

Enteract: CRM Essentials

Elevating banking sales and service

To keep pace with rising customer expectations and win market share amidst mounting competition from national banks and fintechs, mid-sized financial institutions must lean into customer relationship management strategies and engineer processes that prioritize efficiency and customer experience.

Help your teams act faster, serve better and deepen customer relationships with Enteract from Fiserv, delivered in partnership with VeriPark.

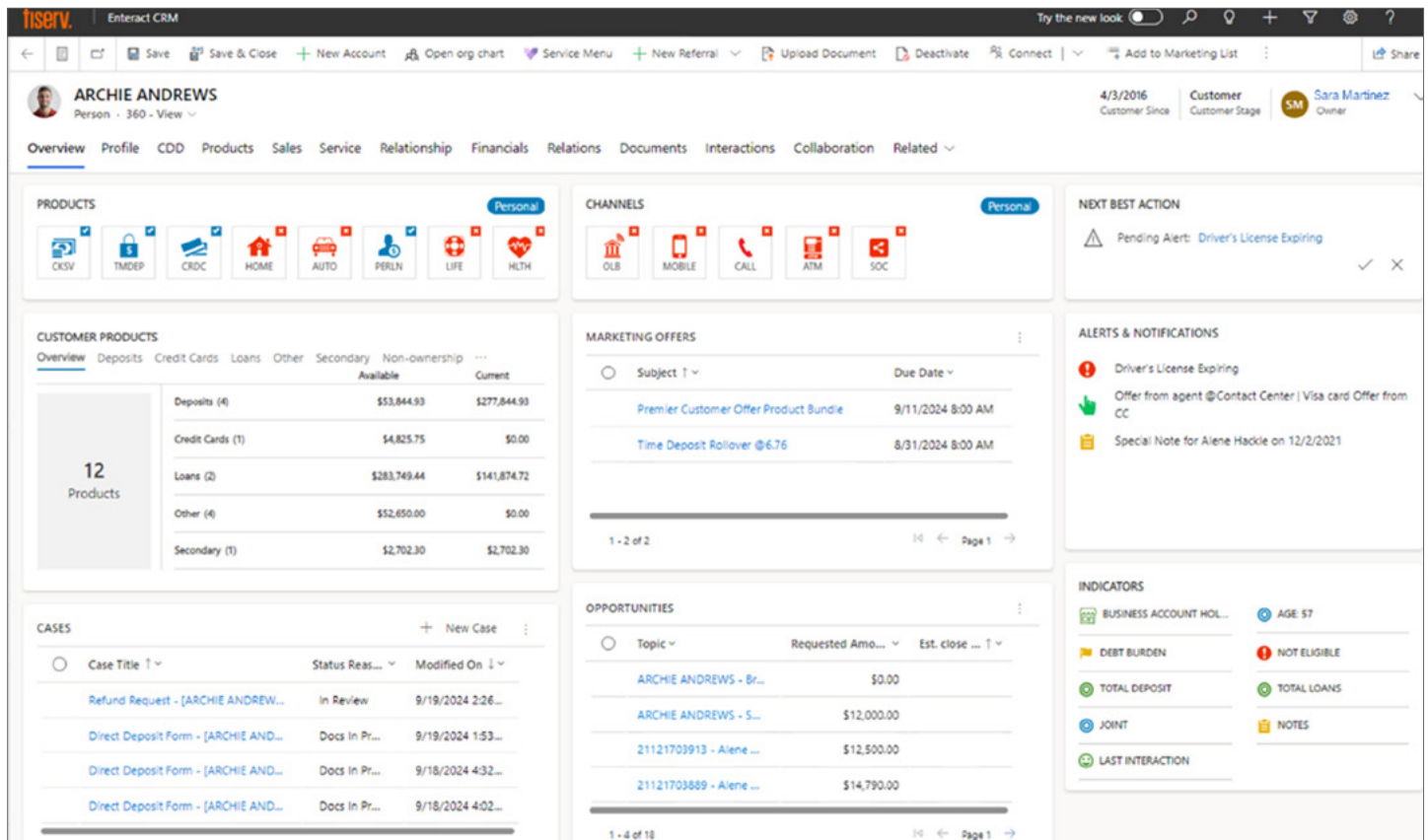
Built on Microsoft Dynamics 365, with the embedded AI capabilities of Microsoft Copilot, Enteract is geared for the enterprise sales and service needs of mid-sized institutions.



