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## Wintrust Financial Chooses EnAct from Fiserv for Enterprise Sales and Relationship Management

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), the leading global provider of financial services technology solutions, announced today that [Wintrust Financial](#), a Chicago-based financial holding company with more than \$14 billion in assets, is implementing [EnAct™](#), its relationship sales management solution for financial institutions.

Using the EnAct solution from Fiserv, Wintrust Financial's bankers will now have a holistic view of client relationships with access to sales productivity tools to execute local outreach programs, track relationship management and prospecting activities and monitor opportunity pipelines.

EnAct leverages [Microsoft Dynamics CRM®](#) and is designed to serve the distinct needs of banks' primary lines of business — Retail, Commercial and Wealth — enabling Wintrust Financial to deploy a single, banking-ready CRM solution enterprise-wide. In implementing EnAct, Wintrust aims to better support collaboration across its organization, enabling referrals between divisions and facilitating team-based management of high-value relationships that span multiple business lines.

"We empower our community banks to manage their clients and their markets locally but we also want to leverage our combined scale and use the most advanced tools to serve our customers and grow our business," said Tom Ormseth, senior vice president, Wintrust Financial. "As part of our expansion program, we identified the need for an enterprise customer relationship management solution and we chose EnAct because it provides us with specialized banking functionality on a versatile technology platform. We felt Fiserv was the right partner for us because they understood our business and had the experience and know-how to help us succeed."

Wintrust Financial recognized that lack of user adoption is a common pitfall of CRM projects so deep integration with Outlook was considered an important benefit of EnAct. Outlook is integral to bankers' workday at Wintrust; it's where they manage their time, contacts, tasks and their email communication with clients and colleagues. EnAct is built on Microsoft Dynamics CRM, so it is delivered as an extension of Outlook and integrates seamlessly with Microsoft Office® applications making it intuitive and easy to use and encouraging end-user adoption.

"By expanding its relationship with Fiserv, Wintrust joins a growing family of banks that are using EnAct to help execute their growth strategies," said David Dervish, managing principal, Customer Value Enhancement, Fiserv.

Wintrust Financial began its initial rollout of EnAct to a pilot group of more than 200 commercial bankers in December 2010 and is continuing implementation to a total of 1,400 users across 15 community banks as well as its various wealth management and specialized financial services divisions.

To complement EnAct, Wintrust Financial also licensed [Aperio™ Campaign Management](#) and [Aperio Customer Analytics](#). These solutions will help Wintrust analyze customer needs, identify opportunities and better manage centralized marketing campaigns that support local business development initiatives.

### Additional Resources:

- | EnAct from Fiserv - <http://bit.ly/enXlxa>
- | Aperio Campaign Management for Signature - <http://bit.ly/gkwxWR>
- | Aperio Customer Analytics for Signature - <http://bit.ly/i8GtAr>
- | Microsoft Dynamics CRM - <http://bit.ly/fK4jzq>
- | Wintrust Financial Corporation - <http://bit.ly/eODYN5>

### About Wintrust Financial Corporation

Wintrust Financial Corporation (Wintrust) is a financial services holding company based in Lake Forest, Illinois, with assets above \$14 billion. The Company engages in the business of providing traditional community banking services, wealth management services, commercial insurance premium financing, mortgage origination, short-term accounts receivable financing, and certain administrative services, such as data processing of payrolls, billing and treasury management services. The Company provides community-oriented, personal and commercial banking services to customers located in the greater Chicago, Illinois and southern Wisconsin metropolitan areas (see map) through its 15 wholly owned banking subsidiaries.

## **About Fiserv**

Fiserv, Inc. (NASDAQ: FISV) is the leading global provider of information management and electronic commerce systems for the financial services industry, driving innovation that transforms experiences for financial institutions and their customers. Fiserv is ranked No. 1 on the FinTech 100 survey of top technology partners to the financial services industry. For more information, visit [www.fiserv.com](http://www.fiserv.com).

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