Enteract

CRM Solutions

@ the speed of life℠

Enteract:
A powerful new sales & service solution for banking – from Fiserv & Microsoft

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Enteract
powered by Microsoft Dynamics® 365

Leverages Dynamics 365 + Power Platform + Azure PaaS

- Cloud-based
- Highly Adaptable

Designed for Retail & Commercial Banking

- Comprehensive banking customer relationship data model
- Product Onboarding / new account set up
- Readily integrated to core systems, ECM, digital channels, LOS etc.
- Branch & Contact Center, Back-office users
- Role-based Tablet Apps

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The digital transformation impetus is accelerating the use of powerful
application platform capabilities that underpin the leading SaaS CRM solutions.

Digital Transformation Challenges

- Adapt faster
- Simplify User Experiences
- Optimize Customer Experience
- Rationalize application portfolio
- Streamline / automate processes
- Enable Omni-channel

Single platform.
Multiple customer-centric workloads.

Leverage aPaaS capabilities to customize, extend, create

Consolidate workloads & eliminate redundant applications

Microsoft Dynamics 365

CRM aPaaS Enablers

- Low-code Development
- Mobile / Tablet ready
- Rapid Deployment
- Secure & Scalable
- Flexible Integration
- RPA & Workflow
- Ecosystem / App stores

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Modular licensing & deployment

Single Customer View	Prospect & Sales Management	Complaints & Service Request Management	Campaign & Marketing Management	Contact Center
New Customer Enrollment	Next Best Action	Private Banking	Mobile Device Apps	Master Data Management

Integration Framework

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Retail Banking Features

360° Customer View
Accounts & Cards
Alerts & Offers
Interaction History

Sales Management
Product-wise pipeline
Lead/Opportunity capture
Performance scorecard

Complaints & Service Requests
Complaint capture & assignment
SLAs and escalations

Contact Center
IVR / CTI Integration
360 pop-up & unified desktop

Customer Enrollment
Customer on-boarding
Compliance Approvals
KYC Checks

Master Data Management
New Customer Enrollment
KYC capture & profiling
Static data updates

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Corporate Banking Features

360° Customer View
Products
Limits & Utilizations
Group structure

Sales Process & Pipeline
Deal pipeline
Opportunity phases
Targets & actuals

Complaints & Service Requests
Trade Finance SRs
Cash Management SRs
SLA driven / escalation support

Dashboards
Corporate RM dashboard
Corporate Manager dashboard
Branch Manager dashboard

Account Planning & Call Reports
Appointment scheduling
Call reports
Call report dashboards

Company Management
New customer enrollment
Account opening
Group relationship
Contact plans, authorized callers

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Private Banking Features

360° Customer View
Wealth Management Data Model
Asset Allocations by Asset Class
Investor Profile, KYC & Regulatory Checks
Next Best Action

Sales Process
Risk & Liquidity-based Product Suitability
KYC & Regulatory Checks
Buy/Sell Order Capturing
Order Management System Integration

Portfolio Management
Investment Portfolio Setup
Capture Asset Allocation Mandates
Re-balancing Process
Research Dissemination

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Common Sales & Service Challenges in banking

Poor front-line visibility to customer relationships

Stale & missing customer data

Inconsistent sales process execution

Limited wallet-share penetration

Missed opportunities during inbound service interactions

Disconnected Channel Experiences

Inefficient Customer Onboarding

Limited Management Visibility into Sales & Service Activity

Missed Customer Commitments

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Redefine Customer Relationship Management with Enteract℠ *powered by Microsoft Dynamics 365*

