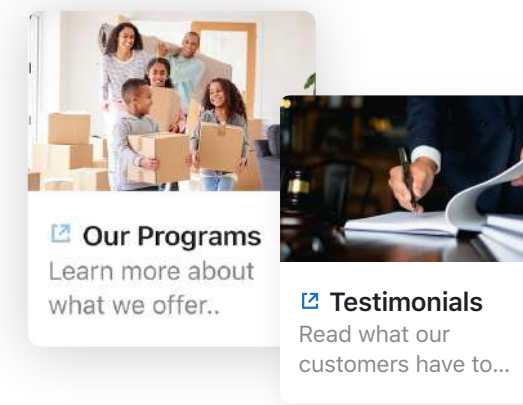
End-to-end client interaction management

Unstructured ePaper workflows with persistent audit trails

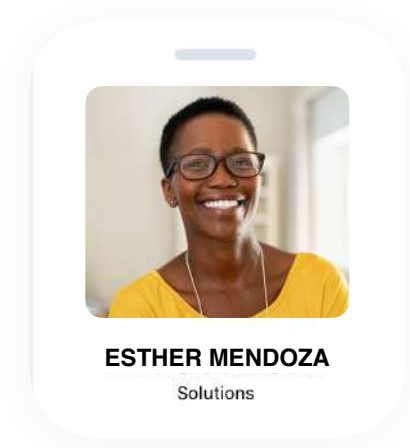


Orchestrate end-to-end client business with the power of OneStop

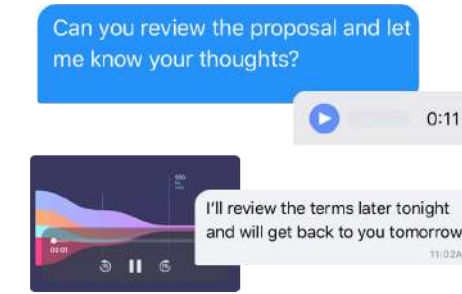
Manage Your Client Business Flows and Deliver an All-in-One, Continuous, Connected Journey



