

A large, semi-transparent, stylized '@' symbol is positioned on the left side of the slide, partially overlapping the background. It is rendered in a light grey or white color with a slight gradient.

EnAct

Relationship Sales Management for Bankers

Enabling Superior Sales & Relationship Management in Banking

What is EnAct?

EnAct is Fiserv's specialized version of Microsoft Dynamics CRM, tailored to the distinct sales and relationship management landscape of Commercial Banking, Retail Banking and Wealth Management.

What can EnAct do for your bank?

Across lines of business, EnAct equips bankers and bank managers with the tools and insights to identify opportunity, engage clients intelligently, and effectively develop new business. EnAct can help bank sales organizations **win wallet share and market share** by improving sales productivity, ensuring process consistency, and by sharpening focus and accountability.



Business Development & Marketing

- Target list building and Prospect Import
- Lead Distribution & Tracking
- Center of Influence management
- Sales campaign management
- D&B Hoovers



Client Relationship Management

- Aggregated 360° view of Customers, Households & Complex Relationships
- Enterprise referral management
- Business Processes Flows
- Financial Needs Assessment
- Cross-sell recommendations



Sales Management & Coaching

- Roll-up Pipeline Reporting
- Goals, Incentives & Performance Management
- Pursuit / Account Teams
- User/Team activity metrics for coaching
- Sales Dashboards with team rollups

Unify CRM Across Business Lines With a Single Enterprise Deployment



Wealth management

Private notes and appointments
Preacceptance
Customer due diligence
Trust accounts



Retail banking

Financial profiling
Campaigns
Goals and incentives
Sales autoreporting
Floater CSR



Commercial banking

Treasury onboarding
Access D&B data
Sales teams
Centers of influence
Pipeline reporting

360-degree view ■ Relationship Groups ■ Role-based access ■ Referrals
Marketing Campaigns ■ Workflow ■ Leads ■ Prospects ■ Enterprise reporting

Day-to-Day Activities Made Easier with Outlook and Mobile Access



On the Go, on Your Phone, Mobile Apps Take It With You



Sales Opportunities

My Open Sales Opportunities +

- Rockland Leads**
AT HOME REAL ESTATE GROUP
Commercial/Business Checking
- A O Barnes Div - Commercial/Business Checking**
A O Barnes Div
Commercial/Business Checking
- ASG Forwarding Inc - Commercial/Business Checking**
ASG Forwarding Inc
Commercial/Business Checking
- A & A Custodial Services - Commercial/Business Checking**
A & A Custodial Services
Commercial/Business Checking
- ASG Forwarding Inc - Commercial/Business Letter of Credit**
ASG Forwarding Inc
Commercial/Business Letter of Credit

Bart Stillabower

Contact

Profile Identify Needs Recommend

Contact Type Customer	Relationship Start D... 9/15/1998
Profit Indicator C	Relationship Depth ---

Bart Stillabower
Sr VP

Contact 610-882-1651

MS bmgr Activities

ASG Forwarding Inc

Client

MS rm Owner	Activities
Cases	Sales Opportunities
Contacts	Marketing Opportunities

Summary

Relationship Management

- 360 view of clients
- Appointments and activities
- Consumer households
- Mixed households/Relationship groups
- Referral automation

Business Development

- Pipeline management
- Prospects and leads
- Client profiling
- Customer onboarding
- Campaign management
- Centers of Influence
- D&B Hoovers

Sales Management

- Dashboards
- Goals and performance
- Account teams
- Account plans
- Timely reports
- Pipeline analytics

Service Management

- Case management
- Service Level Agreements (SLAs)
- Workflows and routing
- Case escalation
- Queues