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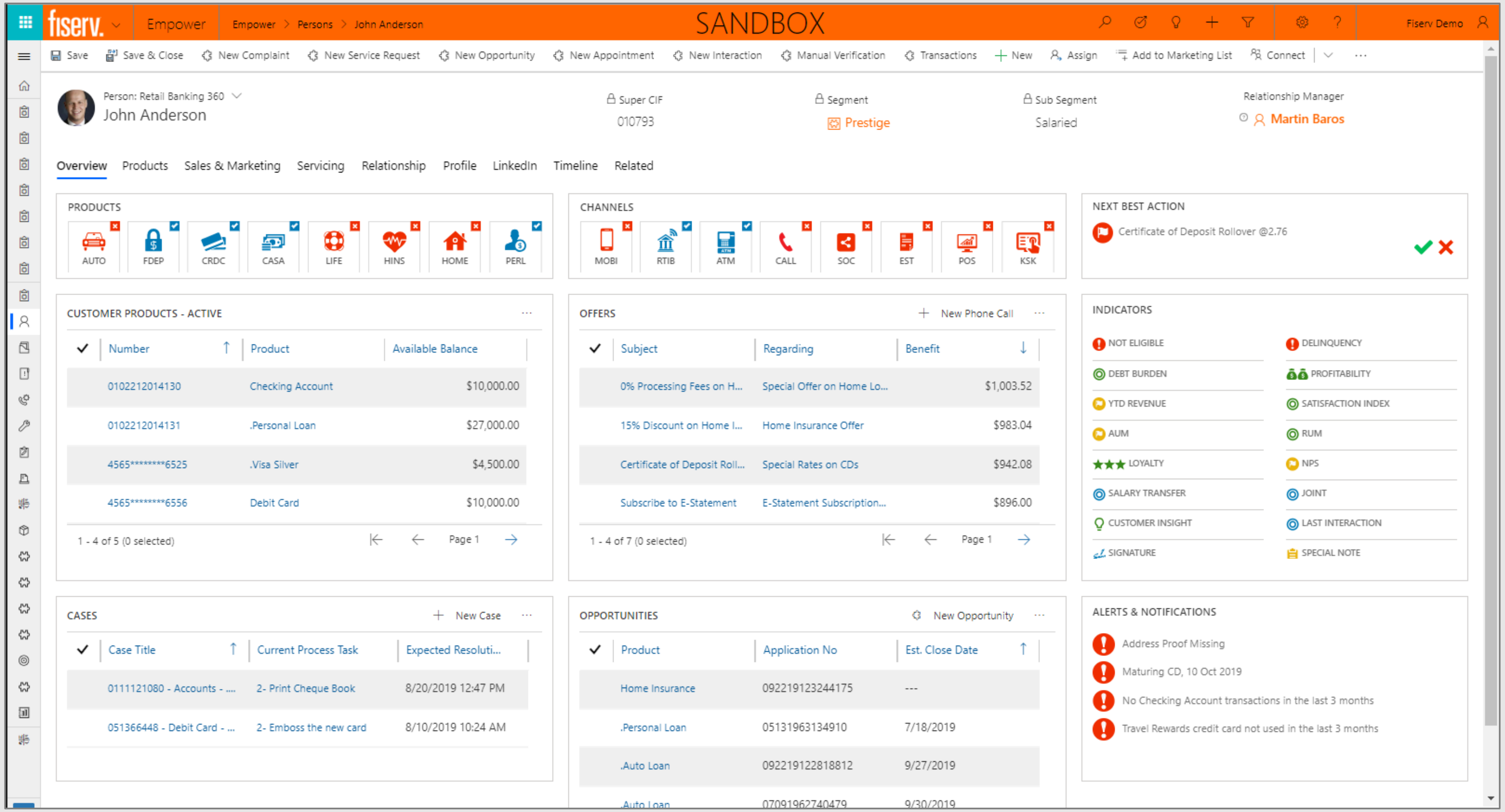
Unified “3-D” view of customer relationships

