



# Knowledge Management Services

Upland's new KM Services offering is now available to our customers. These services ensure that your knowledge journey does not end after the initial deployment and software training. We created this program based on years of experience in the knowledge space, customer feedback, and overall market trends.

Our mission is to help our customers develop the skills for you to be successful and enable your users to become self-sufficient when using knowledge.



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# 01

## Health Checks

Collaborative sessions to evaluate and review business objectives and success metrics.



# Health Checks

**Upland has designed the Health Check program as a follow-on to the deployment services that supported your successful Upland deployment. This program will help your organization achieve your business goals and ensure maximum ROI from your Upland investment.**

We will conduct several collaborative review sessions with you twice a year with the intent of confirming your business objectives and current success metrics. (Don't worry. If these objectives and metrics aren't already in place, the Upland team will help you establish them!)

These review sessions will also help identify opportunities for improvement and optimization, with specific plans to achieve your goals.

This program provides flexibility and allows us to adjust our mutual success plans to help achieve your business goals. The program can include the following components:

- Return on Investment (ROI) review
- Key Performance Indicators (KPI) review
- Corporate initiatives
- Review new and emerging trends in the market
- Product feature review
- Process improvement

## What should you expect?

As we conduct our review of your current goals and configurations, we will need support from your team to collect the appropriate information so we may enact positive change. As a Team, we will search for new initiatives and emerging trends within your organization as well as the industry. We will also request time with your user community to understand how they are leveraging your Upland investment so we may determine if there are improvements we may implement. These review sessions will help us drive innovation and improve overall ROI and employee satisfaction.

Once we have completed our review, we should expect one of two outcomes, first, everything is perfectly fine and we have nothing to change; or two, we have identified areas for change, e.g., new integration/federation, or improvement. Either way, we will have a baseline document we will use to compare where we were and how we are progressing over time.

### Key Benefits

**Maximize** return on your Upland investment.

**Improve** resource effectiveness

### Industry Expertise

**Evaluation** against Upland and industry best practices.

**Identify** opportunities to improve.

**Get direct feedback** and recommendations from industry experts.

# 02

## Knowledge Assessment

Consultative approach to assessing your knowledge management implementation with detailed recommendations for optimization and value-add.



# Knowledge Assessment

A knowledge assessment from Upland helps you safeguard and grow your investment in Knowledge Management (KM).

## Key Benefits

**Solidify** the current state of your KM deployment and or strategy. **Identify** and remediate KM problems.

**Fine-tune** your KM approach based on your environment.

**Accelerate** the next phase of your KM initiative.

**Maximize** return on your KM investment.

**Improve** resource effectiveness.

## Customized Knowledge Sessions

Health Assessments for existing Upland deployments or with any other KM solution you may use.

**Tailored sessions** to observe your environment and performance and provide detailed recommendations in a concise report.

## Industry Expertise

**Evaluation** against Upland and industry best practices.

**Identify** opportunities to improve KM performance.

**Get direct feedback** and recommendations from industry experts.

## Knowledge Assessment Overview

A Knowledge Management solution is a powerful tool that promotes knowledge sharing across your organization, which increases employee engagement and customer satisfaction throughout the enterprise. But have you ever wondered if it's as effective as it could be and delivering maximum value? If so, let Upland give you peace of mind with a Knowledge Assessment. These consultant-led sessions are designed to examine your existing or future KM deployment to determine if they meet your current business requirements, follow recommended best practices from Upland and the industry, and perform as efficiently as possible.

## Is a Knowledge Assessment Right for You?

A Knowledge Health Check is the service for you if you want to use your KM solution more effectively and efficiently and better leverage all its capabilities for improved customer service, IT support and enterprise-wide collaboration.

- Show how you can get even more from your KM solution by maximizing use of its features and capabilities.
- Prepare you for a smooth implementation or upgrade by identifying any additional resources needed for success.
- Review current struggles and challenges with your KM implementation, user adoption and authoring, and identify remediation steps.



## What does a Knowledge Assessment Include?

An Upland Knowledge Expert will work with you to help you understand the primary business use for your KM solution, how your internal or customer service teams use the solution to meet these goals and how it fits your organization's overall knowledge management initiatives. We'll also help you fine-tune many different aspects of your KM deployment, including:

- Knowledge processes
- Knowledge training
- User knowledge base adoption
- Knowledge search proficiency
- KM leadership
- Agent contribution practices
- KM coaching and monitoring

## Deliverables

The Upland Assessment ensures you have the total picture of how your Upland, or any other KM solution is working for you. Armed with this information, you'll know if you're getting all you can out of your products and what steps to take to get you to the next level for KM success. Upon conclusion of the Upland Knowledge Assessment, you'll receive:

- An executive summary of your health check results with a summary list of key observations and recommendations
- An action plan to make sure you're getting the most out of your KM solution
- Upland solution specific recommendations for current Upland customers
- A written engagement summary report that includes all results and strategies presented throughout the Health Check; and
- Consultation sessions post check up to address questions and concerns that arise along the way.



