Upland Panviva

Case Study

Bupa eliminates inconsistency with Upland Panviva
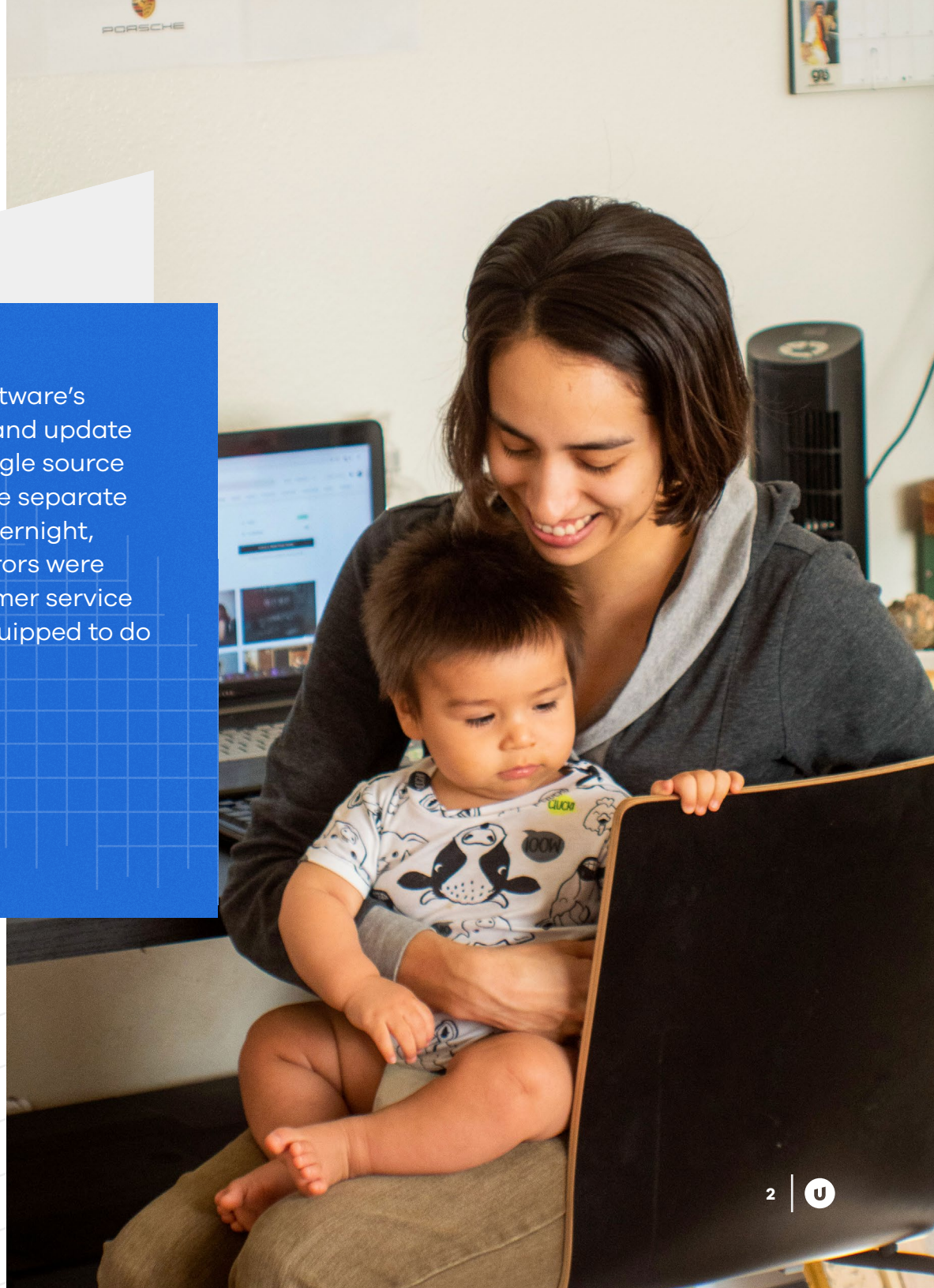
Bupa

Bupa used Upland Software's Panviva to centralize and update its information in a single source of truth that serves five separate call centers. Almost overnight, call times dropped, errors were eliminated, and customer service advisors got better equipped to do their best work.

How can you ensure advisors quickly and consistently find the information they need?

Too many systems.

In a dynamic, highly regulated industry like health insurance, ensuring staff have access to the latest information is paramount. Add those challenges to the reality of ever-changing products and policies housed in multiple systems and interfaces and you're left with call center advisors who are overwhelmed and unable to provide the best customer service possible.

Before Panviva, advisors searched through intranets, documents, notes, and policy manuals to answer customer questions and comply with procedures. Bupa needed to find a system that would help guide their advisors quickly through these customer calls, pointing them quickly to the exact information they needed in the moment.

With Panviva, Bupa delivers the right knowledge to the right people.

After implementing Panviva, Bupa did away with complex information systems in favor of a single source of truth for knowledge robust enough to handle the needs of multiple call centers and employee types, each with their own specific needs. Panviva's user-friendly interface made it easy to get up and running quickly, and immediately cut call times and training times, making advisors both happier and more successful.

"Every time we run training on the system, someone says, I wish we'd had this ten years ago."

– Gillian Doolan
Implementation & Change Manager/
Product Manager
Bupa

Call handle times immediately dropped by 15 seconds with Upland Panviva

A pilot program with immediate results.

When Bupa first implemented Panviva, leaders including Gillian Doolan, who headed the central knowledge management team, expected a learning curve that would initially hurt call center performance. What they found was the opposite.

During the pilot, call handle time actually *dropped* by 15 seconds. "Call times went down instantly," says Doolan. "Customers got consistent answers and they got them faster." Overall Doolan was pleasantly surprised by how quickly people took to Panviva. But, she explains, "Once people see the system at work, it sells itself."

With Panviva, inconsistency is a thing of the past.

Even with five separate member service call centers (each with their own people and versions of the same documents), Bupa was able to use Panviva as a single source of truth. Panviva has centralized Bupa's processes, policies, and procedures while eliminating extra file drives in a single stroke. Along the way, the team has also standardized structures and templates. "Now whenever we find information that is generic across several areas, we make one document and release it in Panviva. The departments still have ownership of the information, but we develop and maintain it centrally and make it available to

everyone whose role permits them access," explains Doolan.

One of the most important documents is something everyone uses: the policy manual. Maintenance of the manual, once extremely unwieldy, is now managed centrally, with near-instant changes available system-wide so it is always up to date and accurate—no email alerts required.

What's more, Panviva guides Bupa advisors through processing claims, making it easy for everyone to answer queries and serve customers.

Results for Bupa

26%
reduction
In agent attrition

15-second
Improvement
In call handle time

More
claims
Handled by frontline staff alone

Upland helps global businesses accelerate digital transformation with a powerful cloud software library that provides choice, flexibility, and value. Our growing library of products delivers the "last mile" plug-in processes, reporting, and job specific workflows that major cloud platforms and homegrown systems don't provide. We focus on specific business challenges and support every corner of the organization, operating at scale and delivering quick time to value for our 1,700+ enterprise customers. To learn more, visit www.uplandsoftware.com.

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