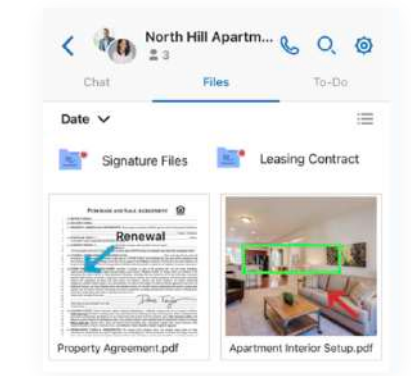
Content Channels



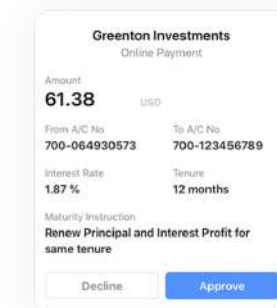
Customer Click & Connect



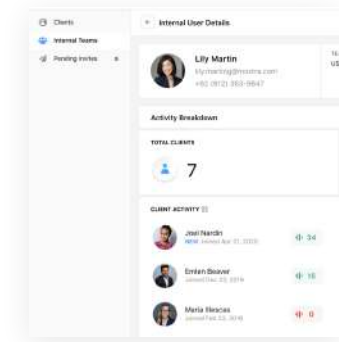
Secure Messaging



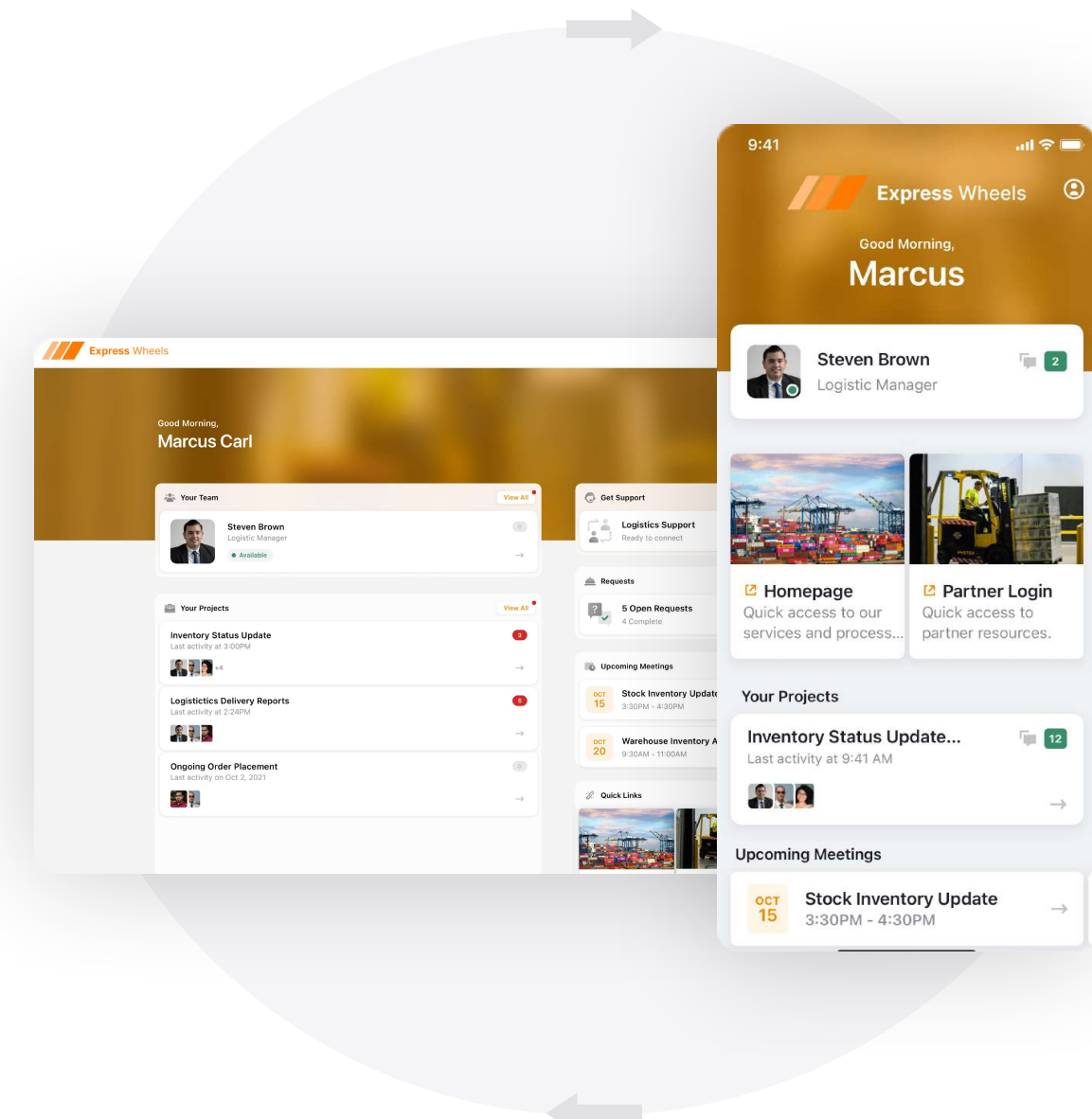
Document Collaboration



Transactions

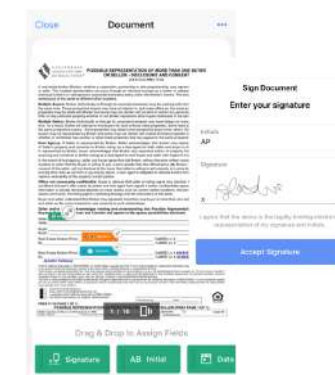


Management Portal



