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Fiserv Customer Experience Innovation is “Hands On” with Devices Enabled with Microsoft Technology

BROOKFIELD, Wis.--(BUSINESS WIRE)-- Fiserv, Inc. (NASDAQ: FISV):

- Fiserv collaborating with Microsoft on device applications, including customer interaction management for Windows Phone, immersive branch banking experiences with Surface 2.0, and a Windows-based tablet application for financial advisors
- Innovative financial institutions can use devices to make sure every experience is meaningful and adjusts to how the customer chooses to interact

Sibos stand J114 – [Fiserv, Inc.](#) (NASDAQ: FISV), the leading global provider of financial services technology solutions, today announced its commitment to offer financial institutions solutions that deliver a compelling “hands on,” yet seamless customer experience, as a business partner supporting key aspects of Microsoft Corp.’s device strategy – Windows Phone, Windows-based tablet devices and Microsoft Surface 2.0.

As consumers adopt new technologies and interfaces in their everyday lives, they increasingly expect their financial providers to provide similar experiences to manage their financial lives. For financial institutions, this not only means effectively supporting new devices, but ensuring that underlying infrastructures make the experience consistent across channels. No matter how customers choose to interact – in person, online, or via touch screen or mobile device– innovative financial institutions can ensure that every experience is meaningful by giving their staff innovative tools to illustrate the financial conversation.

“Digital transformation means developing the ability to offer a cross-channel customer experience and interaction options on the customers’ terms,” said John Macaluso, senior vice president, technology strategy, Bank Solutions, Fiserv. “It involves collaboration, immediacy and convenience that deliver value beyond just products. Windows Phone, Windows-based tablet devices, and Surface provide exciting solutions for financial institutions that want to create a more personalized experience for their customers.”

Aperio™ from Fiserv is a customer interaction solution based on Microsoft technologies that helps financial services firms track customer interactions across multiple channels and proactively make decisions about how to proceed with customer in real-time. Fiserv is collaborating with Microsoft to extend the cross-channel customer relationship and servicing capabilities of Aperio from branch and online to the mobile channel through Windows Phone. Distinct from traditional mobile banking, the integration helps extend the bank platform to mobile channels aiding in account opening and servicing.

“The relationship between the bank and its customers is changing as more mobile and Internet-based banking services become available to consumers. To remain competitive in the future, the bank must be present in the financial lives of its customers virtually any time, any place, on any device, and across any channel,” said Joe Pagano, managing director, Banking and Capital Markets, Worldwide Financial Services, Microsoft. “Banks continue to be customer-centric organizations, and, as a result, the branch has a renaissance opportunity to emerge as a more strategic tool in the relationship with customers. Fiserv is helping lead the charge for the digital transformation of branch banking by giving branch staff the technology to improve branch bank service, drive traffic to branches and increase per client profitability as a result of improved and differentiated service.”

In addition to banking, Fiserv is a leader in the wealth management industry with a platform that allows investment advisors to design goals-based financial plans for each client household and illustrate the impact of recommended products on preserving retirement income. Working with Microsoft, Fiserv has developed this application so that information is displayed for clients in a dashboard fashion on the slate device.

“As the leader in managed accounts technology, we have shared our vision for the unified managed household and have delivered infrastructures to enable our clients to paint the ‘big picture’ for their clients. The potential for devices enabled with Microsoft-technology can add a ‘hands on’ interaction to make meetings with financial advisors and their clients even more personal for financial planning around lifestyle goals and retirement,” explains Cheryl Nash, Interim President, Fiserv Investment Services.

As a leader in financial services technology, Microsoft invited Fiserv to become a global development partner focusing on banking environment solutions for the next version of Surface, the [Samsung SUR40](#) for [Microsoft Surface](#). Over the next several months, Fiserv will work with Microsoft to develop implementation plans for how this device can help financial institutions deliver a branch experience that allows consumers to understand, plan and manage their finances through an immersive and intuitive interface.

Additional Resources

- Samsung SUR40 - <http://bit.ly/rbzVkh>
- Microsoft Surface - <http://bit.ly/r1mwbQ>

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.

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