# 03

## Technical Services

Deploy customized features and third-party integrations to support business goals.





# Technical Services

**Evolve your knowledge journey with critical third-party integrations necessary to support your organization's current and future business goals. Refresh the user experience with updates to the interface, including color or logo changes. Add new features or functionality as your business goals change.**

## Overview

Upland's Professional Services team will work with you to understand your technical needs and work with you to deploy custom features, refresh the interface, or build necessary integrations to support your business for today and into tomorrow.

## User Experience

There are many reasons customers change their user interface (UI), e.g., new corporate branding, features, or components they would like to add to the UI, modern technologies may provide a fresh look, etc. This Service will provide the support and development for such initiatives.

## Integration Services

Even though Knowledge Management (KM) platforms provide impactful ROI and end-user benefits as standalone systems, these platforms can augment a person's experience with numerous, integrated, third-party applications.

Upland's integration approach allows us to quickly and seamlessly deploy to virtually any third-party application, including many off-the-shelf applications and homegrown or customized solutions our customers may leverage.

Some key platforms you will have access to with this Service include numerous CRM & ITSM tools, chat platforms, and custom solutions.

- MS (Dynamics/Teams/SharePoint)
- ServiceNow
- NetSuite
- Cherwell
- Atlassian (Jira/Confluence)
- Salesforce
- Genesys Cloud
- Web Services

These integrations provide customers with options based on several customers and best practices use cases.

**SelfService** Integrations provide users an enormous benefit by presenting the knowledge to resolve their problems without opening a ticket or interacting with a human in chat.

**Agent Integrations** will allow the support staff to search for knowledge in real-time based on information submitted in a ticket or webchat to serve their customers better. In many cases, we will allow Agents to attach relevant knowledge to the ticket or case for future reference AND as a step guide to the user who reported the issue so they may resolve the problem with the linked knowledge. Our Agent integration goes a step further in that it provides the options for Agents to make corrections to knowledge that is outdated, incorrect, or requires a minor update of some kind. The integration also allows Agents to create new knowledge if a solution to the requestor's issue did not exist.

### Key Benefits

**Deliver** knowledge to users in the channels they work.

**Maximize return on your KM investment**

**Improve** resource effectiveness.

### Industry Expertise

**Evaluation** aligned with Upland and industry best practices.

**Identify** opportunities to improve KM content.

# 04

## Administration Services

Admin support based on needs including content archiving, UI/UX modifications, and user/settings management.



# Administration Services

**Remove the administrative activities from your organization and let Upland manage your Knowledge Management (KM) platform.**

## Overview

The Upland Services organization will work with you to determine what administrative tasks you would like us to manage on your behalf. Each customer has unique needs when it comes to managing their KM platform. This offering allows you to pick and choose where an Upland Administrator can provide the most benefit to your organization.

Customers may use the monthly allowance\*, per purchased package, to request various administrative tasks as outlined in the following section.

### Key Benefits

**Remove** the activities for platform management.

**Evolve** KM search configurations to enhance the end-user experience.

**Maximize** return on your KM investment.

**Improve** resource effectiveness.

### Industry Expertise

**Identify** opportunities to improve KM performance.

**Get direct feedback** and recommendations from industry experts.

## Is a Knowledge Assessment Right for You?

User Management, content archiving, settings management, UI/UX modifications.

- **Profile management**
  - Manage user roles/permissions – if not automated with SSO
  - Archive users
- **User interface updates**
  - Update UI elements within the scope of the Admin Interface
- **Content review**
  - Permissions and visibility
  - Archival – recommendations and execution
- **Settings configuration**
  - Review and fine tuning of application settings
- **User communications**
  - Updates to system announcements, FAQ, home pages, etc.
- **Knowledge best practices/advanced training**
  - Content/document development
  - Review and coaching suggestions
  - Engagement strategies
  - Template best practices

\*Hours will not rollover – the program is designed for customers to leverage our expertise and work together to continuously improve the knowledge journey.

# 05

## Governance

Development of a governance playbook with the policies and procedures for long-term management of knowledge.



# Governance

**Upland developed this program to help customers create proper policies and procedures to manage their Knowledge program with the necessary controls to be successful. Upland understands the importance of knowledge management and can share our experience and expertise with our customers so they may be successful today and have the tools to evolve.**

Your investment in the knowledge solutions provided by Upland also emphasizes you understand the benefits knowledge brings to your business. Despite understanding the importance of a knowledge solution, some customers do not have the in-house expertise to manage and govern knowledge long term. The Governance program will help you build upon the foundation created from your initial implementation by reinforcing key concepts. We will also create a playbook from which you can manage knowledge long-term.

## Project Goals

This program builds upon the foundation created during the first implementation. From this foundation, we will tailor a playbook for you to follow to ensure you have the right processes and procedures in place for future growth and success.

