

# Interact<sup>SM</sup>

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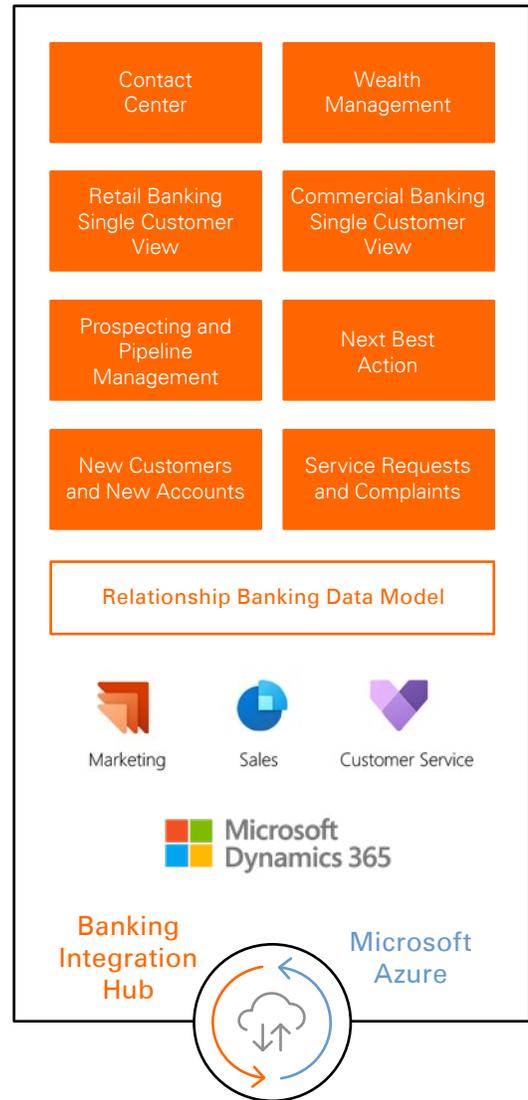
Accelerate Sales and Drive Efficient,  
Positive Customer Experiences

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**Enteract from Fiserv empowers bankers with the tools and insights they need to help accelerate sales and deliver efficient, positive customer experiences. It offers the comprehensive customer relationship management (CRM) features of Microsoft Dynamics 365, tuned to the unique needs of commercial and retail banking and is delivered by Fiserv through the Microsoft cloud.**

Built on Microsoft Dynamics 365, Enteract provides bankers with insights into customer data and activities while streamlining service processes and customer onboarding. This can accelerate your financial institution’s ability to grow market share and deepen customer and business relationships. Enteract features a Microsoft Azure-based integration framework that synchronizes customer data with back-end systems and enables real-time process integration across core banking, enterprise content management and digital channels.

**Enteract Unites Customer Service and Management Across Your Enterprise**





**Unify  
Customer Data**

- Super CIF
- Households
- Connections
- Interaction history
- 360-degree single customer view



**Streamline  
Processes**

- New customer
- New accounts
- Servicing
- Integration
- Automation
- Case management



**Enable  
Collaborative  
Sales and Marketing**

- Referrals
- Campaigns
- Pipeline
- Account teams



**Deliver  
Actionable Customer  
Insight**

- Product eligibility
- Next best action

Designed for regional banks and large community financial institutions, Enteract puts your employees and customers at the heart of your digital transformation strategy.

Having a clear view to customer data is just the beginning. By rapidly integrating with account processing, enterprise content management, loan origination and digital channels, Enteract goes beyond traditional banking CRM solutions. Enteract orchestrates marketing, sales, fulfilment and servicing by connecting the field, branches, contact center and back office. These sales processes lead to frictionless new customer account setup, onboarding and ongoing servicing – all within a single application for an enhanced banker experience.

Give your team the advanced technology needed to execute your sales strategies and deliver the customer experience your brand promises.