Aggregates batch & real-time data from multiple sources

Consolidated view of Sales, Marketing, Service

Graphic indicators with one-click drill-down / launch



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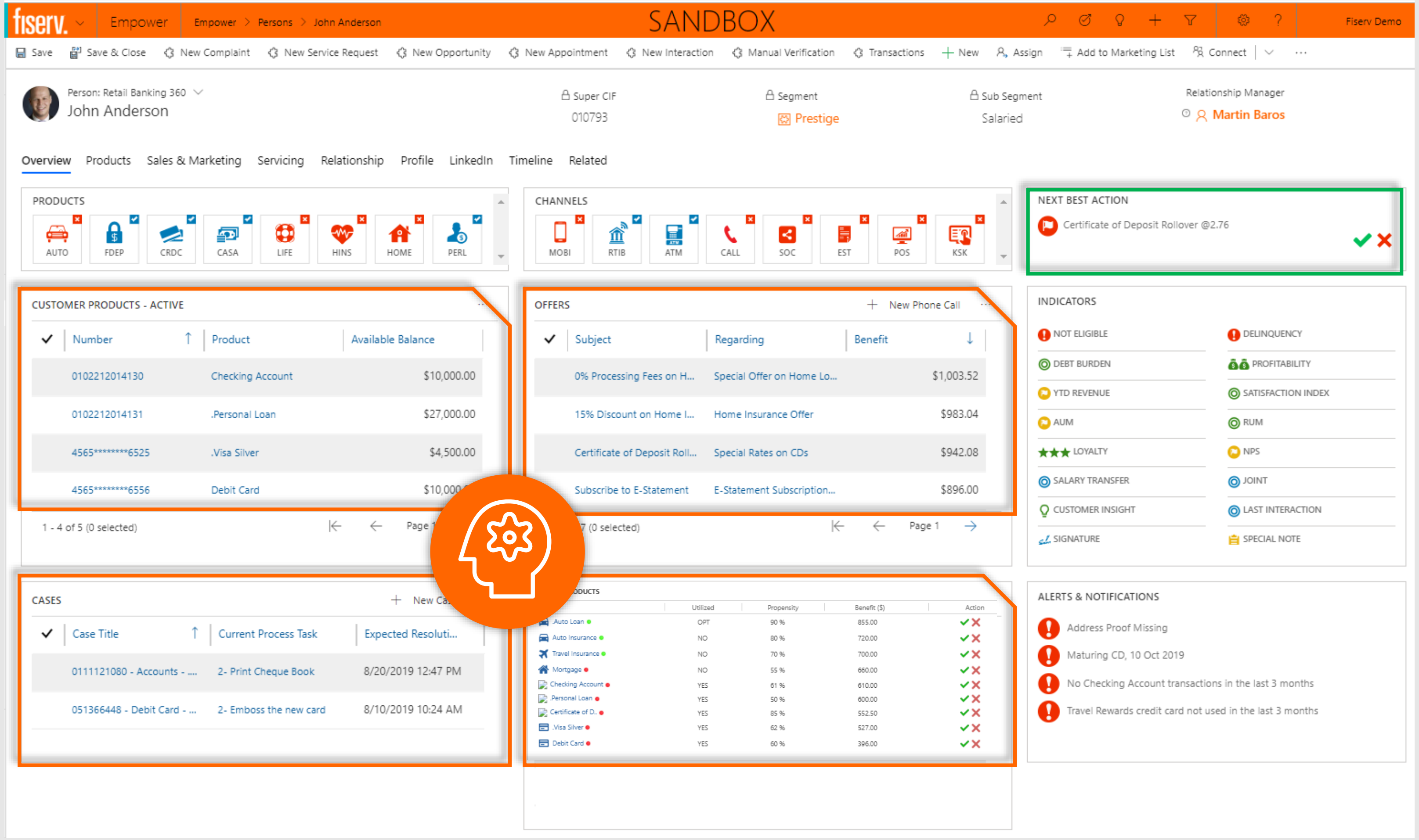
Insights to uncover cross-sale and service opportunities