Performance Forecast.mp4

Spotlight



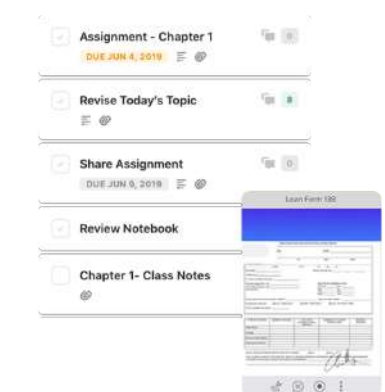
Digital Signature



Co-Browsing



Video Meetings



Manage Approvals and Deadlines

Account Management Control

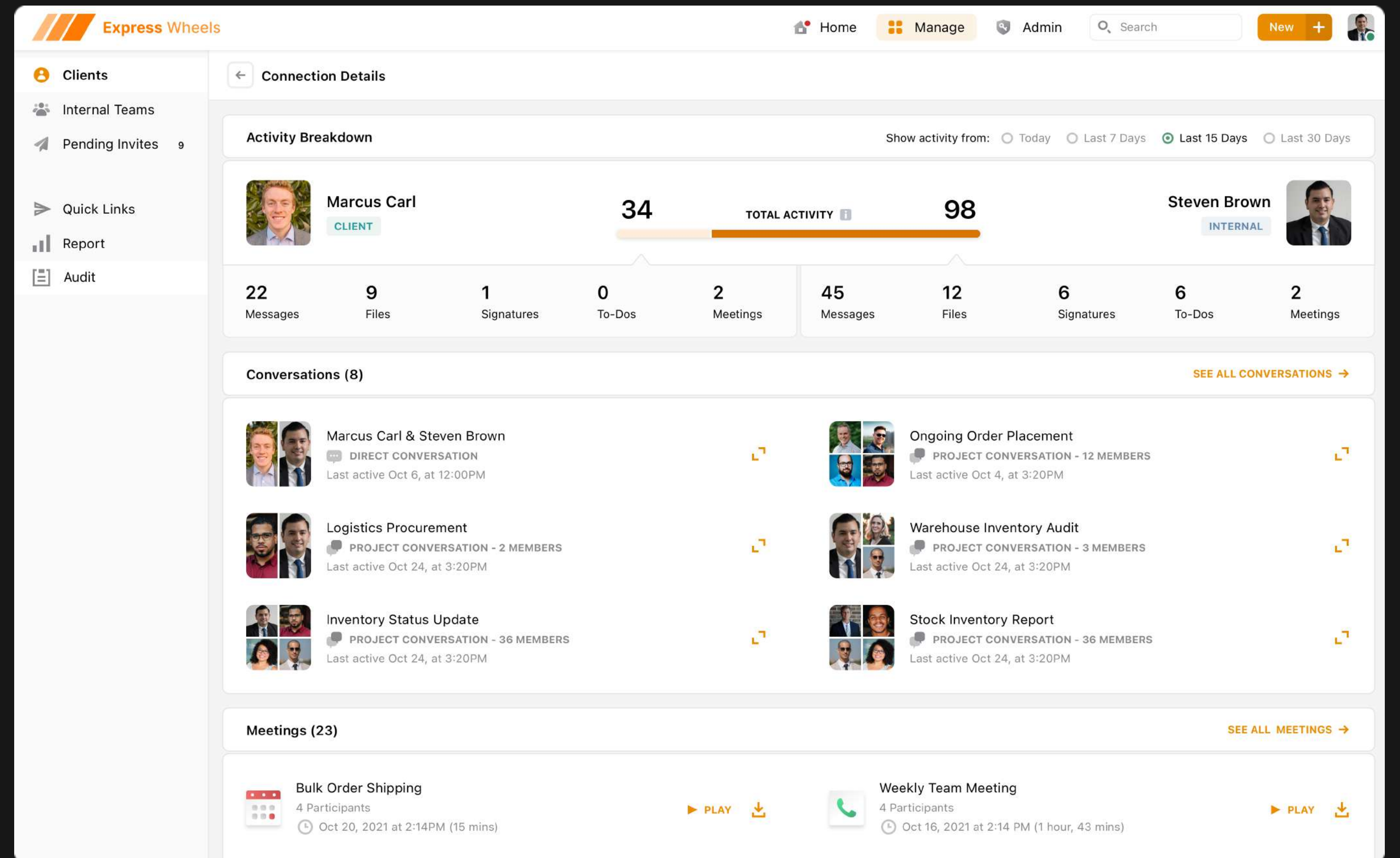
The Client Management Dashboard

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.