### Governance Sessions

- Content Training
- Administration Training
- Implementation Training
- Onboarding Training
- Content
- Administration
- Advanced Pro/Training
- Governance Playbook
- Workflow
- Online learning
- Go-live preparation
- Reports/Analytics
- Coaching-for-Coaches
- Train-the-Trainer

## Deliverables

Once Upland has completed your Knowledge Assessment, we will conduct governance sessions (below) throughout the year with your knowledge team. to audit your progress and make recommendations based on the results from the audit. This program will also help your team feel more comfortable with onboarding events that require training new knowledge users through internal expansion or acquisition.

## Governance Sessions

Multiple entities sharing a centralized or decentralized knowledge base require well-defined rules of engagement and organizational structure to support the knowledge initiatives for growth and adoption. We will dig deep into the following topics to then help you implement a plan to support this initiative.

## Training

In-depth training is crucial for KMS (Knowledge Management System) personnel. Upland's training program provides your team with the knowledge and hands-on experience they need for success.

The **Implementation** workshop will prepare them for onboarding new teams or departments within your organization, including baselining, creating a content plan and taxonomy.



In the **Administration** session, they will learn best practices around role structures which is the foundation for creating efficient content strategies. They will also learn system search settings, and how to create and manage review/approve workflows for content.

**Content** in your Knowledge Solution is what it's all about. In these hands-on sessions your team will learn not only the software tool but also content styles & standards to ensure consistency, analyzing source content to ensure it is fit for purpose, and how to use the solution for effective collaboration between authors, users and your teams.

Creating proper **Onboarding** rules and guidelines as new departments or groups are brought into the Knowledge Solution is critical to its long-term success. Your team will learn how to support and enable other teams to be self-sufficient while adhering to corporate standards.

In the **Online Learning** session, your team will learn how to implement this feature for user skill check as well as effectively using it for digital signatures.

The **train-the-trainer** session teaches you how to incorporate your Knowledge Solution into new-hire training, remedial training and ongoing training initiatives.

The **coach-the-coach** session shows you how to enable other authoring teams so that they too can ensure that the content they build is fit for purpose and follows styles & standards for overall corporate consistency.

## Pro/Training sessions

Twice a month, we will conduct advanced Pro sessions with your team to audit their progress and provide support, guidance and supplemental training as needed.

## Go-Live preparation

A smooth roll-out to end-users paves the way for great user adoption. We will equip your team with a detailed checklist to use with each and every implementation to ensure just that.

## Reporting

Your team will learn how to define data needs and which reports can support those needs. They will also learn how reports can help you be proactive in updating and perfecting your Knowledge Solution.

## Governance Playbook

It's important that your team can carry on with the continuous improvement and updating of your Knowledge Solution. We'll help build a governance playbook that lays out strategies and tasks for maintaining content and administering your Solution.



# 06

## Center of Excellence

Certification process that enables organizations to become self-sufficient with internal expansion and growth.



# Center of Excellence

**Most customers start their knowledge journey by identifying users where knowledge is critical to their success and the organization's success.**

Once this first project/deployment is complete, we often find customers looking to expand knowledge to other areas incrementally, e.g., by acquisition, new departments, or evolving use cases.

After the knowledge platform is launched and the expansion into other departments or businesses begins, managing the knowledge can become challenging. The Upland COE is designed to help you through this growth and ensure you are poised for maximum success.

## Center of Excellence (COE) & Certification

This program is designed to help build a COE within your organization to manage expansion opportunities and become self-sufficient.

Upland will conduct several sessions with your team to identify the following components that are key principles for a COE.

At the end of these sessions, you will be

### Workshops

- Essentials
- Styles & Standards
- Users, roles & permissions
- Collaboration & NEW Feedback
- Content administration
- Quarterly update sessions from other Upland product lines
- Workflow
- Online learning
- Go-live preparation
- Reports/Analytics
- Coaching
- Deployment shadowing

### COE Components

- People – enthusiastic subject matter experts
- Well defined goals and objectives
- Documented best practices
- Repeatable processes
- Success definition
- Evaluate and evolve processes
- Governance
- Reporting and Analytics

Certified by Upland and will be able to support expansion opportunities with minimal Upland services involvement.

Upland's certification process will provide the necessary knowledge to the team you identify with owning the responsibility to onboard new entities within your organization. We will train your team to understand the tools and methods we employ to onboard our customers and conduct follow-up workshops throughout the year to audit your progress.





Upland Panviva is a knowledge management (KM) system that focuses on providing employees and customers with contextual guidance at their moment of need. Panviva simplifies complex processes and helps to communicate critical changes in highly compliant industries, slashing training times and increasing productivity for businesses. The unique design allows agents to access critical processes and, policies in just a few clicks. Reducing time spent searching for answers, or repetitive low value requests triaged to senior staff. From a single source of truth deliver governed knowledge to web, chatbots, CRMS and self-service portals enabling a true omnichannel experience for customers.

**Want to learn more?**

**Contact us.**



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