Next Best Action Recommendations

Product Suitability Matrix

Contextual & Timely Offers



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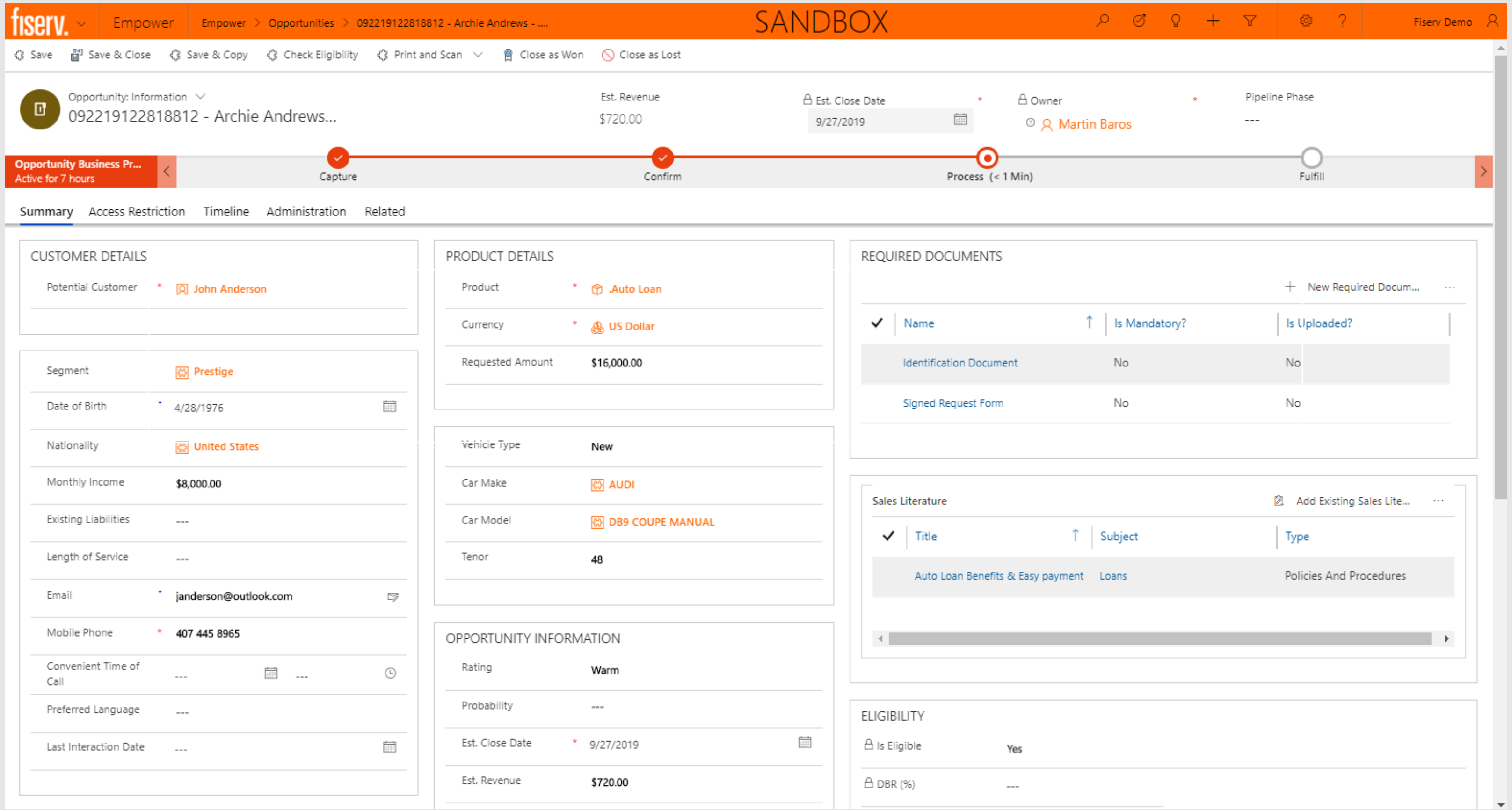
Sales process consistency

Step-by-step business processes

Product-specific Sales Processes

Process Tips & Reminders



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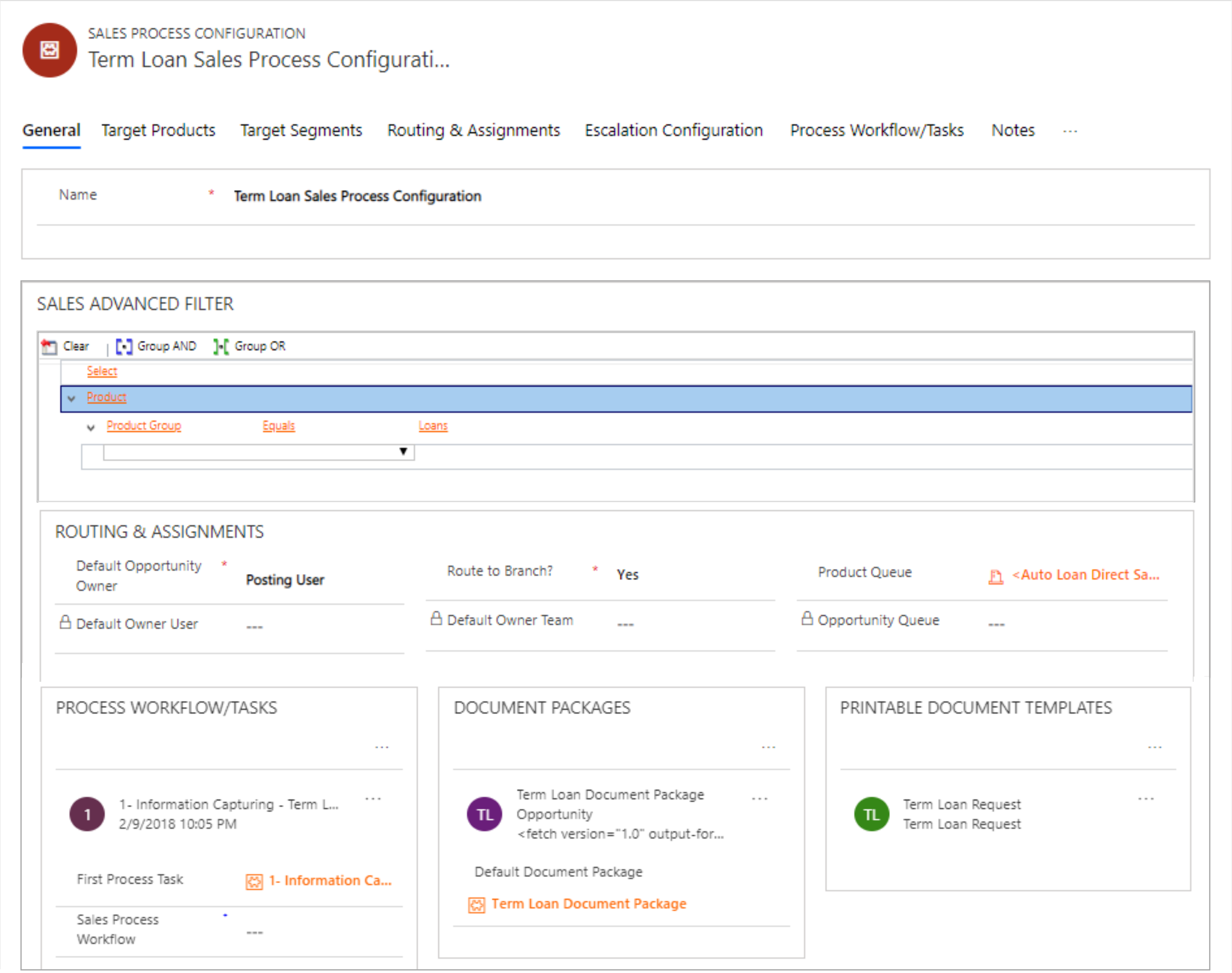

