

Case Study

**Desert Financial
transforms
member
experience with
Panviva.**



INDUSTRY
Financial Services

COMPANY
Desert Financial Credit Union

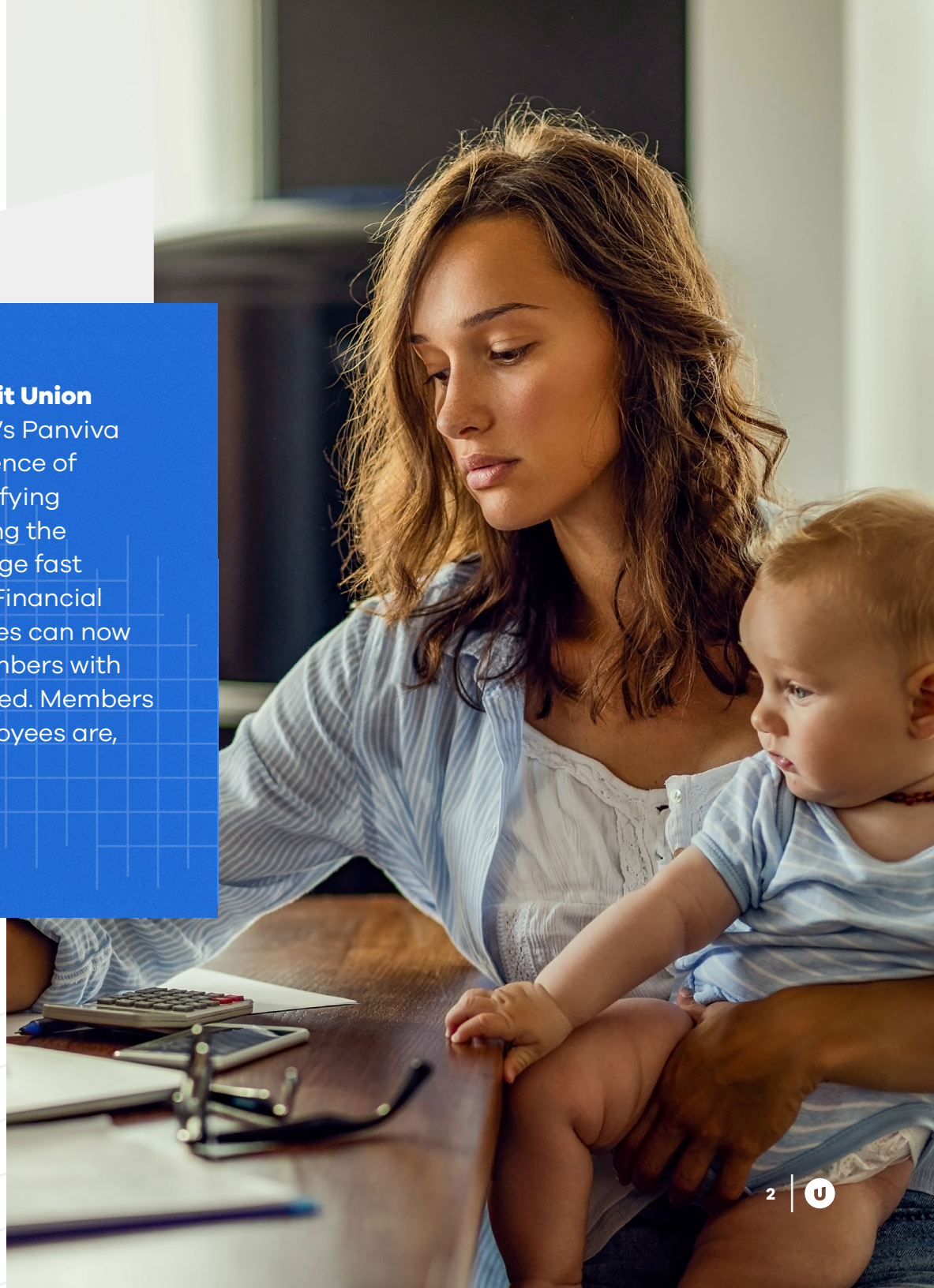
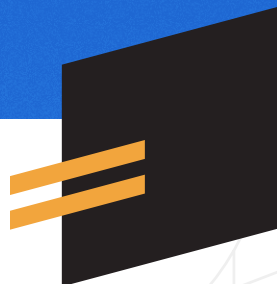
Phoenix, AZ
desertfinancial.com

Desert Financial Credit Union is the largest credit union in Arizona, operating 47 branches throughout Maricopa, Gila, and Pinal counties. As of October 2019, Desert Financial managed \$4.8 billion in assets.



Desert Financial Credit Union

used Upland Software's Panviva to improve the experience of its members. By simplifying procedures and making the act of finding knowledge fast and accurate, Desert Financial ensured that employees can now confidently assist members with whatever they may need. Members are happier, and employees are, too.



How do you revive an aging knowledge management infrastructure?

Old technology couldn't keep up.

Desert Financial's aging, out-of-date knowledge management infrastructure was frustrating, to say the least. Information searches yielded a kitchen sink of links that seldom produced what the employee had actually been trying to find. In addition to irrelevant information, much of what surfaced was out of date or required multiple screenshots to explain what needed to be done. Simply opening a new account, for example, was a 20-page process.

Newfound consistency has transformed content.

Desert Financial has seen big improvements in customer experience, employee engagement, and day-to-day operations. Especially beneficial has been Panviva's content ownership and feedback capabilities, fixing a previously inconsistent process for retiring stale and outdated procedures. Now, Desert Financial employees know how to give feedback to content authors to update the procedures, making changes more timely and efficient.

"Now that we've got this ownership and feedback process, we can really maintain this program. It's taken on a whole different approach from what we did in the past."

– Jim Lavery

Vice President of Contact Centers and Credit Services , Desert Finance

Using and managing content is intuitive using Panviva.

Panviva sparked Desert Financial to rethink the way it used information.

When it set out to upgrade its information management infrastructure, the Desert Financial team looked at several vendors, but most were little more than data warehouses that offered to hold the material Desert Financial already had. These products were snappier versions of the status quo, not systems that could fundamentally improve the team's approach.

Panviva took a different approach—so different that the team at Desert Financial ultimately rethought the way the credit union was using information. Rather than rolling Panviva out fast, the project team took the time to be methodical about

its approach, as suggested by Panviva's enablement team.

"The end result gave us a much better solution than we would have had if we had tried to force it too fast," explains Jim Lavery, Vice President of Contact Centers and Credit Services.

The rollout to the credit union's Retail Service Managers went even better than expected. The Panviva implementation team at Desert Financial was nervous about the reaction when it introduced the Retail Service Managers to Panviva at a regularly scheduled team meeting. To their relief, the Service Managers loved it.

"I heard stories of them going back to their branch, sharing their experience, telling

their tellers, who haven't even seen the system yet, how much they're going to love this new system," Lavery says.

Now, content is easier to create and use.

With Panviva, Desert Financial's previously cluttered information system has been cleaned up. More significantly, there are feedback processes in place to keep it that way. Now, content is easy and intuitive, both for those managing it as well as for those using it day to day. Employees can flag necessary updates within the software for content authors to fix. The resulting system is robust, easy to use, and makes being a member—and an employee—a whole lot better.