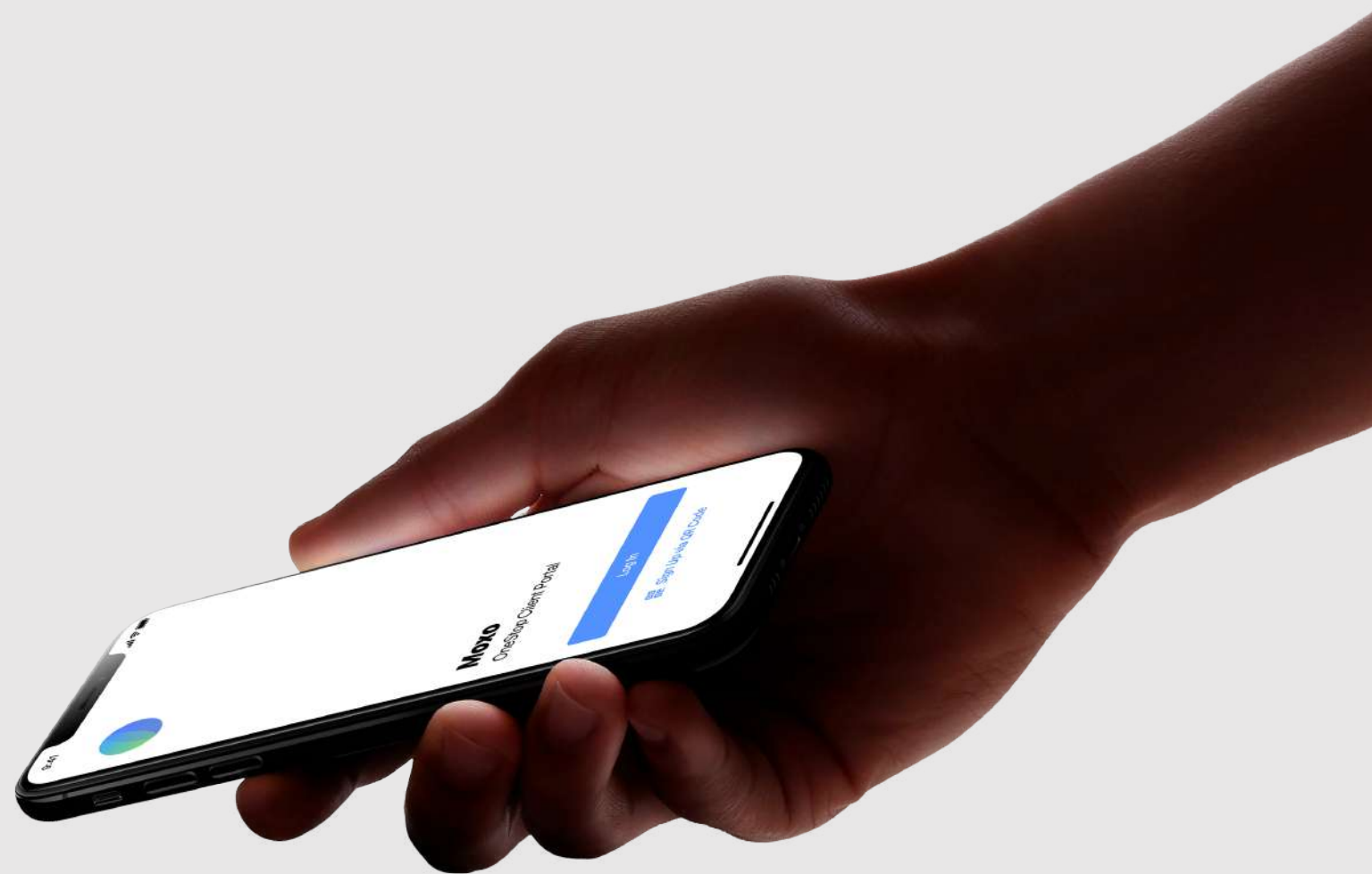
Track all interactions with a complete digital e-paper trail in the audit log.

The screenshot displays the 'Internal Users' management interface in the Express Wheels Admin Portal. The user 'Julia David, Administrator' is logged in. The page shows a list of 230 internal users with columns for Name, Job Title, Admin status, Status, and Clients. The status of each user is indicated by a colored badge (ACTIVE in orange, PENDING in yellow). The interface includes a search bar, filters for status and assigned to, and buttons for 'Import' and 'Invite'.