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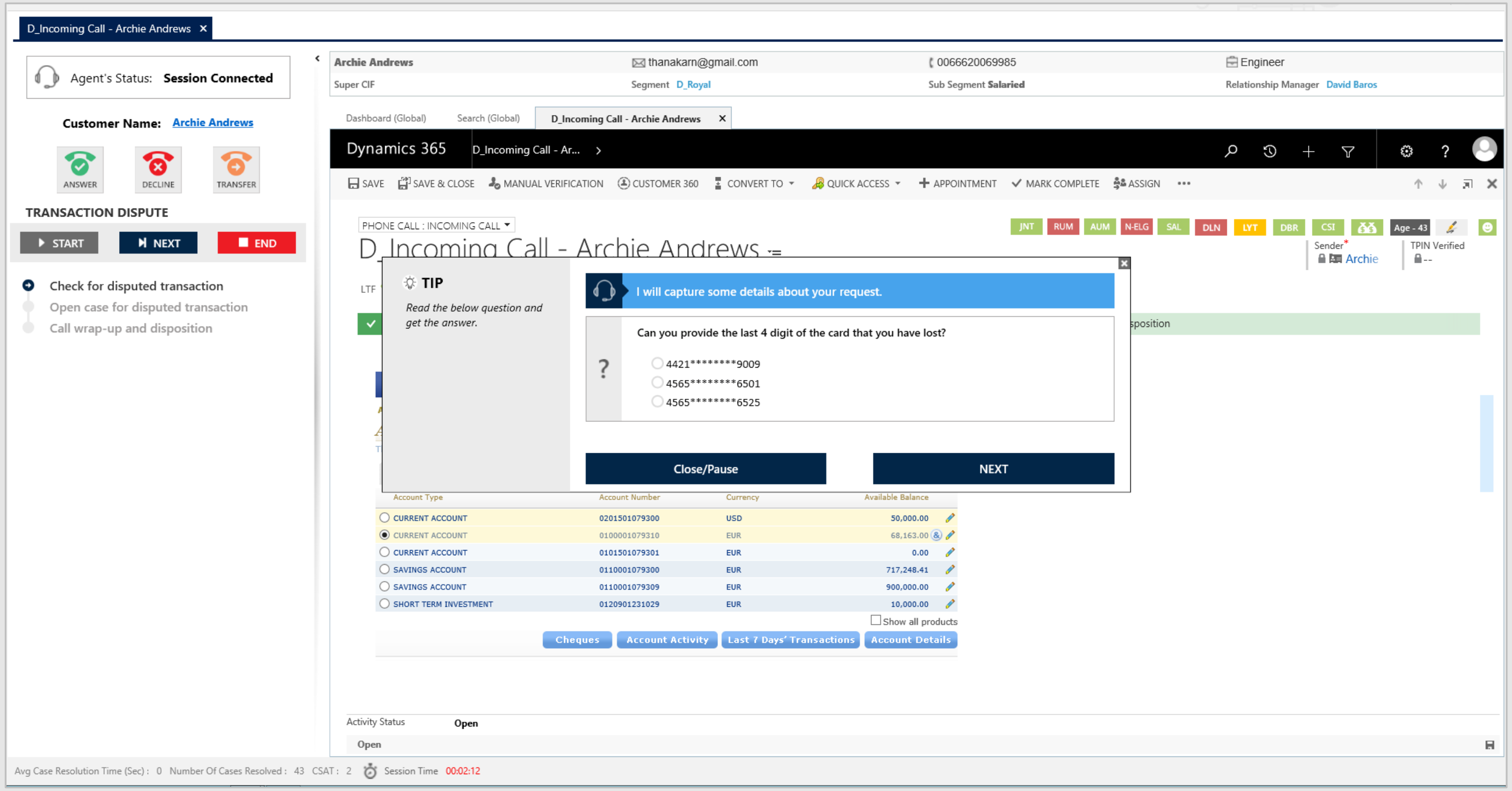