## Align

- Align execution to strategy with common workflows, tools and data across the organization
- Coordinate field-level sales plays with centralized marketing campaigns
- Orchestrate customer journeys that deliver on your brand promise

Capture a real-time, 360-degree view of customer products, sales, cases and key indicators



## Inform

- Inform front-line staff with visual indicators and next-best-action prompts as they interact with customers or plan sales calls
- Bring organizational focus to what matters most with role-based dashboards that give at-a-glance clarity to sales goals and performance, campaign activity, caseloads, SLA targets and portfolio growth
- Give managers the leading and lagging indicators they need to course-correct

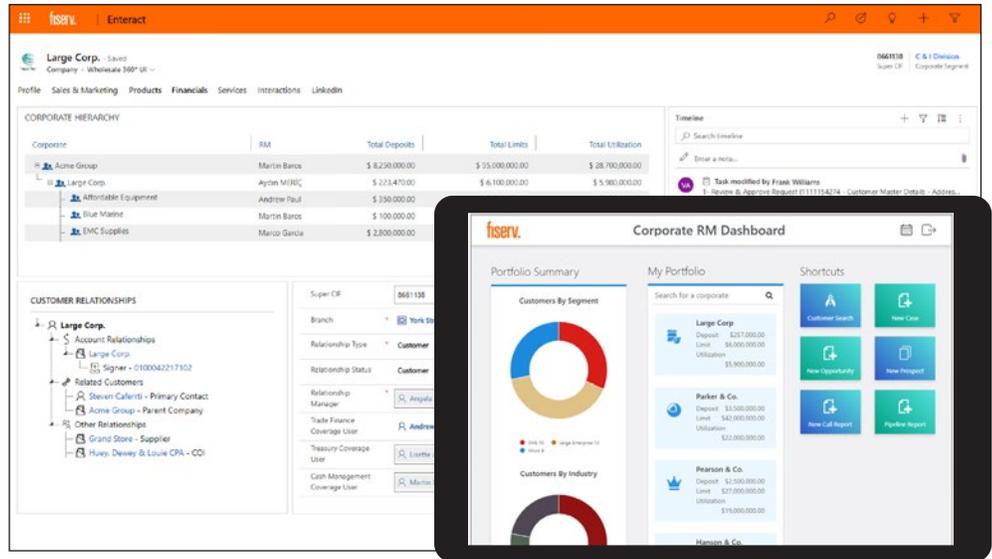
Unite customer service and management across your enterprise



## Enable

- Arm your front-line staff with current, reliable and comprehensive information about customer relationships
- Make teamwork easy with collaboration features that help your staff come together to serve customers and win new business
- Enable staff to do more while they're away from their desk with intuitive apps for mobile phones and tablets

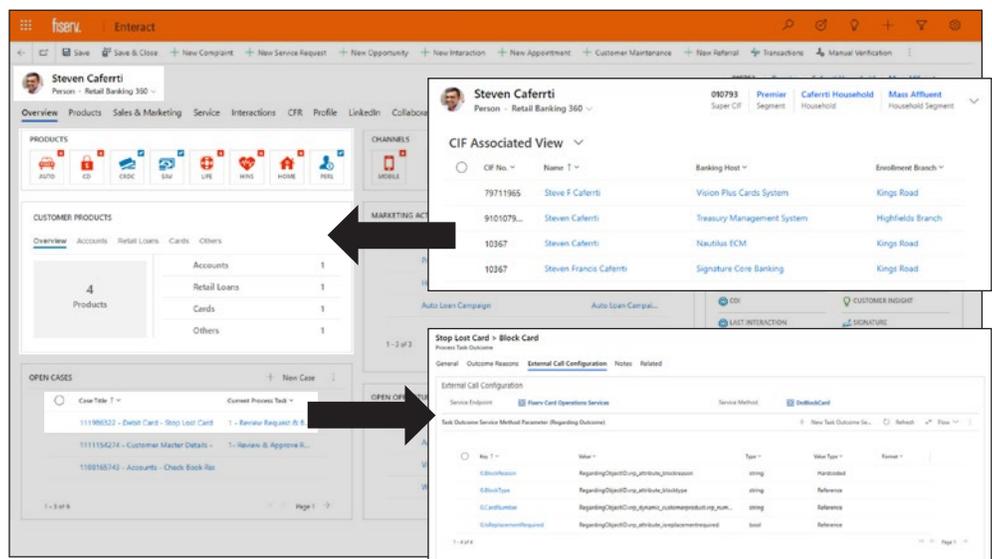
## Deeply engage commercial relationships



## Integrate

- Use the sophisticated Enteract banking integration framework to quickly integrate sales and service processes with any API
- Consolidate daily customer data feeds from multiple sources into a comprehensive Dynamics 365 banking customer data model using the Enteract high-efficiency data loader
- Use native integration with Microsoft Outlook, SharePoint, and other Office 365 applications and the Power Platform to help ensure Enteract fits seamlessly into your application stack

