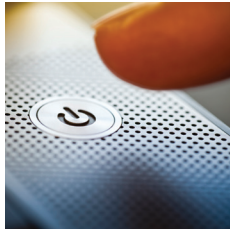


## Product



### EnAct™

## Enterprise Customer Relationship Management (CRM) Built by Bankers for Bankers



EnAct from Fiserv combines CRM capabilities tailored for banking with an enterprise platform that can meet your most demanding IT requirements.

### What Makes EnAct Different

With more than 20 years of experience in the industry, Fiserv provides technology solutions that work the way banking organizations work. EnAct helps banking organizations to deliver role-based tools, workflow and reporting that matches the way each person works. The solution enables you to maintain confidentiality with a trusted line of business model that helps to ensure that only authorized people have access to sensitive information. Teams can collaborate more easily across organizational and geographical boundaries, and automated processes improve operational efficiencies for your organization for such tasks as customer onboarding, pre-acceptance, fee exceptions, portfolio management and more.

EnAct is designed to help you easily identify and manage referrals and opportunities across retail and commercial banking and wealth management lines of business.

Further, you can accurately model complex relationships such as households, partnerships, trusts and centers of influence.

### Here is How EnAct Works

EnAct is designed to take advantage of valuable information stored in back-end systems by aggregating a single, up-to-date view of customer, account, market and business data. These aggregation capabilities let you put it to work to help you accomplish your business goals. EnAct gives your people the visibility they need to do their job:

- Executives gain high level visibility into the business to help promote well-informed leadership decisions
- Management gains metrics that help them track performance and manage business goals
- Front-line workers get the right information at the right time to promote better customer service and job efficiency

### Enterprise-Ready CRM

Built on the foundation of Microsoft® Dynamics CRM, EnAct meets enterprise requirements for security, scalability and flexibility while providing core capabilities for sales management, customer service, data integration, process automation, reporting and analytics.

## **Essential CRM for Community Institutions**

The scalable and flexible licensing of EnAct allows community institutions access to leading-class customer relationship management features at an affordable cost. EnAct provides frontline staff the tools they need to actively engage clients and prospects for overall contact management:

- Update relevant customer information
- Set customer-related tasks and activities
- Make referrals to other associates and business units

## **Role-Based Tools**

Every role in financial services has its own way of working with customers. With a highly personalized, customizable user interface, EnAct enables you to tailor the user experience for each role in your organization, including pre-built role profiles for financial services such as:

- Personal bankers and mortgage specialists
- Wealth managers, private bankers and trust officers
- Commercial bankers, treasury and cash management specialists

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*“As the bank has grown into new markets and expanded product offerings, we understand the need for technology that empowers employees and fosters new cross-sell opportunities.”*

**Central Bank**  
Lexington, KY

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## **Automation for Banking Business Processes**

With flexible automation built on the Microsoft Dynamics CRM workflow platform, EnAct helps you to ensure consistent and repeatable execution of financial services processes, such as:

- Customer onboarding
- Fee exception and pre-acceptance
- Sales and portfolio management
- Lead and referral routing

EnAct includes over 100 workflows out of the box, with intuitive tools for customizing and creating your own.

## **Trust Clients and Relationships**

Help ensure the security and privacy of your most sensitive customers by defining and enforcing trust relationships so that each employee sees only the data that is relevant to their role. EnAct allows you to define and control who can see the data associated with sensitive clients and accounts.

## **Household and Complex Relationship Modeling**

Deep modeling capabilities help you to define complex relationships and super relationships, such as households, corporations, limited partnerships and influencers so you can better understand the business landscape.

## Sales Management

EnAct provides a sales management solution built for financial services institutions with integrated, customizable tools, analytics and automated processes across sales activities, including:

- Customer segmentation
- Lead management and routing
- Opportunity management
- Pipeline management and analytics
- Customer onboarding and account origination
- Sales coaching and performance management
- Portfolio management
- Customer needs profiling
- Referrals management

## Actionable Analytics

EnAct enables you to provide your sellers and agents with personalized dashboards, contextual analytics and flexible reporting with drill-through capabilities to help make sense of customer data, track opportunities and identify trends.

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"Using EnAct, local managers can pull a report on their sales activity every morning. They can look at appointment activity, view sales pipelines for any line of business or banker, and generate win/loss reports. These tools enable them to manage their staff more effectively, improve their own efficiency and make better decisions."

**Wintrust Bank**  
Rosemont, IL  
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## Key Benefits

- Ensures security and privacy
- Easily identifies and manages referrals across retail and commercial banking
- Offers deep modeling capabilities and actionable analytics
- Provides personalized dashboards
- Easy to deploy
- Training offerings for financial services
- Professionals including documentation and self-service training
- Paid support offerings
- Customer advisory board
- Roadmap and upgrades for future Microsoft Dynamics CRM releases

## Data Integration and Synchronization

With EnAct, you can automate data import and synchronization from banking data sources across the organization, consolidating information into a single view that is up to date and accurately represents your customers and your business. EnAct delivers:

- Scheduled synchronization to help ensure your people have up-to-date information
- Data integration tools built on open standards to help you make use of data in legacy systems and point solutions
- Bulk data import with data cleansing to help ensure the quality of your enterprise customer data
- Sales and account validation to match sales opportunities to banking data systems



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) and [fiserv.com/speed](http://fiserv.com/speed) to learn more.

## Complete Customer View

By putting all your customer relationship data in one place, EnAct enables you to put it to work to achieve your business goals. With EnAct, you can:

- Provide sales people with a complete view of customer and promotion information, so they can identify and take advantage of cross-sell and up-sell opportunities
- Enable service agents to see open and past service calls with the current customer, so they can address their needs quickly, leading to a higher level of customer satisfaction and retention
- Proactively identify your most profitable clients to help ensure that you always provide them with the highest level of service

## Connect With Us

For more information about EnAct, call 800-872-7882, email [getsolutions@fiserv.com](mailto:getsolutions@fiserv.com) or visit [www.fiserv.com](http://www.fiserv.com).



**Fiserv, Inc.**  
255 Fiserv Drive  
Brookfield, WI 53045

800-872-7882  
262-879-5322  
[getsolutions@fiserv.com](mailto:getsolutions@fiserv.com)  
[www.fiserv.com](http://www.fiserv.com)