Actionable customer insights

Empower your front line with a comprehensive, 360-degree profile of each client. Enteract's Single Customer View module provides at-a-glance indicators and alerts, and enables users to easily navigate aggregated customer data. Whether preparing to meet with a commercial client, answering a product inquiry for a retail customer or handling a call from a small business, users can quickly see the breadth of a customer's relationship, understand relevant engagements and identify opportunities to meet more of their financial needs.

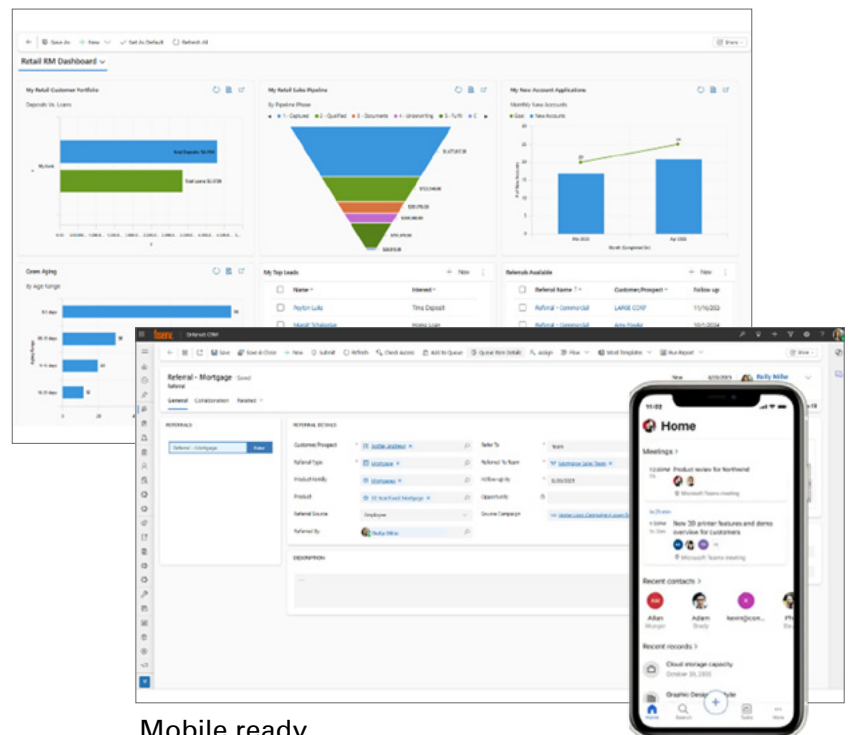
Configurable dashboard



Advanced sales and relationship management

Enable teams to nurture leads, manage referrals, accelerate opportunities and cultivate their pipeline while effortlessly tracking performance against goals. Interact's Sales and Prospect Management module, with integrated Copilot AI capabilities, helps to automate follow-ups, surface insights and enhance productivity to shorten sales cycles and increase win rates. Whether on desktop or mobile device, Interact ensures business development is targeted and proactive, wherever your teams work.

Referral management



Mobile ready

AI assistance with Microsoft CoPilot

With Microsoft Copilot integrated into Dynamics 365, Enteract users get AI-based insights and guidance as they work through sales activities and handle service requests. Copilot automates routine tasks and follow-ups, freeing staff to focus on building deeper customer relationships or closing complex deals. The result is a more proactive, efficient and personalized approach to client engagement.

Feature highlights

- Opportunity summarization
- Meeting preparation
- Email drafting
- Natural language chat
- Knowledge article suggestions
- Real-time prompts
- Post-interaction summaries

Partners in your CRM success

Selecting a trusted partner with a deep understanding of your business and existing technology environment is often even more critical to the success of banking CRM initiatives than choosing the right technology solution itself. Fiserv and VeriPark combine deep expertise and a consultative approach to help Enteract clients navigate the complexities of integrating and implementing enterprise banking CRM. Together, we guide institutions through every step of configuration and integration, offering both technical and organizational best-practice recommendations to accelerate implementation and drive effective user adoption.



Connect with us

For more information
about Enteract: CRM Essentials:

 800-872-7882

 getsolutions@fiserv.com

 [fiserv.com](https://www.fiserv.com)

Fiserv is the global technology leader at the intersection of finance and commerce. Our solutions empower financial institutions and businesses of all sizes to deliver banking and payments experiences that move more than money.

Discover how at [fiserv.com](https://www.fiserv.com).