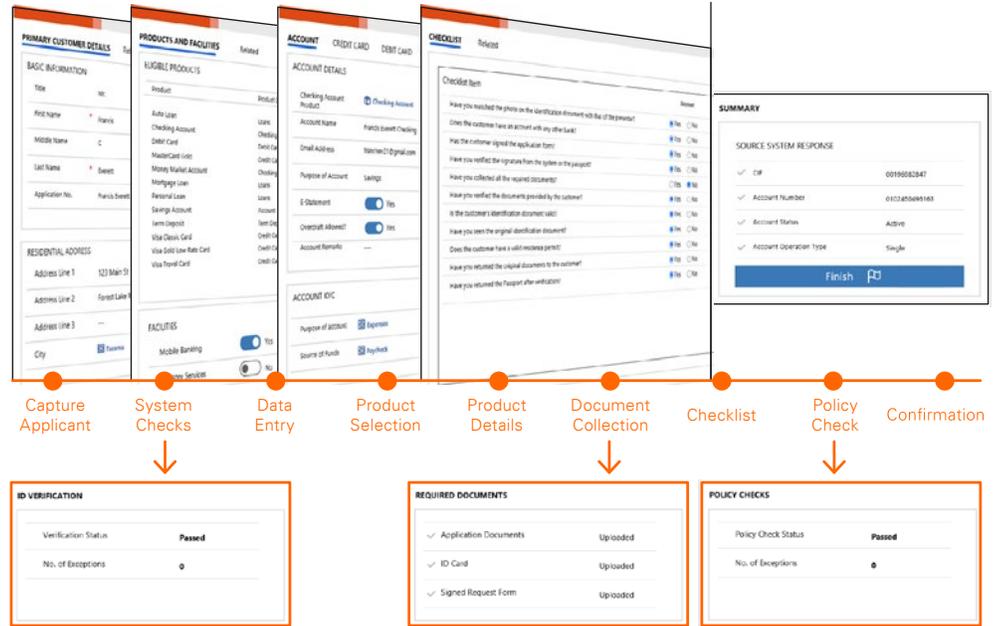
## Integrate contact center, sales outreach and other functions for aligned workflows





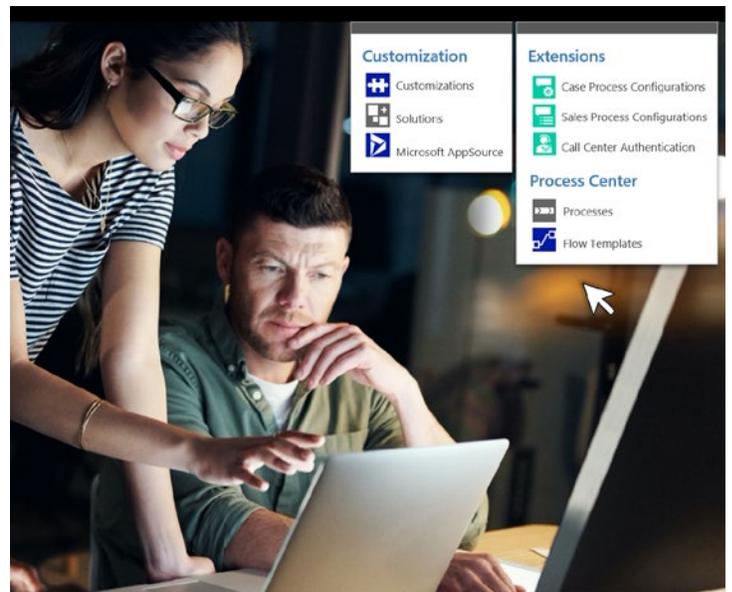
## Streamline

- Streamline customer enrollment and new account opening processes with product-specific business rules and fast-path workflows
- Drive efficiency gains by eliminating unnecessary hand-offs and low value process steps through integrated automation
- Reduce the number of applications that sales and service staff use by consolidating more customer-related workloads into a single, modular, enterprise application



## Adapt

- Rapidly adapt application functionality through configuration – not coding – to meet changing needs and incorporate process improvements
- Take advantage of regular updates from Fiserv and Microsoft
- Add new Enteract modules for specific user roles with ease
- Explore a growing ecosystem of Microsoft Dynamics 365 integrated apps from Microsoft AppSource



# Connect With Us

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