

Case Study

**AAA Northeast
transforms
its knowledge
ecosystem
with Panviva**



INDUSTRY

Automotive Services

COMPANY

AAA Northeast
northeast.aaa.com

AAA Northeast is a not-for-profit auto club providing insurance, travel, financial and automotive-related services in Connecticut, Massachusetts, New Hampshire, New Jersey, New York and Rhode Island. It has approximately 6 million members and more than 60 branches.



AAA is a national organization made up of independent clubs serving local territories throughout the U.S. and Canada. Founded over 100 years ago, AAA now has nearly 60 million members and 1,100 branches. From roadside assistance to defensive driving courses, approved auto repair options and more, AAA is known as the go-to company for people's traveling needs.



Large-scale mergers and multiple knowledge sources created some service and efficiency bottlenecks at AAA Northeast

Based in Rhode Island, AAA Northeast's territory extends into six states. As it expanded through consolidation with other AAA clubs, AAA Northeast had no formal knowledge management strategy or system. To keep track of all of its policies and procedures, it used a combination of paper, shared drive and intranet documents, memos and institutional knowledge conveyed through word of mouth.

How AAA Northeast improved its knowledge base and agent training

When looking for a knowledge management solution, AAA Northeast evaluated its choices and decided Panviva would best meet its needs. Thus, began the knowledge management journey in 2019.

The need for centralized knowledge management was further highlighted when AAA Northeast expanded into the business of handling service calls for car manufacturers and other companies with roadside assistance programs. The automotive services call center grew from 350 agents to over 500. With so many people, processes and knowledge sources, AAA Northeast needed a more efficient way to organize and optimize information, including:

- | Analyzing its procedures, processes and guidelines of newly merged territories.
- | Comparing information across territories and consolidating knowledge sources.
- | Developing a new path forward.

By implementing Panviva, AAA Northeast was able to bring all of its knowledge sources together to create a consistent user experience for agents across the organization.

"Panviva was an important part of our success in developing consistent guidelines and practices across our expanding organization and 24/7 operation."



How consolidating knowledge sources enabled operational efficiencies for AAA Northeast

Why Panviva was the best fit for AAA Northeast

Prior to Panviva, AAA Northeast agents would spend a lot of time searching for the right answers, which would lengthen the duration of a call. The longer members were kept on the phone, the greater impact it would have on overall satisfaction.

It was important for AAA Northeast to find a solution that would mitigate long call times and enhance employees' day-to-day activities. Panviva was the right solution based on its ease of use, ability to handle multiple knowledge types, version control, feedback management and search capabilities. At its core, AAA Northeast used Panviva for:

- | Customer service calls.
- | Technical content updates.
- | Employee training documents.

Consistent and cohesive knowledge enables AAA Northeast to thrive

By combining its multiple knowledge sources into one solution, AAA Northeast was able to maintain version control of its 3,000-plus knowledge base articles and streamline agent feedback.

Panviva's direct feedback feature marks the document title and the subpages it is directly tied to for automatic updates across the system. Prior to implementing Panviva, updating three resources could take up to three months. With Panviva, updates can be completed within a month.

The centralized systems also allow AAA Northeast to better support agents working at home. Using Panviva, it built an internal community board to communicate with all of its agents. This was a key optimization for the organization because it could now provide

cohesive and consistent information including:

- | Standard roadside assistance call flow with various scenarios.
- | Business updates.
- | Inclement-weather advisories.
- | New functionality availability.
- | An interactive question and answer area.
- | Training resources.
- | Templates for new business onboarding.

At AAA Northeast, employee experience levels range from veteran agents, who look up only what they need, to new hires, who rely heavily on available resources. Since implementing Panviva, the organization has been able to bring new agents to competency quicker and cut training and development time in half.

"Using Panviva, we created outlines of steps and factors in the decision-making process for our agents to follow, empowering our frontline people to act on an issue rather than escalating it."