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Fiserv Only Vendor Ranked in Leader Category in IDC Financial Insights Report on Employee-Assisted Onboarding Software Solutions

- | Aperio ranked in leader category for its modern-looking user interface, institution-defined workflow processes and its "best next" interaction feature
- | Fiserv only vendor to appear in the leader category
- | Business Process Manager from Fiserv ranked as major player for allowing users to add business rules and instant issue codes and its unique wizard interface

BROOKFIELD, Wis.--(BUSINESS WIRE)-- [Fiserv](#), Inc. (NASDAQ: FISV), a leading global provider of financial services technology solutions, announced today that its [Aperio™](#) solution was the only solution to appear in the Leader category in the IDC Financial Insight report, "[IDC MarketScape: North America Retail Banking Employee-Assisted Deposit Customer Onboarding 2014 Vendor Assessment](#)." In addition, its [Business Process Manager](#) (BPM) solution was ranked as a Major Player in the report.

This [IDC Financial Insights](#) report provided an assessment of six retail banking employee-assisted onboarding software solutions, how the major vendors compared with each other, and what criteria are most important for financial institutions to consider when making their buying decision. Strengths of the Aperio solution called out in the report were its modern-looking user interface; that its workflow is executed based on processes defined by the institution; and that it includes a "best next" interaction feature to guide the financial institution's employees in discussions with the customer early in the relationship.

The BPM solution from Fiserv was lauded for allowing users to add business rules for occurrences such as high dollar deposits and allowing for instant issue codes. The BPM wizard interface is unique and provides an alternative method to managing workflow.

"Onboarding the consumer's deposit relationship is at the heart of what the branch has been designed to facilitate," said [Karen Massey](#), senior research analyst, banking, [IDC Financial Insights](#). "There is a great untapped opportunity for financial institutions to not only provide the most efficient session in onboarding a new customer, but to also better leverage vendor solutions for the right customer information to deepen the relationship."

"Technology like account opening solutions can help transform the branch into an experiential environment. Successful financial institutions will provide a quality experience at every channel and realize the in-branch experience offers their best opportunity to stand out," said Jaime Dominguez, director of product strategy, Bank Solutions, Fiserv. "Our solutions rank highly because Fiserv provides clients with solutions that help enhance their brand, secure relationships, retain deposits, grow new business and, most of all, drive change to the customer experience."

Aperio from Fiserv is a cross-channel customer interaction solution suite that enables customer relationship management (CRM), business process management (BPM) and enterprise application integration (EAI), customer analytics, campaign management and imaging to work in concert, pointing customers towards stronger sales and services.

Aperio integrates and automates business processes, tracks customer interactions across multiple channels, and provides organizations the information and analytics to proactively make decisions about how to proceed with customers - based on real-time data.

BPM from Fiserv automates account opening and many other business management processes. It provides workflows that simplify both routine and complex customer service and interoffice tasks, including change of address, check ordering, wire transfers and risk assessment. Customizable templates walk tellers, call center agents and back-office staff through account openings and other procedures, minimizing human error. And integration with the financial institution's core platform means that information gathered during account openings and other tasks automatically flows to the core database.

Additional Resources:

- | Aperio from Fiserv - <https://www.fiserv.com/industries/bank-platforms/signature/aperio-signature.aspx>
- | Business Process Manager from Fiserv - <https://www.fiserv.com/industries/bank-platforms/multi-platform-solutions/business-process-manager.aspx>
- | IDC Financial Insights - <http://www.idc.com/prodserv/insights/financial/index.jsp>

About IDC MarketScape

The [IDC MarketScape](#) vendor analysis model is designed to provide an overview of the competitive fitness of ICT (information and communications technology) suppliers in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each vendor's position within a given market. [IDC MarketScape](#) provides a clear framework in which the product and service offerings, capabilities and strategies, and current and future market success factors of IT and telecommunications vendors can be meaningfully compared. The framework also provides technology buyers with a 360-degree assessment of the strengths and weaknesses of current and prospective vendors.

About Fiserv

This year, Fiserv, Inc. (NASDAQ: FISV) celebrates 30 years of leadership in financial services technology. As one of FORTUNE® magazine's World's Most Admired Companies, Fiserv is helping clients worldwide achieve best-in-class results by driving innovation in payments, processing services, risk and compliance, customer and channel management, and business insights and optimization. For more information, visit www.fiserv.com.

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