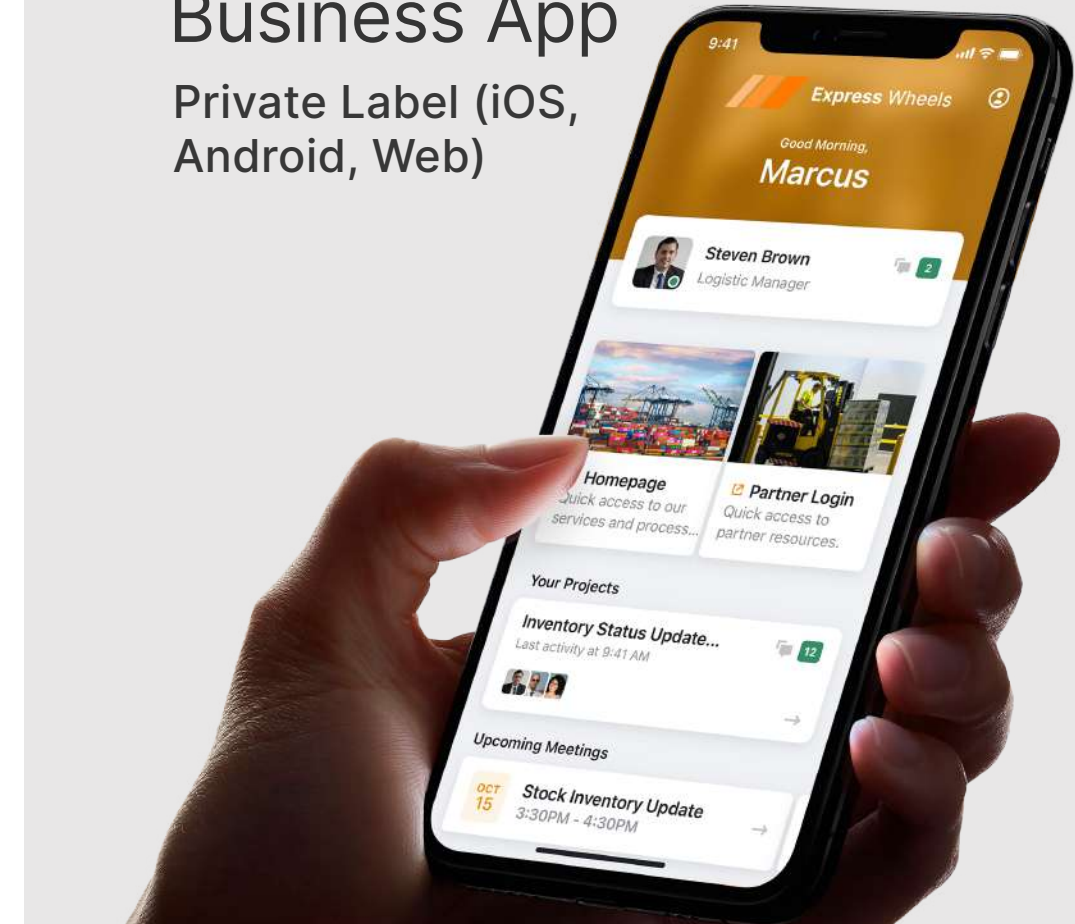
NAME	JOB TITLE	ADMIN	STATUS	CLIENTS
James Goulet james@expresswheels.com	Inventory Manager	-	ACTIVE	6
Felix George felix.george@expresswheels.com	Delivery Partner	-	ACTIVE	8
Grace Ruth grace@expresswheels.com	Fulfilment Partner	-	ACTIVE	4
Leo Harper Leo@expresswheels.com	Supply Chain Manager	-	ACTIVE	23
Beth Murphy beth@expresswheels.com	Channel Partner	-	PENDING	4
Benjamin Roy benjamin@expresswheels.com	Director	✓	PENDING	4
Sara Klein sara@expresswheels.com	Inventory Manager	-	ACTIVE	15
Julian Gruber julian@expresswheels.com	Shipment Partner	-	ACTIVE	21
Rebecca Brabec rebecca@expresswheels.com	Auditor	-	ACTIVE	3
Sebastian hedly sebastian@expresswheels.com	Delivery Associate	-	ACTIVE	5
William Teller william@expresswheels.com	Trucking Partner	✓	ACTIVE	24
Martin Lancaster martin@expresswheels.com	Logistic Manager	-	PENDING	0
Alicia Stanger alicia@expresswheels.com	In-Charge, Warehouse	-	ACTIVE	12
Jeremy Watson jeremy@expresswheels.com	Finance Officer	-	ACTIVE	5

OneStop Client Interaction Hub Editions

Starter App
Moxo Branded



Business App
Private Label (iOS, Android, Web)



Advanced
Embeddable SDK



Pricing to fit your business needs.