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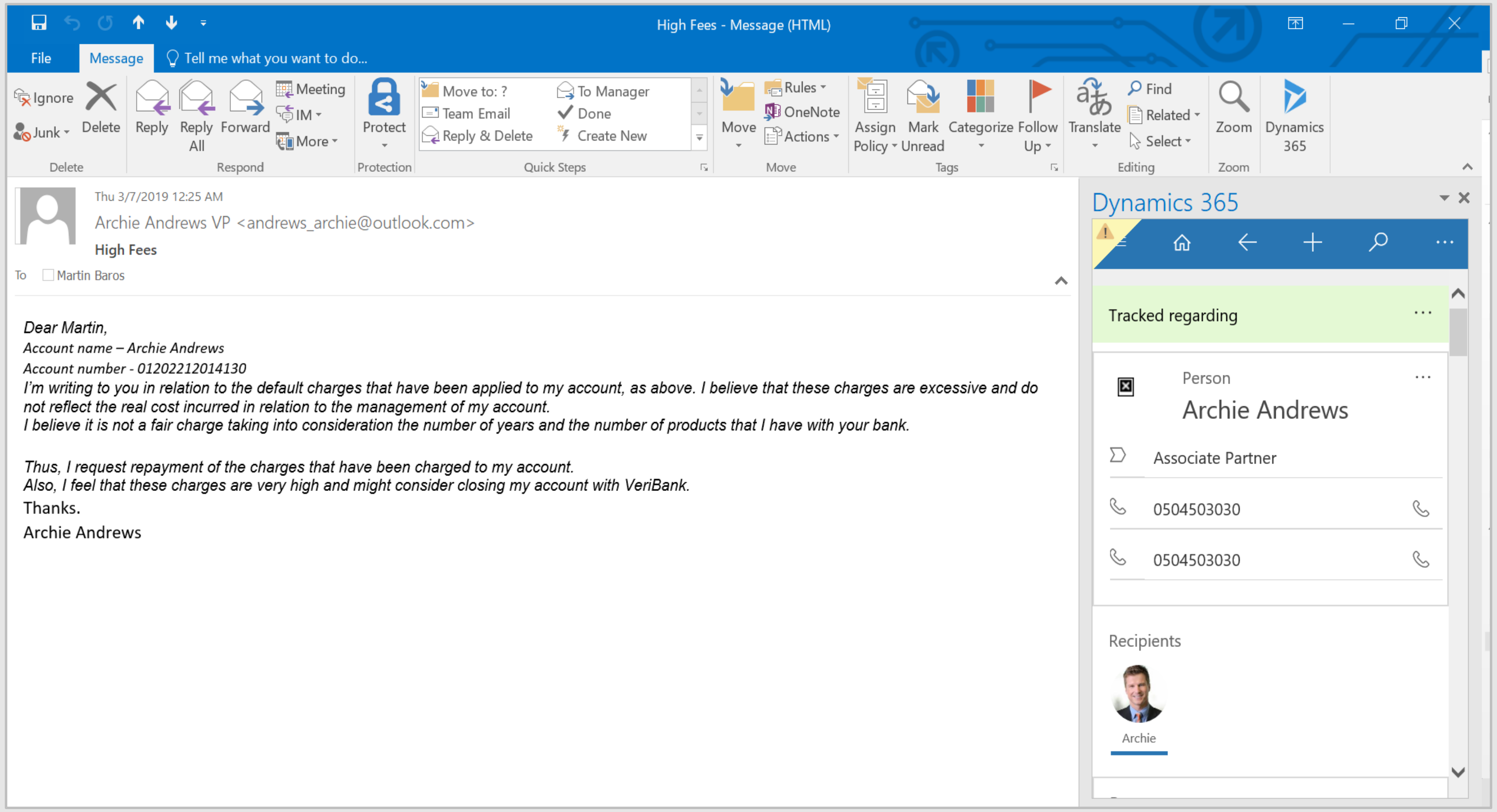
Better user experience for employees

