

### Sentry<sup>SM</sup> Unified Communications: ConvergeIT<sup>®</sup> VoIP

#### Enhance Service, Improve Security and Reduce Costs with Integrated Communication Management



Your VoIP phone system and contact center capabilities will grow over time with new and improved functionality. ConvergeIT VoIP has been deployed at more than 2,500 financial institutions and has evolved over time based on customer input.

Your financial institution needs comprehensive, secure communication solutions that enable you to respond quickly and proactively to accountholders' needs. Sentry Unified Communications: ConvergeIT VoIP from Fiserv delivers efficient, enterprise-wide voice management to help you enhance service and control costs.

ConvergeIT VoIP empowers your teams and product specialists to communicate with accountholders via messaging, voice, web, email and fax. Designed specifically for financial institutions and integrated with your account processing solution from Fiserv, ConvergeIT VoIP helps you provide the proactive services accountholders demand.

#### Maximum Value for Your Investment

As a subscription service hosted in a secure data center at Fiserv, ConvergeIT VoIP enables you to control costs by paying only for the services you need today. Rather than incurring upfront capital expenses, Fiserv allows you scale the solution to fit your needs.

All information and communications are encrypted and adhere to bank-level security protocols. New features and applications are easily downloaded to keep your phone system up to date.

#### Flexibility and Ease of Use

ConvergeIT VoIP is the only VoIP system designed for and integrated with account processing systems from Fiserv. A service-oriented architecture allows you to integrate your communication systems with your account processing system to enhance service, integrate business continuity and disaster recovery services, reduce operating costs, unify branch operations and improve efficiencies. This powerful and easy-to-use business phone system offers all of the features your financial institution needs, with the flexibility to add more advanced capabilities as your operations grow.

#### TrustID<sup>®</sup> Call Authentication

TrustID call authentication is a new security service option that helps separate trusted callers from unverified or potentially fraudulent callers. This service can prevent suspicious actors from attempting to gain accountholder information through contact center agents. The service validates information automatically, instantly and invisibly before the call connects to an agent.

## **Telephones and Headsets**

ConvergeIT VoIP works with standards-based devices such as Polycom® telephones and Plantronics® headsets. Users have the option of a telephone handset, a software-based phone or even a smart phone using the mobile application. Whether using the telephone or software, your staff can easily access voicemail, voicemail greeting selections, activity/presence selection, call recording, conferencing, call transferring and more.

Employees are far more productive when they can manage their calls right from their PCs, using point-and-click dialing, personal call queues, call forwarding, transferring and conferencing, one number access and more – all integrated with the desktop phone or headset.

## **Auto Attendant**

An auto attendant answers and routes calls automatically – 24 hours a day, 365 days a year – without a live operator. It includes powerful, yet simple voice-prompted menus, dial by name, directory and support for multiple schedules.

## **Operator Console**

Our operator console is an easy-to-use, feature-rich software application that enables an operator or receptionist to handle calls easily and effectively while delivering personalized service.

## **Voicemail/Unified Messaging**

Powerful voicemail capabilities are included in ConvergeIT VoIP. Features include flexible message playback, multiple personal greetings, customizable message delivery and notification options. With unified messaging, users can access voicemail through Microsoft® Outlook®.

## **Audio Conferencing**

The audio conferencing bridge pays for itself by eliminating expensive external audio conferencing services. The intuitive interface simplifies conference call setup, scheduling, email invitations and management.

## **Integrated Omnichannel Contact Center**

Our cost effective, powerful omnichannel contact center solution automatically routes inbound calls, emails, faxes, web chats and SMS texts to the right person or department – every time. Route by caller ID, DNIS, agent availability, consumer priority and more. An integrated contact center supervisor functionality allows you to stay in control by monitoring lines, queues and workgroups. It even allows supervisors to monitor, coach and join calls to maximize the service experience.

## **Screen Pops/Integration**

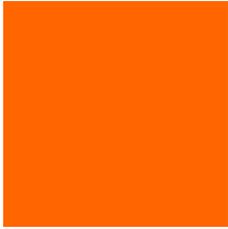
Through integration with your account processing system, calls routed from Sentry Unified Communications: ConvergeIT IVR can display a member or customer record as the call is being delivered to the agent. Additional integration is available through other customer relationship management applications from Fiserv.

## **Automated Call and Screen Recording**

Call and screen recording options allow all or designated calls and interactions to be automatically recorded and stored in a secure database for retrieval and reporting purposes. Call recording aids in agent training, compliance and quality assurance.

## **Quality Management**

Review and score agents based on objective and subjective parameters in order to improve quality and performance. These tools enable supervisors to measure performance equally across agents.



Fiserv is driving innovation in Payments, Processing Services, Risk & Compliance, Customer & Channel Management and Insights & Optimization. Our solutions help clients deliver financial services at the speed of life to enhance the way people live and work today. Visit [fiserv.com](http://fiserv.com) to learn more.

## Collections

The outbound dialer option is the ideal tool to address collection needs. The system can automatically dial from a scheduled list and quickly connect live calls to the appropriate collections agent.

## Reporting

Reporting for both real-time and historical reports includes all communications channels, supports both text and graphics and offers scheduled distribution and exports to external systems.

## Administration

The administrator console enables easy management of all switching, extension, workgroup and messaging functions, either locally or from a remote location. Administrators can completely manage their own phone systems and eliminate costly move, add and change fees.

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"We've been using the ConvergeIT hosted phone system and contact center for our 300 employees since 2017 with great success. During the Covid-19 pandemic, the solution was critical in maintaining business continuity. Our employees were able to quickly switch to working from home and remote offices while maintaining a high level of service for our members. With the flexibility of the system, there was no limit to what we could do remotely."

**Steve Schexnayder**  
Chief Information Officer  
Neighbors Federal Credit Union

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## Key Benefits

- Improve service and consumer loyalty
- Interact with accountholders through their preferred communication channel
- Automatically route questions to the person best able to answer them
- Maintain high service levels by monitoring and coaching calls
- Improve service quality through detailed call reporting metrics
- Communicate as if all staff were in the same branch with VoIP station-to-station dialing and presence management
- Provide anywhere access with our mobility solutions
- Improve security and business continuity
- Reduce operating costs through easy self-administration, consolidation of carriers and elimination of long distance and toll charges between branches
- Add services on demand to control costs and scale as your business grows
- Meet ever-changing market demands and regulatory standards

## Connect With Us

For more information about Sentry Unified Communications: ConvergeIT VoIP, call 800-872-7882, email [getsolutions@fiserv.com](mailto:getsolutions@fiserv.com) or visit [fiserv.com](http://fiserv.com).



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