STARTER APP

Moxo Branded

\$1,200

+ \$300 One-Time Set Up Fee

USD / year

BUSINESS APP

Private-Label

\$4,800

+ \$1,500 One-Time Set Up Fee

USD / year

ADVANCED APP

Embeddable SDK

Custom Package

USD / year

Includes up to 10 users. Suitable for trials and small organizations.

Features

- Complete collaboration suite including messaging, document exchange, video meetings, task management, eSignatures, and more.
- Supports basic customer interaction workflows

Includes up to 50 users. Our scalable solution for organizations of all sizes.

Everything in the Starter App Edition, plus

- Scalable user-based capacity
- Reporting & Audit Trails
- Integrations (CRM Connectors, Transactions, Zapier, and more)
- Customizable customer interaction workflows

Options for

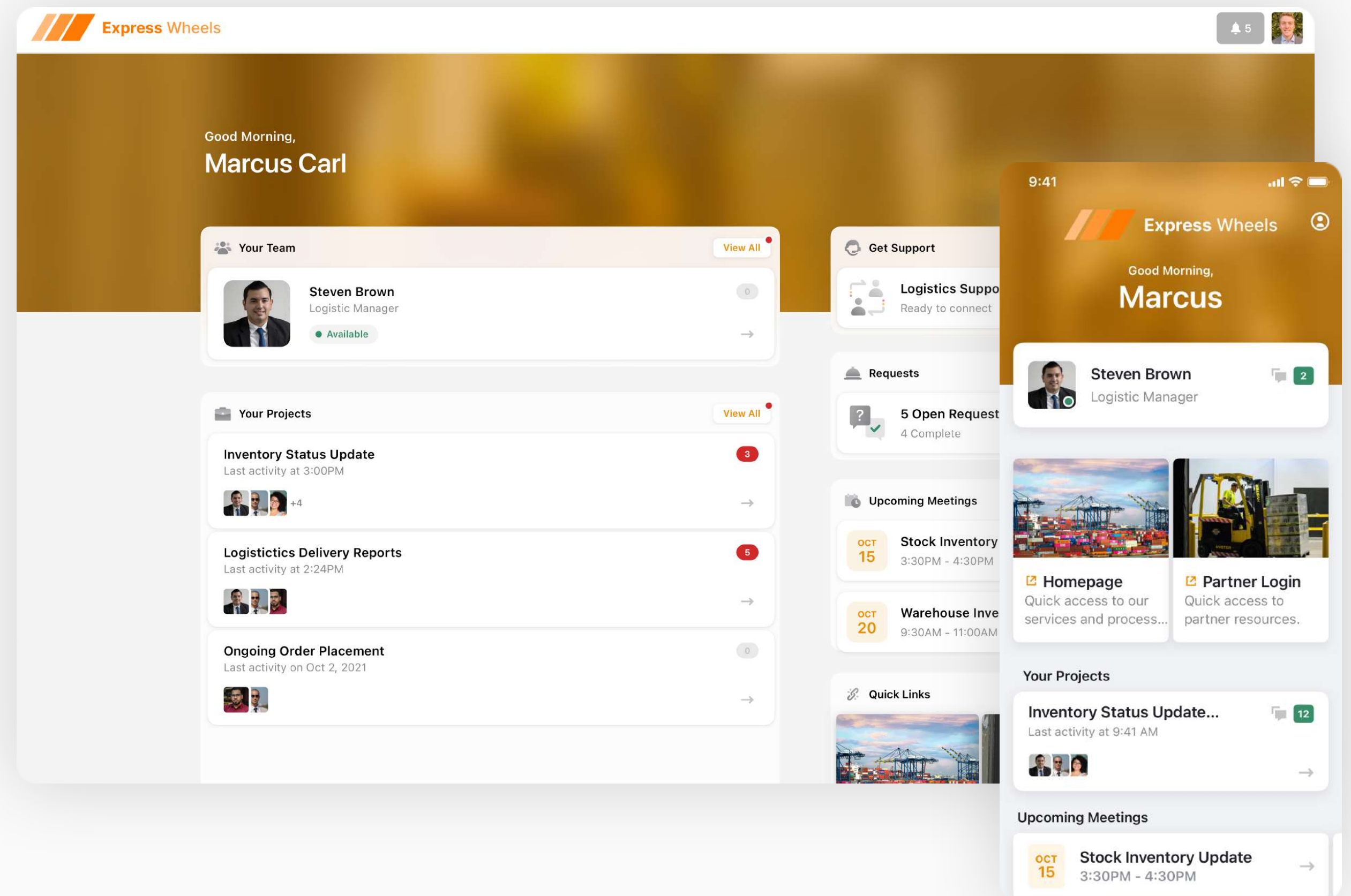
- Private cloud
- On premises

Everything in the Starter App Edition, plus

- API/SDK Access
- SAML SSO
- Transactions API
- Social Connectors

Add-On User Capacity Packs

User Pack	Price (\$/year)
20 User Pack	\$1,200/year
100 User Pack	\$4,800/year
500 User Pack	\$18,900/year