Office365 Integration

User Access through Browser, Outlook or Mobile App

Role-based Dashboards & Views



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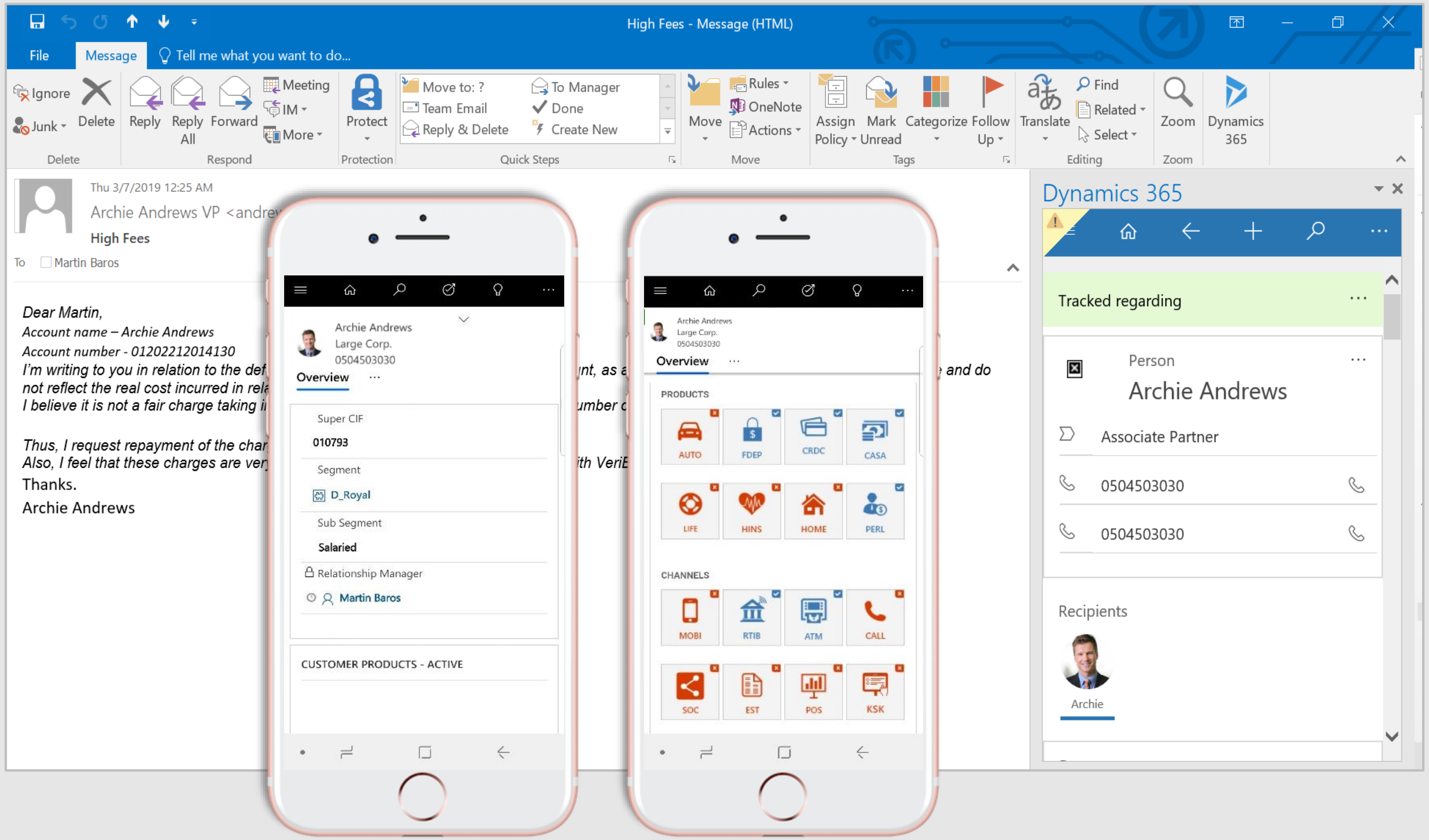

