upland Panviva

Case Study

Park National Bank reduces agent turnover by 62% using Panviva.

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Park National Bank is a regional financial institution with a strong focus on relationship-based banking. Founded in 1908, the organization has grown into a diversified financial services provider while maintaining its community-first mindset.

Park's Customer Care Center (CCC) is central to their service strategy, supporting retail banking, deposit operations, fraud alerts, and digital banking inquiries.

Park needed a scalable, modern knowledge foundation to help their associates deliver first-class customer experiences while ensuring compliance.

Panviva became the knowledge foundation for customer experience.

The Challenge: Overcoming inefficiency and inconsistency

Before Panviva, Park's CCC relied on shared drives, PDFs, Word documents, and printed binders to support frontline agents. While some procedures were documented, much of the day-to-day knowledge lived in the minds of subject matter experts (SMEs), creating huge risk in a highly regulated banking environment.

This decentralized system created several critical problems:

- **Inconsistent information:** The bank was struggling to move away from unreliable "tribal knowledge." Information was scattered and difficult to update, making it challenging for associates to deliver consistent answers and positive customer experiences.

- **Longer handle times:** Associates wasted valuable time searching through disorganized documents, which increased Average Handle Time (AHT) and frequently required supervisor intervention to resolve customers' questions.

- **Onboarding delays:** New hires faced a steep learning curve, and the lack of a reliable knowledge hub hindered agent proficiency and confidence, impacting the center's overall effectiveness.

- **Agent burnout:** Navigating complex and outdated documentation led to stress and frustration, contributing to an unsustainable turnover rate approaching 100% in 2023.

- **Compliance exposure:** Tedious manual updates made it difficult to ensure associates were always using the most current procedures.

These challenges impacted productivity, morale, and customer experience (CX), prompting leadership to seek a centralized, real-time knowledge solution.

The Solution: A centralized source of truth delivered in the moment of need

Park National Bank chose Panviva to establish a single, reliable source of truth for its customer care associates. The platform provided a robust framework to centralize, standardize, and manage the bank's vast repository of procedural knowledge.

Panviva's solution delivered immediate value through its powerful features:

- **Centralized knowledge hub:** Panviva replaced the unruly shared drive with a structured, accessible platform, making it significantly easier for associates to find accurate, up-to-date information within their workflow.

- **Real-time guidance and updates:** The platform's news and events section keep associates informed of critical updates instantly, while Panviva's guide on the side delivers step-by-step guidance for complex call types in real time.

- **Robust search functionality:** Advanced search capabilities allow agents to locate specific information quickly, helping reduce call handle times and supporting higher first contact resolution (FCR) rates.

- **Streamlined training and onboarding:** Park relies on Panviva as the backbone of its training and onboarding experience, helping associates learn and apply the same guided, compliant knowledge from day one. Panviva's self-guided online learning center helps onboard new hires faster and supports continuous learning for all associates.

"It's made a huge difference in our ability to be comfortable knowing that when a customer calls, the information they get from our associates is the right information."

– Brittany White
Business Analyst & Knowledge Author
Park National Bank

"Panviva has reinforced the strong operational discipline we expect at Park, enabling us to scale capabilities with consistency, enhance compliance, and accelerate innovation—without compromising the customer experience that defines our institution."

– John Rees
Director of Customer Care
Park National Bank

The Results: Confident agents, improved customer experiences

Within 90 days of implementing Panviva, Park National Bank began seeing measurable and operational improvements across the Customer Care Center. The platform not only contributed to improvements in key performance metrics but also fundamentally improved the associate experience.

Drastic reduction in turnover

The agent turnover rate plummeted from nearly 100% in 2023 to just 38% in 2024, reflecting a major improvement in job satisfaction and retention. Panviva also enabled remote training, allowing Park to broaden its talent pool and reduce dependency on local, onsite hiring.

Improved efficiency

Associates became more versatile and efficient, leading to measurable improvements in AHT and a decrease in tickets entered for common issues like online banking.

Increased first call resolution

With instant access to accurate information and guided workflows, associates resolved more customer issues on the first contact, boosting FCR rates.

Enhanced associate confidence

By empowering associate with the right tools and knowledge, Panviva reduced their reliance on supervisors, SMEs, and other departments, enabling them to handle complex inquiries with confidence.