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



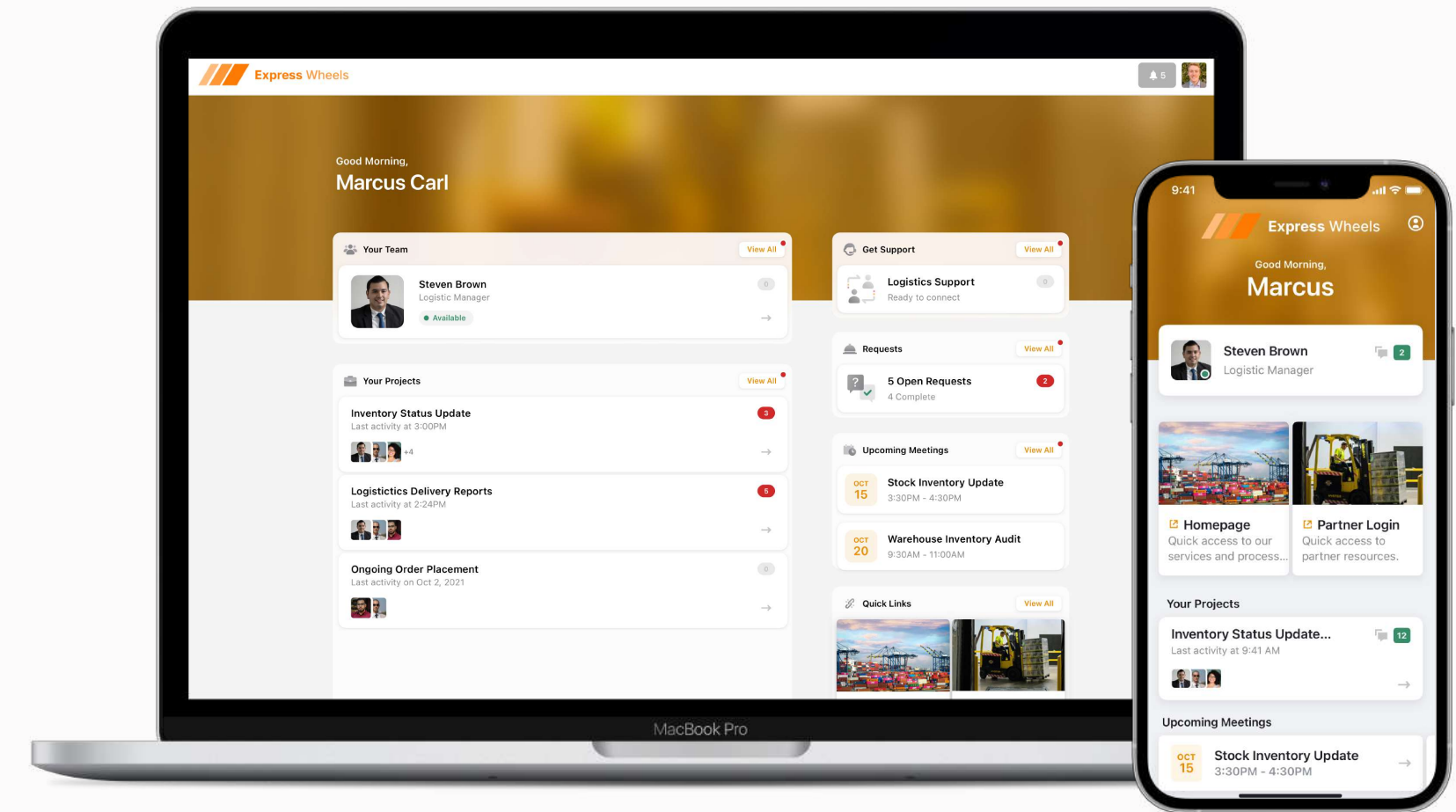
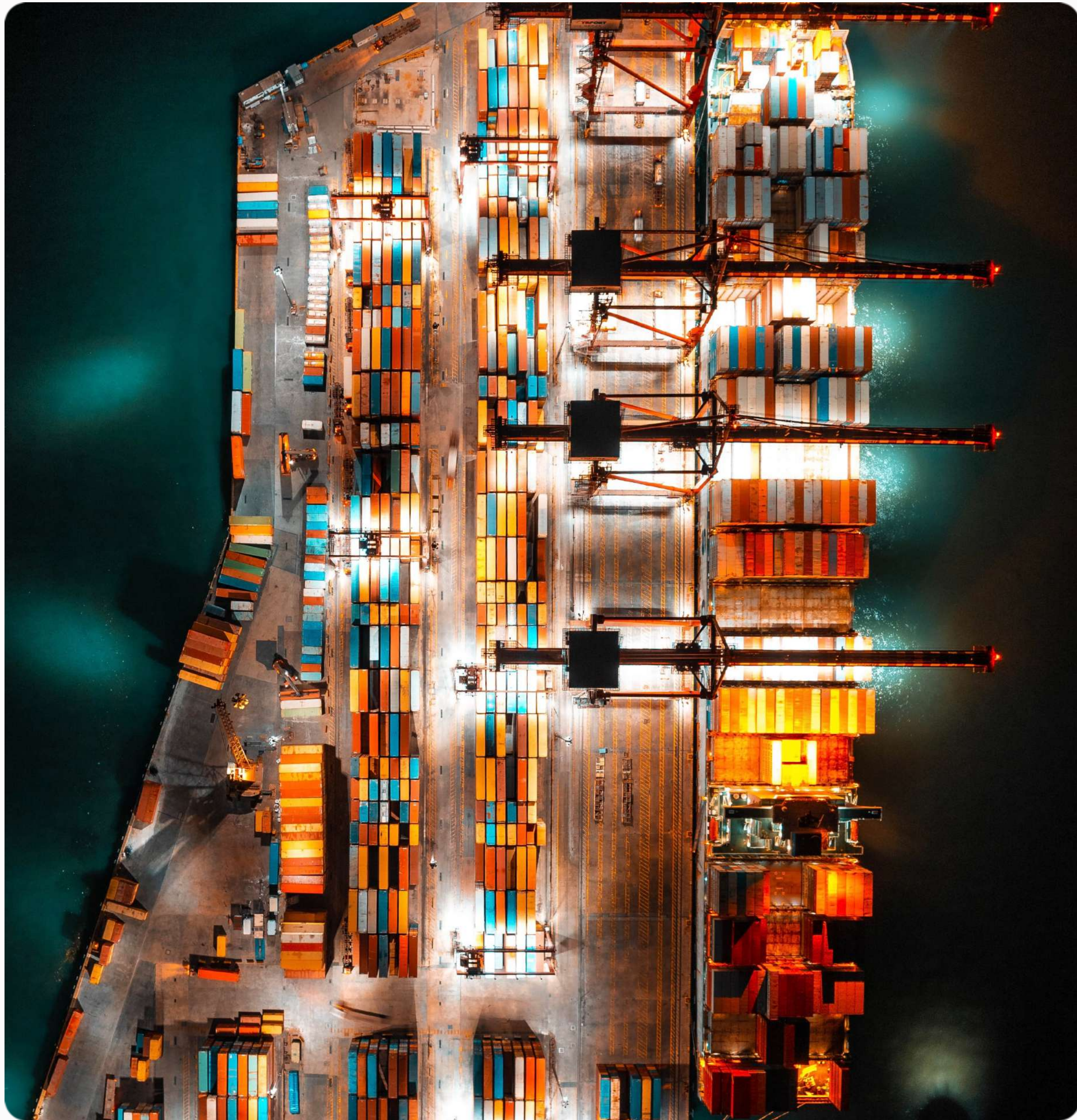
Citi Bank Financial Services



Form Collective Interior Design



Van Lanschot Financial Services



Get your OneStop Client Interaction Hub

Modernize client interaction workflows.