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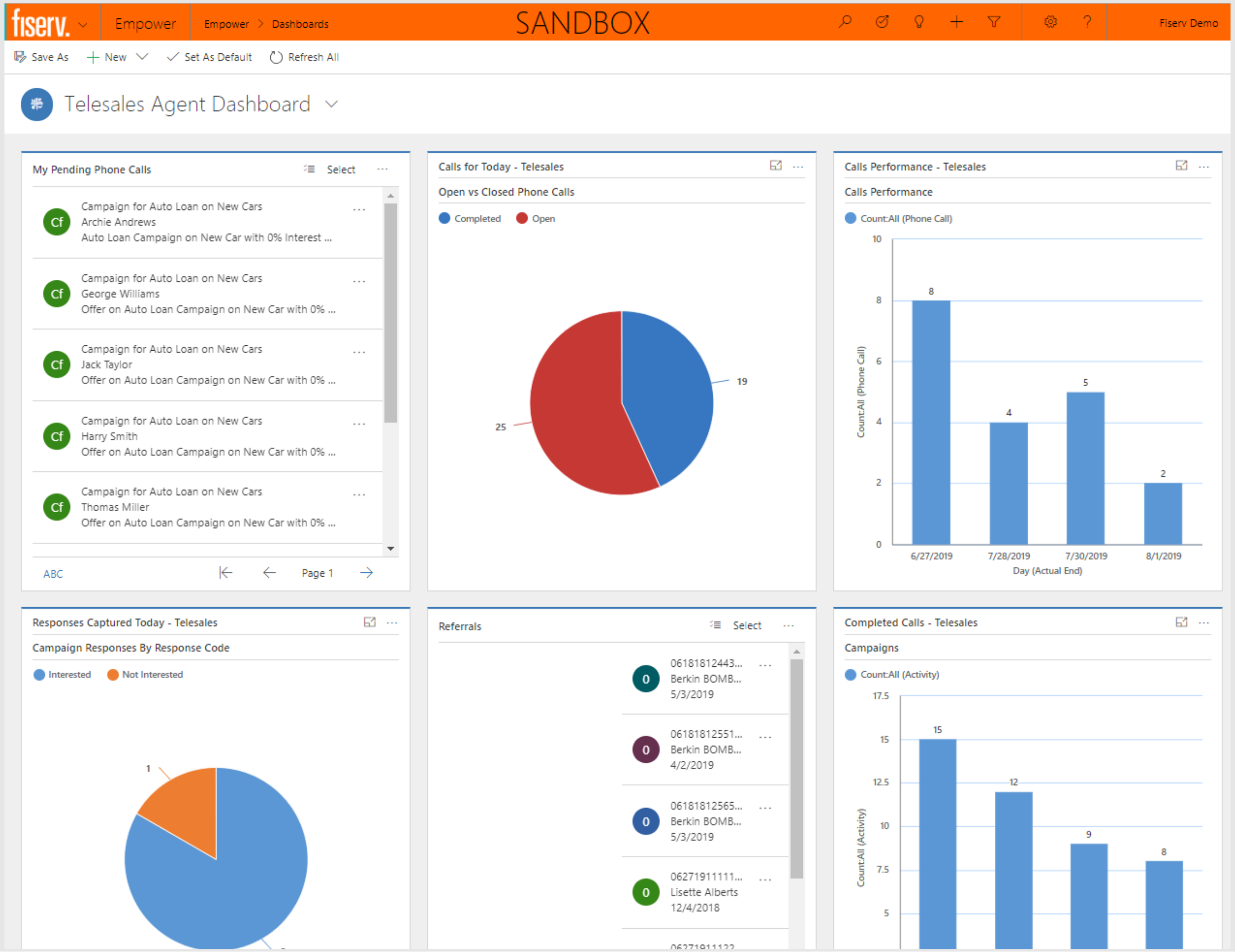

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Your vision. Our technology.
Let’s get after it together!

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