Expanded governed knowledge at scale

Park increased its governed, compliant knowledge from roughly 50 critical documents to more than 500, supporting the consolidation of multiple branch call centers into a single, centralized location.
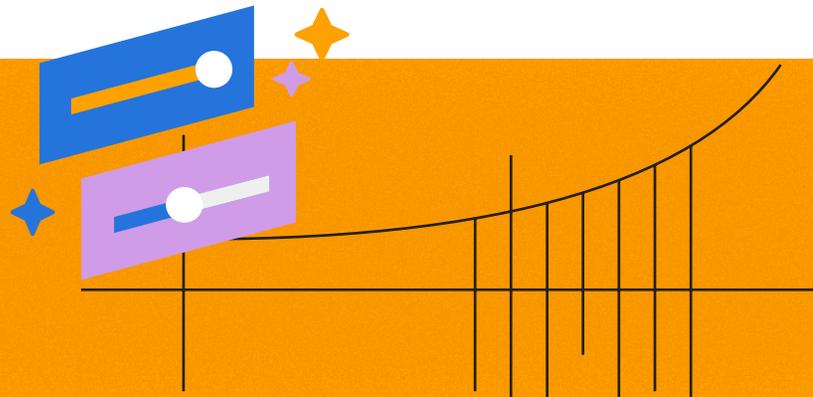
Results at a glance

As Park National Bank modernized its Customer Care Center, Panviva enabled associates to navigate complexity, stay compliant, and deliver confident service across every interaction.

With guided, real-time knowledge embedded directly into their workflow, associates no longer rely on fragmented documentation or tribal knowledge to find answers.

90 days

70 agents

FCR ↑

62% turnover ↓

1 **Faster access to answers**
2 **Quicker onboarding**
3 **Instant updates & alerts**
4 **Lower agent stress**

"As business conditions evolve, we continue to deliver strong customer experiences and operational performance while expanding our capabilities. Panviva has been instrumental in enabling that level of disciplined, scalable growth."

– John Rees
Director of Customer Care
Park National Bank
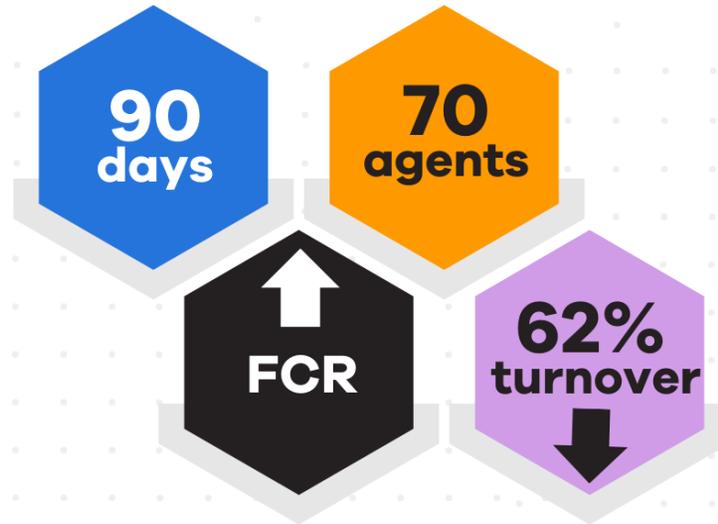
"We see associates ask a question, then say, 'Never mind—I just found it in Panviva.'"

– Brittany White
Business Analyst & Knowledge Author
Park National Bank

Why Panviva: A knowledge foundation built for change

Why the partnership works

Park National Bank's success with Panviva is rooted in alignment between technology, people, and purpose.

Panviva supports Park by providing:

- Compliance-first knowledge management with audit trails
- Real-time guidance when chatbots and automation fall short
- Scalable training and change management
- AI-powered curation with human-in-the-loop oversight

The remarkable 62% reduction in agent turnover stands as a strong indicator of the project's success, showcasing how the right tools can create a more confident, capable, and stable workforce.

As the Customer Care Center continues to grow and as Panviva expands into additional lines of business, Park is well-positioned to scale service excellence without sacrificing accuracy or compliance.

A more compliant path forward

With Panviva, Park transformed knowledge from static documentation into a living, operational asset. One that empowers associates, protects compliance, and strengthens customer trust.

In a highly regulated banking environment, Panviva ensures knowledge stays accurate, governed, and available in real time, so change never compromises compliance.

"Panviva gives us the operational confidence to scale responsibly—ensuring that as we grow, we never compromise the quality, consistency, or integrity of the experience we deliver."

– John Rees
Director of Customer Care
Park National Bank

Knowledge with Trust, AI with Purpose.

Upland Panviva is the AI-powered real-time guidance for compliant, competitive organizations. With Gen-AI curation approved by business experts, deliver real-time recommendations for agents and customers. Deliver trust, productivity & CX excellence to highly regulated industries.

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For more information visit: uplandsoftware.com/panviva